



COMPASSION
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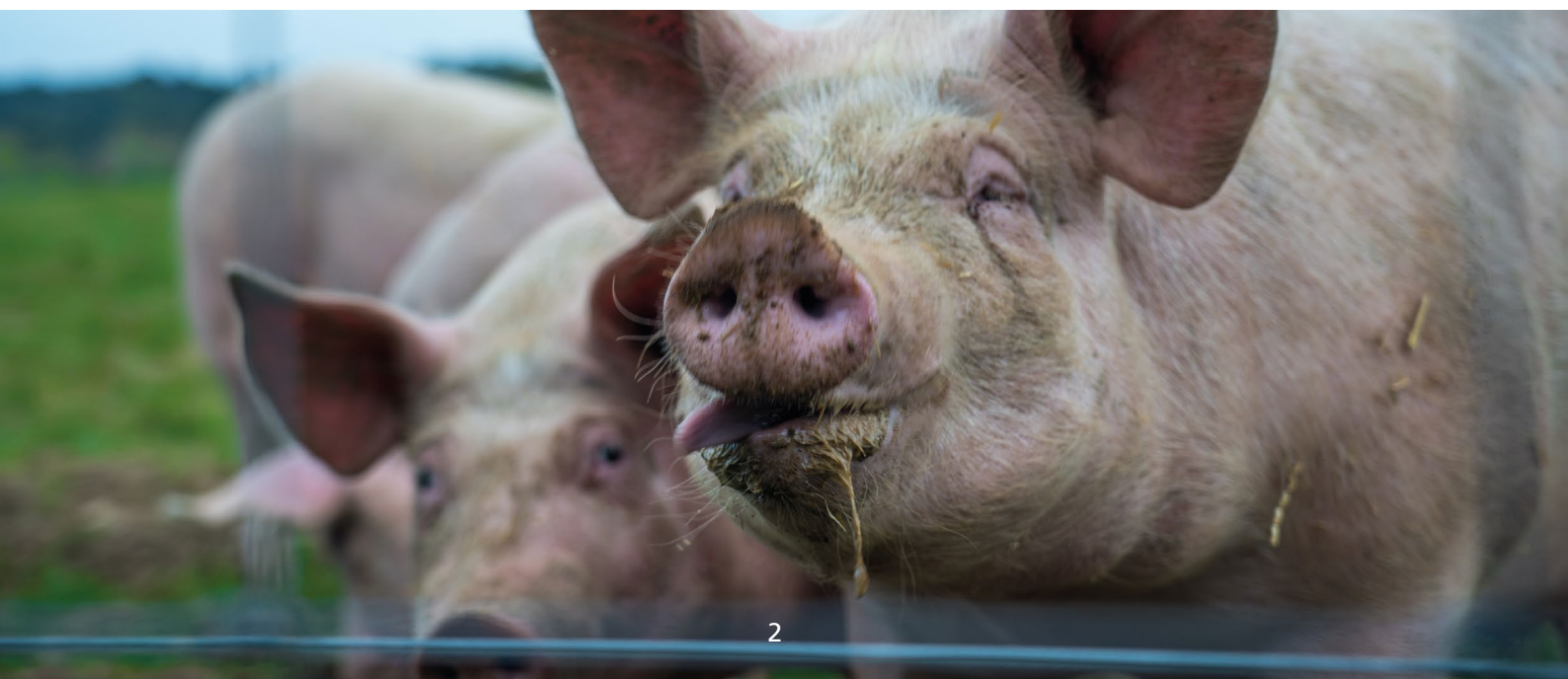
Food Business

Food businesses paving the way for a cage-free Europe



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INTRODUCTION

10 VISIONARY COMPANIES

embracing cage-free production are showcased in this report:



Several of them are supporting the call for an EU-wide ban on cages.

"A crucial step forward in supporting and advancing sector-wide transformation would be the introduction of legislation by the European Commission to enforce a ban on cages."

Leonardo Mirone,
ESG Leader Sourcing Chains, Barilla

"We fully support the call for a legislative ban on cages in Europe, which is urgently needed to create a level playing field and to raise the bar for rabbit welfare."

Ricarda-Maria Heidmeyer,
General Manager, BreFood

"Demonstrating our commitment to a cage-free future, we've voluntarily embraced sow stall-free and free farrowing systems, expanding opportunities for retailers across Europe to access cage-free continental pork products. As pioneers in Italy's cage-free transition, we urge legislators to endorse our efforts by implementing a comprehensive ban on cages."

