

SUPERMARKETS & FARM ANIMAL WELFARE 'RAISING THE STANDARD'



Compassion in World Farming Trust Supermarket Survey 2001

SUPERMARKETS & FARM ANIMAL WELFARE 'RAISING THE STANDARD'

Supermarket Survey of Farm Animal Welfare Standards

Conducted by

Compassion In World Farming Trust (CIWF)

Compiled by

Philip Lymbery

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SUPERMARKETS & FARM ANIMAL WELFARE - 'RAISING THE STANDARD'

CIWF SURVEY OF SUPERMARKET PERFORMANCE ON ANIMAL WELFARE 2001

The welfare of farm animals is recognised as an important public and political issue in the UK and Europe. The past decade has seen some welcome legislation introduced to counter some of the worst excesses of factory farming. Narrow veal crates for calves and sow stall cages for pregnant pigs have both been banned in the UK. Yet the vast majority of farm animals are still kept indoors in highly intensive systems. Consumers are increasingly concerned about the way in which farm animals are treated. With most of the nation's food shopping now taking place in supermarkets, the multiple retailers have become the main link between the farm and the food we put into our shopping baskets. Compassion In World Farming Trust (CIWF) has carried out this survey of supermarket standards and performance on farm animal welfare in order to raise those standards and to inform consumers about how their food is produced.

Supermarkets have enormous influence over the animal welfare standards adopted in the production of the meat, milk and eggs they sell. Their dominant force in the UK retail sector and consequent buying power means that supermarkets have the ability to impose tight requirements on how food is produced. They also have tremendous scope for promoting one product over another using mechanisms such as price promotions, in-store product positioning, labelling, and publicity or customer information campaigns.

CIWF's 'Raising the Standard' survey has benchmarked the UK's leading supermarkets on farm animal welfare standards. This was achieved by issuing a comprehensive questionnaire on key areas of animal welfare to the 10 biggest UK supermarkets. By repeating the survey on an annual basis, it aims to track progress and commitment to these standards in order to improve the lives of farm animals. It also highlights the need for greater attention to welfare standards as part of each company's corporate responsibility for social issues. CIWF is delighted that all 10 leading supermarkets participated by supplying data during the period July-November 2001. Grateful thanks are extended to each company for its help and co-operation; ASDA, The Co-operative Group (CWS), Iceland Foods, Marks & Spencer (M&S), Safeway, Sainsbury's, Somerfield, Tesco, Waitrose and Wm Morrison's Stores.





CIWF's 'Raising the Standard' initiative supports supermarket best practice on farm animal welfare and consumer choice by:

- Tracking and benchmarking supermarket commitment and progress on key areas of animal welfare concern, thereby providing a comparative set of data to inform future retail strategy on farm animal standards.
- Rewarding progress and best practice on animal welfare by ensuring public recognition for improvements made and strides taken, something that has all too often gone unnoticed in the past.
- Highlighting areas where animal welfare standards need improvement.
- Informing consumers about the welfare standards employed by the supermarket at which they shop.
- Seeking to re-establish ethical standards of farm animal welfare as an alternative to price-based competition whereby companies vie to see who can sell food for the lowest price.

In short, this 'Raising the Standard' supermarket survey is an integral part of CIWF's campaign for more humane food and farming.

PHILIP LYMBERY

Compassion In World Farming

SUMMARY & CONCLUSIONS

The past decade has seen some welcome legislation introduced to counter some of the worst excesses of factory farming. Narrow veal crates for calves, for example, and sow stall cages for pregnant pigs have both been banned in the UK. Yet the vast majority of farm animals are still kept indoors in highly intensive systems. Consumers are increasingly concerned about the way in which farm animals are treated. With most of the nation's food shopping now taking place in supermarkets, the multiple retailers have enormous influence on how farm animals are raised and their products marketed.

Compassion In World Farming Trust's (CIWF) survey serves as a benchmark by which, progress on farm animal welfare standards amongst the UK's leading supermarkets can be gauged. The information was received directly from supermarkets via questionnaire during the period July-November 2001. Participating companies were: ASDA, The Co-operative Group (CWS), Iceland Foods, Marks & Spencer (M&S), Safeway, Sainsbury's, Somerfield, Tesco, Waitrose and Wm Morrison's Stores. By repeating the survey on an annual basis, CIWF aims to track progress and commitment to these standards in order to improve the lives of farm animals.

CIWF's survey has identified areas of standards and performance on farm animal welfare that need further progress from the UK's 10 major supermarkets. Progress is urgently needed to raise welfare standards for indoor-farming of pigs, the rearing of chickens for poultry meat where the great majority are intensively farmed, and on farmed fish welfare. Maximum transport times for animals, including poultry, travelling to slaughter need to be reduced further by most companies.

Pig Welfare

3 out of 10 supermarkets are still selling imported pigmeat produced using sow stalls & tethers under their own label. In these systems, sows are unable to exercise or turn around throughout their 4-month pregnancy. They have been banned in Britain on cruelty grounds. Most companies did not supply data for branded pigmeat on this issue.

At the end of their pregnancy, most breeding pigs kept indoors still give birth and nurse their piglets in narrow farrowing crates. These systems are as equally restricting as sow stalls, but remain legal in the UK. **Much of the pork, bacon and ham in supermarkets come from mothering sows kept in farrowing crates.** However, most stores reported also selling some pigmeat from sows farrowing outdoors. **5 out of 10 supermarkets sold small proportions of pigmeat produced using the more humane non-crate indoor system. The Co-operative Group (CWS) reported 80-90% of its own label pigmeat coming from uncrated sows kept indoors.** This is a welcome step forward.

The most welfare-friendly rearing system for pigs is a well-managed outdoor farm. CIWF's survey found most supermarkets to be stocking some outdoor-bred pork. **All of the fresh pork in Marks & Spencer comes from breeding sows kept outdoors. Whilst outdoor pig farms breed the piglets in the open air, many are then subsequently reared indoors. The survey made the welcome findings that 25% of pigmeat for Waitrose, 12% for Safeway (own label) and 5% at CWS is both reared and bred outdoors.**

Chicken Welfare

Most supermarkets allow chickens reared intensively for meat to be stocked at densities that exceed government guidelines. Broiler chickens are often kept in their thousands in windowless sheds at high stocking densities whereby they carpet the floor at several weeks old. Stocking densities are often expressed in terms of the number of kilograms of bird reared per square metre of floor space. UK government guidelines specify a maximum of 34kg bird/m². Only Marks & Spencer stipulate this maximum, which CIWF believes in itself is too high. Most other supermarkets will accept chickens kept at stocking densities up to 38 kg bird/m², thereby exceeding government guidelines.

Consumers wishing to buy a more humanely reared chicken can choose free range or organic options. **9 out of 10 companies sell free range or organic chickens. Nearly a third of the chickens sold by M&S and Waitrose come from these high welfare systems.** CIWF urges all supermarkets to insist on reduced stocking densities for indoor-reared broiler chickens, and to promote greater sales of free range and organic chickens.

Egg Laying Hens

Moving away from sales of eggs from battery cages is seen by CIWF as a key indicator of performance on farm animal welfare. **Marks & Spencer was the first UK supermarket to sell only free range eggs in shell, and to remove all battery egg ingredient from its entire range of processed and ready made meals. Waitrose has also followed this highly welcome achievement for own label processed products. Non-cage eggs now account for half or more (50-100%) of eggs sold by CWS, M&S, Safeway, Tesco and Waitrose.** CIWF urges the remaining 8 supermarkets to set targets for the elimination of egg sales and egg ingredient from battery cages, a system so cruel that the European Union has agreed to prohibit it by 2012.

