



2023 REPORT

Europe



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“Chickens are sentient beings who deserve a good quality of life, with the ability to express their natural behaviours and be happy. That’s why the Better Chicken Commitment (BCC) was developed, providing five clear steps to improve welfare and let chickens be more chicken. ChickenTrack is here to measure the progress of companies who have signed up to the BCC, helping to drive compliance, encourage transparency and support successful transitions to higher welfare.”

DR. TRACEY JONES, *Global Director of Food Business,
Compassion in World Farming*

An Urgent Need for **CHANGE**

Worldwide, chicken meat production and consumption continue to increase year on year. An estimated 70 billion chickens are slaughtered annually for meat, with over two-thirds being fast-growing breeds raised in barren, overcrowded sheds. The problems associated with intensive chicken production are well documented and include a plethora of health and welfare issues associated with fast-growing breeds, a lack of space provision, no access to natural light or enrichment and outdated stunning systems.

Breeding for fast growth rate, high breast meat yield and feed efficiency, results in lethargic birds with poor walking ability and high rates of lameness who spend the majority of their time (85%) sitting doing nothing instead of behaving like chickens who naturally like to perch, peck, forage, scratch and play. Many fast-growing birds suffer from heart defects, organ failure, compromised immune systems, muscle diseases, high rates of hock and foot lesions and musculoskeletal problems.

All of this means that most broiler chickens have a poor quality of life from start to finish. With this in mind, the Better Chicken Commitment (BCC), also known as the European Chicken Commitment (ECC), was developed in 2017 by a coalition of NGOs in Europe. It is a comprehensive set of science-based criteria that will, when used as a complete package, significantly improve the welfare of broiler chickens.

Compassion in World Farming has been working with companies throughout Europe to encourage them to sign up to the BCC and commit to achieving the following by 2026:

- Implement a maximum stocking density of 30kg/m² or less
- Adopt slower growing breeds with improved welfare outcomes
- Provide a least 50 lux of light (including natural light) and an enriched environment (with 2m of usable perch space and two pecking substrates per 1,000 birds) to enable expression of natural behaviours
- Adopt Controlled Atmosphere Stunning (CAS) using inert gas or multi-phase systems, or effective electrical stunning without conscious inversion
- Demonstrate compliance with the above criteria via third-party auditing and annual public reporting on progress towards this commitment

To date, over 380 companies have signed up to the BCC in Europe, committing to offer their customers only higher welfare products from healthier, happier chickens. ChickenTrack was launched in 2021 as a tool to monitor, encourage and celebrate progress towards this goal.

**Statement from Dr. Tracey Jones,
Global Director of Food Business,
Compassion in World Farming**

“Company sign ups to the Better Chicken Commitment are an essential first step to improving the lives of millions of chickens raised for food each year. However, it is only when the full package of changes is made will chickens start to feel the benefits and the company can say its products are higher welfare.”

The journey to delivering higher welfare is not easy. That’s why we urge companies to develop a roadmap, which is a detailed yearly progress plan, supported by all stakeholders in the business, outlining actions and incremental targets until 100% compliance is achieved. Developing the roadmap solidifies WHY a company committed to Better Chicken, HOW the company can successfully make the change and by WHEN. If the roadmap is also accompanied by a public-facing transition timeline, this can help accelerate the shift to higher welfare chicken for the whole industry – which is the ultimate goal of the Better Chicken Commitment.

There are, of course, many challenges – not least the cost-of living crisis. But the welfare of the millions of broiler chickens that companies are responsible for should always be a matter of priority. Higher welfare should be the minimum baseline standard – in good times or in bad. So, let’s continue to work together to make Better Chicken a reality.”



ChickenTrack

METHODOLOGY

In line with the requirements of the BCC, signatories must **publicly disclose** and update their progress annually against all criteria. Public disclosure indicates that a company holds itself accountable for the commitments it has made, communicating to investors, customers and other key stakeholders that it takes its social responsibility targets seriously, and can demonstrate progress to BCC compliance.

ChickenTrack seeks to represent company progress against the criteria in graph format as a percentage transition, either for individual criteria or as an overall figure across all criteria, depending on how the company chooses to report. All information in ChickenTrack is based on this publicly disclosed

information, such as on the company's website, its animal welfare policy or ESG/CSR report, or in a press release.

To view the full reporting framework visit www.compassioninfoodbusiness.com.

