

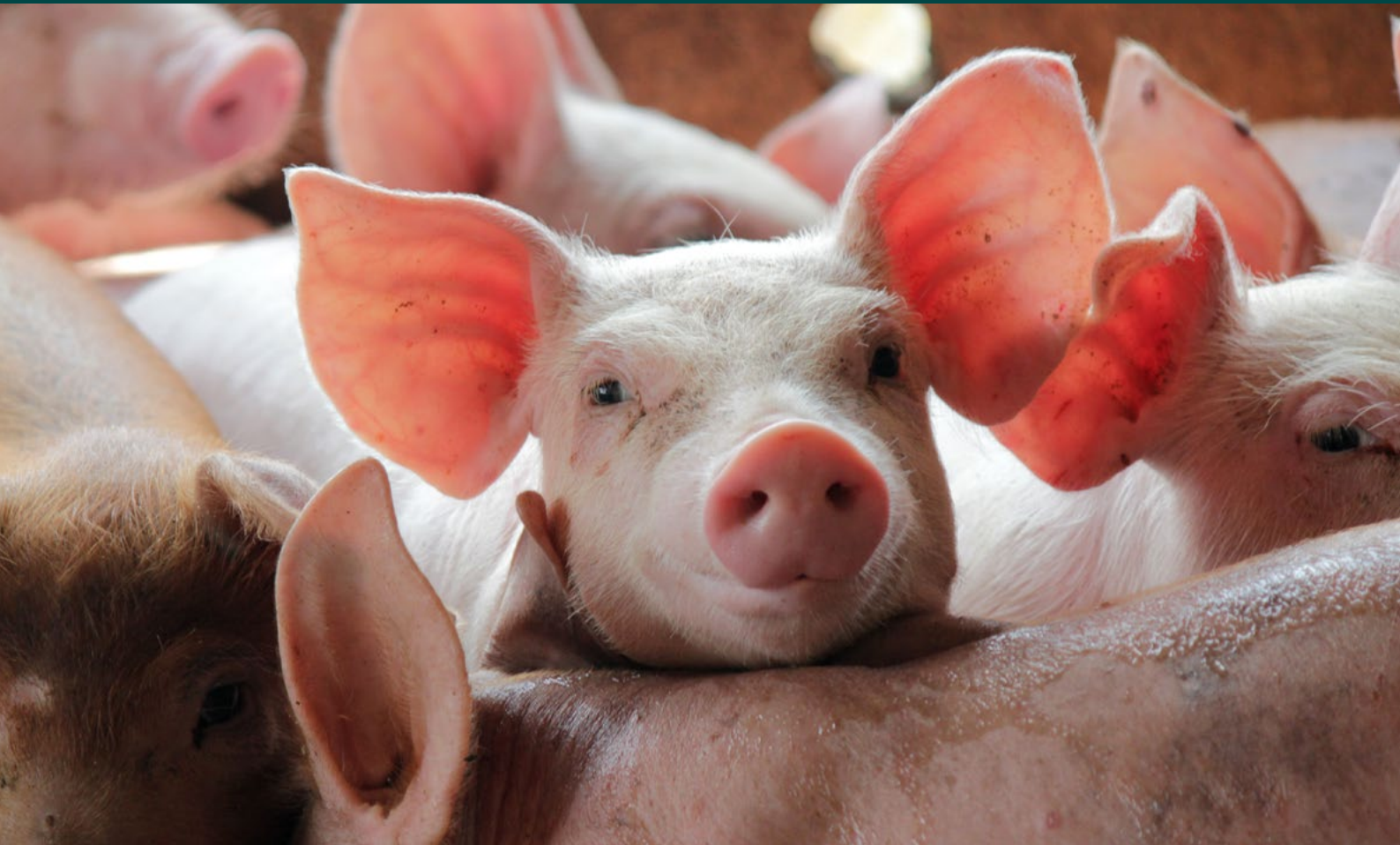


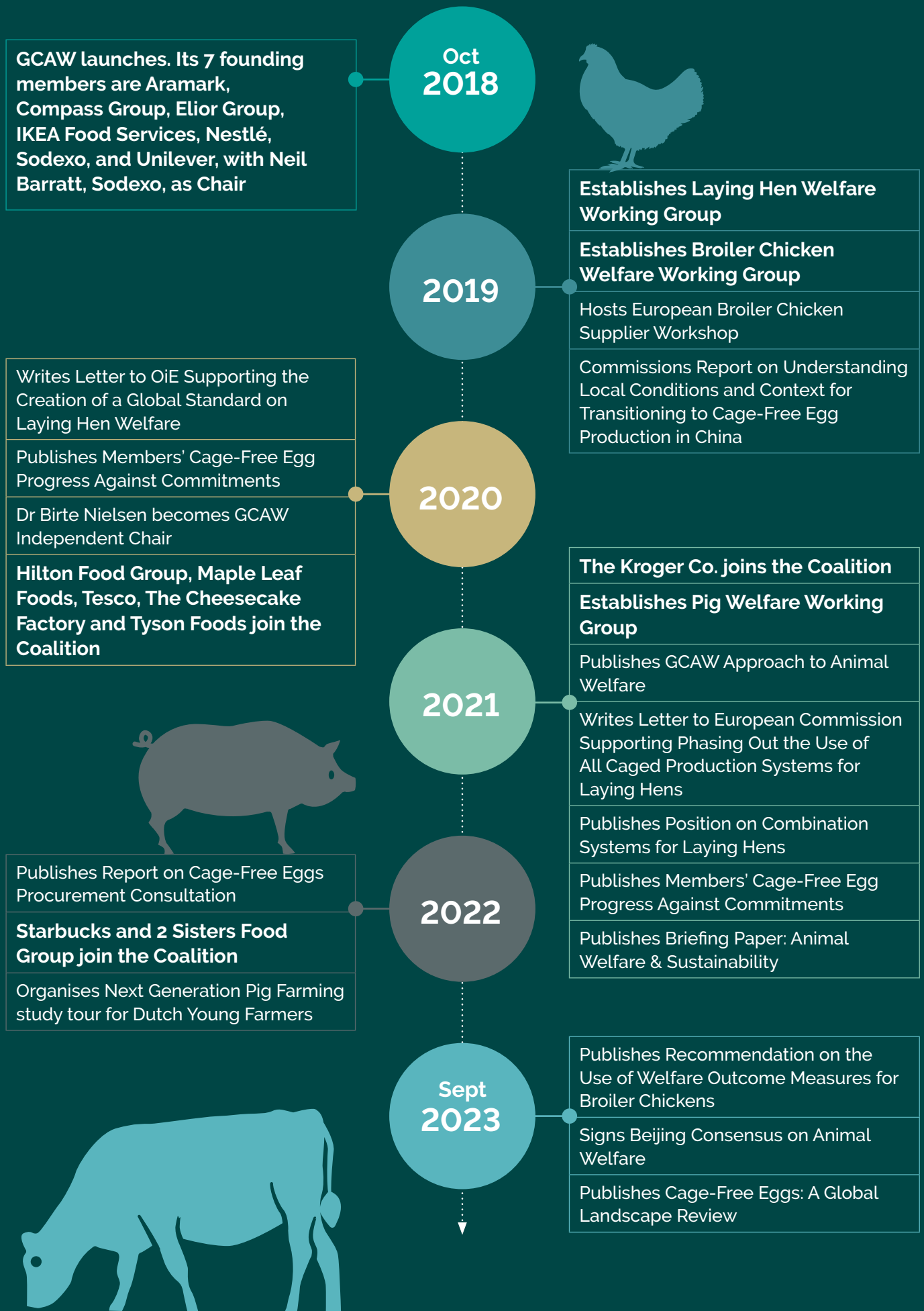
**GCAW**

Global Coalition for Animal Welfare

The Global Coalition For Animal Welfare

# The First Five Years





# Foreword



**Brian Lindsay**  
GCAW Independent Chair



**As someone involved in many aspects of the livestock sector, I am extremely cognisant of the need to identify science-based and equitable solutions that can be feasibly implemented by famers.**

I also recognise the need for collaboration throughout supply chains and with industry peers to identify shared ambitions and address common barriers. Engaging with stakeholders is fundamental to deliver transformative systemic change.

This is why I am honoured to have been selected to take on the critically important role of Independent Chair of GCAW, and to have an opportunity to build on the solid platform established by my predecessor, Dr Nielsen, to facilitate member-led processes which achieve tangible results.

Being new to GCAW, I have been impressed by the progress that has been achieved since GCAW's inception. Initial conversations with GCAW members have been extremely positive and I have been encouraged to hear their desire to do more to generate beneficial welfare impacts for farmed animals.