Pietro Pizzagalli,
General Director, Fumagalli

"Carrefour's cage-free eggs initiative is part of our approach to protect the welfare of farm animals, and its goal is to support customers in making the right food choices. That is why we also support the introduction of an EU-wide ban on cages for laying hens, following on from the ECI 'End the Cage Age'."

Carrefour Poland,
www.carrefour.pl

EXECUTIVE SUMMARY



An increasing number of European and global food companies are phasing out cages from their supply chain, paving the way for a cage-free future. This report highlights leading food businesses driving the cage-free transition across the European Union (EU), anticipating legislative changes and responding to consumer demand. Whilst encouraging, only a legislated ban on the use of caged systems for both EU produced and imported products will raise the baseline standards for farm animals and consign cages to the history books.

Around 300 million farm animals are kept in cages across the EU, including 40% of the laying hen flock (155 million hens), 94% of farmed rabbits (72 million rabbits) and 96% of breeding sows (10 million sows). Animals kept in cages are confined in barren environments, either overcrowded or completely lacking social contact, unable to turn around or express even the most basic behaviours.

Scientists are backing the call to end caged systems. There is abundant scientific evidence confirming cages are severely detrimental to animal welfare. This includes the latest Scientific Opinions from the European Food Safety Authority (EFSA), recommending that cages should no longer be used for laying hens, breeding sows, quail and ducks to protect the welfare of those species.

European citizens are calling for change. In the latest Eurobarometer on animal welfare (October 2023), 94% of EU citizens surveyed believe that it is

important that farmed animals are provided with enough space to be able to move around, lie down and stand up, while 89% believe that it is important that farm animals are not kept in individual cages. More significantly, 1.4 million EU citizens signed the European Citizens' Initiative (ECI) on 'End the Cage Age', to which the European Commission responded in June 2021 with a clear commitment to publish legislative proposals for an EU ban on cages to come into force by 2027. **However, the European Commission has yet to deliver on its commitment, which was due by the end of 2023.**

Inaction by EU policy makers has the potential to halt progress. Since the European Commission made its commitment in 2021, many producers have been waiting for further information on timelines, direction, and possible funding sources to accompany the phasing out of cages.

Pioneering food companies are taking the lead and are paving the way for a cage-free future in Europe. Over 1,400 commitments have been made by food companies across Europe for cage-free laying hens alone¹, of which over 800 are already fulfilled, while other companies have made commitments to eliminate cages and crates for sows and rabbits.

Through their work, these companies are demonstrating that successful cage-free farming is not only possible at scale but is also the right thing to do – for the business, their customers and the animals in their supply.

10 MAJOR FOOD COMPANIES signed an open letter to the European Commission in 2021 in support of the 'End the Cage Age' ECI:



"It is encouraging to see an increasing number of food companies across the European Union voluntarily phasing out cages in their supply chain. Our citizens want an end to cages, the evidence of their negative impact on the lives of millions of animals is overwhelming.

As a matter of urgency, the European Commission must honour its commitment and present a legislative proposal to phase out the use of cages for all farmed species as soon as possible.

This would help create a level playing field in the market and would be in line with the strongly held aspirations of EU citizens."



Philip Lymbery,
Global CEO,
Compassion in World Farming

ENDING THE CAGE AGE

In June 2021, the European Commission gave a clear commitment to introduce, by the end of 2023, a legislative proposal to ban the use of cages for farmed animals within the EU from 2027². This included cages for rabbits, laying hens, quail and ducks, stalls and farrowing crates for sows, and individual calf pens.

This historic decision was made in response to the European Citizens' Initiative (ECI) to 'End the Cage Age'³, signed by an overwhelming 1.4 million EU citizens and supported by a coalition of 170 European NGOs led by Compassion in World Farming.

This commitment was part of the Commission's proposed revision of the wider EU animal welfare legislation under the *Farm to Fork Strategy*. However, the only proposals to be presented on farm animals so far are minor amendments to the Regulation on the protection of animals during transport, which were announced in December 2023.

Meanwhile, around **300 million farm animals** continue to be caged each year in Europe.

Cages are still widespread in the EU

- Of the 77 million **rabbits** farmed for meat production⁴, 94% (**72 million**) are farmed in cages for the entirety of their lives⁵.
- Of the 11 million **sows** kept for breeding, 96% (**10 million**) are kept in cages (sow stalls and farrowing crates) for approximately 40% of their productive lives⁶.
- Of the 390 million **laying hens** farmed in the EU, 40% (**155 million**) are housed in cages for the entirety of their productive lives⁷.
- Of the 33 million **ducks** farmed annually for foie gras in the EU, it is estimated that 90% (**almost 30 million**) are kept in cages and force-fed for the last two weeks of their lives.
- Tens of millions of other farm animals are kept in cages in the EU for at least a proportion of their lives, including **laying quail, laying hen pullets and dairy calves**.