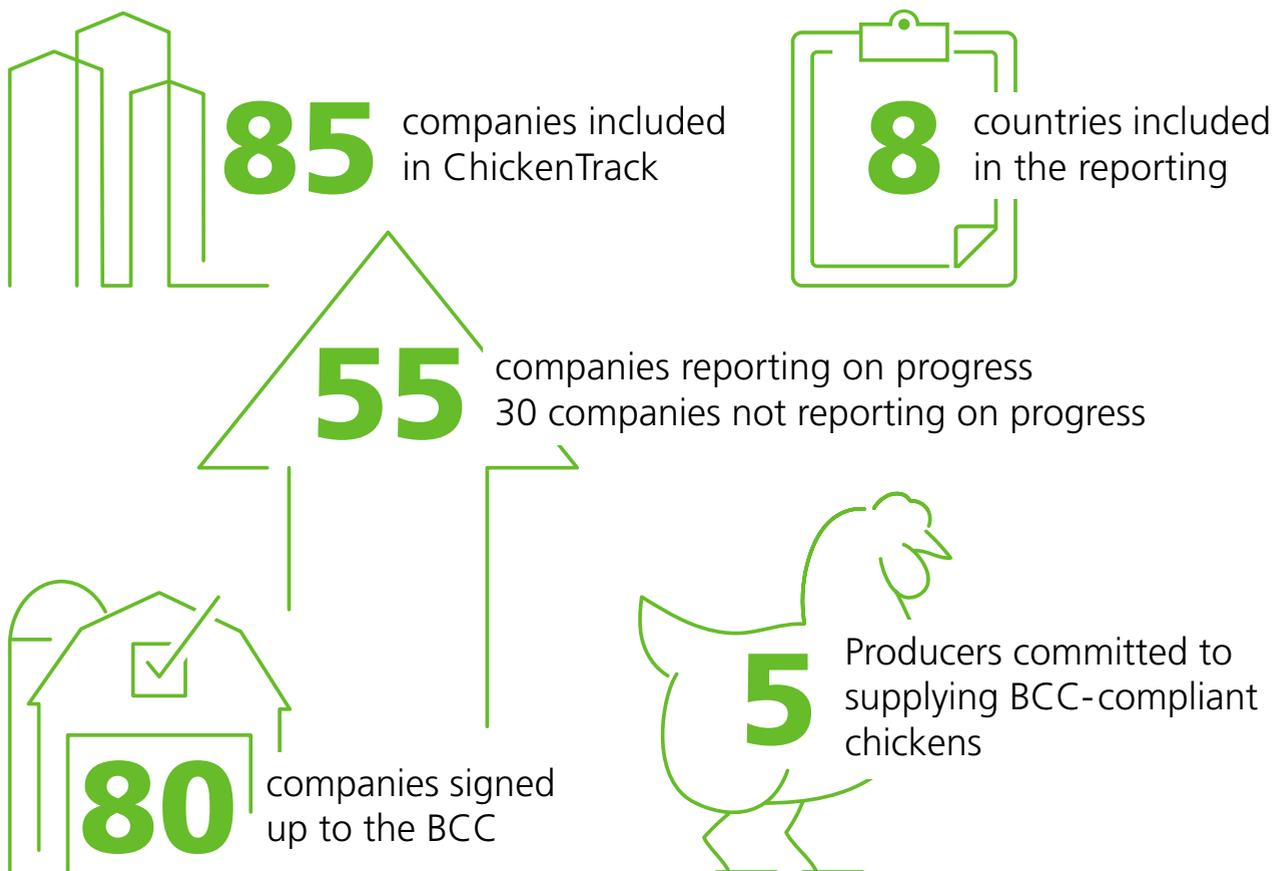
Companies included in ChickenTrack were selected based on their geographic relevance, size and 'chicken footprint.' ChickenTrack 2023 provides sector progress averages for each criterion of the BCC, and overall progress averages depending on how the companies report. Each sector reports information uniquely, depending on the remit of their operations, which prevents direct comparison of progress across sectors.

Key FINDINGS

Following two successful European ChickenTrack reports in 2021 and 2022, we now present the key findings of company progress by sector in 2023.

Company-specific progress can be viewed at www.compassioninfoodbusiness.com.

Additionally, we hosted a webinar on 20th March 2024, which included the key findings of ChickenTrack 2023 and case study examples. There was also further information on the support we can provide, such as guidance on roadmapping, our new marketing toolkit and updates on latest research. A recording of this is available at www.compassioninfoodbusiness.com.





COMPANIES WITH PUBLIC ROADMAPS

2 companies have public roadmaps detailing incremental targets towards 100% compliance:



