



GCAW

Global Coalition for Animal Welfare



GCAW Broiler Supplier Workshop: Transitioning to Higher Welfare Broiler Production

5-6th November 2019, Zwolle, Netherlands

Outcome briefing

Background

The Global Coalition for Animal Welfare (GCAW) is the world's first food industry-led initiative aimed at advancing animal welfare globally. Launched in October 2018, this global platform brings together major food companies and animal welfare experts with a shared aim of improving animal welfare standards at scale and in meeting consumer demand for food products from animals reared in systems that promote good welfare. The founding members are Aramark, Compass Group, Elior Group, IKEA Food Services, Nestlé, Sodexo and Unilever.

As part of GCAW's work to improve the welfare of broiler chickens within member companies' own supply chains and across the wider food industry, the Coalition is engaging with broiler chicken suppliers to facilitate a transition to higher welfare production. All GCAW members have made public commitments to improve broiler welfare and many have signed up to either or both the European Chicken Commitment (ECC) and the US Chicken Commitment, both of which are initiatives by animal welfare NGOs which outline specific requirements for improving the welfare of broiler chickens by food businesses.

This GCAW workshop was organized to facilitate a dialogue between key industry participants, mainly on the production side of the supply chain, to discuss challenges and opportunities around improving broiler chicken welfare at scale as well as identify specific actions GCAW can take to support suppliers during the transition.

Agenda

The agenda included a visit to the Windstreek chicken farm in Raalte (NL), which provided an opportunity to view an alternative farming system for chickens that has been developed with improved sustainability and welfare dimensions. The workshop, with an agenda developed with supplier input, was chaired by Nicky Amo (Chronos Sustainability) and Vanessa King (Unilever/GCAW Broiler Welfare Working Group) and featured presentations by

Kate Parkes (RSPCA), Dr Heleen van de Weerd (Chronos Sustainability), Mr Claude Toudic (Hubbard France) and Dr Ingrid de Jong (Wageningen Livestock Research). The day concluded with a practical session involving breakout groups where participants brainstormed key barriers to improved chicken welfare as well as potential solutions, including the role GCAW might play in driving change.

Farm visit

Windstreek is the product of six years' development work and the vision of farm owner, Robert Nijkamp. The broiler house and concept are the outcome of a Wageningen University research project: "Broilers with Taste", funded by the Dutch Ministry of Economic Affairs, Agriculture and Innovation, with the input of several industry and supply chain partners. The broiler house incorporates a range of innovative features and best practice examples on environmental management, such as reduced energy consumption and closed loop systems, and broiler welfare. The chickens (26,000) in this house are raised at a low stocking density of 25 kg/m² and are of the slower-growing Hubbard JA 757 breed. They are provided with natural light through windows covering one whole side of the barn, an innovative brooding feature ('motherhoods') imitating the mother hen to provide shelter for the chickens throughout rearing, and environmental enrichment including platforms, straw bales and daily grain scattering.

Robert Nijkamp explained that despite the many positive features of the farm, the promotion and marketing of his products remains a challenge. In the Netherlands, the Beter Leven labelling assurance scheme is used to indicate animal products that are produced with higher requirements for animal welfare than basic

legislation. With such an innovative system, none of the existing scheme levels perfectly matches the features of Windstreek, therefore, some derogations have been made to label the chicken as Beter Leven 1-star (e.g. the platform surface area forms part of the floor space requirement, and the whole barn is classed as a verandah). He indicated that one of the practical challenges with growing slower growing chickens is that they are more active, which, while positive for welfare, can pose difficulties during catching. Conducting catching at nighttime mitigates this problem.

The farm also markets the meat from these chickens for use in ready-made products, to compensate for the longer grow-out period that these chickens have (8 weeks) and the impact such timelines may have on income. The important role of retailers and foodservice companies in communicating and promoting higher welfare products to consumers was emphasized.

Rather than representing a model of mainstream broiler production, Windstreek provides an example of a "systems-thinking approach", demonstrating what can be achieved by taking a step back to question the status quo, go back to basic principles and consider how to future-proof farming systems.

Workshop presentations

Summary of broiler supplier survey results - Dr Heleen van de Weerd, Chronos Sustainability

Heleen van de Weerd presented the findings of a pre-workshop survey of broiler meat suppliers. The aim of the survey was to understand current standards of broiler production in Europe and to identify what suppliers perceived as the challenges and opportunities related to transitioning to higher broiler welfare. Fifty percent of respondents have already made specific commitments to improve broiler welfare production and are already fulfilling some of the ECC commitments at least partially. Perceived challenges linked to transitioning to higher welfare and the role that GCAW can play in facilitating progress were used to inform the workshop programme.