Farmed Fish

Most supermarket trout and some salmon are slaughtered using methods that are unacceptable on welfare grounds. Most salmon and trout sold in supermarkets have been reared at stocking densities too high for good welfare. CIWF urges supermarkets to raise their farmed fish welfare standards by demanding that suppliers rear fish at much reduced stocking densities, use only humane slaughter methods, and stop the practice of prolonged pre-slaughter starvation.

Transport of Animals

Millions of farm animals undergo transport over long distances across Europe, simply to be slaughtered or put into veal crates at the journey's end.

To protect their welfare, animals should be transported over the shortest possible distances. In principle, animals for slaughter should be killed at the nearest available abattoir. All 10 major supermarkets set a maximum journey time of 8 hours or less for red meat animals travelling to slaughter. **Wm Morrison's set the highest standard with journeys of no more than 4.5 hours to slaughter allowed for cattle, sheep and pigs.**

Most companies set maximum journey times for poultry, but it is generally set far too high, with journeys up to 12 hours permitted by 2 companies. **Only 2 companies set satisfactory maximum journey times for poultry: Iceland (3.5 hours for chickens) and Waitrose (4 hours for all birds).** CIWF encourages all supermarkets to insist on the lowest possible maximum journey times for animals travelling to slaughter. Maximum journey times should be no more than 8 hours at the very most for mammals, and 4 hours for birds. CIWF urges supermarkets to ensure that policies on maximum journey times are equally applicable to imported meat as well as animals produced domestically.

Livestock Markets

Livestock markets are often noisy, confusing and highly stressful places for animals. Pens are often overstocked, and the animals handled roughly, and deprived of food and water. The welfare of the animals is better protected if they are spared market day. The proportion of meat animals sourced from livestock markets is at a welcome low level. **Two supermarkets, M&S and Waitrose, report having dispensed with markets entirely for own label**

meat. Three major supermarkets still source a quarter to a third of fresh lamb (own label) from livestock markets. CIWF believes that the spread of the recent Foot & Mouth Disease (FMD) epidemic has illustrated the need to abandon the use livestock markets altogether.

Exotic Animal Products

Exotic animal products are often produced in ways that cause immense suffering. Examples include cutting the legs from live frogs (frogs' legs), force-feeding geese and ducks to produce abnormally large livers (foie gras). Exotic meats are produced from the farming of essentially wild animals such as ostrich or emu. **Of the 10 supermarkets, only Waitrose sell foie gras. Only Sainsbury's sells ostrich meat.** None of the supermarkets surveyed sell frogs' legs or emu meat.

Genetic Engineering

The genetic engineering of farm animals, for example, to grow faster, bigger or leaner, threatens to unleash a new wave of serious welfare problems. **2 out of 10 supermarkets do not have a policy against stocking products from genetically engineered animals** or those subject to the products of genetic engineering. CIWF believes it important that all supermarkets have a clear policy not to stock produce from genetically engineered animals. This policy should be extended to cover both branded and own label products.

Overall Performance on Farm Animal Welfare

CIWF is seeking to chart the progress of supermarkets toward higher standards of farm animal welfare on an annual basis. To help monitor progress, key indicators of animal welfare have been selected to evaluate an overall performance index. These key indicators are based on the elements identified by CIWF as part of its vision of the “perfect” welfare-friendly supermarket. Five star ratings have been awarded for performance on each indicator using transparent and easily understood criteria. The total number of stars accumulated by each supermarket provides the relevant overall performance index. A table is given showing the overall welfare performance index for each company. **The top 5 supermarkets in 2001, in order of overall farm animal welfare performance, were Marks & Spencer, Waitrose, Safeway, The Co-operative Group (CWS) and Tesco.**



SUPERMARKETS & FARM ANIMAL WELFARE

SURVEY RESULTS – 2001

The following results are the first of an annual review of supermarket standards and performance on animal welfare by Compassion In World

Farming Trust. The main findings of the survey are presented here, together with a brief outline of each animal welfare issue. These results will serve as a benchmark by which, future supermarket progress on these issues can be gauged. The information was received directly from supermarkets via questionnaire during the period July-November 2001.

Key

The following symbols appear in the tables:

- N/A means "Not Applicable". This generally means that the company concerned does not sell the product or item.
- ? means that no data was supplied by the supermarket on that item.
- Fresh means meat, milk or eggs that have not been frozen or processed.



GENERAL FARM ANIMAL WELFARE STANDARDS

Board Member & Corporate Policy on Animal Welfare

CIWF believes that good indicators of the seriousness of a company's commitment to farm animal welfare are whether they have a written corporate policy on animal welfare and whether a board or executive member has been designated with specific responsibility for this issue. The current positions of supermarkets on this indicator are given in the table below. Whilst 8 out of 10 major supermarkets have a written animal welfare policy, as yet only 3 companies report having a board level representative with this specific issue in his/her brief.



SUPERMARKET COMMITMENT & CORPORATE POLICY ON FARM ANIMAL WELFARE

Board/Executive Member Responsible for Farm Animal Welfare & Written Corporate Policy with Objectives?

	ASDA	CWS	Iceland	M&S	Safeway	Sainsbury's	Somerfield	Tesco	Waitrose	Wm Morrison's
Board or Executive Member for A/W?	NO	YES	NO	YES	NO	YES	NO	?	NO	NO
Written Corporate Policy?	YES	YES	YES	YES	NO	YES	YES	YES	YES	NO

Questions asked:

Has your company appointed a main Board/Executive member with specific responsibility for farm animal welfare?

Does your company have a written corporate farm animal welfare policy with objectives?

SALES OF SUPERMARKET 'OWN LABEL' LIVESTOCK PRODUCTS

Supermarket products are usually sold either with the company's own label or under that of a branded supplier. Supermarkets have direct control over

the standards used to rear animals destined for sale under their own label, and have a greater capacity to set higher standards if they so choose. The table below shows that the vast majority of fresh meat, milk and eggs sold in supermarkets is sold under company own labels.

SALES OF SUPERMARKET 'OWN LABEL' LIVESTOCK PRODUCTS

'OWN LABEL' PRODUCTS AS PROPORTION OF TOTAL SUPERMARKET SALES PER CATEGORY

Company	Fresh Beef %	Fresh Sheep %	Fresh Pork %	Bacon & Pigmeat Sausage %	Ham %	Fresh Poultry Meat %	Fresh Milk %	Eggs in Shell %
ASDA	100	100	100	95	95	100	96	98
CWS	99	99	99	70	80	99	99	99
Iceland Foods	100	10	60	60	60	60	40	5
Marks & Spencer	100	100	100	100	100	100	100	100
Safeway	100	100	100	Bacon 70 Sausage 65	80	95	95	92
Sainsbury's	98	98	98	Bacon 78 Sausage 81	95	95	97	95
Somerfield	98	98	98	30	30	90	100	90
Tesco	?	?	?	?	?	?	?	?
Waitrose	100	100	100	85	85	95	90	90
Wm Morrison	100	100	100	98	95	99	96	97

Question asked: What proportion of your company's total sales volume of fresh meat, milk and eggs is sold as own label/own brand product rather than under the suppliers' brand label?

THE WELFARE OF PIGS

Breeding Pigs



The welfare of pigs has been much in the news in recent years. In 1999, the UK banned the use of narrow sow stalls and tethers for pregnant pigs. In this system, sows often spend their four-month pregnancy caged in a narrow sow stall or chained in a row by a heavy tether around their neck. The European Union (EU) has agreed to ban the prolonged use of sow stalls from 2013, whilst tethering will be illegal from 2006. CIWF believes that supermarkets should support these newly raised welfare standards by ensuring that any pork they sell has not been produced by a sow caged in a stall or tether system. This survey found that 3 out of 10 supermarkets are still selling stall & tether-produced pigmeat under their own label. Most companies did not supply data for branded pigmeat.