ENDING THE CAGE AGE



Member States taking action to ban cages

An EU-wide ban on the use of cages in farming would extend and complete a cage-free transition that is already underway in a number of Member States. Several have already responded to increasing public concern for farmed animal welfare, with national bans on cages or agreements to phase them out. In other countries, we see a significant increase in cage-free production in response to consumer and market demand. See Appendix I for further details.

Scientists back the call for cage-free farming

A wealth of conclusive scientific evidence unequivocally supports the urgent need to eliminate caged systems (see Appendix II for further details). Alternative cage-free systems for all species are already commercially available and have a much higher welfare potential than cages - meaning that those systems, when well designed and well managed, will deliver better welfare for the animals. Extensive scientific reviews demonstrate that only cage-free systems provide the potential for animals to express their full behavioural repertoire and for a good quality of life.

EU consumers and citizens demand cage-free farming

Latest Eurobarometer⁸ shows overwhelming support for higher welfare farming:

The October 2023 Eurobarometer report shows that public support for improving the welfare of farmed animals is overwhelming. Nine out of ten (89%) EU citizens surveyed believe that farmed animals should not be kept in individual cages, and 94% believe they must have sufficient space to move around, lie down and stand up. The vast majority (91%) of EU citizens believe it is important to protect the welfare of farmed animals, eight in ten (84%) believe the welfare of farmed animals should be better protected than it is now, and six in ten (60%) are willing to pay at least 5% more for products from

animal-welfare-friendly production systems. Over half of those (60%) would be willing to pay at least 10% more.

Informed consumers increasingly choose cage-free products:

When informed, consumers increasingly choose cage-free products. In 2008, mandatory marking of shell eggs by method of production (cage, barn, free-range, organic) was introduced in the EU. Since then, there has been a steady increase in the number of cage-free laying hens from 25.3% to 60.3% in 2022, aided by the increasing number of companies committed to cage-free egg production.

Businesses answer the call for cage-free products

Market leaders create ripple effects:

Forward-thinking companies started early on to introduce and promote products made with cage-free eggs, such as Unilever with its iconic brands of mayonnaise (Hellmann's, Amora, Calvé) in 2009. This generated a ripple effect across the industry which led to other European and global brands soon following its example.



ENDING THE CAGE AGE



Engaging consumers on the cage-free journey

Many companies have employed their marketing communication strategies to emphasise their ethical commitments, steering consumer behaviour towards more humane choices.

This is particularly evident in the promotion of cage-free products, where companies have used a variety of marketing initiatives to promote their higher welfare products.

Food companies lead the cage-free transition

An increasing number of well-known European food companies have committed to going entirely cage-free for one or more species in their supply chain¹.

Major producers from across the European Union have already taken this step without waiting for legislative reform and have committed to converting their production to cage-free, affirming their leadership position in the cage-free market. Examples in the laying hen sector include leading EU producers **Eurovo** (pan-Europe), **LDC** (France) and **Huevos Guillén** (Spain).

Making a cage-free commitment is an important first step. Real impact for animals, however, comes when companies actively advance the transition and fulfil their commitments. Among the 1,400 cage-free egg pledges made by companies in Europe, over 800 have been successfully implemented¹. Renowned global companies, including **KFC, Subway, Barilla, Ferrero, Danone, Mars, Nestlé and Unilever**, have already achieved cage-free status for their eggs and/or egg products.



ⁱ Examples include:

- **For laying hens:** most of the EU's leading retailers, including all major French, German and Italian retailers, as well as a large number of retailers in Spain (e.g. **Mercadona, Alcampo**), and Poland (e.g. **Biedronka, Carrefour**); leading European food service companies such as **Elior, Sodexo, Compass Group, McDonald's, KFC, Burger King, Subway**; leading manufacturers such as **Barilla, Nestlé, Danone and Ferrero**.
- **For breeding sows:** **IKEA Italy, Domino's Pizza Europe**.
- **For meat rabbits:** several retailers such as **Carrefour France** and **Kaufland Germany**; food service company **Elior** and **Compass Group** in France; manufacturers **BreFood** and **Danone ELN** (baby food division).