21 COMPANIES ARE REPORTING FOR THE FIRST TIME





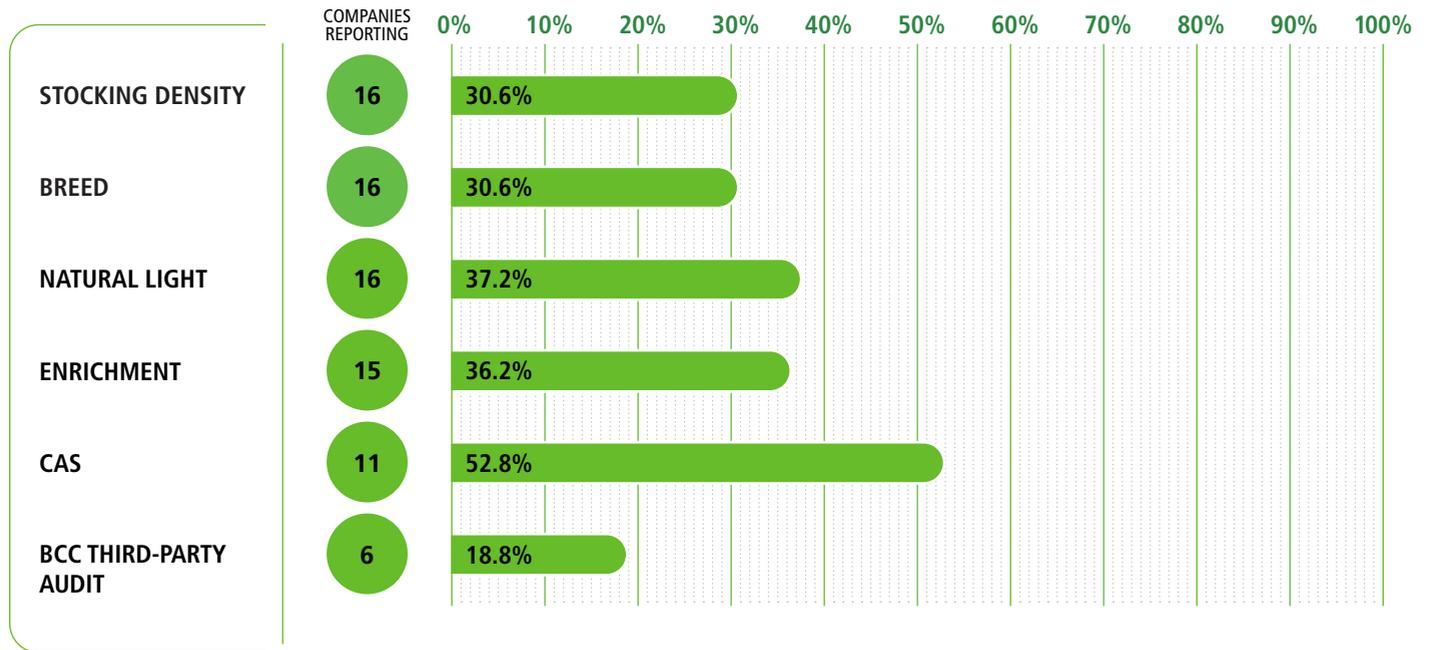
Progress by
SECTOR

RETAILERS & MEAL KITS

33 companies evaluated

21 companies report on transition progress

Most progress has been made on CAS Slaughter, followed by Natural Light and Enrichment. Least progress has been made on Breed, Stocking Density and Third-Party Auditing. Not all companies report on all criteria.



Five companies Carrefour Italy, Carrefour Spain, Cortilia, Eroski and REMA 1000, are reporting on overall transition as opposed to progress by each criterion. REMA 1000 is already reporting 96% compliance.



2023 PROGRESS HIGHLIGHTS

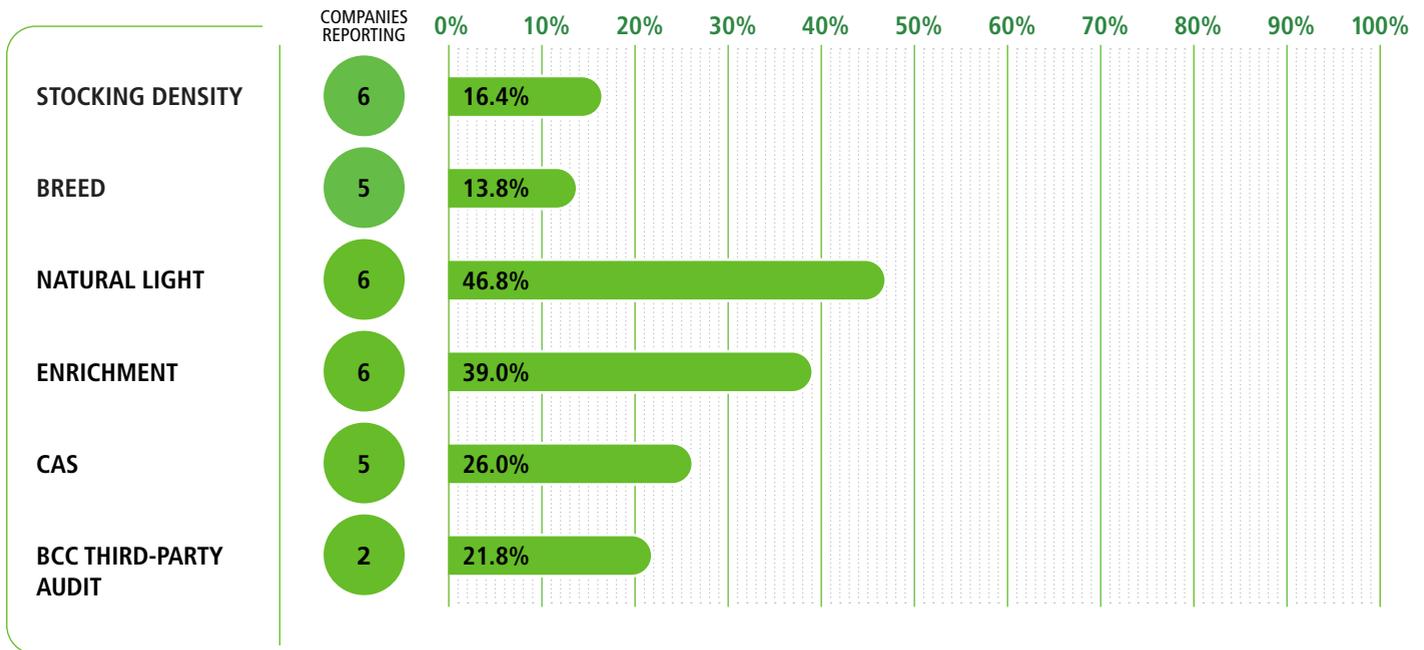
- **M&S** is the only UK retailer that is 100% compliant with the BCC for all its fresh supply, and is working towards 100% compliance for its whole supply by 2026.
- **Carrefour** (Poland) reporting for the first time across Stocking Density (28%), Breed (28%), Natural Light (28%) and CAS Slaughter (38%)
- **HelloFresh** reporting for the first time across Breed (19%), Enrichment (29%) and CAS Slaughter (43%); the full scope of this reporting can be viewed at www.compassioninfoodbusiness.com
- **Schiever Distribution** (France) for 100% transition in its first year of reporting across Stocking Density, Breed and Natural Light