Background to the EU Chicken Commitment (ECC) - Kate Parkes, RSPCA

In 2017, about 30 European animal welfare NGOs came together to reach an agreement on what the most pressing welfare concerns related to broiler production were, and how these should be mitigated. This led to the ECC, which asks food businesses and their chicken suppliers to meet the following requirements by 2026: to meet EU legislative requirements, to reduce stocking density to 30 kg/m² or less, to adopt breeds that demonstrate higher welfare outcomes, to meet improved environmental standards (on lighting, perching and air quality), to not use cages or multi-tier systems, and to adopt controlled atmospheric stunning using inert gas or multi-phase systems, or effective electrical stunning without live inversion. The ECC also includes a requirement for third-party auditing and annual public reporting on progress towards the commitment.

Note: for further information on the Broiler Commitments, including the scientific rationale behind some of the requirements, please contact the GCAW Secretariat at: secretariat@gc-animalwelfare.org.

The transition to slower growing breeds from a breeder's perspective - Claude Toudic, Hubbard France

With an increased focus on animal welfare outcomes rather than simply driving up daily growth, broiler breed companies are encouraged to develop robust slower growing breeds without substantially reducing weight gain. There are some less favorable aspects of raising slower-growing breeds, including increased emissions, land and energy use, and the costs associated with them. Meanwhile, animal welfare is generally improved, with positive effects seen on, for example, mortality rates, feather cover, genetic diversity, antibiotic use, worker satisfaction and responding to consumer concerns. Utilizing all parts of the chicken carcass is a key factor in the sustainability of slower growing chickens.

Welfare and economics of higher welfare chicken production - Dr Ingrid de Jong, Wageningen Livestock Research

Higher welfare broiler production systems were defined and the Dutch market transition towards these was explained. The 'Chicken of Tomorrow' – broilers reared according to higher welfare standards – had a 95% market share of fresh meat in 2017. The concept requires a slower growing breed and environmental enrichment and has led to positive effects on, for example, footpad lesions, hock burns, and lameness. Key factors that made the transition possible were the availability of a cost-efficient alternative to conventional chicken, and the fact that there was no longer a cheaper choice available, as well as decisive initiatives by retailers. The Dutch example shows that major change is possible, resulting in a significant welfare gain compared to conventional chicken at relatively low cost, with higher costs from improved welfare being owned by and paid for by the market.

Welfare aspects and challenges of transitioning to higher welfare broiler production – experiences from RSPCA Assured) - Kate Parkes RSPCA

The various criteria in the ECC and the reasoning behind choosing these requirements were explained. For example, slower growing breeds generally have lower mortality, better leg health, better meat quality and an increased behavioural repertoire. More space can also improve litter quality and leg health, while promoting natural behaviour. A stimulating, enriched environment encourages birds to be more active, helping them to stay healthy. Improved slaughter practices are required since the most common system in use for poultry slaughter – electric water bath stunning – is associated with significant welfare risks through live inversion and shackling, and the alternative of gas (controlled atmospheric) stunning is challenging for certain market segments.

Scientific and practical aspects of environmental enrichment for broilers - Dr Ingrid de Jong, Wageningen Livestock Research and Dr Heleen van de Weerd, Chronos Sustainability

Environmental enrichment increases the occurrence and range of the animal's species-specific behaviour, as well as the animal's ability to handle behavioural and physiological challenges. It also prevents the development of abnormal behaviour or reduces its extent and complexity. Various successful enrichments were discussed, including elevated platforms, substrate (hay, straw) bales, vertical panels offering shelter, and dustbathing and foraging materials. Both fast and slow growing chickens may have different preferences. Questions on the optimal location and quantity of enrichment need further investigation, and the economic consequences (benefits and costs) need to be clearly quantified.

General discussion

Principal discussion centered on the importance of improved consumer awareness and the recognition that consumer communication on higher welfare chicken production is more challenging than, for example, cage-free eggs. The general view was that retailers have a crucial role to play here.

There was a question about whether or not the 'Chicken Commitments' will "be enough for the NGOs". Since the Commitments requires substantial inputs and investment, there is a fear that the welfare agenda will keep moving. One response was that companies should set their own agenda in terms of priorities and future objectives. Provided this is communicated and there is a clear foundation and action behind commitments, companies can take control of their own welfare agenda.

A final point in the general discussion was a concern that for segments of society (for example, certain Muslim communities requiring Halal slaughter), gas stunning methods are not acceptable. This indicates a potential challenge for companies that have signed up to the ECC and who sell products into markets catering for these interests. One suggested action for GCAW was to organize an expert briefing on Halal to further clarify this aspect.



