

Chicken Track

2021 European Report

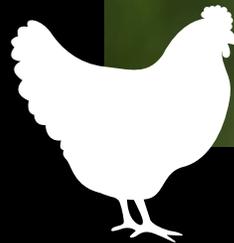


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Foreword

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Chickens are sentient beings capable of a range of emotions including fear and pain as well as pleasure, joy and excitement. Given the opportunity they can lead complex, dynamic lives and are motivated to express a range of behaviours. The welfare issues associated with standard intensive production are well documented and centre on the negative effects of breeding for high growth potential, large breast meat yield and feed efficiency; rearing at high stocking densities; a lack of an enriched environment and poor conditions at slaughter.

This is why over the past four years, more than 270 food companies in Europe and the UK have signed up to the **Better Chicken Commitment** (BCC), acknowledging their responsibility to improve broiler welfare by addressing the ways in which chickens are bred, farmed, and slaughtered.

This intent represents the biggest potential shift in chicken welfare in over a decade, requiring system change at scale and pace. Such change inevitably comes with its challenges, such as a lack of availability, consumer acceptability, additional costs, and an impact on environmental metrics. Scalability is critical to unlocking supply chains, removing barriers and mitigating some of the impacts of producing to a higher welfare standard.

Success requires resourceful and creative thinking and a can-do attitude from all involved to develop a solutions-led approach across the entire length of the supply chain. Food companies and producers need to develop their own individual roadmaps for implementation, but positive action across the industry and support from a broad range of other stakeholders,

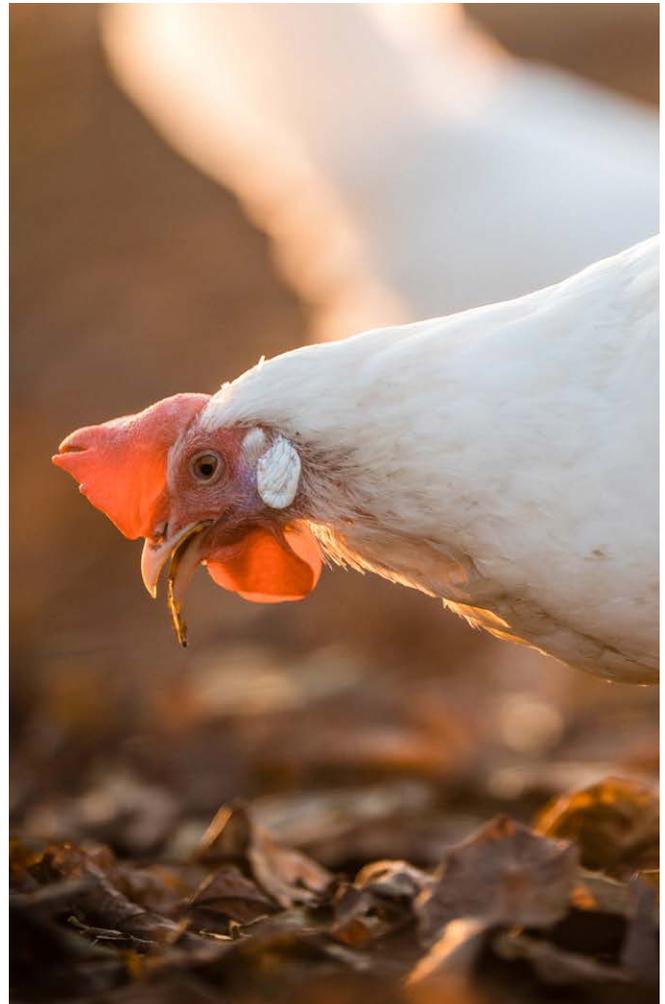


such as certification schemes, NGO's, investors and consumers, is also needed to help build supply.

The growing number of commitments across the different food sectors is a positive and hugely important first step towards making higher welfare chicken the norm, but time is ticking and much needs to be done to meet the 2026 BCC deadline. Parent flocks need to be laid down and scaled-up, contracts need to be signed, product offerings may need to change, and the consumer needs to be brought on board.

It is vital that companies move forward with their implementation plans and begin to report year-on-year progress, demonstrating their ownership and responsibility by not only making commitments but delivering on them too. This first European ChickenTrack rounds up progress over the last year and lays out a reporting framework for companies to adopt. Examples of companies leading the way on reporting are given, as well as an indication of how Compassion will begin to track and report on such progress.

I am truly hopeful and excited about the future of chicken welfare and remain committed to facilitating the change. A true market shift to higher welfare chicken is achievable if we all work together now to make it a success.



T. A. Jones



Dr Tracey Jones
Global Director of Food Business,
Compassion in World Farming International



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Introduction



Introduction



Over the last four years, more than 270 companies across the different food sectors have signed up to source higher welfare broiler chicken in Europe.

The **Better Chicken Commitment** (BCC)¹ developed in 2017, is a unified corporate ask supported by more than 30 NGOs in Europe committing its signatories to introduce higher welfare standards for chickens in their supply by 2026. By signing up, companies commit to provide chickens with more space to live, with natural light and enrichment for occupation, and to ensure slower growing breeds with proven welfare outcomes are adopted, as well as humane slaughter without live inversion of the birds, and third-party auditing. The criteria are known to improve bird welfare as **evidenced by science** and best-case examples and the commitments are set to benefit hundreds of millions of birds annually

In Europe, over **270 companies** across different sectors have signed up for better chicken, including key brands like KFC, Subway, and Domino's Pizza Enterprise; Unilever, Nestlé, and Danone; Elior Group, Sodexo, and Compass Group; M&S, Waitrose and 99% of the French retail market. A critical mass of companies asking their suppliers for compliant chicken product is important to stimulate production and upscaling of the required parent flocks. Public commitments are a key signal to the market for change, and decisive action by companies to start the process of transition to the new standard is critical for market success. Compassion has worked closely

with many of the leading companies signing up with hundreds of millions broiler chickens set to benefit. A similar ask is actioned in the US where more than **200 companies** have signed up to the Better Chicken Commitment.

Public facing commitments to change are important first steps for any company, however, mapping out a route to implement that change is vital and will require working with all stakeholders (both internal and external) involved in the supply chain.

Compassion works with companies from sign-up to having BCC-compliant product on shelf. Get in touch with your CIWF Food Business Manager to take you through our guide on **Building a Roadmap to Implement Higher Welfare Chicken** which provides helpful support and guidance on how to:

- Build the business case with internal and external stakeholders
- Map out the supply chain
- Secure supply chain solutions
- Bring consumers on board through marketing and communications

Despite disruption to business due to the Covid-19 pandemic, companies remain committed to making the BCC a success with new sign-ups continuing to emerge. Important updates over this period are summarised in the Research Update section on page 7.