FOOD SERVICE & HOSPITALITY

14 companies evaluated

8 companies report on transition progress

Most progress has been made on the Natural Light and Enrichment criteria, followed by CAS Slaughter and Third-Party Auditing. Least progress has been made on Breed and Stocking Density.



One company, SSP International, is reporting on overall transition as opposed to progress by each criterion.



2023 PROGRESS HIGHLIGHTS

- **Accor** (France) reporting for the first time across Stocking Density (34%), Breed (19%), Natural Light (31%), Enrichment (16%), CAS Slaughter (24%) and Third-Party Auditing (22%)

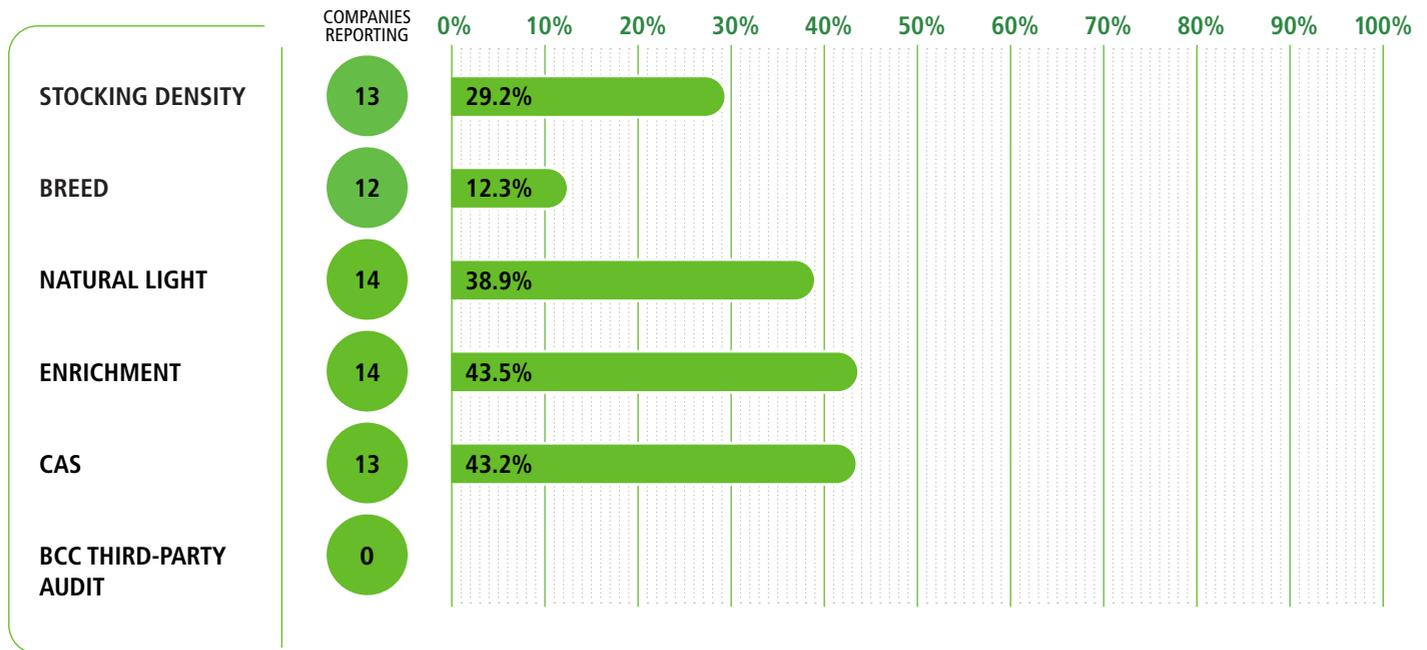
- **API Restauration** reporting on transition progress for the first time on Natural Light (55%) and Enrichment (33%)

RESTAURANTS

23 companies evaluated

15 companies report on transition progress

Most progress has been made on the Enrichment and CAS Slaughter criteria, followed by Natural Light and Stocking Density. Least progress has been made on Breed transition and no company is reporting Third-Party auditing. Not all companies report on all criteria.



Only one company, IKEA, is reporting on overall transition as opposed to progress by each criterion.