If you are working in the animal sourced foods space and want to drive positive animal welfare action in your business, I encourage you to contact the GCAW Secretariat to find out more. The value of collaboration and shared understanding is immense and essential for accelerating change.

## Vision

**An animal protein value chain that ensures animal welfare globally, to the benefit of humans and farm animals everywhere.**

## Mission

**Develop and implement an action plan on priority animal welfare issues in global food production and increase the availability of food products from animals reared in systems that promote good welfare.**

## Scope

**Applicable to all livestock food products. The main types of animal protein are poultry (e.g. broiler chicken, turkey, geese, duck), beef, pork, veal, rabbit, fish, egg and dairy products.**

The Global Coalition for Animal Welfare is the world's first food industry-led initiative aimed at advancing animal welfare globally. GCAW unites major companies and animal welfare experts in improving animal welfare standards at scale and in meeting consumer demand for food products from animals reared in systems that promote good welfare.

The whole supply chain is represented, including producers, manufacturers, retailers, and food service companies. As such, GCAW provides a platform for members to work together pre-competitively to address systemic barriers to change, share best practices and accelerate progress on key animal welfare issues.



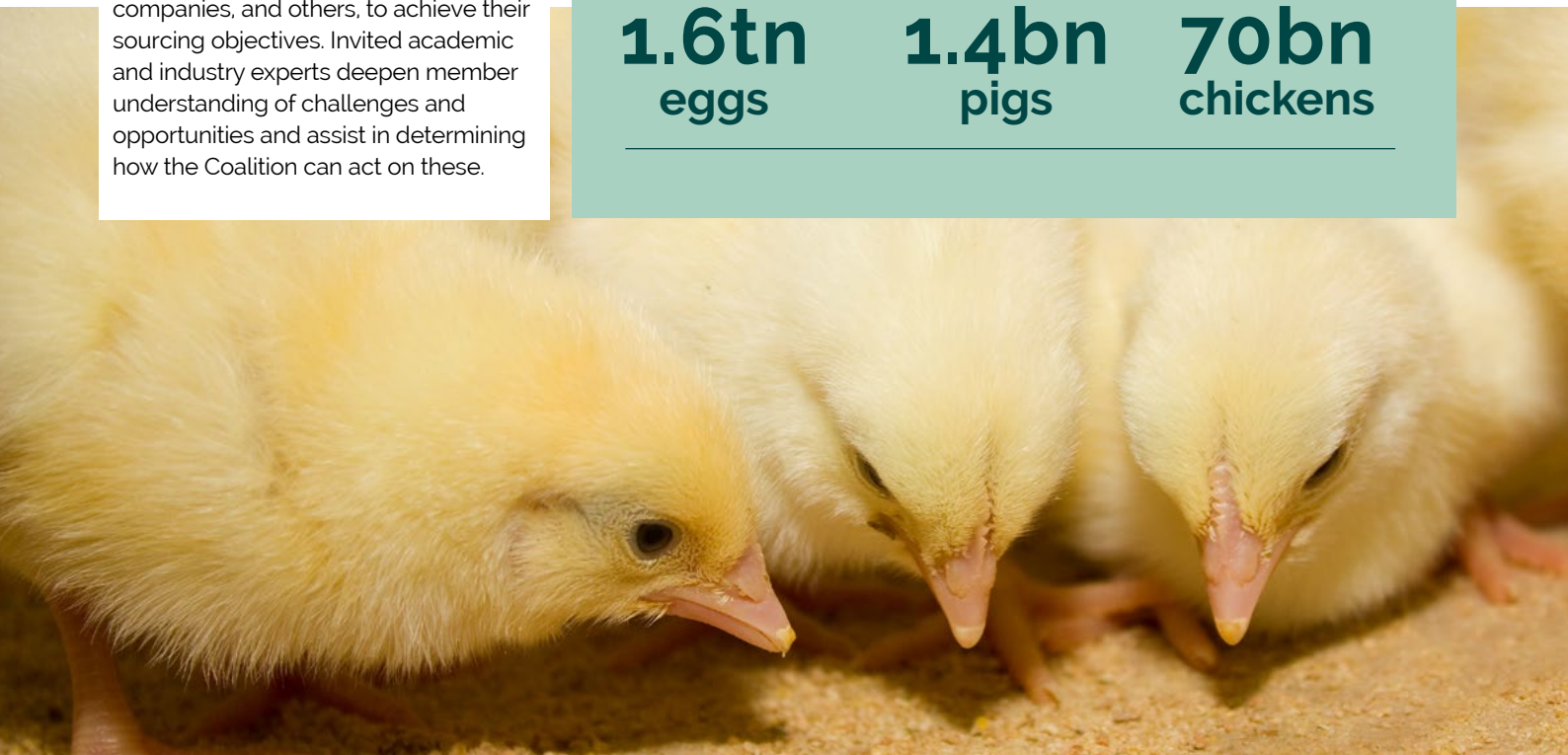
While all relevant farm animal species are in GCAW's scope, the Coalition's work to date has been focused on three species-specific priority workstreams: Laying Hens, Broiler Chickens and Pigs.