Criteria of the Better Chicken Commitment

By 2026, signatories commit to the following criteria for 100% of the fresh, frozen and processed chicken in their supply chain:

- Comply with all EU animal welfare laws and regulations, regardless of the country of production.
- Implement a maximum stocking density of 30kg/m² or less. Thinning is discouraged and if practiced must be limited to one thin per flock.
- Adopt breeds that demonstrate higher welfare outcomes: either the following breeds, Hubbard Redbro (indoor use only); Hubbard Norfolk Black, JA757, JACY57, 787, 957, or 987, Rambler Ranger, Ranger Classic, and Ranger Gold, or other breeds that meet the criteria of the RSPCA Broiler Breed Welfare Assessment Protocol.
- Meet improved environmental standards including:
 - At least 50 lux of light, including natural light.
 - At least two metres of usable perch space, and two pecking substrates, per 1,000 birds.
 - On air quality, the maximum requirements of Annex 2.3 of the EU broiler directive, regardless of stocking density.
- No cages or multi-tier systems.
- Adopt controlled atmospheric stunning using inert gas or multi-phase systems, or effective electrical stunning without live inversion.
- Demonstrate compliance with all standards via third-party auditing and annual public reporting on progress towards this commitment.

¹ Also known as the European Chicken Commitment (ECC). The two names refer strictly to the same initiative and set of criteria. The Better Chicken Commitment tends to refer to commitments taken at a national level, while the European Chicken Commitment is more commonly used for region-wide or multiple country commitments. For ease we refer to the Better Chicken Commitment throughout the report and give specific examples of country scope where appropriate.

Research Update



Research Update

Two key scientific publications demonstrated the importance of breed change for a good quality of life and positive welfare of broiler chickens.

Dixon, 2020: Steady & slow wins the race²

Pen trials: 8.5 birds/m²; JA757 breed was compared against three typical fast-growing breeds (Ross 308, Cobb 500 and Hubbard Flex) – all anonymous in the studies' results.



Results:

- Fast breeds: had higher productivity; poorer welfare outcomes; inferior meat quality
- JA757 (RSPCA Assured control breed): had lower productivity; were more active with better welfare outcomes and better meat quality
- The slower growing birds:
 - had significantly better walking ability than the fast-growing breeds: 90% of JA757 had acceptable gait scores (0-2 scores) compared to 63-73% for fast-growing breeds [fig 1]
 - spent significantly less time feeding, drinking and sitting and more time foraging, dustbathing and perching than fast-growing breeds [fig 2]
- After Day 9, fast-growing breeds performed less standing, walking and preening than the JA757, and even less so later in life when the faster growing breeds increased the amount of time they spent sitting and decreased their time spent on other behaviours.

² Dixon LM (2020) Slow and steady wins the race: The behaviour and welfare of commercial faster growing broiler breeds compared to a commercial slower growing breed. PLOS ONE 15(4): e0231006. <https://doi.org/10.1371/journal.pone.0231006>

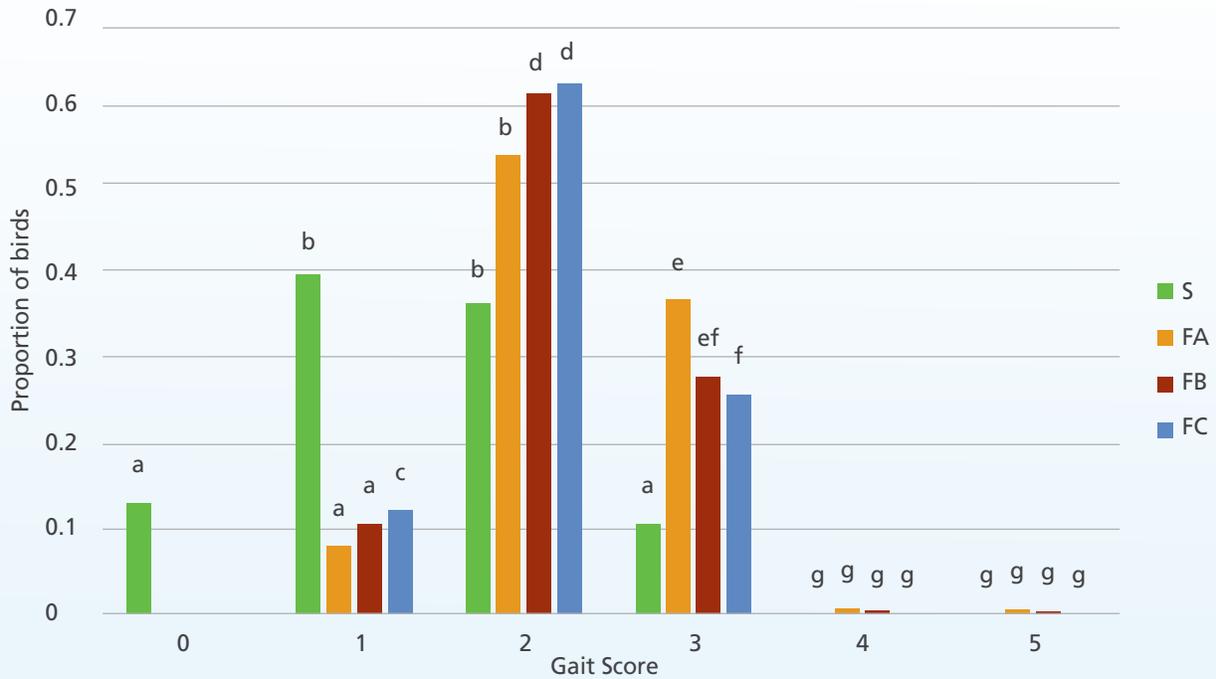


Figure 1. Gait score: Mean back-transformed proportions of each gait score for the four breeds. Different letters denote significant differences between groups.