ENDING THE CAGE AGE

Companies back cage-free legislation

In 2021, ten leading European food companies voiced their support for the ECI 'End the Cage Age' by sending a joint letter to the European Commission and Members of the European Parliament commending the aims of the initiative. These companies included ALDI Nord, Barilla Group, Fattoria Roberti (Italian egg producer), Ferrero, IKEA, Jamie Oliver Group, Le Groupement Les Mousquetaires (French retailer), Mondelēz International, Nestlé and Unilever. Many of these companies are already leading the way and driving the market with their own commitments and transitions to cage-free production. However, cages will only be eradicated for good through legislation.

"As a company that already uses 100% cage-free eggs for our food products in Europe, we know it's possible to phase out cages in a business-friendly way. We hope the 'End the Cage Age' Initiative will help improve welfare for all laying hens in the EU and lead to better welfare conditions for other farm animals in the future."

**Owen Bethell, Environmental Impact Lead,
Global Public Affairs, Nestlé**



Funding the transition

The European Commission's commitment to introduce legislative proposals to phase out cages also envisages the provision of financial aid for producers who need to make the transition, together with other supportive policy measures, including possible adjustments in trade policy.

Financial support for farmers is fundamental to the success of this transition. It is likely that a combination of funding sources will be needed to enable this, including public EU funds (in particular through the next Common Agricultural Policy (CAP) cycle), and national funding. Contributions from the various stakeholders in the food chain, including processors, retailers and consumers, will also be necessary to support this transition.

"The lack of leadership shown by the European Commission on this issue following its initial commitment has the potential to halt the voluntary cage-free transition that we are already seeing in many Member States. Producers are keenly waiting for direction on timescales, minimum system requirements (such as pen size and design) and how their transition to a cage-free future will be financially supported. We urge the next College of Commissioners to table legislative proposals to phase out cages as one of its first priorities."



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





LAYING HENS

The current situation

In the EU (2022 data), there are 390 million laying hens reared for egg production. While barren battery cages were banned in 2012, enriched cages (currently used for 40% of laying hens in Europe) provide only slightly more space and minimal enrichment, limiting the natural behaviours of hens.

Enriched cages, typically housing 40-80 hens, offer only 750 cm² per hen, restricting movement. 'Combination cages' and 'restricted access systems' are currently used, and marketed as "cage free", but are not suitable cage-free alternatives as they have doors and internal partitions, so although birds can roam when the doors are open, the system converts into a caged system when the doors are closed. In addition, the law lacks protection for millions of young chicks, pullets and breeders, some of which are kept in barren cages.

Scientific research emphasises that only true cage-free systems can satisfy the hens' behavioural needs.

Cage-free alternatives

Cage-free indoor alternatives for laying hens, called barn systems, are widespread in many EU Member States, constituting 37.7% of the total EU egg production⁷. These systems, including single-tier flat deck and multi-tier aviaries, are successfully implemented at scale. In order to deliver good welfare, aviaries need to be well designed, offer enough space, necessary resources, and essential features to facilitate free movement within the system, enable important behaviours and reduce the likelihood of injuriesⁱ. Cage-free systems with outdoor access (free-range and organic), making up 22.5% of the total EU production⁷, offer more opportunities for species-specific behaviours.

In response to evidence highlighting the impact of cages and responding to consumer demand, some European countries have introduced national bans on enriched cages, including Austria, Germany (from 2025, or 2028 in exceptional cases), Czech Republic (from 2027), France (effective, for new caged systems) and Wallonia in Belgium (from 2028).

Leaders in the cage-free transition

In countries without a national cage ban for laying hens, numerous proactive producers and food companies are voluntarily phasing out cages, with most aiming to complete their transition by 2025. Globally, over 2,500 commitments from retailers, manufacturers and food service companies to source only cage-free eggs or egg products have been made, with 1,200 already fulfilled¹.

In Europe, there are over 1,400 commitments, with 800 already fulfilled¹, including major companies like **Albert Heijn, Aldi Nord, Lidl, Auchan, Carrefour, Biedronka, Netto, REWE Group, Kaufland, KFC, Subway, Barilla, Ferrero, Danone, Mars, Nestlé and Unilever**. See page 12 for more information on companies' transition towards their cage-free goals and further examples of those that are already 100% cage-free in the EU.

Companies that have committed to source exclusively cage-free eggs, including leading manufacturer **Barilla** and retailers **Carrefour Group** and **Biedronka**, are featured below in this report.

Driven by consumer demand, the voluntary transition of these industry leaders has led to a substantial rise in cage-free egg production across the EU in recent years (from 47% to over 60% between 2017 and 2022).