2023 PROGRESS HIGHLIGHTS

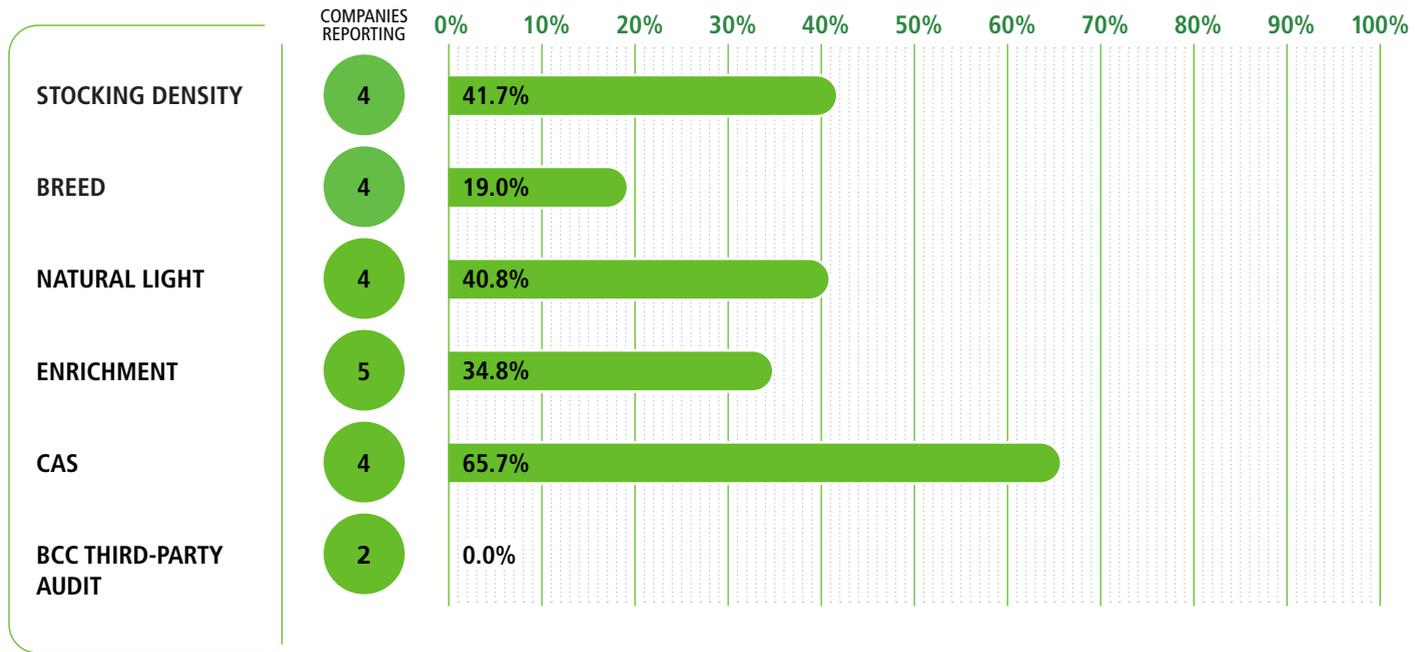
- **Flunch** (France) reporting for the first time across Natural Light (43%), Enrichment (43%) and CAS Slaughter (71%)
- **TGI Fridays** (UK) reporting for the first time on Natural Light (80%) and Enrichment (80%)

MANUFACTURERS

9 companies evaluated

6 companies report on transition progress

Most progress has been made on CAS Slaughter, followed by Stocking Density, Natural Light and Enrichment. Least progress has been made on the Breed and Third-Party Auditing criteria. Not all companies report on all criteria.



There are no Manufacturers reporting on overall transition as opposed to progress by each criterion.