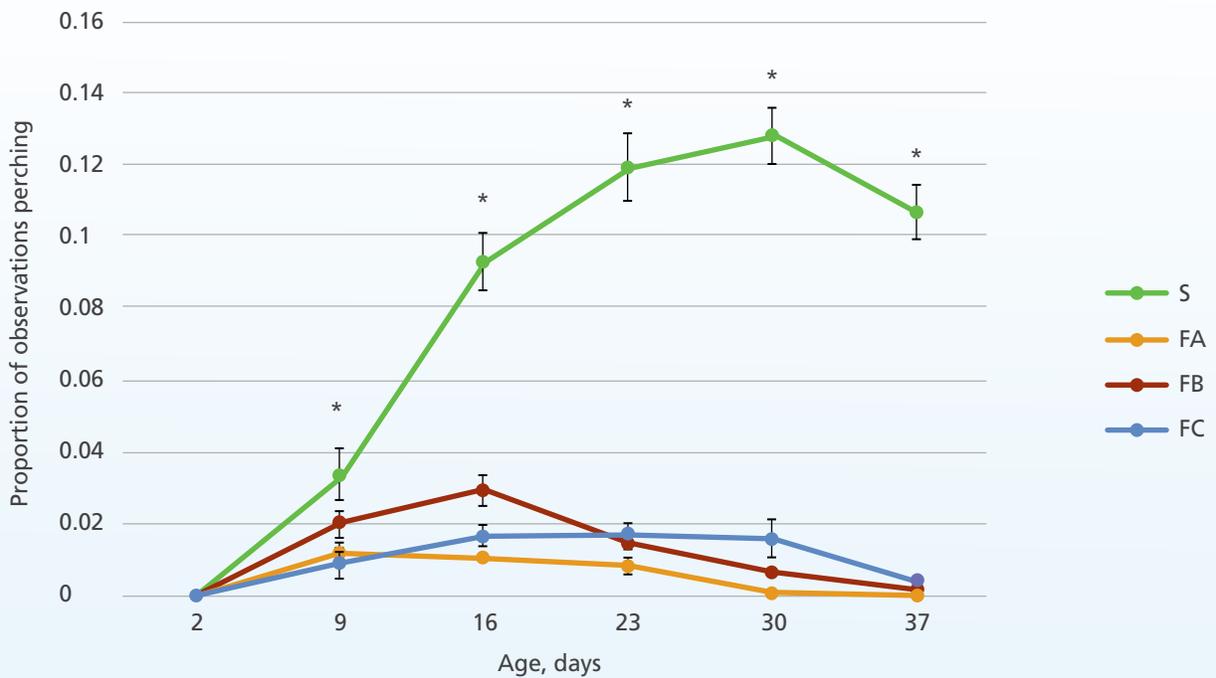


Figure 2. Perching behaviour: The mean proportions of time perching (\pm SEM) during the lights on period for the four breeds. Different letters and asterisk symbols denote significant differences.

Rayner *et al.*, 2020: Slow-growing broilers are healthier and express more behavioral indicators of positive welfare³

Commercial house trials of one slower-growing breed (at 30kg/m², condition 1), a second slower-growing breed (at 30 and 34kg/m² conditions 2 and 3) and a fast-growing breed (at 34 kg/m² condition 4). Slower-growing breeds both had daily growth rate of less than 50g/day.

Comprehensive suite of measures including behaviour and Qualitative Behaviour Analysis (QBA) for negative and positive welfare indicators were taken.



Results:

- Fast-growing breed had poorer health and welfare outcomes compared to slower-growing breeds. A lower stocking density also had welfare benefits.
- The slower growing birds:
 - had significantly less hock burns and better feet condition than the fast-growing breed: both slower-growing birds showed close to no sign of pododermatitis compared to the fast-growing breed [fig 3]
 - utilised the bales for perching at rates in the mid and late parts of the growth cycle while the fast-growing breed did not utilise the bales [fig 4]
 - behaved with a happy/active profile compared to being flat/stressed as per the fast-growth rate breed [fig 5]
- There was a significant effect of stocking density on negative welfare indicators. The higher stocking density group (condition 3) presented higher mortality, fearfulness and post-mortem inspection rejections than the slower-growing breeds kept at lower stocking density.
- For broilers, good walking ability and physical health are crucial to be able to conduct important natural behaviours such as perching and foraging. The range of measures used in this study allow us to evaluate the negative impacts of fast-growing breeds on bird mobility and leg health, as well as on their overall emotional states, behaviour and attitude, through the use of Qualitative Behaviour Analysis.

³ Rayner, A.C., Newberry, R.C., Vas, J. et al. Slow-growing broilers are healthier and express more behavioural indicators of positive welfare. *Sci Rep* 10, 15151 (2020). <https://doi.org/10.1038/s41598-020-72198-x>

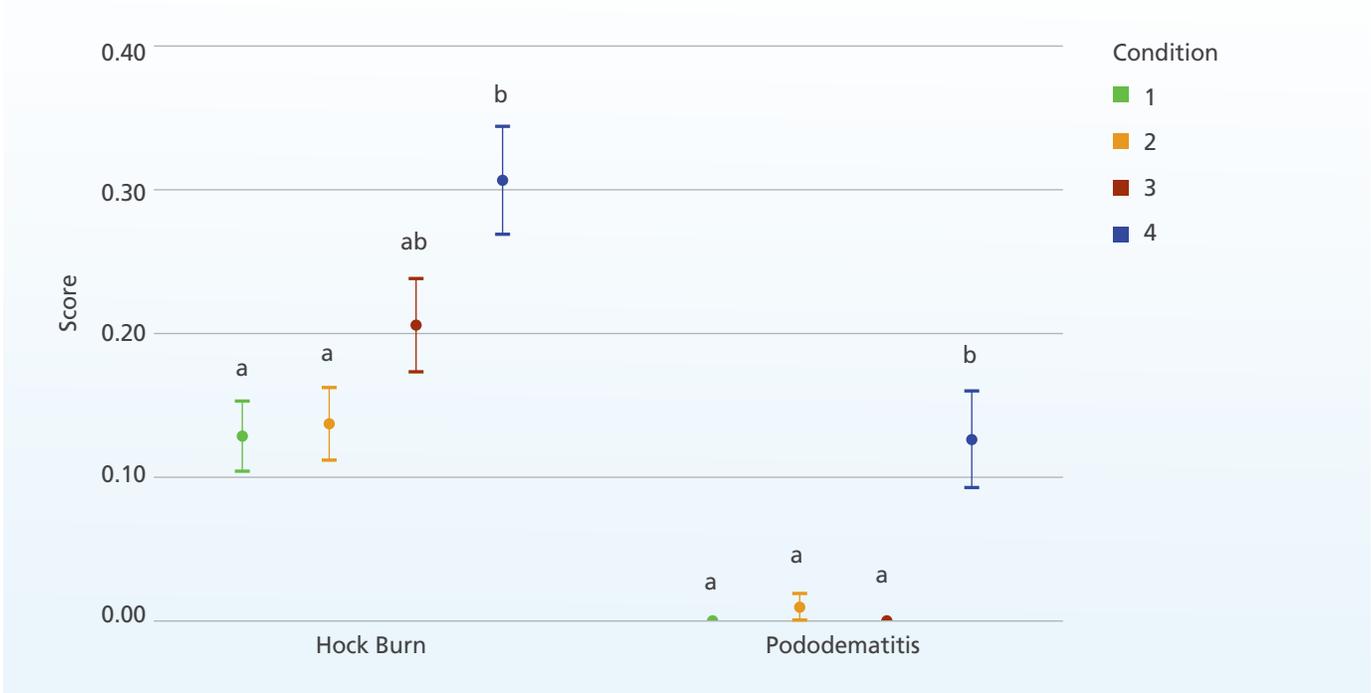


Figure 3. Leg health: Mean (\pm SE) hock burn and pododermatitis score (ranging from 0, no evidence of lesion, to 4, severe lesions) by condition, 2 days before processing of production cycles 3 and 4. Different letters indicate significant differences in score distribution within each variable.