Members selected the current focus areas based on three broad considerations:

- Areas where there are known substantial and current barriers to change.
- Areas where animal welfare issues substantially influence the business of member companies.
- Areas where there are opportunities to advance improvements through collaboration and the combined influence of GCAW member companies.

Members are able to participate in multiple working groups across several species, including laying hens, broiler chickens, and pigs.

Bi-monthly working group meetings enable GCAW members to share information and updates with each other with a view to creating the right enabling environments for member companies, and others, to achieve their sourcing objectives. Invited academic and industry experts deepen member understanding of challenges and opportunities and assist in determining how the Coalition can act on these.





Research Publication: [Cage-Free Eggs: A Global Landscape Review](#)

## Laying Hen Welfare Working Group

### Expert briefings

- Agri-Advanced Technologies
- Aldi Nord Germany
- British Egg Industry Council
- Compassion in World Farming
- FAI Farms
- Global Food Partners
- Humane Society International
- Integrated Quality Consulting, China
- International Cooperation Committee of Animal Welfare
- Kipster
- Nutri Avicola
- Responsible Soy Association
- Textile Exchange

### Discussion topics

- Combination systems
- Beak trimming
- Alternative supply chain models for procurement of cage-free processed egg ingredients
- Cage-free egg production in Latin America
- Cage-free egg production in China
- In-ovo sexing
- Day old chick culling
- NGO cage-free egg progress reporting initiatives
- Opportunities for coordinated supplier engagement
- Carbon-neutral, high welfare egg production
- Alignment with assurance schemes and labelling
- Responding to consumer preferences and market drivers
- Country-level challenges with cage-free egg supply



### Raising Awareness of Regional Transition Challenges

"Nestlé is one of the founding members of GCAW. Food service companies and food manufacturers are working together through GCAW to advance animal welfare standards globally, including improving conditions for intensively reared livestock. We supported the development of a report on the local conditions and context needed for transitioning to cage-free egg production in China."



### Accelerated Cage-Free Progress Through Pre-Competitive Collaboration

"Since we first released our Sustainable Sourcing Policy and Sustainability Code of Conduct in 2016, we have continued to make tangible and measurable progress each year, despite a number of challenges and changes to our business. As we continue to progress, we know that for us to reach our goals, we need the support of the larger industry to help shift supply and implement widescale change. To help with this work, we remain committed to pre-competitive collaborations with our peers and partners and continue to support collaborations with partners like GCAW and Monterey Bay Aquarium – Seafood Watch."

We reached our cage-free egg goal for our restaurants and bakeries in 2022, three years ahead of schedule, and all of our international licensees have committed to source 100% cage-free eggs by 2030.

While the transition to cage-free eggs internationally remains a challenge in certain markets, all cheesecakes and desserts sold internationally are supplied by our bakeries and baked with 100% cage-free eggs."



Knowledge Share: [Recommendation on the Use of Welfare Outcome Measures](#)



### Sharing Animal-Led Broiler Research to Improve Outcomes

"Within an 80-acre tract sits our Broiler Welfare Research Farm, which is a testing ground for key aspects of broiler chicken welfare such as lighting, environmental enrichments, and stocking density. This research is based on an approach that allows animal preference to guide our actions. Because chickens can't tell us what types of housing they prefer, we create a variety of options within one environment and then observe animals' behaviour. We use a science-based approach to evaluate the impact of the different choices on measurable outcomes of animal welfare and health."