Farming Systems for Mothering Sows



Intensively reared sows often spend motherhood behind bars. When near to giving birth (farrowing), the heavily pregnant sow is moved to a farrowing crate. Here she will stay until her piglets are weaned at 3-4 weeks old. This is another system, in which sows are unable to exercise or turn around, and is supposedly used to protect piglets from being crushed by their mother, but is actually quite unnecessary. Sows kept in a more natural outdoor

environment are perfectly able to rear their piglets without crushing them. CIWF's survey found 5 out of 10 supermarkets sold small proportions of pigmeat produced using the more humane non-crate indoor system. The Co-operative Group (CWS) reported 80-90% of its own label pigmeat to come from uncrated sows indoors. Most stores reported selling pigmeat from sows farrowing outdoors. All of the fresh pork in Marks & Spencer comes from sows kept outdoors whilst giving birth and nursing piglets.

Bedding & Outdoor Pig Production

Bedding material such as straw is important for the welfare of sows. They naturally spend a large proportion of their time rooting around, chewing and investigating their surroundings. Where sows are housed indoors, straw gives them the material to fulfil these needs. It also provides a more comfortable lying area for the heavy animals, and can also help keep them warm. CIWF's survey found that 100% of own label pigmeat for ASDA, M&S, Waitrose and Wm Morrison's is bred from sows supplied with bedding material. Half of own label pigmeat from a further 3 companies comes from straw bedded units. CIWF believes that all pigs should be provided with suitable bedding material.



The most welfare-friendly rearing system is a well-managed outdoor farm. The survey found most supermarkets to be stocking some outdoor bred pork. Marks

& Spencer is the only company to date reporting 100% of its fresh pork to be outdoor produced. CIWF urges all supermarkets to follow this high-welfare lead.

SUPERMARKET PIG WELFARE SURVEY – BREEDING SOWS

Company	Pigmeat Produced Using Sow Stalls & Tethers (% Sales Volume) (Own Label Only)				Pigmeat Produced From Different Farrowing Systems (% Sales Volume) (Own Label Only)			Bedding Material - Own Label	Proportion Outdoor Bred
	Fresh Pigmeat	Bacon & Ham	Processed Meat	Ready Made Meals Containing Pigmeat	Close Confinement Farrowing Crate	Non-crate Indoor System	Outdoor Farrowing	% Pigmeat Sales with Bedding	% Total Sales Volume (own label & branded)
ASDA	0	0	0	0	70	5	25	100	25
CWS	0	10	0	0	Pigmeat 10-15 Bacon 80-90	Pigmeat 80-90 Bacon 10-15	Pigmeat 5 Bacon 5	40-50	25-35
Iceland Foods	0	0	0	0	?	?	?	?	?
Marks & Spencer	0	0	0	0	100 (pigmeat for processing)	0	100 (fresh pork)	100	100
Safeway*	0	5	0	0	60	5	35	50	40
Sainsbury's	0	Bacon 0 Ham ?	?	?	?	?	?	Recommended	?
Somerfield*	0	0	0	0	70	5	25	50	25
Tesco	0	0	0	0	?	?	?	?	?
Waitrose	0	0	0	0	50	0	50	100	50
Wm Morrison*	0	Bacon 35 Ham 70	0	50	Pork 100 Bacon 100 Ham 70	Ham 5	Ham 25	100	Pork 25 Ham 5 Bacon 10

*Data for own label product only

Breeding Pig Welfare – Questions Asked:

What proportion of your company's total pigmeat sales volume in each of the following product categories is produced from the progeny of breeding sows kept in stall or tether systems?

If a proportion of your company's pigmeat sales still comes from sows kept in stall or tether systems during pregnancy, in the interest of consumer choice and animal welfare, are these products clearly labelled as to method of farm production?

What proportion of your company's total UK sales volume of fresh pigmeat, bacon and ham is produced using the different farrowing systems for farrowing and lactating sows?

What proportion of your company's total UK sales volume of fresh pigmeat, bacon and ham is produced from sows provided with bedding material such as straw (own label pigmeat & branded)?

What proportion of your company's total UK sales volume (both own label and branded) of fresh pigmeat, bacon and ham is produced from breeding sows kept outdoors (outdoor bred)?

Fattening Pigs Reared for Slaughter

Supermarkets were surveyed on key welfare standards that apply to fattening pigs for slaughter. Bedding material is important to provide comfort and to allow the animals to exercise their exploratory behaviours. Where straw is absent, this can provide a barren environment for the pigs and can lead to



problems with so-called 'vices' such as piglets biting each other's tails. Tail docking is used to help prevent this vice. Similarly, teeth clipping is often carried out in an effort to stop injuries to the sow's teats or from fighting piglets. However, scientific and practical evidence shows that by keeping the pigs in better conditions, the 'need' for tail docking and teeth clipping can be eliminated.

This survey found all rearing pigs produced for the own label products of M&S, Waitrose and Wm Morrison's are provided with bedding, at least for fresh pork. However, less than 50% of pigmeat for 3 out of 10 companies comes from straw-based rearing systems, whilst a further 3 companies supplied no data on straw provision.

The proportion of tail docking and teeth clipping reported between supermarkets varied from 95% to 0%. The policy of only carrying out these mutilations on veterinary advice was not intended by the survey to mask actual levels of tail docking, etc. These questions will be altered accordingly for the next survey.

Outdoor pig farms often breed the piglets in the open air. However, many are then subsequently reared indoors. The survey made the welcome findings that 25% of pigmeat for Waitrose, 12% for Safeway (own label) and 5% at the Co-op (CWS) is reared as well as bred outdoors.

REARING PIGS – PROPORTION (%) OF PIGMEAT PRODUCED TO WELFARE STANDARD

Company	Own Label Bedding Provided?	Own Label Tail Docked?	Own Label Teeth Clipped? %	Total Sales Volume % Outdoor Reared & Bred
ASDA	40	80	85	0
CWS	10	95	95	5
Iceland Foods	?	?	?	?
Marks & Spencer	100 (Fresh pork)	0 (unless on veterinary advice)	0 (unless on veterinary advice)	0
Safeway*	50	80	85	12
Sainsbury's	?	?	?	?
Somerfield*	60	85	90	0
Tesco	?	?	?	?
Waitrose	100	0 "unless advised by a vet"	0 "unless advised by a vet"	25
Wm Morrison*	100	On veterinary advice	"when necessary"	?

Questions Asked:

What proportion of your company's total UK sales volume of fresh pigmeat, bacon and ham is produced from pigs reared for slaughter that are provided with bedding material, have had their tails docked or teeth clipped?

What proportion of your company's total UK sales volume (both own label and branded) of fresh pigmeat, bacon and ham is produced from pigs for slaughter that have been both bred and reared outdoors (outdoor reared)?

* Data refers to own label product only.



THE WELFARE OF BEEF CATTLE

Two key indicators of the welfare-friendly level of cattle rearing systems are whether the animals are provided with straw bedding and allowed access to the outdoors, at least during the grazing season. Most supermarkets reported

that cattle are generally given bedding material. The Co-op (CWS) admitted that only 30-40% of its beef comes from straw-housed animals. Permanently indoor-housed cattle accounted for 5-15% of fresh beef sales from three supermarkets. CIWF urges all supermarkets to ensure that standards insist on the provision of bedding, and that all cattle have access to the outdoors.