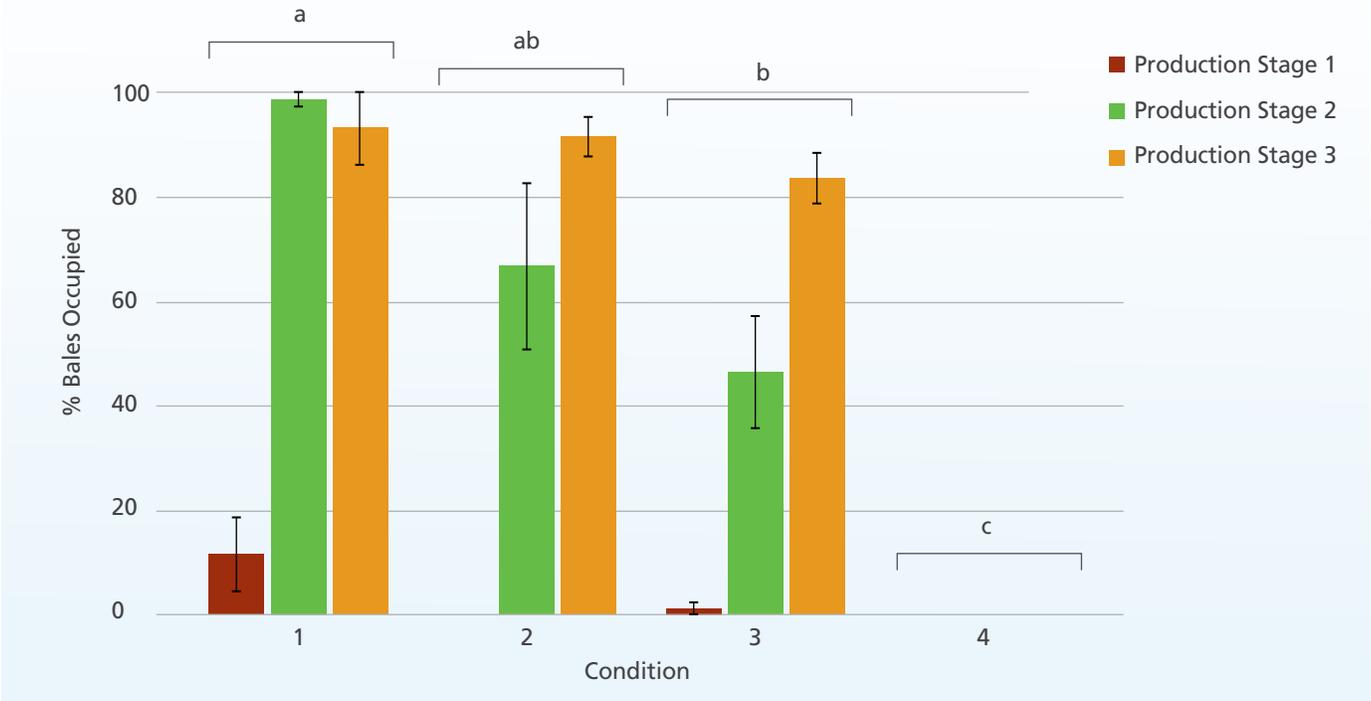


Figure 4. Bales occupied: Mean percentage (\pm SE) of enrichment bales occupied by condition at each production stage. Different letters indicate significant differences in bales occupied.