ⁱ For further information, see Compassion's guidance on cage-free indoor housing: <https://www.compassioninfoodbusiness.com/media/7436221/additional-guidance-on-multi-tier-systems-for-laying-hens.pdf>

CAGE-FREE GAINS TRACTION AS COMPANIES DELIVER ON GOALS

In 2016, Compassion in World Farming launched **EggTrack** in response to a surge in food company commitments to shift to cage-free systems for laying hens. The voluntary commitments and continued progress of businesses in their cage-free transition clearly demonstrate that food companies are focused on providing a cage-free future for laying hens in Europe. **EggTrack** acts as a tool to monitor company progress towards their cage-free targets, promotes transparency and drives market transition towards cage-free productionⁱ.

44%
of EU commitments
tracked in 2023
achieved 100%
cage-free

87%
transition to
cage-free for
EU companies
in 2023

Retailers

81 of the 141

EU retailer commitments
have reached 100%
cage-free includingⁱⁱ



Manufacturers

19 of the 22

EU manufacturer
commitments have reached
100% cage-free including



Food service

26 of the 50

EU food service company
commitments have reached
100% cage-free includingⁱⁱⁱ



ⁱ **EggTrack** 2023 monitored the progress of 715 cage-free egg commitments across 444 companies worldwide. For 71% of these commitments, companies are publicly disclosing their progress towards achieving their 100% cage-free target.

ⁱⁱ Key: SE= Shell Eggs; EP= Egg Products

Albert Heijn Europe (SE, EP); **Aldi Nord** Europe (SE); **Auchan** France, Poland, Spain (SE); **Carrefour** Belgium, France, Italy, Spain (SE); **Casino** France (SE); **E.Leclerc** France (SE); **Lidl** 14 EU countries (SE and/or EP depending on countries) Austria, Belgium, Denmark, Finland, France, Germany, Italy, Luxembourg, Netherlands, Portugal, Romania, Slovenia, Spain, Sweden; **Metro AG Group** Poland, Austria, Germany, Italy, Netherlands (SE); **Kaufland** Germany (SE, EP), Poland (SE); **REWE Group** Austria, Germany (SE, EP); **Netto** Poland (SE); **Biedronka** Poland (SE, EP).

ⁱⁱⁱ **KFC** Europe; **Subway** Europe; **McDonald's** France, Netherlands; **flunch** France; **Bertrand Franchise** France; **Sodexo** Austria, Belgium, Germany, Luxembourg, Netherlands, Poland, Sweden; **CIRFOOD** Italy.

CASE STUDY

NO CAGES, NO BORDERS: A GLOBAL COMMITMENT TO CAGE-FREE

"Barilla endeavours to ensure that all suppliers of raw materials of animal origin comply not just with legal requirements, but also with the highest animal welfare standards and criteria and we proudly achieved our global cage-free goal in 2019."

"Compassion has been a steadfast ally, encouraging us to elevate our standards, exemplified by extending our cage-free commitment to combi systems. A crucial step forward in supporting and advancing sector-wide transformation would be the introduction of legislation by the European Commission to enforce a ban on cages."



Leonardo Mirone,
ESG Leader Sourcing Chains,
Barilla



© Barilla Group

Barilla Group, headquartered in Parma, Italy, is a family-run business with a global footprint extending to over 100 countries. The company distributes two million tonnes of pasta, pasta sauces and bakery products every year. Among its portfolio are iconic brands such as Barilla, Mulino Bianco, Pan di Stelle, Pavesi, Harrys and Wasa.

In 2012, Barilla received Compassion in World Farming's Good Egg Award for its decision to source exclusively **cage-free egg products** across Europe, and began its shift away from cages, prioritising sourcing from producers who raise hens in barns. In 2014, they extended this commitment to their global operations, deciding to phase out cages from their global supply by 2020.

Remarkably, this transition reached **global completion in 2019**, one year ahead of target. Barilla also committed to working with suppliers to **exclude combination cages and restricted access systems** from its supply chain by 2023.

In 2022, Barilla acquired new operations in Canada temporarily adjusting its cage-free percentage down to 99.9%. Nevertheless, the company is actively in the process of transitioning these acquired systems to achieve again 100% cage-free sourcing.

Barilla relies on egg products as a key ingredient for its baked goods and egg pasta, purchasing 20,258 tonnes of eggs and egg products each year.

2 MILLION hens already cage-free

In parallel to its cage-free egg transition, Barilla is working on reducing egg content in some of its recipes. In 2020, they launched three biscuit lines in Italy with lower egg content and higher plant-based proteins. This commitment resulted in an **8% global reduction in egg usage** and a **14% decrease in the number of hens reared**, earning Barilla Compassion's Special Recognition Award in 2021.