2023 PROGRESS HIGHLIGHTS

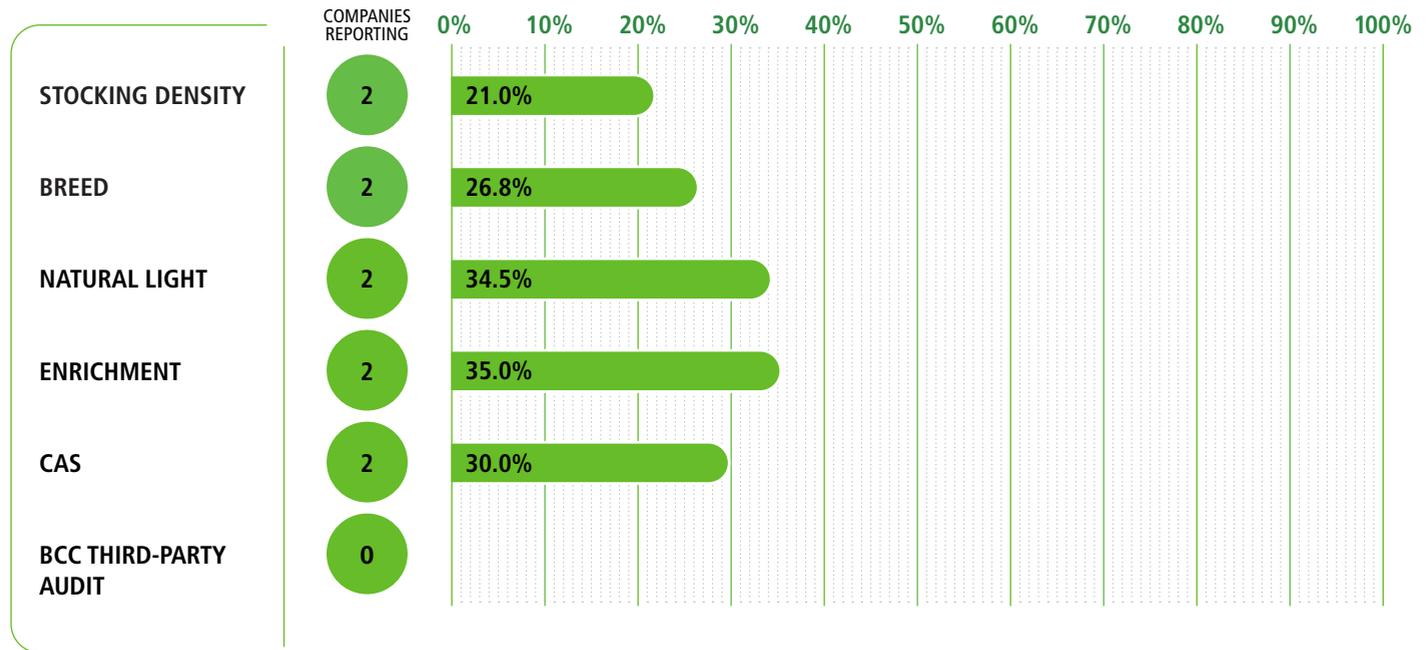
- **Premier Foods** reporting on transition progress across Stocking Density (45%), Enrichment (45%) and CAS Slaughter (99%)
- **Unilever** reporting an 18 percentage point increase in progress on Stocking Density and Breed, and a 10 percentage point increase in progress on Enrichment from last year

PRODUCERS

6 companies evaluated

5 companies report on transition progress

Most progress has been made on Enrichment and Natural Light, followed by CAS Slaughter, Breed and Stocking Density. Not all companies report on all criteria.



Two companies, Plukon Food Group and 2 Sisters Food Group, report on overall supply of BCC-compliant chicken as opposed to progress by each criterion.



Norsk Kylling's figures are not included in the graphs above as it is the only Producer committed to the BCC and is already 100% across all criteria. Of the other Producers evaluated in ChickenTrack, Plukon Food Group, 2 Sisters Food Group and LDC have commitments to supply BCC-compliant chicken to their customers. Fileni and Galliance have a partial commitment to convert a proportion of their supply to the BCC.

2023 PROGRESS HIGHLIGHTS

- **Fileni** reporting for the first time on Stocking Density (19%), Breed (28%), Natural Light (17%), Enrichment (17%) and CAS Slaughter (19%)
- **LDC** reporting on transition progress across Stocking Density (23%), Breed (26%), Natural Light (52%), Enrichment (53%) and CAS Slaughter (41%)

COMPANIES NOT REPORTING

Policy commitments are the first step to a higher welfare future for chickens. However, implementing change and reporting transition towards full compliance shows stakeholders that a company holds itself accountable to its commitments and to delivering better welfare for chickens.

30 companies are not reporting on progress. We therefore urge the following companies to report on their transition in 2024.

- Alcampo
- Aldi (Belgium)
- Aldi (France)
- Aldi (Spain)
- Aramark
- Auchan (Poland)
- Azzurri Group
- Best Western (France)
- Bofrost
- Bordeau Chesnel
- Burger King (UK)
- Carrefour (Belgium)
- CH&Co Group
- Chipotle Mexican Grill (UK)
- Colruyt Retail (France)
- E.Leclerc (Spain)
- Eataly (Italy)
- Elior
- Galliance
- Groupe Le Duff
- Herta
- Lidl (Belgium)
- Nestle Group
- Okay
- Pizza Express
- Pizza Hut (UK)
- Prezzo Restaurants plc
- Snowfox Group
- Sodexo Group
- The Restaurant Group plc





Committed to Better Chicken
Raising standards together

A powerful visual identity for 'Better Chicken'

Following requests from companies during individual conversations and at various events including Working Groups and our Broiler Chicken Forum, Compassion has been working with a creative agency to develop a memorable visual identity for 'Better Chicken'. The aim is to provide food businesses who have signed up to the BCC with digital assets that they can share with their customers to help them communicate about the higher welfare journey they are on.

The digital assets will contain a strong, recognisable visual identity and educate the public about what higher welfare means for broiler chickens and how the BCC addresses this. The purpose of these assets is to encourage consumers to support companies who are working towards achieving 100% compliance with the BCC.

Compassion's own social media campaign promoting the 'Better Chicken' visual identity and highlighting why the BCC is so important, kicks off this Spring. We will also be working with a small group of European companies to pilot a wider programme. If you are interested in becoming a pilot company, please get in touch. Companies will be provided with digital Guidelines, an End User Agreement and Conditions of Use as well as the logo, accompanying iconography, a video and 25 animations – including some that celebrate achieving 100% compliance for each criterion.

The digital assets will be available in other languages, such as French and Italian in due course.