## Broiler Chicken Welfare Working Group

### Expert briefings

- American Society for Protection of Cruelty to Animals
- Global Animal Partnership
- Hendrix Genetics
- Hubbard Breeders
- International Poultry Welfare Alliance
- Norsk Kylling
- University of Guelph
- World Animal Protection

### Discussion topics

- Differing world views and regulatory frameworks for broiler production
- Implementing effective environmental enrichment for broilers
- Key welfare indicators
- Lifecycle assessments of alternative broiler systems
- Welfare outcome measures within assurance schemes
- The Better Chicken Commitment / European Chicken Commitment – policy and implementation
- Alignment with assurance schemes and labelling
- Responding to consumer preferences
- Procurement frameworks for higher welfare chicken
- Road-mapping of commitments
- Building supply of slower growing breeds
- Uniting welfare and sustainability goals with new poultry breeds



GCAW Member Learning at Tyson Foods' Broiler Welfare Research Farm



## Accelerated Progress on Sow Housing Through Open Relationships

"We meet frequently with animal advocacy groups as they bring important perspectives to issues, global advancements and science related to animal welfare. We are committed to seeking open and constructive relationships with them.

We are extremely proud that Maple Leaf Foods achieved our target of transitioning 100% of our owned sow spaces (69,850 sow spaces) to our Advanced Open Sow Housing System by the end of 2021. This now represents 93% of our owned sow spaces, following the acquisition of new sow barns. 100% of our sow spaces meet open sow housing standards according to the NFAACC Code of Practice and Canadian Pork Excellence PigCARE program.

Our unique approach significantly lowers the time a sow spends in a stall, providing 100% open housing following breeding and throughout pregnancy, in an environment where they are free to roam, feed and socialise."



## Pig Welfare Working Group

### Expert briefings

- 3Ts Alliance
- Aarhus University
- AI4Animals, Deloitte
- Big Dutchman
- duBreton
- Connecting Agri and Food
- RSPCA Approved Farming Scheme
- Skiold Group
- UK Agriculture and Horticulture Development Board

### Discussion topics

- Alternatives to tail docking, teeth reduction and castration
- The benefits to animal welfare and sustainability of ending castration
- The use of immunocastration
- Transitioning from sow stalls to group housing
- The science of free-farrowing and free-farrowing in practice
- Effective environmental enrichment programmes for pigs
- The role of AI in monitoring welfare in slaughterhouses
- Global variations in approaches to pig welfare
- The use of welfare outcome measures
- Alignment with assurance schemes and labelling
- Responding to consumer preferences
- Sow welfare and legislation
- The European Food Safety Authority's Scientific Opinion on The Welfare of Pigs on Farm
- NGO initiatives



## Positive Impacts for Pigs Through Wide Market Engagement

"Through engagement with our suppliers and the overall market, we made significant strides in advancing pork welfare within our supply chain from 58% contracted group-housed pork at the end of fiscal year 2020 to 91% at the end of fiscal year 2023. In addition, we influenced suppliers to create a product line with higher animal welfare standards to meet our needs and requirements.

Aramark maintains our commitment to eliminate gestation crates from our supply chain and we continue to work with suppliers to meet this goal. Our progress this year alone has positively impacted 125,000 hogs and 4,000 mother pigs."

In addition to the meetings of the three working groups, quarterly All Members' Meetings have provided an opportunity for all members to discuss broad issues and developments in animal welfare, concerning multiple species or species not covered by specific working groups, and to agree on priorities to tackle the most persistent and widespread issues they are facing in their supply chains.

Guest speakers are invited to these meetings to inform members about specific issues and new research. Over the last five years these have included expert briefings from:

- **Blonk Sustainability** - The Role of Livestock Within Circular Food Systems
- **Crustacean Compassion** - Welfare of Decapod Crustaceans
- **Eurogroup for Animals** - Developments in EU Animal Welfare Legislation
- **London School of Economics** - Animal Welfare as Part of a Just Transition
- **Optifarm** - The Use of AI and Robotic Technology in Animal Welfare
- **Produtor do Bem** - The Role of Assurance Schemes
- **Royal Agricultural University** - Welfare Outcome Measures
- **Scotland's Rural College** - Qualitative Behaviour Assessment: Assessing Emotional Wellbeing in Farm Animals
- **Sustainable Food Trust** - Developing a Holistic, Common Framework to Define On-Farm Sustainability
- **University of Calgary** - Introduction to Beef Cattle Welfare
- **University of Veterinary Medicine, Vienna** - Alternatives to the Disbudding of Cattle
- **Wageningen University & Research** - Livestock Within Sustainable Food Systems



## Influence Throughout the Value Chain

"Collaboration across the entire value chain is essential to make meaningful change. That is why we are working closely with our suppliers, partners, industry bodies and leading animal welfare organisations across the globe – including Compassion in World Farming, Global Food Partners and Humane Society International – to continually research, develop and enhance our animal welfare standards and approach.