BEEF CATTLE REARING SYSTEMS – SUPERMARKET PERFORMANCE ON WELFARE

% Total Sales Volume of Fresh Beef Produced Under Different Rearing Systems

Company	% Indoors Permanently	% Indoors + Daytime Outdoor Access	% Outdoors Permanently	% Provided with Bedding Material
ASDA	0	100	0	90
CWS	5	95	0	30-40
Iceland Foods	?	?	?	?
Marks & Spencer	0	0	100 (summer months)	100 (except in areas where straw is "not available, i.e. Northern Ireland and the Orkneys")
Safeway*	15	25	60	100
Sainsbury's	0	0	100	100
Somerfield*	7	90	(summer months) 3	95
Tesco	"produced from cattle that are generally housed on bedding material in winter and out in summer"			
Waitrose	0	25	75	100
Wm Morrison*	?	?	?	100

Questions asked:

What proportion of your company's total UK sales volume of fresh beef (both own label and branded) is produced from cattle reared: In permanent indoor housing, in indoor housing with daytime access to the outdoors, or outdoors permanently?

What proportion of your company's total UK sales volume of fresh beef (both own label and branded) is produced from housed cattle provided with bedding material such as straw?

*Data refers to own label product only.

THE WELFARE OF CALVES FOR VEAL

None of the UK's 10 biggest supermarkets sell veal produced in veal crates. This is highly welcome as veal crates are narrow crates where the animals are reared in darkened sheds and unable to exercise or turn around. It is a system that was banned in the UK in 1990, and will be banned in the European Union from 2007.

5 out of 10 supermarkets surveyed sell veal. The highest welfare system

allows these sociable animals to be housed as a group with straw bedding throughout the rearing period. Two supermarkets sell veal produced in systems where the calves are kept separately for the first weeks of life and are not provided with straw bedding.



VEAL REARING SYSTEMS – SUPERMARKET PERFORMANCE ON WELFARE

% Total Sales Volume of Fresh Veal Produced Under Different Rearing Systems

Veal Calf Rearing System	ASDA	CWS	Iceland	M&S	Safeway*	Sainsbury's	Somerfield*	Tesco	Waitrose	Wm Morrison*
Group Housing – Straw-based	N/A	N/A	?	0	0	100	N/A	?	100	N/A
Group Housing – Non-straw-based	N/A	N/A	?	100	100	0	N/A	?	0	N/A
Group Housed for entire rearing period	N/A	N/A	?	0	0	90	N/A	100	100 except on vet advice	N/A
Veal Crates	N/A	N/A	?	0	0	0	N/A	0	0	N/A

Questions asked:

What proportion of your company's total UK sales volume of fresh veal (both own label and branded) comes from each of the following production systems: Straw-based group housing, non-straw-based group housing (slatted floors, no bedding), or veal crates?

Of your company's sales volume of fresh veal reared in group housing, what proportion is produced from calves kept in groups throughout the entire rearing period including the first few weeks of life?

*Data refers to own label product only.

THE WELFARE OF DAIRY CATTLE

As part of the dairy cow section of the survey, CIWF asked about the housing systems used. High welfare systems should provide daytime access to the outdoors during the grazing season, and ensure that all cows have clean, dry bedding material. When housed, the cows should have freedom to move around and exercise. It was an unwelcome surprise to find that some dairy cows providing the milk for 4 major supermarkets are tethered in the cowshed. An even more worrying trend would be any adoption of highly intensive “zero grazing” systems where the cows are kept indoors permanently.



DAIRY CATTLE REARING SYSTEMS & POLICY ON KEY WELFARE INDICATORS

% Total Sales Volume of Fresh Milk Produced Under Different Housing Systems

Housing System	ASDA	CWS	Iceland	M&S	Safeway*	Sainsbury's	Somerfield*	Tesco	Waitrose	Wm Morrison*
Covered Housing/Yard with Bedding Material	100	95	?	100	100	95	?	?	100	100
Permanently Tethered within Cowshed	0	0	?	0	0	0	?	?	0	0
Tethered in Cowshed & Daily Exercise	minimal	5	?	0	0	5	?	?	0	1
Permanently Indoors (Zero Grazing)	0	0	?	0	0	1 "if any"	?	?	0	0

Question asked:

What proportion of your company's total UK sales volume of fresh milk (both own label and branded) is produced from cows that are: Provided with bedding material such as straw in the covered housing or yard, permanently tied/tethered within the cowshed, tied/tethered within the cowshed but given untethered exercise on a daily basis, or kept on a zero-grazing basis (i.e. kept permanently within the shed/yard without access to grazing outdoors)?

*Data refers to own label product only.

EXOTIC ANIMAL PRODUCTS

Exotic animal products are often produced in ways that cause immense suffering. Examples include cutting the legs from live frogs (frogs' legs), and force-feeding geese and ducks to produce abnormally large livers (foie gras). Exotic meats are produced from the farming of essentially wild animals such as ostrich or emu. Welfare concerns remain about the farming of deer,

especially with regard to the method of slaughter. The most humane slaughter method for deer is for a marksman to shoot them in the field of rearing.

Of the 10 supermarkets, only Waitrose sell foie gras. Only Sainsbury's sells ostrich meat. Farmed deer is sold by 4 supermarkets; M&S, Sainsbury's, Tesco and Waitrose; with 30% of farmed deer meat for Sainsbury's being shot in the field, and 10% for Waitrose.

SUPERMARKET SALES SURVEY OF EXOTIC MEAT & ANIMAL PRODUCTS

Asked "Does Your Company Sell the Following at any Time During the Year?"

Exotic Animal Product	ASDA	CWS	Iceland	M&S	Safeway*	Sainsbury's	Somerfield*	Tesco	Waitrose	Wm Morrison
Foie Gras or Products Containing Foie Gras	NO	NO	NO	NO	NO	NO	NO	NO	YES**	NO
Frogs Legs	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Ostrich Meat	NO	NO	NO	NO	NO	YES	NO	NO	NO	NO
Emu/other Ratite Meat	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Farmed Deer Meat	NO	NO	NO	YES	NO	YES	NO	YES	YES	NO
If Meat from Farmed Deer Sold, % Produced Using Different Slaughter Methods										
Farmed Deer – Shot in Field %	N/A	N/A	N/A	0	N/A	30	N/A	0	10	N/A
Farmed Deer – Slaughtered in Dedicated Deer Slaughterhouse %	N/A	N/A	N/A	100	N/A	20	N/A	100	90	N/A
Farmed Deer – Slaughtered in Standard Abattoir %	N/A	N/A	N/A	0	N/A	50	N/A	0	0	N/A

Questions asked:

Does your company sell the following at any time during the year: Foie gras or products containing foie gras, frogs legs, ostrich meat, or meat from other ratites (e.g. Emu)?

Does your company sell meat from farmed deer, and if so, what proportion is produced from animals slaughtered on-farm by being shot in the field, from animals slaughtered in a dedicated deer slaughterhouse not used for the killing of other red meat animals or from animals slaughtered in standard red meat abattoirs?