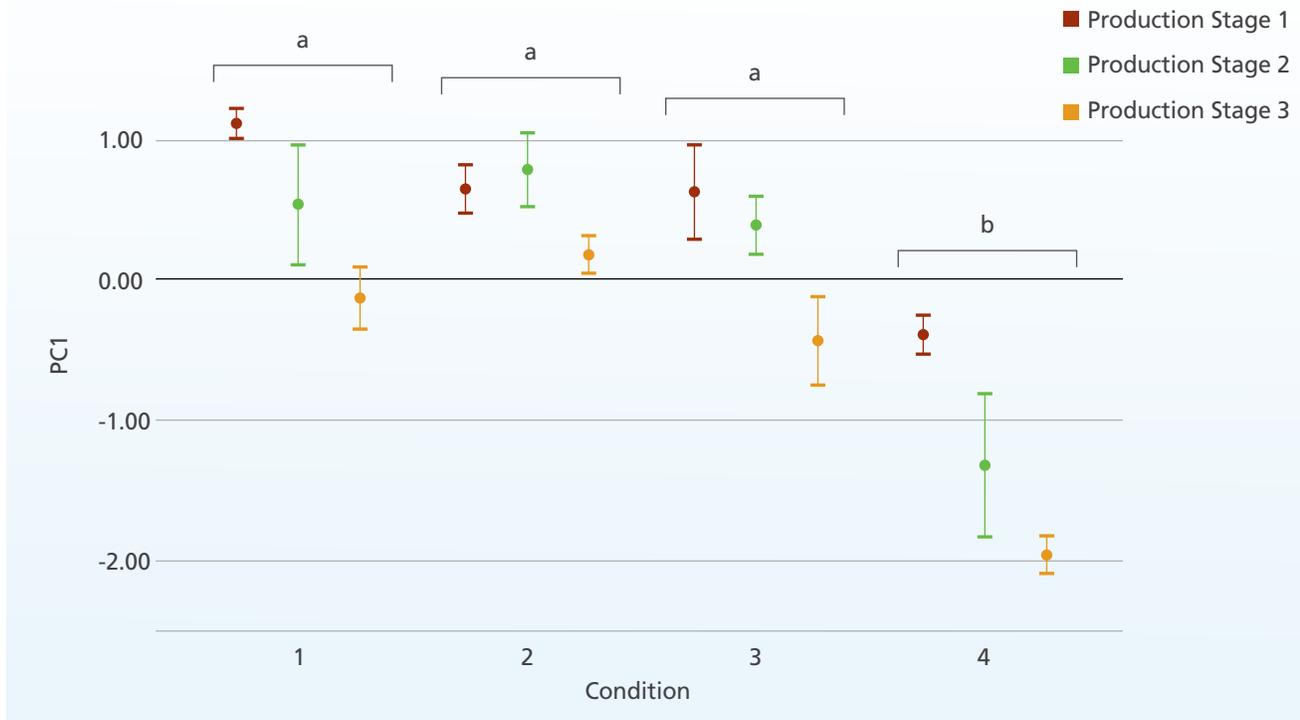


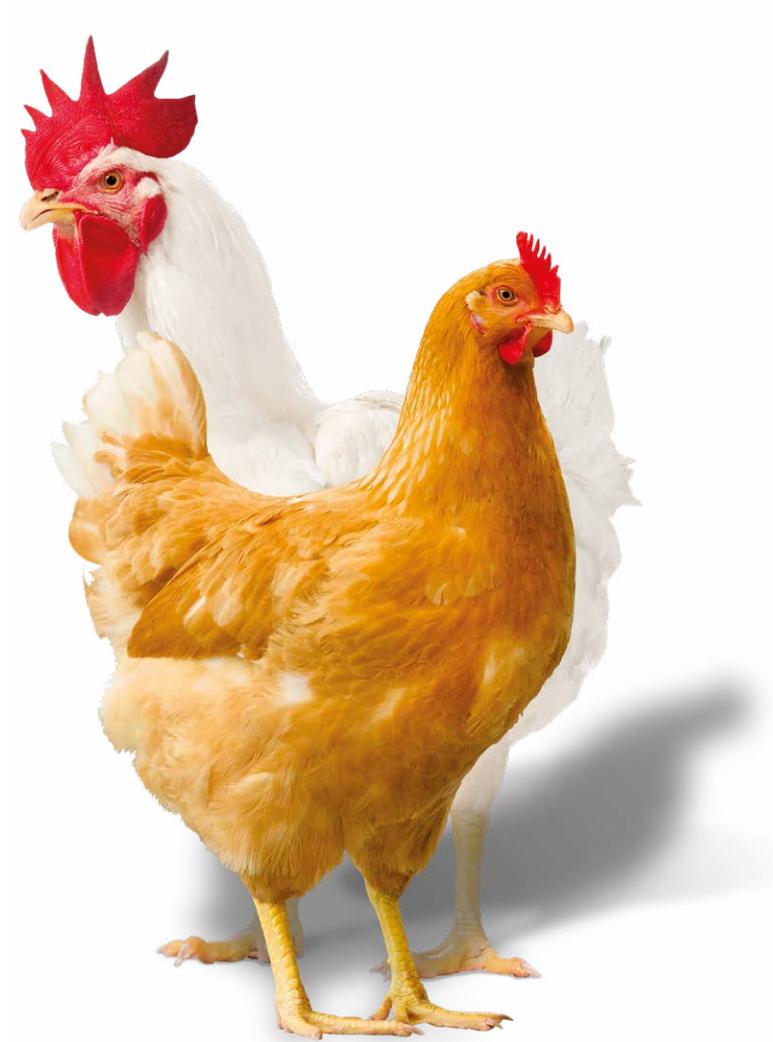
Figure 5. Qualitative Behaviour Analysis: Mean (\pm SE) Qualitative Behaviour Assessment principal component scores, which ranged from 'Happy/Active' (high scores) to 'Flat/Stressed' (low scores), by condition at each production stage. Different letters indicate significant differences in scores.



A new breed approved: the Hubbard Redbro

To register a new breed on the approved BCC list a company must have the breed tested according to the [RSPCA Broiler Breed Protocol](#) at an independent research centre with appropriate facilities and expertise. Ideally additional measures such as behaviour and muscle myopathies will be included in the assessment. Breeds approved by the RSPCA are automatically added to the list. For breeds with improved welfare outcomes, but not approved by the RSPCA, a protocol is in place to review the breed by the BCC Technical Committee for potential inclusion.

Following a robust process of reviewing data from the broiler breed trial and commercial trials by Compassion in World Farming, the Hubbard Redbro was approved by vote in the BCC Technical Committee in February 2021, for indoor use only. Following a similar process, the Hubbard Redbro was also approved for use in the UK's Red Tractor Enhanced Welfare module in August 2021. The welfare outcomes of the Hubbard Redbro are very similar to the slower-growing JA787 bird and has the added advantage of an average 8% faster growth with 0.4% higher breast meat yield, and a 9 points lower feed conversion^{4, 5}.



© Hubbard Breeders

⁴ "The Hubbard Redbro: the latest premium broiler breed", April 2021 Poultry News.

Retrieved from: https://www.hubbardbreeders.com/media/art_poultry_business_2021_04_interview_morrison_s_1_pageld_1.pdf

⁵ <https://www.hubbardbreeders.com/fr/hubbard-redbro-leaflet-produit/>

Market Highlights



Market highlights

In the past year, the market support for the BCC has continued with further companies pledging to meet BCC criteria for 100% of their supply, including key commitments from producers, and new marketing and communication plans addressing the need to bring the consumers on board for a successful transition.

Recent commitments



KFC

In March 2021, KFC France [publicly committed](#) to sourcing their chicken to higher welfare standards by 2026, following the company's earlier [commitment](#) in the UK, Ireland, the Netherlands, Belgium, Sweden and Germany, in July 2019.



Subway

In August 2021, the world's largest quick service restaurant chain, Subway, [signed up to the Better Chicken Commitment](#) for 100% of the chicken in its European managed supply chain by 2026.



Carrefour Poland

Carrefour Polska became the first retail chain in Poland to [sign up to the Better Chicken Commitment](#) in May 2021. All their own-brand products (fresh, frozen, whole chicken and branded products containing more than 50% chicken) will meet the higher welfare criteria of the BCC by 2026.

Producer pledges



Galliance

Galliance, the poultry division of the French cooperative Terrena, has committed to produce increasing volumes of chicken that meets the Better Chicken Commitment criteria, supporting its customers who have signed up to the BCC and reinforcing the transition to higher welfare indoor chicken in France.



2 Sisters Food Group

2 Sisters Food Group, one of the leading food manufacturing companies in Europe, has acknowledged the increasing demand for BCC standard chicken. They have committed to producing chicken to this standard to meet the growing industry demand and have plans for expansion of their BCC farms throughout Southern England in 2022.



Marketing and communications



M&S

M&S will convert all their current 'Oakham' chicken to the BCC-compliant 'Oakham Gold' for 100% of their fresh supply by [Autumn 2022](#). In the process, products are being fully rebranded, and a dedicated TV commercial has been produced to bring consumers on board with their transition to higher welfare chicken.