As a founding member of GCAW, we are working with other leading international food companies. Together, we have an opportunity to collectively address systemic barriers to change, share best practices and accelerate progress on key animal welfare issues at a faster pace than would otherwise be possible. At Compass we also understand that we can utilise our position to connect and influence key players in the value chain to drive structural change."



GCAW organised a study tour to Sweden for the next generation of Dutch pig farmers in collaboration with NAJK, the Dutch young farmers association.



Knowledge Share: [Implementing Animal Welfare Commitments: GCAW Member Experiences](#)





### Continual Development Builds Trust with Suppliers

"We want to work together with our suppliers, encourage them and drive continuous improvements through development goals and KPIs. Although we find more challenges with implementation of commitments in regions such as Asia, we have managed to achieve progress there through close collaboration with our direct suppliers. In general, it is part of our company culture to build long-term relationships with our suppliers, and to offer support which also builds mutual trust."



### Partnership Working to Generate Higher Welfare Supply

"Partnerships play a big role in our success. Every partner in our value chain has a role to play in creating the value, capacity and capability we need to deliver brands and products that consumers love and that support the wellbeing of people and planet. We're committed to collaborations that generate value and growth for Unilever and our partners."

We're one of the founding members of GCAW. We work together with others to accelerate the transition to higher welfare systems. We are doing this in order to generate a greater supply of higher welfare meat products in the supply chain."



GCAW signs the Beijing Consensus on Animal Welfare

More than

**one billion**

people purchase food products from GCAW members every day



Operate in

**190**  
**markets**

worldwide



Combined annual revenues of over

**US\$520**  
**billion**



Source over

**9 billion**  
**eggs**



from approximately

**30 million**  
laying hens



Work with over

**60,000**  
**suppliers**



**Dr Birte Nielsen**  
GCAW Independent Chair 2020-2024



## An Academic Perspective

One of the many things that impressed me during the 3 years I was chairing the Global Coalition for Animal Welfare, was the wide-reaching subjects covered by experts at the GCAW meetings. The presentations by animal welfare scientists and the discussions that ensued were not only enlightening but also very constructive. The exchanges were often mutually beneficial, further emphasising the need for researchers and the food industry to continue to work together.

One of the recurring dilemmas facing the animal protein chain is the (sometimes) diverging solutions for environmental and animal welfare

problems, respectively. Keeping a firm focus on evidence-based animal welfare in a pragmatic way may be the most important role of GCAW, as the combined knowledge of the invited speakers and the member companies helps identify the main issues at hand, as well as their possible solutions.

An example of a very tangible result of the Coalition is the GCAW Recommendation on the Use of Welfare Outcome Measures for Broiler Chickens, which is a useful document, based on the science yet written in a language that is accessible to the people working day-to-day with animal welfare standards.



### Investing in Innovation

"The welfare of animals in our protein supply chain has long been a priority for Kroger. As part of our focus on responsible sourcing, we aim to advance animal welfare while balancing other topics affecting people and our planet. We work with our suppliers, animal welfare experts and others to advance standards that protect workers and animals and preserve access to affordable proteins for our customers.

In recent years, Kroger has made substantial progress toward our goals to improve animal welfare for laying hens, pigs and chickens. We also invest in bringing innovative new items to our customers, including Simple Truth + Kipster next-level cage-free eggs and a line of Our Brands plant-based alternatives for our customers.

Kroger participates in collaborative groups, including GCAW, to stay informed of developments in protein production in the US and around the world. We believe learning from others and building coalitions of action across sectors is the best way to achieve lasting change. We appreciate being part of the multi-sector GCAW conversations and working groups."





## Industry Level Work Driving Progress

"Some of the issues we would like our suppliers to address must happen at the industry level. Recognising the responsibility we have as the voice for our partners (employees) and customers, we continue to look for opportunities to collaborate with others across our industry and the NGO community to promote best practices. We participate and engage with organisations where issues related to animal welfare can be addressed industry wide.