**READ MORE
ABOUT BARILLA**

CASE STUDY

'ACT FOR FOOD' PROGRAMME PLEDGES CAGE-FREE EGGS

"Carrefour's cage-free eggs initiative is part of our approach to protect the welfare of farm animals, and its goal is to support customers in making the right food choices."

"That is why we also support the introduction of an EU-wide ban on cages for laying hens, following on from the ECI 'End the Cage Age'."

Carrefour Poland



© Compassion in World Farming

Carrefour Group is a French company and leading global retailer with nearly 14,350 stores, operating in over 30 countries worldwide including France, Spain, Italy, Poland, Belgium, Romania, Brazil and Argentina.

In 2018, Carrefour Group committed to source exclusively cage-free eggs for its own brand and branded shell eggs at a global level by 2025 (2028 for branded shell eggs in Argentina and Brazil). This decision was made in response to consumer demand as well as animal welfare, food safety, product origin and farmer welfare concerns.

Carrefour is progressing at pace towards its cage-free targets and is now now 66% cage-free globally on its own-brand shell eggs.

66%

cage-free own-brand shell eggs globally

In the **EU**, the group also extended its 2025 cage-free commitment to own-brand egg products, with an extended deadline of 2028 for Spain, Italy and Romania. In 2022, **60% of its own-brand egg products** sales were made from **cage-free** eggs in the EU.

In **France**, Carrefour is already 72% cage-free on its own-brand shell eggs, with 53% of those eggs coming from free-range systems and 19% coming from indoor barn systems with improved standards, including the provision of **wintergardens** to allow the expression of species-specific behaviours, such as foraging and dustbathing. Carrefour France was

awarded Compassion in World Farming's Good Egg Award in 2019 for these commitments.

Carrefour Group also has a global commitment to **ban cages for quail and rabbits** (for raw products) by 2025. In France, all its own-brand quail eggs are already sourced from cage-free aviaries where quail are free to fly, with reduced stocking densities, enrichments and natural light. Farmers report a more positive and pleasant working environment.

In **Poland**, Carrefour became the **first retailer to receive a Good Egg Award** in 2023, for its transparency and continuous progress towards its cage-free target, rejection of combination cages and restricted access systems and its public support for the EU cage ban.

**READ MORE
ABOUT CARREFOUR**

CASE STUDY



LEADING THE WAY ON CAGE-FREE EGGS IN POLAND

"We strive for continuous improvement, also around our animal welfare initiatives, and this is detailed in our annual Sustainability Reports. For this reason, we put much effort to withdraw caged eggs four years ahead of our target."

Karolina Błońska,
Senior Sustainability Manager,
Biedronka



© Jeronimo Martins Polska S. A.

Jeronimo Martins Polska S. A. is the owner of Biedronka, the largest retail chain in Poland with 3,569 stores located in more than 1,100 towns and cities. Biedronka works with more than 1,700 suppliers (93% in Poland) and is the largest private employer in Poland and second largest Polish company.

In 2018, Biedronka committed to source only cage-free shell eggs (own brand and branded) and egg products (own brand) by 2025.

In 2021, four years ahead of its target, Biedronka reached 100% cage-free for its own-brand and branded shell eggs.

In 2022, three years ahead of its target, the company reached 100% cage-free for its own brand egg products.

100%
**cage-free shell eggs
and own-brand egg
products**

At present, Biedronka partners with over ten packing plants and over **160 laying hen farmers**.

Of these farms: 12% supply organic eggs, 43% supply free-range eggs and 45% supply eggs

from barn systems. Biedronka works hard to maintain the availability of its cage-free eggs by approving new suppliers who meet its cage-free requirements, and closely monitors the competitiveness of its prices.

Biedronka's marketing initiatives include social media and print advertisements, informing customers about the company's move away from using cages and providing insights into the reasons behind this important decision.

**READ MORE
ABOUT BIEDRONKA**



Sow in a farrowing crate



Outdoor farrowing sow

SOWS

The current situation

In the EU, there are 10.9 million breeding sows, producing over 250 million piglets annually⁶. Approximately 96.2% of European breeding sows are confined in cages for about 40% of their productive lifeⁱ. Sow stalls, partially banned in Europe since 2013, are still widely used for the first four weeks of pregnancy before sows are group housed for the remainder of their 114-day gestation. Sow stalls severely restrict movement and hinder natural behaviours. One week prior to the expected farrowing date, sows are moved into a farrowing crate where they are confined until their piglets are weaned, and where they are unable to turn around and interact appropriately with their piglets.