French animal welfare labelling

Level C of the [French animal welfare label](#) is equivalent to the on-farm criteria of the BCC (higher welfare indoors). The labelling scheme has been joined by over 60% of French retailers (Casino, Carrefour France, Système U, Lidl France, Intermarché), as well as by poultry producers and national brands. Clear labelling of products will help drive consumer choice.

Make higher welfare chicken the baseline standard

Compassion and the NGO coalition advocate for full sign-up to the BCC for 100% of chicken supplies in order to raise baseline standards. Some companies, however, have made partial commitments or are introducing a mid-level compliant tier to their fresh chicken offer. In Belgium for instance, most committed retailers have pledged to improve chicken welfare for their fresh and frozen supplies, and exclude value ranges and processed products. Others, for example Tesco ('Room to Roam' range) and Morrison's in the UK have introduced a BCC compliant indoor tier between standard intensive production and free-range fresh chicken offer. Whilst such approaches may help stimulate some market shift, more needs to be done to ensure commitments cover all own-label supply and raise the baseline in-store.

04 Broiler Welfare Reporting Framework



Broiler Welfare Reporting Framework

Methodology

To encourage transparency and help prepare companies to report progress against their commitments to higher welfare chicken, Compassion has laid out a reporting framework for ChickenTrack 2022, in which this progress will be captured for the first time. Companies that have publicly pledged to transition 100% of their broiler supply chains to aligned standards are being asked to report in one of two ways, depending on their supply model.



1) Publicly disclose the proportion (%) of chicken within your supply chain, in terms of volume purchased, that currently meets each individual criterion of the BCC.

Using this first approach, companies should publicly disclose individual progress figures for stocking density, breed, environmental enrichments, CAS, and third-party auditing. If desired, progress towards meeting the standards for environmental enrichments can be broken out further into separate figures for natural light and enrichment.

Example:

“We have a commitment to source 100% chicken that meets the Better Chicken Commitment by 2026. As of June 2022, x% of the chicken we purchase in Europe [OR COUNTRY] meets the stocking density standard, x% meets the breed standard, x% meets the environmental enrichments standard, x% meets the CAS standard, and each criterion is fully audited by [COMPANY NAME].”

Demo Tracker Display:

Criterion	Sub-criterion	Specification	Progress	Progress that is third-party audited
Compliance with EU legislation			100%	None
Breed		BCC approved list	0%	None
Stocking density		30 kg/m ²	20%	None
Environmental enrichment (pecking substrates, perches*)	Natural light		50%	None
	Enrichment		25%	None
CAS slaughter			25%	None

* 2 metres of usable perch space per 1,000 birds and 2 pecking substrates



2) Publicly disclose the proportion (%) of chicken within your supply chain, in terms of volume purchased, that currently meets all BCC criteria.

Using this second approach, companies should publicly disclose a single figure that represents their progress towards all BCC standards. For example, if a company only sources a product that is aligned to the BCC across every criterion, progress can be represented in a single figure. A company should not use this method if one or more of the criteria are unfulfilled, unless it is explicitly clarified which criteria are excluded.

Example:

“We have a commitment to source 100% chicken that meets the Better Chicken Commitment by 2026. As of June 2021, x% of the chicken we purchase in Europe [OR COUNTRY] meets the BCC standards and is audited by [COMPANY NAME].”

Demo Tracker Display:

Criterion	Sub-criterion	Specification	Progress	Progress that is third-party audited
Compliance with EU legislation			 20% 	 20% (RSPCA Assured)
Breed		BCC approved list		
Stocking density		30 kg/m ²		
Environmental enrichment (pecking substrates, perches*)	Natural light			
	Enrichment			
CAS slaughter				

* 2 metres of usable perch space per 1,000 birds and 2 pecking substrates

For both approaches, we ask that companies **clarify the scope of their commitment and reporting** (e.g. fresh, frozen, processed and applicable countries if not across Europe). Additionally, we ask companies to report whether each criterion is third-party audited and specify the auditor/scheme; for ease, we recommend companies report whether “None,” “Partial,” or “All” of the cited progress is audited.

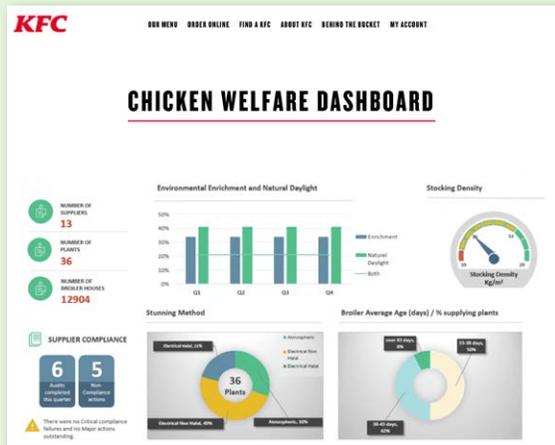
As with our [Eggtrack report](#), only data published within the two years prior to **31 July 2022** will be considered accurate and up-to-date. We offer these two methods of reporting because we recognise that companies collect data in a number of different ways. We wish to remove as many barriers as possible to encourage transparent disclosure while also providing a clear and consistent framework for communicating progress.



Examples of Best Practice Reporting

Companies have started publishing publicly available information on their transition towards the Better Chicken Commitment. Alongside our recommendations detailed above, we encourage companies to use infographics and designed data visualisation to make their reporting easily understandable to consumers and investors.

KFC UK & Ireland



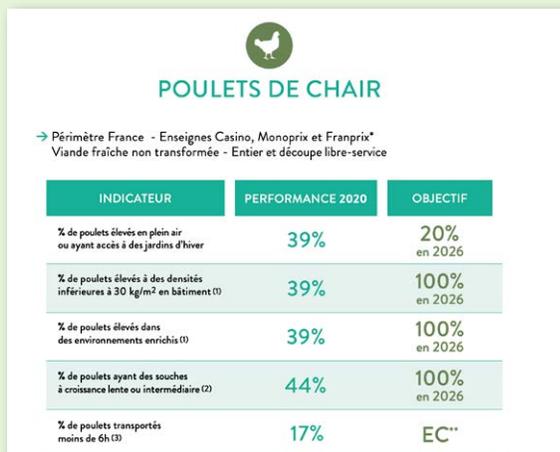
[click here](#)

Sodebo (France)



[click here](#)

Casino (France)



[click here](#)

Norsk Kylling (Norway)



[click here](#)