*Data refers to own label product only. ** Produced 100% from ducks kept under extensive conditions

TRANSPORT OF ANIMALS

The long distance transport of animals for slaughter or further fattening is a

major public issue in the UK and Europe. Millions of farm animals undergo transport over long distances across Europe, simply to be slaughtered or put into veal crates at the journey's end. To protect their welfare, animals should

TRANSPORT OF ANIMALS FOR SLAUGHTER								
Supermarket Policy on Total Maximum Journey Times for Animals Travelling from Farm to Slaughter								
	Total Maximum Journey Time (Hours) – Red Meat				Total Maximum Journey Time (Hours) - Poultry			
	Cattle	Sheep	Pigs	Policy Applies UK + non-UK?	Chickens	Turkeys	Ducks	Policy Applies UK + non-UK?
ASDA	8	8	7.5-8	"must comply with the current national legislative requirements"	12 (from start of loading & unloading)	7	8	"As per national legislative requirements"
CWS	8	8	8	YES	No maximum	6	8	YES
Iceland Foods	6.5	6.5	?	N/A	3.5	?	5	YES
Marks & Spencer	8	8	8	YES	8	8	8	YES
Safeway*	6	6	6	YES	8	8	8	YES
Sainsbury's	6-8	?	8	YES	12	12	12	YES
Somerfield*	8	8	8	?	8	8	8	YES
Tesco	8	8	8	YES	8	8	8	YES
Waitrose	8	8	8	YES	4	4	4	YES
Wm Morrison*	4.5	4.5	4.5	N/A	No maximum	No maximum	No maximum	N/A

Questions asked:
 What is the total maximum journey time from farm to slaughter allowed by your company for cattle, sheep & pigs (hours)?
 Does this policy apply equally to animals being transported for slaughter in non-UK countries as well as the UK?
 What is the total maximum journey time from farm to slaughter allowed by your company for broiler chickens, turkeys & ducks (hours)? Does this policy apply equally to poultry being transported for slaughter in non-UK countries as well as the UK?
 *Data refers to own label product only.

be transported over the shortest possible distances. In principle, animals for slaughter should be killed at the nearest available abattoir. Supermarkets can play their role by insisting on the lowest possible maximum journey times for animals travelling to slaughter. Maximum journey times should be no more than 8 hours at the very most for mammals, and 4 hours for birds. Policies on maximum journey times should be equally applicable to imported meat as well as that produced domestically.

The survey found that all 10 major supermarkets set a maximum journey time of 8 hours or less for red meat animals travelling to slaughter. Wm Morrison's set the highest standard with journeys of no more than 4.5 hours to slaughter allowed for cattle, sheep and pigs. Most companies set maximum journey times for poultry, but it is generally set far too high, with journeys up to 12 hours permitted by 2 companies. Only two companies set satisfactory maximums for poultry; Iceland (3.5 hours for chickens) and Waitrose (4 hours for all birds).



LIVESTOCK MARKETS

Livestock markets are traditional collection points where large numbers of farm animals, such as sheep, cattle, pigs and horses, are bought and sold. Markets are noisy, confusing and highly stressful places for animals. Pens are often overstocked, and the animals handled roughly, and deprived of food and water. The welfare of the animals is better protected if they are spared market day.

The proportion of meat animals sourced from livestock markets is at a welcome low level. Two supermarkets, M&S and Waitrose, report having dispensed with markets entirely for own label meat. Three major supermarkets still source between a quarter and a third of fresh lamb (own label) from livestock markets. The spread of the recent Foot & Mouth Disease (FMD) epidemic has illustrated the need to abandon the use of livestock markets altogether.

PROPORTION OF SUPERMARKET MEAT SOURCED FROM LIVESTOCK MARKETS			
Company	% Sales Volume – Own Label		
	Fresh Beef	Fresh Sheep Meat	Fresh Pigmeat
ASDA	5	35	0
CWS	5	5	0
Iceland Foods	?	?	?
Marks & Spencer	0	0	0
Safeway	10**	0	0
Sainsbury's	?	?	?
Somerfield	5	30	0
Tesco	0	25	0
Waitrose	0	0	0
Wm Morrison	Currently under review.		

Question asked:
 What proportion of your company's total sales volume per category is produced from animals sourced through auction marts or collection centres? ** Pre-Foot & Mouth Disease

THE WELFARE OF LAYING HENS

The production of eggs from battery cages is a flagship issue for CIWF and other farm animal welfare organisations. Battery cages are tiny barren cages in which, hens cannot exercise or even flap their wings. This system has been the subject of many years of intense public and political campaigning, which following a CIWF campaign resulted in the European Union agreeing to prohibit barren battery cages by 2012. However, the danger of battery eggs being imported into the UK, either as eggs in shell or as liquid egg for

processing, will remain after the anticipated EU cage ban.

CIWF encourages all supermarkets to increase their proportion of non-cage egg sales to 100%. In addition, supermarkets should insist on non-cage egg ingredient in ready made meals and processed egg products throughout their product range. Marks & Spencer was the first UK supermarket to achieve these targets, and has since been followed by Waitrose in this key area of progress on farm animal welfare. Non-cage eggs now account for half or more (50-100%) of eggs sold by CWS, M&S, Safeway, Tesco and Waitrose.



SUPERMARKET SURVEY OF ALTERNATIVE EGG SALES

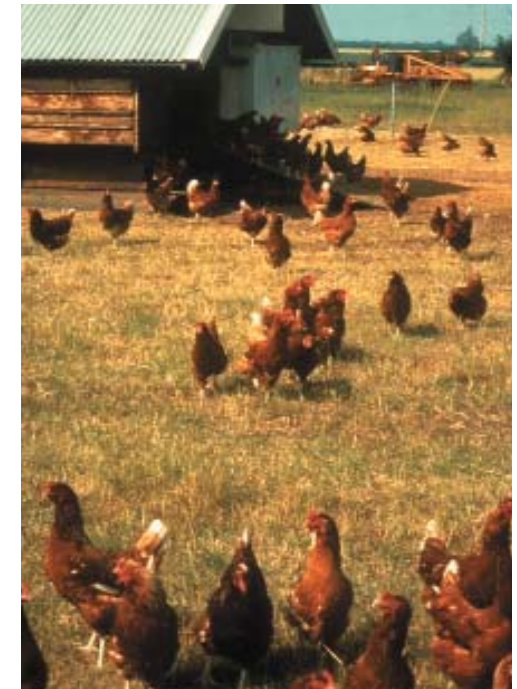
Company	% Total Sales Volume			
	Battery Eggs	Non-cage Alternatives (Free-range, barn, organic)	Processed & Ready Made Meals with Egg % non-cage egg ingredient	% Battery Eggs Labelled Clearly: "Eggs from caged hens"?
ASDA	69	31	0	100
CWS	50	50	5	100
Iceland Foods	67	32	?	0
Marks & Spencer	0	100	100	N/A
Safeway*	48	52	0	100
Sainsbury's	62	38	?	100
Somerfield*	85	15	?	Preparing to implement
Tesco	45	55	?	100
Waitrose	0	100	(own label) 100	N/A
Wm Morrison*	75	25	0	100

Questions asked:

Of the total sales volume of shell eggs sold by your company (own label & branded) in the UK each year, what percentage is made up of battery cage produced eggs (Own label & branded or eggs from non-cage alternatives (barn, free range, etc.)?)

Of your company's total sales volume of processed and ready-made meal products containing egg ingredient (both own label and branded), what proportion currently uses egg ingredient from non-cage alternatives (barn, free range, etc.)?

What proportion of battery eggs (both own label and branded) sold in your company's stores is labelled using the clear, factual labelling term "Eggs from Caged Hens"? *Data refers to own label product only.





THE WELFARE OF BROILER CHICKENS

In terms of the number of individual animals produced annually, broiler chickens reared for meat represent the largest area of factory farming in the UK. The vast majority of the 800 million broiler chickens reared annually in the UK are crammed together, many thousands of birds in each barren shed. They are not caged, but kept at such high stocking densities that the birds quickly carpet the floor of the shed. Broiler chickens grow at super-fast rates, so fast that their bones, heart and lungs often cannot keep pace. Intensive rearing of chickens has been criticised at the highest level, including in a recent report by the European Commission's own expert Scientific Committee

on Animal Health and Animal Welfare (SCAHAW, 2000).

