



GCAW

Global Coalition for Animal Welfare

Knowledge Share



Cage Free Eggs: A GCAW Global Landscape Review

December 2023

© Global Coalition for Animal Welfare 2023

www.gc-animalwelfare.org



GCAW

Global Coalition for Animal Welfare

CAGE-FREE EGGS: A GCAW GLOBAL LANDSCAPE REVIEW

EXECUTIVE SUMMARY

INTRODUCTION

Thousands of food companies have committed to transition to cage-free egg supply chains, with many having set a deadline to do so by 2025. Whilst progress is being made in some geographies, in others there is a need to accelerate the transition if these deadlines are to be met.

This paper presents an overview of cage-free egg production globally, collating available data on egg production in 40 countries that together represent over 90% of global production. Additional indicators and insights from the countries analysed are also presented, to provide companies and other stakeholders insight that can help inform cage-free egg supply chain transition approaches in the lead up to commitment deadlines.

HEADLINE FINDINGS

- Demand for eggs is growing: global egg production increased by almost 21 million tonnes in the decade to 2021, to reach a volume of 86.4 million tonnes¹. In 2022, 1.6 trillion eggs were farmed around the world, creating a market value of \$248.49 billion. By 2023, this had grown to \$270.08 billion².
- Food companies increasingly want to source cage-free eggs: there are currently over 2,500 company commitments to do so³.
- It is estimated that globally, 84.2% of laying hens are housed in caged systems. Regarding the 15.8% of laying hens kept in cage-free systems, it is estimated 12.4% are kept in indoor systems and 3.4% have access to the outdoors⁴.
- There is significant variation in the availability of cage-free eggs globally. In our analysis, the proportion of eggs produced in cage-free systems by country varies from 0% to about 95%. Although progress towards cage-free egg production is accelerating in some geographies, significant improvements are needed in others to enable companies to meet their sourcing commitments and fulfil changing stakeholder expectations.
- The increased costs of cage-free production, coupled with a lack of availability and traceability, are major challenges for companies looking to fulfil their cage-free egg commitments, notably in Asia, the Middle East and South America.

FIVE UNDERLYING BARRIERS TO CAGE-FREE PROGRESS

Based on the analysis presented in this paper and insight from the member companies of the Global Coalition for Animal Welfare, we have identified the following key barriers to progress towards cage-free egg supply chains:

1. Higher costs and labour requirements associated with cage-free production, coupled with restricted access to investment finance, particularly for small-scale farmers.
2. Limited consumer drivers for action, resulting from poor availability of cage-free eggs in some regions, concerns around premium pricing, and insufficient awareness of the benefits of higher welfare production.
3. Lack of clear market signals to producers. Beyond clear consumer demand, this includes inadequate engagement across supply chains, and insufficient long-term assurance from corporate buyers to build producer confidence.
4. Wide variation in levels of husbandry, management, and veterinary knowledge on cage-free production, and also access to appropriate training to transition.
5. Different terminology in different countries and a lack of traceability makes it difficult to introduce clearly defined, reliable and trusted cage-free standards that all stakeholders understand and can adhere to.

RECOMMENDATIONS

Action is required from multiple stakeholders to accelerate progress towards cage-free egg supply chains. We have summarised key recommendations for action in the following areas:

COLLABORATION

To avoid disconnects that hamper progress, communication between buyers and producers needs to be strengthened through engagement and the development of mutually beneficial solutions.

CAPACITY BUILDING

Producers need support to understand changing requirements and to be able to adapt successfully to managing cage-free production.

CONFIDENCE AND ALIGNMENT

Traceability and consistent product labelling is essential for confidence in cage-free supply chains, for the companies throughout the supply chain and the end consumers. There is also an opportunity to increase awareness of the links between improved animal welfare and benefits to other important concerns such as human health, food safety and quality, to align the priorities of different stakeholders.

CLEAR DIRECTION

Governments and investors have significant capacity to influence animal welfare within the food industry. As such, it is essential that lawmakers and investors are well informed of the latest scientific findings, consumer attitudes and market drivers.

COUNTRY ANALYSIS OF CAGE-FREE EGG PRODUCTION AND CORPORATE COMMITMENTS

	Country	Global Market Share ⁵ (% of world production)	Country Status ⁶ (% cage-free production)	Corporate Commitments ⁷	Legislation covering laying hens ⁸	Ban on cages	Mandatory method of production labelling
1	China	40%	10%	86	No	No	No
2	USA	7.4%	35%	723	Yes, at state level	Bans in 10 states	No
3	India	7%	20%	58	No	No	No
4	Indonesia	5.6%	10%	77	No	No	No
5	Brazil	4%	5%	213	No	No	No
6	Mexico	3.3%	6%	157	No	Proposal	No
7	Japan	3%	8%	145	No	No	No
8	Russia	2.8%	<1%	79	No	No	No
9	Turkey	1.4%	12%	118	Yes	No	Yes
10	Thailand	1.2%	8%	66	No	No	No
11	Ukraine	1.1%	5%	45	Yes	No	Information unavailable
12	Colombia	1%	30%	91	No	No	Proposal
13	Iran	1%	0%	6	No	No	No
14	Germany	1%	95%	419	Yes	Yes	Yes
15	Pakistan	1%	Data unavailable	20	No	No	No
16	Argentina	0.9%	11%	80	No	No	Proposal
17	UK	0.9%	62%	330	Yes	Battery cages	Yes
18	France	0.9%	65%	384	Yes	Yes	Yes
19	Spain	0.9%	27%	212	Yes	Battery cages	Yes
20	South Korea	0.9%	5%	60	No	No	No

	Country	Global Market Share (% of world production)	Country Status % cage-free production	Corporate Commitments	Legislation covering laying hens	Ban on cages	Mandatory method of production labelling
21	Italy	0.8%	64%	169	Yes	Battery cages	Yes
22	Netherlands	0.8%	92%	125	Yes	Yes	Yes
23	Nigeria	0.7%	50%	26	No	No	No
24	Philippines	0.7%	Data unavailable	53	Yes	No	No
25	Canada	0.6%	13%	223	Yes	Battery cages	No
26	Egypt	0.6%	50%	43	No	No	No
27	South Africa	0.6%	14%	56	Yes	No	No
28	Poland	0.6%	24%	222	Yes	Battery cages	Yes
29	Peru	0.5%	7%	106	No	No	No
30	Morocco	0.5%	0%	42	No	No	No
31	Vietnam	0.45%	<1%	39	No	No	No
32	Saudi Arabia	0.4%	0%	52	No	No	No
33	Ireland	0.4%	47%	88	Yes	Battery cages	Yes
34	Algeria	0.35%	0%	14	No	No	No
35	Taiwan	0.3%	15%	37	Yes	No	Yes
36	Australia	0.3%	45%	124	Yes	Battery cages	No
37	Chile	0.2%	2%	94	No	No	No
38	Israel	0.15%	7%	29	Yes	Yes (phase-out to 2038)	No
39	New Zealand	0.07%	34%	100	Yes	Battery cages	No
40	UAE	0.06%	0%	67	No	No	No

REFERENCES

- ¹ United Nations Food and Agriculture Organisation (FAO) Statistical Yearbook World Food and Agriculture 2022
- ² The Business Research Company Egg Global Market Report 2023
- ³ Chicken Watch, 2023
- ⁴ WATTPoultry, 2022
- ⁵ Calculation based on data from [Helgi Library](#)
- ⁶ Figures mainly taken from [Welfare Footprint Project, Center for Welfare Metrics](#)
- ⁷ Source [Chicken Watch website](#)
- ⁸ Main source [Animal Protection Index website](#)