05 ChickenTrack 2022: What to expect



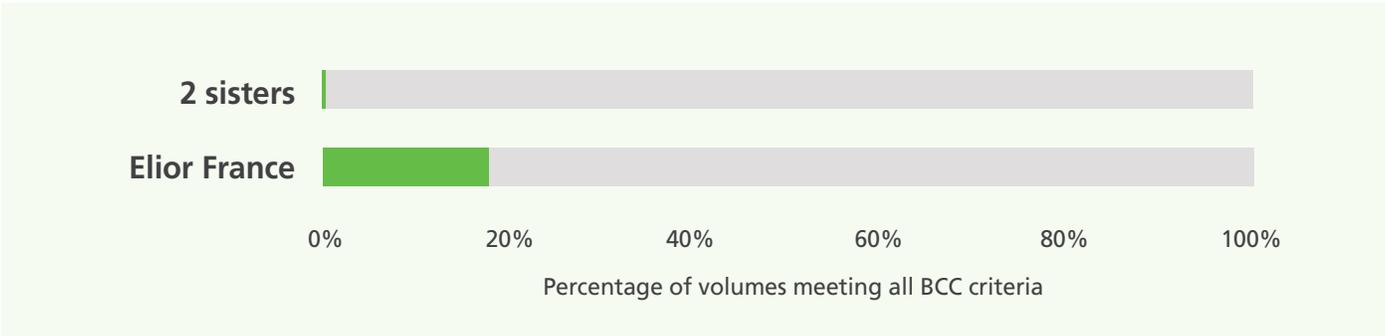
ChickenTrack 2022: What to expect

This section is an introduction to the layout of the upcoming European ChickenTrack 2022. For their reporting to be included in ChickenTrack 2022, companies will need to publish the appropriate data before the 31 July 2022.

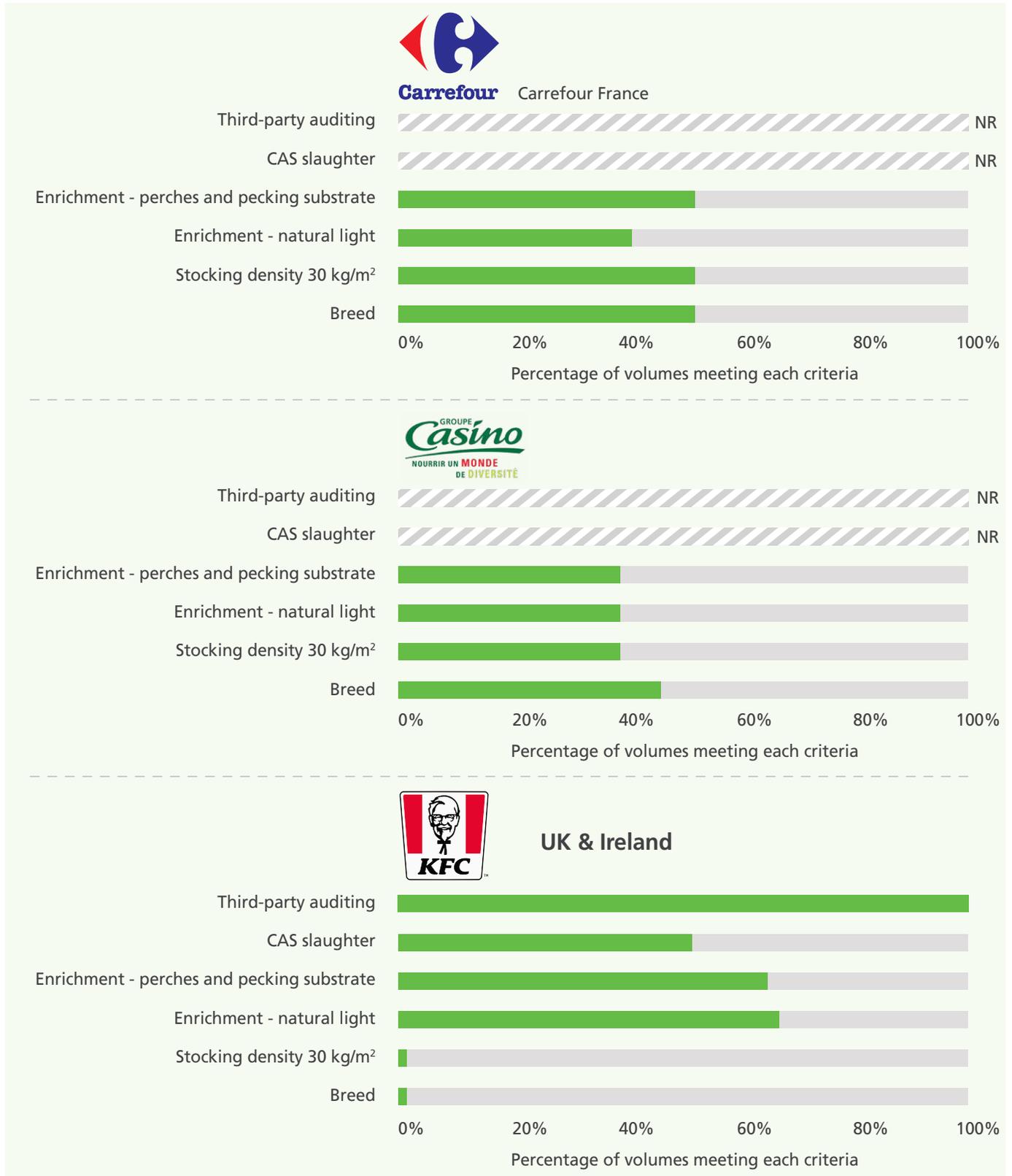


Reporting by volumes meeting all BCC criteria

Advisory note: Companies choosing this approach must clarify under which assurance scheme (e.g. Red Tractor Enhanced Welfare, RSPCA Assured, Beter Leven, Level C of the French animal welfare labelling ...) they are reporting, to guarantee all criteria are being met.