Cage-free alternatives

Cage-free alternatives for breeding sows are already successfully implemented. In indoor sow stall-free systems, sows are accommodated in group housing throughout pregnancy, reducing aggression through strategies such as increased space, visual barriers, bedding, and the provision of manipulable materialsⁱⁱ. For several years, group housing has proven successful in countries that have prohibited sow stalls, including the United Kingdom (since 1999), and Sweden (since 1994). Meanwhile other countries are phasing out the use of sow stalls, such as Germany (from 2028).

A ban on cages for farrowing sows would prohibit routine crating, after an initial training period, with temporary confinement permitted only for exceptional cases. In alternative indoor farrowing systems, sows are housed in farrowing pens, with or without the potential for temporary confinement. Pens allow for nest building behaviour and facilitate sow-piglet interactions.

Well-designed systems minimise the risk of piglet crushing, by providing more space and incorporating key features such as anti-crushing bars and sloped walls, enclosed creep areas for piglets, as well as separate functional areas for nesting, feeding and dungingⁱⁱⁱ. Since 1987, Sweden has successfully eliminated farrowing crates, while Finland is actively promoting the voluntary phase out of conventional crates through subsidies, leading to 40% of sows farrowing in temporary crating systems with a maximum of five days confinement. Austria and Germany have banned farrowing crates from 2033 and 2035 respectively, but will allow for temporary confinement for six (Austria) and five (Germany) days.

Outdoor systems, with well-designed ranges, also allow for the successful cage-free management of breeding sows.

Leaders in the cage-free transition

In countries without a national ban on sow stalls or farrowing crates, several progressive producers and food companies have chosen to voluntarily phase out cages, successfully transitioning to cage-free systems. Notable examples of companies committed to phasing out sow stalls and farrowing crates from their supply chain include IKEA Italy and Domino's Pizza Europe.

This report showcases below three companies transitioning to, or already operating, cage-free systems for sows: Italian pig producer **Fumagalli**, Dutch pig producer **Zonvarken**, and food manufacturer **The Compleat Food Group (TCFG)**.

ⁱA typical sow's productive life lasts 2.2 years, based on a median parity of 5 litters and an average of 2.3 litters/sow/year.

ⁱⁱFor further information, see Compassion's guidance on group housing of dry sows, <https://www.compassioninfoodbusiness.com/media/5823244/indoor-housing-systems-for-dry-sows-practical-options.pdf>

ⁱⁱⁱFor further information, see Compassion's guidance on free-farrowing pen design: https://www.compassioninfoodbusiness.com/media/7453526/infographic_free-farrowing-pen-key-features-for-success-march-2023.pdf

CASE STUDY



LEADERS IN CAGE-FREE PIG FARMING IN ITALY

"Animal welfare has consistently been a fundamental part of our development and investment strategies. Demonstrating our commitment to a cage-free future, we've voluntarily embraced sow stall-free and free farrowing systems, expanding opportunities for retailers across Europe to access cage-free continental pork products. As pioneers in Italy's cage-free transition, we urge legislators to endorse our efforts by implementing a comprehensive ban on cages."



Pietro Pizzagalli,
General Director
Fumagalli



© Fumagalli

Fumagalli is an Italian family-run pig producer, owning **34 farms** and supplying cage-free pig meat across Europe to retailers such as Waitrose (UK), Esselunga (Italy), Dagab (Sweden) and through its online platform.

Fumagalli has always been at the forefront of the Italian pig sector when it comes to animal welfare, progressively replacing sow stalls and farrowing crates with cage-free alternatives. It also provides all its meat pigs with straw bedding and has phased out the practices of teeth clipping and tail docking in all its farms.

In 2015, Fumagalli initiated its transition to alternative farrowing systems and in 2023, **60% of its sows were free farrowing**. The company has innovatively designed its own farrowing pens, featuring a footprint ranging from

6.5m² – 7.5m²; separate functional areas for feeding, resting, nesting and dunging; anti-crushing features; an attractive creep area for the piglets; and 50% solid flooring with straw and paper as nesting substrate, for added comfort and environmental enrichment.

After an initial learning period where sows were temporarily confined for a maximum of three days around farrowing, the system is now successfully operated under a zero-confinement policy, meaning that farrowing sows are never crated.

In its breeding farms, **80% of the dry sows are successfully kept in groups** throughout their pregnancy (inclusive of the observation period) and are provided with straw for bedding and enrichment - meaning that sow

stalls are never used at any time.