As of April 2023, in our US and Canadian company-operated stores 100% of eggs are cage-free, inclusive of branded products supplied to our licensee business partners in those markets. In our EMEA and UK company-operated markets, 99.9% of eggs are cage-free. In Asia markets where Starbucks operates, such as China and Japan, cage-free egg production is limited, and supply is not yet widely available. Starbucks remains committed to increasing cage-free egg supply in all company-operated stores globally, in partnership with industry stakeholders."

**Dr Nathan Rhys Williams MRCVS**  
GCAW Secretariat



## An Industry Perspective

### The global landscape for managing farm animal welfare has changed significantly over the past five years.

We have seen landmark legislative change both proposed in Europe after 1.4 million people signed the European Citizens' Initiative to 'End the Cage Age', and adopted, with the introduction Prop 12 which bans the use of crates and cages for sows, calves and laying hens in California, USA.

While legislative change is essential in raising baseline production standards, many food companies have gone further than these minimum standards. In recent years, we have seen businesses pushing significantly ahead of legislation and adopting ambitious commitments to improve animal welfare. Thousands of food companies have committed to sourcing cage-free eggs and several hundred have committed to the requirements of the NGO-developed Better Chicken Commitment or European Chicken Commitment. Many other companies have developed their own commitments and programmes for improving animal welfare.

The scale of the movement and its momentum in recent years has been impressive but challenges nonetheless remain in implementing aspects of these commitments. Working through these challenges have been a key focus of GCAW working group discussions.

One of the major challenges in implementing animal welfare commitments lies in the complexity of supply relationships. GCAW members operate in 190 countries and the availability of higher welfare production in some countries is very limited. Nonetheless, GCAW members have been concerted in their efforts to work with suppliers to increase higher welfare supply. For example, GCAW members have invested directly into their egg supply chains, committed to longer term buying agreements and are supporting novel supply chain structures to facilitate transition to cage-free production in Latin America and Asia.

All GCAW members have also seen climate goals rising in importance within their businesses over the past five years. This has given rise to complex and unforeseen challenges in implementing animal welfare improvements where they result in greater resource use; for example, the impact of switching to slower-growing broiler chicken breeds.



### Supporting Farmers With Transition

"At Elior Group, animal welfare is a key company initiative that involves all of our stakeholders, from our board to our suppliers, with the support of NGO collaborations and customer engagement. Despite challenges in certain regions in implementing our commitments, we are dedicated to continuing to support local agricultural activities wherever we operate.

For Elior Group, it is essential to support our farmers in their transition, especially as changing expectations regarding livestock farming in recent years have significantly impacted their organisation and investments. We work closely with them to understand their challenges and collaboratively identify solutions to enhance their animal welfare practices. These efforts are communicated to our customers to raise awareness about animal welfare and demonstrate that their sustainable choices contribute to improving these practices."



## The Importance of Regional Adaptation

"Sodexo is currently leveraging a public tool that compares different certifications, in order to raise awareness internally on higher welfare, to set the baseline per country and ease interpretation for buyers when they work on what different standards mean, e.g. For an issue such as stocking density. The outcomes help us understand where we are compliant and to calculate percentages for reporting purposes. When no recognised certifications are available or in use, we need to work with each supplier individually to understand and discuss the different attributes of their farming and production practices."

**Our work on laying hens, broiler chickens and pigs will continue, embracing developments for these species beyond the current headline focus on cage-free eggs and the Better Chicken Commitments. Emerging research and development of in-ovo sexing in egg supply chains, on-farm hatching of broiler chicks and immunocastration of pigs are of considerable interest to GCAW members working to raise the bar.**

We also see a growing need for GCAW to consider expanding its current focus areas to address more species. While other species are regularly discussed during all member meetings, further working groups may be required in supply chains where GCAW members have significant involvement and where there are emerging welfare concerns.

The use of welfare outcome measures and key performance indicators to drive continuous improvement in welfare is another developing focus area. Here, new technology has the potential to transform animal welfare monitoring and reporting. Advances in automated data collection, sensors, and artificial intelligence are being used to track animal health and welfare in real-time, enabling more proactive management and interventions.

Wider collaboration which enables companies to align climate and animal welfare goals will be critical to successful outcomes moving forward. A critical focus for GCAW is to work with stakeholders to identify solutions that deliver improvements in animal welfare whilst also balancing sustainability concerns and cost implications.



# How To Engage With GCAW

Find out more at:

[www.gc-animalwelfare.org](http://www.gc-animalwelfare.org)

Contact us via:

[secretariat@gc-animalwelfare.org](mailto:secretariat@gc-animalwelfare.org)