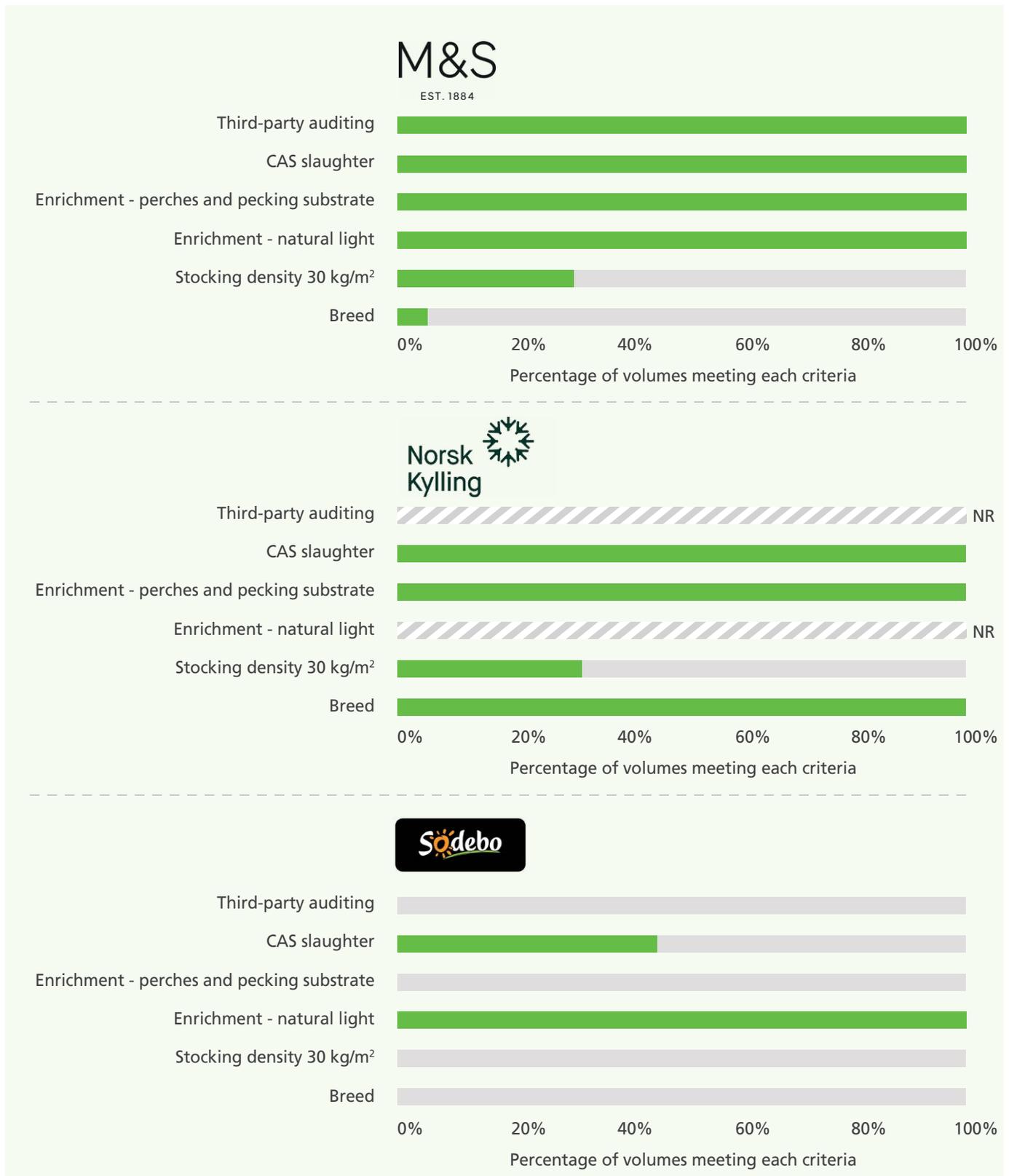


Reporting by volumes meeting each individual criterion of the BCC

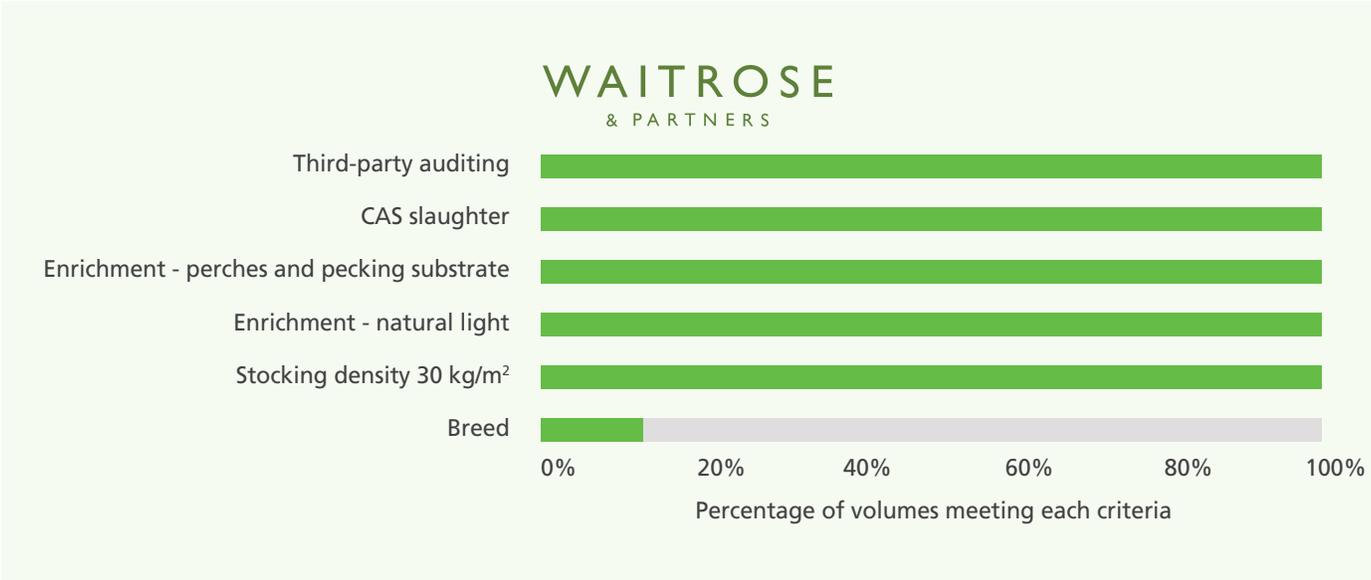


* NR : not reporting on that criteria

Reporting by volumes meeting each individual criterion of the BCC (continued)



Reporting by volumes currently meeting each individual criterion of the BCC/ECC (continued)



Looking Forward



Looking Forward



ChickenTrack will begin to highlight company progress towards broiler welfare commitments in 2022. Companies will be selected based on their size, chicken footprint and market influence. Companies are asked to publicly disclose their reporting ahead of the 31 July 2022 deadline, in line with other updates required for BFAW and EggTrack.

For progress numbers to be included in the annual report and displayed on the tracker, all relevant information must be publicly available on a company's website or in another relevant public document including, but not limited to, an animal welfare policy, an ESG/CSR or progress report, or a press release.

Over the course of the next year, the Food Business Team will continue helping companies map out their transition to a higher welfare broiler supply, provide them with critical resources to support that work, and encourage them to report transparently on their progress.

Broiler resources

- Watch the replay of our 2020 webinar on broiler breeds and welfare [here](#)
- REMA 1000 and Norsk Kylling case study: [Driving higher welfare chicken in Norway](#)
- [Windstreek System case study](#)

References



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2021 European Report



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