Stocking densities for broiler chickens are often expressed in terms of the number of kilograms of bird reared per square metre of floor space. UK government guidelines specify a maximum of 34 kg bird/m². CIWF believes this is set much too high for good welfare. However, the table below shows that most supermarkets will accept chickens crammed at stocking densities of 38 kg bird/m², which thereby exceed government guidelines. Consumers can choose a more humanely reared bird by buying free range or organically produced chickens. Nine out of 10 supermarkets report selling these alternatives. Nearly a third of the chickens sold by two major stores come from these high welfare systems.



SUPERMARKET MEAT CHICKEN SALES & WELFARE STANDARDS

Company	% Total Sales Volume Fresh & Frozen by Rearing Method				Policy
	Intensive	Free Range	Organic	Other Non-Intensive	Max. Stocking (Kg bird/m ² floor space)
ASDA	99.8	0	0.2	0	38
CWS	97	0	2	1	38
Iceland Foods	100	0	0	0	38
Marks & Spencer	70	20	10	0	34
Safeway*	98	1	1	0	None Set
Sainsbury's	94	5	1	0	38
Somerfield*	95	5	0.1	0	38
Tesco	96	3	1	0	38
Waitrose	70	20	10	0	38
Wm Morrison*	99	1	0	0	None Set

Questions asked:

Of the total sales volume (both own label & branded) of fresh and frozen chicken sold by your company (both whole birds and chicken joints), what proportion is made up of standard intensive broiler chickens, free range, organically reared, or other non-intensively reared chickens (e.g. Freedom Food)?

Does your company insist on an **absolute** maximum (as opposed to planned maximum) chicken stocking density from its suppliers of broiler chickens reared for meat (both UK-produced and imported), and if so, what is the absolute maximum insisted upon?

*Data refers to own label product only

THE WELFARE OF TURKEYS, DUCKS & QUAIL

Over 25 million turkeys are reared in the UK each year, about 11 million of these for the Christmas market. Intensive turkey production entails up to 25,000 birds crowded into each shed in conditions similar to broiler chickens. A semi-intensive farming method for turkeys is to raise them in pole barns – densely stocked sheds, but with natural light and ventilation. Ducks too can be reared intensively in barren sheds, and without water for swimming.

When it comes to turkeys, most supermarkets sell humane alternatives.

Only Waitrose and Sainsbury's report selling free range duck. The tiny game bird, quail, is also farmed intensively. These farms can often resemble miniature versions of the intensive systems used for chicken and egg production. CIWF's survey found Safeway and Sainsbury's to be selling intensively reared quail meat. Sainsbury's also sell eggs from caged quail. Waitrose sells quail eggs under a branded label. The production method is not specified.



SUPERMARKET SALES OF TURKEY & DUCK

Company	% Total Sales Volume By System of Rearing (Fresh & Frozen)					
	Turkeys				Ducks	
	Intensive	Pole-Barn	Free Range	Organic	Intensive	Free Range
ASDA	70	29	0.6	0.4	100	0
CWS	30	70	0	0	Low density, open sided barns – 100	0
Iceland Foods	100	0	0	0	100	0
Marks & Spencer	78		12	10	100	0
Safeway*	99	0	1	1	100	0
Sainsbury's	96	0	3	1	92	8
Somerfield*	100	0	0.1	0	100	0
Tesco	46	46	8	1	?	?
Waitrose	78	0	20	2	30	70
Wm Morrison*	100	0	0	0	100	0

Questions asked:

Of the total sales volume (both own label & branded) of fresh and frozen turkey sold by your company (both whole birds and turkey joints), what proportion is made up of: Standard intensively reared turkeys; pole-barn reared turkeys; free range turkeys; organically reared turkeys?

Of the total sales volume of fresh and frozen duck (both own label and branded) sold by your company, what proportion is made up of intensively reared or free range ducks?

*Data refers to own label product only

THE WELFARE OF FARMED FISH

Farmed Salmon



The welfare of farmed fish has been highlighted by a recent report, "In Too Deep: The Welfare of Intensively Farmed Fish", by CIWF. Most farmed salmon are reared intensively. CIWF's survey found that most salmon reared in sea cages are kept at a stocking density of 15-20 kg of fish per cubic metre of water. That is equivalent to each salmon measuring 0.75 metres long (2.5 feet) being allocated a bathtub of water. Serious welfare problems arise from rearing too many fish in each cage. Another major welfare concern for farmed fish is the slaughter method used. Percussive stunning is the more humane method.



However, some supermarket salmon are slaughtered using carbon dioxide stunning before having their gills cut, a method condemned by CIWF on welfare grounds. Salmon are often starved for 7-14 days before slaughter. This is carried out to empty the fish's gut for food hygiene reasons. However, experts suggest that only 24-72 hours of starvation is needed to achieve gut clearance. Some supermarkets are already found to have a higher welfare standard on this issue with salmon for Waitrose being starved for 1-2 days and 3 days for Safeway.

Supermarkets are urged to raise their standards of welfare by demanding that suppliers rear salmon at much reduced stocking densities, use only humane slaughter methods, and stop the practice of prolonged pre-slaughter starvation.

REARING & SLAUGHTER METHODS OF SUPERMARKET FARMED SALMON

Company	% Total Sales Volume Slaughtered Using Each Method			Welfare Policy	
	CO ₂ Stunning	Percussive Stunning (manual)	Percussive Stunning (mechanical)	Days Starved before Slaughter?	Max. Stocking Density (Sea water) Kg fish/m ³ water
ASDA	0	100	0	7	20
CWS	20	80	80	7	20
Iceland Foods	?	?	?	?	?
Marks & Spencer	0	95	5	7-14	20
Safeway*	5	95	0	3	15
Sainsbury's	15	65	20	7-14	30
Somerfield*	0	100	0	7-14	20
Tesco**	54	24	22	7-14	25 (mostly 20)
Waitrose	0	100	0	1-2	(Standard) 20 (Organic) 10
Wm Morrison*	15	65	20	7	20

Questions asked: What proportion of your company's total UK sales volume of fresh farmed salmon (both own label and branded) is slaughtered in the following ways: Carbon dioxide stunning followed by gill cutting, percussive stun using a manual 'priest', percussive stun using a mechanical stunner, electrocution, asphyxiation by air, or other methods (Please specify)?

Under normal circumstances, how many days would the farmed salmon for your company be starved before slaughter?

Does your company insist on a maximum fish stocking density from its farmed salmon suppliers, and what is this maximum at freshwater parr stage and in seawater cages or pens (Kg salmon/metre³ of water)? *Data refers to own label product only **Slaughter method data refers to fresh farmed salmon for Tesco

Farmed Trout

About 35 million farmed trout are produced annually in the UK. Freshwater reared trout are usually reared in earth ponds or tanks with fast-flowing water known as raceways. They are generally stocked at a density of 30 kilograms of fish per cubic metre of water. That is equivalent to giving a dozen trout, each measuring a foot long, a bathtub of water. Three out of ten supermarkets said their suppliers use stocking densities that can be twice this high. Most supermarket trout were found by the survey to be slaughtered

using methods that are not acceptable on welfare grounds. Suffocation in air or on ice, both methods that cause the fish to suffer for a prolonged time before becoming unconscious, have been condemned by the UK Government's advisory Farm Animal Welfare Council. Supermarkets are urged to raise their standards of welfare by demanding that suppliers rear trout at much reduced stocking densities and use only humane slaughter methods.