5

clear steps...
that raise the welfare standards for broiler chickens

Slower growing breeds

For healthier chickens



More space to live

For active chickens



A stimulating environment

So chickens can be more chicken



A humane end

The whole journey matters



Compliance with Better Chicken

Raising chicken standards together



RESOURCES

Photo © Norsk Kylling



Roadmaps

A BCC roadmap is a yearly progress plan, which details incremental targets by individual criterion or by overall progress, to phase in higher welfare criteria until 100% compliance is achieved by the deadline. **Roadmaps should reflect the reality of the supply chain for an individual company; they should not be aspirational.** We would expect a company roadmap to have two layers:

A TOPLINE, PUBLIC-FACING TRANSITION TIMELINE

which includes reporting for the current year and which demonstrates that a company is taking proactive steps to achieve the commitment it has made. Achieving full BCC compliance can be incremental by criterion (for example 100% Stocking Density by 2024, 100% Breed by 2026) or as a yearly progress across all criteria (for example 50% by 2024, 75% by 2025, 100% by 2026).

A PRIVATE, MORE DETAILED TRANSITION PLAN

which acts as a foundation for the public-facing transition timeline, based on comprehensive supply chain mapping, assessment of current practices, and subsequent supply chain solutions where necessary. The analysis and solutions inform the realistic timelines which a company can use in a top-line, public-facing roadmap. Due to commercial sensitivities, we would not expect a company to publish this level of information.

Compassion is pleased to work with companies in the process of planning and executing their implementation strategies; including the initial supply chain mapping process, the gap analysis between existing practices and the BCC criteria, supply chain assessment and solutions and the building of a timebound, clear plan of action.

There are various formats in which a company may choose to publish its roadmap:

- 1) An overarching roadmap which covers incremental progress for all criteria**
- 2) Incremental progress by criteria for all categories of chicken**
- 3) Incremental progress by category (fresh, frozen and processed).**

Roadmaps are the key to achieving 100% compliance with the BCC, however it can be hard to know where to begin. Compassion has prepared a guide to help companies map out their route to implementation, and we also offer tailored workshops to assist companies with the roadmapping process.

Please reach out for assistance with any of the steps towards implementation and we can provide you with tools and guidance to gather this information and create your plan (email: foodbusiness@ciwf.org).



Case Studies



French fast-food chain, **Quick**, signed up to the European Chicken Commitment (ECC) in December 2022 as part of a global initiative to improve animal welfare. One of the criteria of the commitment involves slaughtering chicken without suspending and inverting the chickens upside down. As part of Quick's transition to these higher welfare standards, it has commissioned French researchers, Bureau ETRE and INRAE Caraibe team to investigate an innovative method complying with this criteria.

"Quick as a brand is aware of changes in society. For several months now, we have been looking in depth at how we can implement higher welfare practices in our supply chain. In collaboration with Compassion in World Farming, France's leading scientific experts on the topic, Bureau ETRE and INRAE, and our suppliers, we are working to improve practices, while preserving the specificity of Quick's offer."

– Nicaise Delette, Senior Quality Manager

Read more on
www.compassioninfoodbusiness.com



Leading Italian chicken producer, **Fileni**, has been working with Compassion in World Farming since 2021, on implementing the criteria of the BCC. This collaboration involved the formulation of a comprehensive roadmap, crucial for establishing practical timelines and delineating specific actions and steps necessary for attaining its objectives. The roadmap encompassed discussions on selecting appropriate enrichment substrates and perches to meet the criteria, addressing structural modifications essential for compliance with the lighting requirement, and forging a partnership with an auditing body to establish third-party

certification for the BCC criteria. Notably, Italy lacked a readily available BCC certification scheme, making this partnership pivotal. The roadmap's development also brought to light the necessity for training on animal welfare and the technical intricacies of implementing BCC criteria on the farms. Consequently, this led to dedicated training days for the entire technical staff, fostering heightened awareness and knowledge of animal welfare among Fileni's farmers.

Read more on
www.compassioninfoodbusiness.com

FEED CONTROL IS NOT AN ALTERNATIVE TO BREED CHANGE

Modern broiler breeds are the result of decades of genetic selection to obtain a fast-growing chicken with high breast meat yield and feed efficiency. Such intense selection for performance traits is directly responsible for the plethora of health and welfare issues experienced by these birds. This is why, as part of the Better Chicken Commitment, we are asking companies to adopt slower growing breeds with proven welfare outcomes, so that chickens can lead active, happier lives.