Break-out discussion on key barriers and solutions related to improved chicken welfare at scale

The workshop participants were asked to work in small groups to identify the top two barriers to implementing the ECC, and to then discuss possible solutions to these barriers.

Four key challenges and barriers, and proposed solutions, were outlined:

Challenge 1: Market – How do we match product demand (from GCAW members and others, e.g. retailers) with primary producers as this requires commitment on both sides. How do we get retailers to pay 10-15% more?

Proposed solutions:

- GCAW could bring big businesses together to “own the future chicken”. In the Netherlands, change happened once retailers took responsibility for their role in changing the market, together with other supply chain partners.
- Better return for suppliers. It is key to engage with big purchasers of broilers (e.g. retailers) and educate consumers about paying the true cost of [higher welfare] food products.
- Support broiler suppliers to utilize the whole chicken carcass. Consider different cuts of meat and engage consumers. Market value for all chicken parts to the suppliers.

Challenge 2: Cost/timing – What is the cost associated with transitioning more quickly? Could the solutions become more affordable with time? What is the advantage of moving first - could it lead to more business for producers who can meet demand? There is an interest in delaying the transition because of additional costs, it is impossible for the supply chain to change overnight. How do we work backwards from end of 2025? What are the actual benefits to the industry? How do we justify increased costs to senior management as well as the end consumer? Who is going to pay for more birds, larger sheds, etc.? We need to include cost over time.

Proposed solutions:

- GCAW could engage with retailers [and NGOs], to outline pricing incentives for suppliers.
- When making strategic decisions, companies need to commit to suppliers, follow through on commitments (authenticity) and pay the costs.
- Creating leverage in the form of tax advantages for leading producers or food companies.
- Analyse the on-cost or total cost of production under the ECC. Consider green bonds (e.g. Pepsico has priced its first-ever green bond, designating the proceeds from the \$1 billion offering to help cut virgin plastic use and replenish the water it consumes in making sodas and snacks).



Challenge 3: Communication – How do we communicate to consumers? There are several existing higher welfare standards/ schemes. How do we reconcile the differences between them? How do consumers recognize and understand higher welfare? It is not so much about market advancement but brand enhancement. There is a need to reconcile ECC requirements with retailers' own welfare schemes. What is the central message (not as simple as 'cage-free') – consumers may not understand stocking densities, environmental enrichment, humane slaughter, etc.? We need to develop and communicate simple messages.

Proposed solutions:

- GCAW could establish a recognized baseline standard from which progress can be measured.
- Honesty and transparency – be willing to communicate what the ECC means in practice (e.g. for costs or product features). Have open conversations with organizations who can assist.
- Address the lack of harmonization of welfare schemes that may or may not be aligned.
- Consumers need to understand the role of welfare in terms of human health and sustainability. GCAW could penetrate the marketplace and explain to consumers why animal welfare is important.

Challenge 4: Complexity/managing the unknown – Several aspects of what suppliers are being asked to do are unknown, and certain technical requirements appear to have an unclear basis. Additionally, some technological solutions are still lacking or are being trialed. For example, more testing of new broiler breeds in new farming systems is needed. We do not fully understand what the benefits for the industry will be. The requirement for humane slaughter can be a major challenge for food businesses in certain markets.

Proposed solutions:

- GCAW could get more companies involved and more commitments from stakeholders in order to create momentum. A better understanding is needed regarding what consumers are expecting.
- GCAW could define a clear agenda – a road map setting out what actions need to happen by when if the broiler supply chain is to achieve the ECC by 2026. This should include sector-specific activities.
- Promote the development of new technologies.

Next steps

Vanessa King, chair of the GCAW Broiler Working Group, summed up the day and emphasized the need for clear communications – in terms of transparency between food companies and suppliers, but also communications to consumers, as well as confidence – the need to be confident about why we are doing this and what it means for everyone along the value chain as key to progress.

GCAW will reflect on the outcomes of the discussions and will consider follow-up actions including:

1. Making the European Supplier Workshop an annual event.
2. Hosting a similar workshop with European Retailers:
 - a. Review how many retailers have signed up to the ECC.
 - b. Involve other stakeholders (e.g. retail analyst, Consumer Goods Forum).
3. Host a similar North America Supplier Workshop.

The GCAW Broiler Working Group will review these options and reflect on the wider outtakes from the Workshop. Workshop participants will be kept updated on GCAW's actions.

GCAW thanked the workshop participants and speakers for their inputs.

For queries on GCAW, please contact the GCAW Secretariat at: secretariat@gc-animalwelfare.org.