REARING & SLAUGHTER METHODS OF SUPERMARKET FARMED TROUT

Company	% Total Sales Volume Slaughtered Using Each Method					Welfare Policy
	Suffocation on Ice	Suffocation in Air	CO ₂ Stunning	Percussive Stunning (Manual)	Electrocution	Max. Stocking Density (Kg fish/m ³ water)
ASDA	99	0	0	0	1	Variable
CWS	0	100 (Standard)	0	0	100 (Organic)	(Standard) 30 (Organic) 20
Iceland Foods	?	?	?	?	?	?
Marks & Spencer	100	0	0	0	0	None Set
Safeway*	100	0	0	0	0	30
Sainsbury's	100	0	0	0	0	60
Somerfield*	0	90	0	0	10	30
Tesco **	85	0	15	0	0	65
Waitrose	0	0	80	0	20	(Standard) 29 (Organic) 10
Wm Morrison*	80	18	0	1	1	35-50

Questions asked:

What proportion of your company's total UK sales volume of fresh farmed trout (both own label and branded) is slaughtered in the following ways: Asphyxiation in air or on ice, carbon dioxide stunning, percussive stun using a manual 'priest', percussive stun using a mechanical stunner, electrocution, or other methods?

Does your company insist on a maximum fish stocking density from its farmed trout suppliers, and what is this maximum (Kg trout/metre³ of water)?

*Data refers to own label product only. **Stunned using ice and salt slurry.

Genetic Engineering of Farm Animals

The genetic engineering of farm animals, for example, to grow faster, bigger or leaner, threatens to unleash a new wave of serious welfare problems.

CIWF believes it important that supermarkets take a clear policy not to stock produce from genetically engineered animals.

GENETIC ENGINEERING OF FARM ANIMALS - POLICY & PRACTICE										
Company Policy Not to Stock Animal Products From Animals Subject to Genetic Engineering										
	ASDA	CWS	Iceland	M&S	Safeway	Sainsbury's	Somerfield	Tesco	Waitrose	Wm Morrison
POLICY NOT TO STOCK GE ?	NO	YES (own label only)	YES (own label only)	YES	YES (own label only)	YES (chickens) NO (pigs)	YES (own label only)	YES	YES (own label only)	NO
Question asked: Does your company have a policy commitment not to stock any meat, milk, and eggs from farm animals subject to genetic engineering, and if so, does this apply to equally to branded as well as own label products?										

ORGANIC FARM ANIMAL PRODUCTION

Organic farming as a land-based farming system without using chemical fertilisers and pesticides; preventing disease through best practice animal husbandry rather than drugs; and in harmony with the environment, is a good example of a farming method with the potential for high standards of animal welfare. CIWF encourages the promotion of organic produce as a welfare-friendly alternative to factory farming.



SUPERMARKET SALES OF ORGANIC PRODUCE

% Total Sales Volume Produced Organically Per Category

Fresh Produce	ASDA	CWS	Iceland	M&S	Safeway*	Sainsbury's	Somerfield*	Tesco	Waitrose	Wm Morrison*
Beef	0.4	2	N/A	?	1	1.5	Newly launched	2	5	0
Sheep Meat	0	0	N/A	?	1	2	Newly launched	2	5	0
Pork, Bacon & Ham	0.9	2	N/A	?	1	Pork 2 Bacon 0.7 Sausage 1	Newly launched	1	10	0
Chicken	0.2	2	N/A	?	1	1	Newly launched	1	10	0
Turkey	0.15	0	N/A	?	1	1	0	2	2	0
Duck	0	0	N/A	?	0	0	0	0	0	0
Farmed Salmon	0	0	N/A	?	1	2	0	1	20	0
Farmed Trout	1	60	N/A	?	1	0.4	0	1	15	0
Milk	5	5	N/A	?	3	4.6	0.5	4	20	4
Eggs	5	5	N/A	?	5	9.9	1.7	4	20	1

Question asked:

What proportion of your company's total sales volume (both own label and branded) in each livestock category is produced organically?

*Data refers to own label product only.

USE OF ANTIBIOTIC GROWTH PROMOTERS

Growth promoting antibiotics raise concerns for animal welfare as well as human health. Where they are used, antibiotics may boost growth rates further on animals whose body are already pushed to the limit to produce the maximum amount of meat. The table below shows the proportion of meat sold by supermarkets without using these growth promoters.



SUPERMARKET MEAT PRODUCED WITHOUT GROWTH PROMOTING ANTIBIOTICS

Company	% Sales Volume Produced WITHOUT Growth Promoting antibiotics - Own Label only			
	Beef	Sheep Meat	Pigmeat	Chicken
ASDA	75	90	40	100
CWS	100	100	100	100
Iceland Foods	100	100	100	100
Marks & Spencer	100	100	100	100
Safeway	0	0	50	95
Sainsbury's	?	?	?	100
Somerfield	80	90	30	100
Tesco	100	100	?	100
Waitrose	100	100	40	100
Wm Morrison	?	?	?	100

Question asked:

What proportion of your company's total sales volume in each category is produced without the use of antibiotic growth promoters at any stage in the rearing process?

THE 'PERFECT 10' WELFARE-FRIENDLY SUPERMARKET OF THE FUTURE

Compassion In World Farming Trust is encouraging supermarkets to progress toward a more humane food system. This survey reflects the current state of progress in the retail industry. To aid this process, CIWF has identified the following points which it believes form the essential elements to be included in the 'perfect 10' welfare-friendly supermarket of the future:

1. All red meat, poultry meat, milk and eggs would be produced using well-managed, welfare-friendly systems (i.e. free range or organic). This would include 100% of fresh and processed produce. It would also include 100% of manufactured foods and ready made meals containing animal products as an ingredient. This 100% free range or organic requirement would include the company's entire range of branded products as well as its own label range. No fish products would come from conventional intensive farms.
2. All animals would be provided with bedding material such as straw (mammals) or litter (birds).
3. None of the animals reared for the 'perfect 10' supermarket would have been subjected to mutilations such as tail docking, teeth clipping, debeaking or castration.
4. No products from genetically engineered strains of animals would be accepted, nor those produced using GM production enhancers such as Bovine Somatotropin (BST) for dairy cows.
5. No animals or meat would be sourced from livestock auction markets.
6. Journey times for animals travelling to slaughter would be progressively reduced to the point where the norm is for animals to be slaughtered on the farm of rearing, or at the very least, the local abattoir.
7. All animals would be slaughtered humanely using effective and instantaneous pre-slaughter stunning methods.
8. No exotic animal products would be sold that are produced from essentially wild animals or those where production imposes severe welfare problems. Examples here include ostrich and emu meat, frogs' legs and foie gras.
9. The company should have a written animal welfare policy with targets that are actively reviewed on an annual basis.
10. A main Board or Executive member should be appointed with specific responsibility for animal welfare. In addition, a dedicated animal welfare officer should be appointed to the staff to facilitate active implementation of the company's animal welfare policy.



ANIMAL WELFARE-FRIENDLY SUPERMARKET OF THE YEAR

CIWF is seeking to chart the progress of supermarkets toward higher standards of farm animal welfare on an annual basis. To help monitor progress, key indicators have been selected to evaluate an overall performance index. These key indicators are based on the elements identified by CIWF as part its vision of the 'perfect 10' welfare-friendly supermarket. Five star ratings have been awarded for performance on each indicator using the

transparent and easily understood criteria set out in the key that follows the table below. The total number of stars accumulated by each company provides the overall welfare performance index. The highest number indicates the best performer.