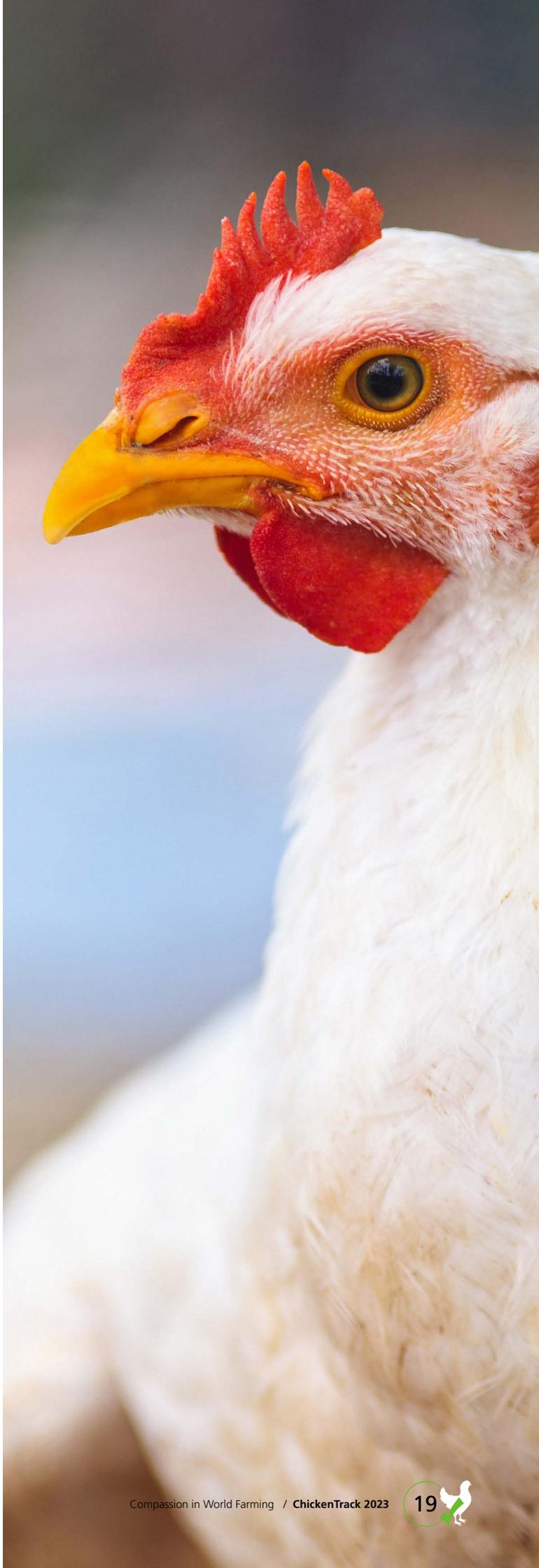
Feed control - where only 50-80% of the ad-libitum feed intake is given to the birds - is already widely practiced for heavy weight broilers to reduce lameness and mortality associated with fast growth. There are suggestions that this practice may be used to improve the welfare outcomes of lighter weight broilers too.

Whilst the potential impact on issues such as hunger and frustration are unknown, it appears an illogical and inefficient strategy — especially when there are breeds with a more balanced genetic growth rate capable of leading fit and healthy lives available.

We must not forget the parents of meat chickens – broiler breeders. They suffer more severe feed restriction, receiving as little as 25-30% of their ad-libitum feed intake at critical points in their life. This is done to maintain physical health and reproductive fitness but causes major welfare issues associated with chronic hunger and frustration, leading to injurious head pecking and constant pecking of fixtures and fittings. Alternative methods, such as using diets with lower energy content, have been proposed but their effectiveness is unclear. Using slower growing breeds alleviates some of the problems associated with feed restriction in parent birds.

Feed control of broilers, to counter the worse effects of genetic selection for fast growth, cannot therefore be acceptable from a welfare and ethical point of view.

Read our full position
www.compassioninfoodbusiness.com





Looking
FORWARD

This year marks Compassion's second annual ChickenTrack report following the guidance report in 2021. It is encouraging to see that reporting on transition has increased from 39% (including Producers) in 2022 to 65% in 2023. However, the majority of companies are falling behind on progress for two key criteria, Breed and Stocking Density, which are pivotal to delivering the full welfare benefits for chickens.

The Better Chicken Commitment is a package of science-based criteria, and ALL the requirements need to be implemented to significantly improve the lives of broiler chickens. Slower growing breeds must be introduced, and it is vital they have more space to move around as well as enrichments for occupation. Research has shown that higher welfare breeds show an increase in highly motivated behaviours such as foraging, scratching, perching, play and dustbathing. This indicates greater cognitive stimulation, improved mental wellbeing and more opportunity to express positive welfare.

In 2024, we expect companies not yet reporting on progress towards BCC compliance to start. We also encourage companies who are reporting to continue moving forward on their implementation. We want to see significant progress on commitments this year ahead of the 2026 deadline. And Compassion is here to support you – from sign-up to having BCC-compliant product on shelf. If your company currently does not have a policy around broiler chickens, or a detailed roadmap for your path towards BCC implementation, please do get in touch with us.

This year, we will also be helping to raise awareness of higher welfare chicken with our 'Better Chicken' digital assets. These will be used in social media campaigns, outlining the need for improved welfare and how the BCC can address this. We will be highlighting those companies who are on the BCC journey, and if you have signed up to the BCC and would also like to use these assets in your communications with your consumers, please let us know.

There is much to be done in the 12 months ahead. Key sectors still need to get on board, such as the UK retail industry, which has huge influence and can help stimulate the market as it shifts towards higher welfare. It is undoubtedly a challenging time, but we need to keep pressing ahead. As progress is made, and we see bigger changes, millions more broiler chickens will start to lead healthier, happier, more fulfilled lives.



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