ANIMAL WELFARE-FRIENDLY SUPERMARKET OF THE YEAR – 2001												
	Key Indicators Selected From CIWF's 'Perfect 10' Welfare-Friendly Supermarket Criteria											
	Non-cage Eggs	Free Range & organic Chicken	Organic Pigmeat	Organic Milk	Bedding for pigs,dairy & beef cattle	Animals not from Livestock Markets	Policy on Maximum Journey times <i>Mammals</i>	Policy on Maximum Journey times <i>Chicken</i>	Not selling Exotic animal products?	Policy not to stock GM	Written welfare policy /board member responsible	TOTAL ☆
M&S	☆☆☆☆☆	☆☆☆	☆☆☆☆☆		☆☆☆☆☆	☆☆☆☆☆	☆☆	☆	☆☆☆☆	☆☆☆☆☆	☆☆☆☆☆	40
Waitrose	☆☆☆☆☆	☆☆☆	☆☆☆☆☆	☆☆☆	☆☆☆☆☆	☆☆☆☆☆	☆☆	☆☆	☆☆☆	☆☆☆	☆☆	38
Safeway	☆☆☆	☆	☆☆☆☆☆	☆	☆☆☆	☆☆☆☆	☆☆☆	☆	☆☆☆☆☆	☆☆☆		29
CWS (Co-op)	☆☆	☆	☆☆☆	☆	☆☆	☆☆☆☆	☆☆		☆☆☆☆☆	☆☆☆	☆☆☆☆☆	28
Tesco	☆☆☆	☆		☆	☆	☆☆☆☆	☆☆	☆	☆☆☆☆	☆☆☆☆☆	☆☆	24
ASDA	☆☆		☆☆☆	☆	☆☆☆☆	☆☆☆	☆☆	☆	☆☆☆☆☆		☆☆	23
Somerfield	☆	☆	☆☆☆		☆☆	☆☆☆	☆☆	☆	☆☆☆☆☆	☆☆☆	☆☆	23
Sainsbury's	☆☆	☆☆		☆	☆☆		☆☆	☆	☆☆☆	☆☆	☆☆☆☆☆	20
Wm Morrison	☆	☆	☆☆☆	☆	☆☆☆☆☆		☆☆☆☆		☆☆☆☆☆			20
Iceland	☆☆						☆☆☆	☆☆☆	☆☆☆☆☆	☆☆☆	☆☆	18

Highest performance per indicator = ☆☆☆☆☆

"Total" column shows the total number of stars out of 55 accumulated across all indicator-categories, giving an index of overall welfare performance

Five star ratings based on actual data provided by supermarkets via questionnaire, July-November 2001

KEY - FIVE STAR RATINGS

The proportion of non-battery cage eggs sold by each company (percentage of free range, organic & barn eggs)

☆	1-25%
☆☆	26-50%
☆☆☆	51-90%
☆☆☆☆	100% non-cage shell eggs
☆☆☆☆☆	100% non-cage eggs & 100% non-cage egg ingredient in processed & ready made products

The proportion of free range and organic chicken meat, outdoor produced pigmeat and organically produced milk (percentage of total sales volume)

☆	1-5%
☆☆	6-15%
☆☆☆	16-30%
☆☆☆☆	31-50%
☆☆☆☆☆	51-100%

The proportion of meat & milk produced from cattle (total sales volume) and pigs (own label only) provided with bedding material (expressed as an average percentage across all categories)

☆	1-29%
☆☆	0-59%
☆☆☆	60-79%
☆☆☆☆	80-99%
☆☆☆☆☆	100%

The proportion of own label fresh beef, lamb and pigmeat not sourced from livestock markets (expressed as an average percentage across all categories)

☆	55-65%
☆☆	66-75%
☆☆☆	76-85%
☆☆☆☆	86-95%
☆☆☆☆☆	96-100%

Supermarket policy on total maximum journey times for animals travelling from farm to slaughter

- ★ Maximum set (mammals & chickens)
- ★★ 8 hours (mammals); 4 hours (chickens)
- ★★★ 6-7 hours (mammals); 3.5 hours (chickens)
- ★★★★ 5 hours (mammals); 3 hours (chickens)
- ★★★★★ 4 hours or below (mammals); 2 hours or below (chickens)

Companies that do not sell exotic animal products such as foie gras (from force-fed fowl), frog's legs (cut from living frogs), and farmed ostrich, emu or deer meat.

- ★ One star is awarded per item for supermarkets not selling foie gras, frogs' legs, farmed ostrich meat, farmed emu/other ratite meat, and farmed deer meat

Supermarkets with a policy not to stock animal products from animals subject to genetic engineering or genetic modification (GM)

- ★ Policy not to stock GM
- ★★ Yes, but only certain lines
- ★★★ Yes, but only label only
- ★★★★★ Yes, across entire product range

Supermarkets with a written corporate policy on animal welfare with objectives, and a main Board/Executive member appointed with responsibility for welfare

- ★★ One of either written policy or Board/Executive member responsible
- ★★★★★ Both written policy and Board/Executive member responsible



Notes

Iceland Foods would like to state that it was unable to complete some of the survey questions on this occasion due to insufficient data capture in the time scale allowed to complete the survey.

CIWF RECOMMENDATIONS FOR PROGRESS ON FARM ANIMAL WELFARE

CIWF's 'Raising the Standard' supermarket survey aims to encourage progress toward higher standards of farm animal welfare throughout the retail sector. In this survey report, CIWF has set out its long-term vision of the elements that should be included in the 'perfect 10' welfare-friendly supermarket of the future. By repeating its supermarket survey on an annual basis, CIWF aims to stimulate and chart improvements in performance and commitment made by major UK supermarkets. To aid this process, and based on the 2001 survey results, the following general recommendations for short-term progress are offered:

- CIWF calls on those supermarkets still selling imported own label or branded pigmeat produced using sow stalls and tethers to stop doing so. These systems, in which sows cannot even turn round throughout their 4-month pregnancy, have been banned in Britain on cruelty grounds.
- CIWF urges supermarkets to promote greater sales of pork, bacon, ham and processed pigmeat products from pigs farmed outdoors.
- CIWF urges all supermarkets to insist on reduced stocking densities for indoor-reared broiler chickens, and to promote greater sales of free range and organically reared chickens.
- CIWF urges supermarkets to follow the lead of Marks & Spencer and Waitrose in no longer selling battery eggs and egg ingredient, by setting targets for the elimination of battery egg sales from their product range in favour of more humane free range and barn eggs.
- CIWF urges supermarkets to raise their farmed fish welfare standards by demanding that suppliers rear fish at much reduced stocking densities, use only humane slaughter methods, and stop the practice of prolonged pre-slaughter starvation.
- CIWF encourages all supermarkets to insist on the lowest possible maximum journey times for animals travelling to slaughter. Maximum journey times should be no more than 8 hours at the very most for mammals, and 4 hours for birds. CIWF urges supermarkets to ensure that policies on maximum journey times are equally applicable to imported meat as well as animals produced domestically.
- CIWF urges those supermarkets still obtaining some animals from livestock markets to abandon using these marts altogether.
- CIWF urges those supermarkets that have not already done so to set a clear policy of not stocking produce from genetically engineered animals. This policy should extend to branded as well as own label products.



SUPERMARKETS & FARM ANIMAL WELFARE

'RAISING THE STANDARD'

PHILIP LYMBERY

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Compassion in World Farming Trust

5a Charles Street, Petersfield, Hampshire

GU32 3EH. UK.

Tel: +44 (0)1730 268070 Fax: +44 (0)1730 260791

Email: compassion@ciwf.co.uk

Website: www.ciwf.co.uk



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