Fumagalli already supplies cage-free pig meat to retailers and **aims to achieve its cage-free transition for its entire production by 2027.**

Set to benefit

3,500

breeding sows per year

While costs of its higher welfare production are approximately 30% higher than standard Italian production, Fumagalli asserts that retailers throughout Europe are unequivocally supportive of its approach.

**READ MORE
ABOUT FUMAGALLI**

CASE STUDY



CHAMPIONING HIGHER WELFARE CONTINENTAL PIG MEAT

"Through collaborative efforts with our supply partners, farmers, customers, industry experts and NGOs, we have successfully led the only pig welfare standard of its kind for over five years. Our tiered approach, accommodating diverse production systems, enables us to incentivise farmers to consistently improve their standards. This reflects our ambition to establish progressively higher standards in the pig sector, promoting cage-free production and advanced animal welfare across different regions in Europe."

Maria Murillo-Mariscal,
Group Head of Farm Assurance,
TCFG



© The Compleat Food Group

Since 2000, The Compleat Food Group (TCFG), a UK-based supplier of continental meat to retailers and food service companies, has been implementing higher welfare practices in the pig industry throughout its suppliers in continental Europe, including Italy, Spain, France, Germany and the Netherlands.

In 2018, it set up a continuous improvement framework for its supply chain across Europe, enhancing traceability and allowing for product differentiation through its **European Farm Partnership (EFP) Pig Welfare Standard**,

featuring Gold, Silver and Bronze levels.

The 'Gold' level of the EFP scheme requires suppliers to be 100% cage-free (i.e. no farrowing crates and no sow stalls), as well as providing more space and bedding to all animals, and not performing any mutilations (teeth clipping, tail docking, castration). Suppliers on their journey towards the 'Gold' level (i.e. trials underway) can enter the 'Silver' level of the scheme.

Three of its pig meat suppliers, **Fumagalli** (Italy), **Madeo** (Italy) and **Marcos** (Spain), have received Compassion's Good Pig Award for

their higher welfare commitments, enabling leading UK retailers to make cage-free commitments for their continental meat.

TCFG is dedicated to improving pig welfare through collaboration and incentivisation of its European suppliers.

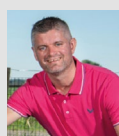
20,000
sows are already
cage-free

READ MORE ABOUT THE
COMPLEAT FOOD GROUP

CASE STUDY

A CAGE-FREE CONCEPT FOR HAPPY PIGS, HAPPY FARMERS

"My goal is to develop Zonvarken to give other farmers the opportunity to join us. Our cage-free, higher welfare system for pigs has been carefully designed to make a huge difference for the animals, but also for the farmers who are happy and proud of their work again."



Jeroen Koks,
Co-founder,
Coöperatie Zonvarken



© Zonvarken

Zonvarken is a small Dutch cooperative of pig farmers, founded in 2018 with the aim of introducing a new concept of pig farming that can benefit pig welfare, farmers' wellbeing and the environment.

The model is economically viable thanks to long-term contracts secured with leading Dutch retailer, Jumbo. Zonvarken products are labelled with the maximum 3-star rating under the Dutch 'Beter Leven' animal welfare certification scheme.

Sows bred on Zonvarken farms are never confined, neither in sow stalls nor in farrowing crates. When they are not with their piglets, dry sows are kept in groups in straw-bedded pens with access to the outdoors, including a wallowing area, and remain group housed until just

before farrowing. Successful group housing without aggression issues is possible thanks to a selection for calmer sows and the provision of an enriched environment.

100%
cage-free sows

Zonvarken sows farrow in spacious free-farrowing pens with 2-3 sows per pen, with plenty of straw bedding on solid floors, facilitating their highly motivated nest building instincts, and access to an outdoor yard.

Successful free farrowing, as demonstrated by low pre-weaning piglet mortality, has resulted from a number of measures including

the choice of non hyper-prolific sows with good maternal abilities.

Piglets stay with their mother for a period of eight weeks (standard weaning age is 3-4 weeks), ensuring they have access to high quality milk, which minimises weight loss. They are then kept in the same groups until slaughter.

This innovative concept has several proven benefits, including improved animal health and welfare, profitable income generated within normal working hours, and a lower environmental impact, thanks to a series of measures such as feeding pigs with human food waste and an innovative manure separation system.

**READ MORE
ABOUT ZONVARKEN**



Meat rabbits in cages



Meat rabbits in a large pen

RABBITS

The current situation

Approximately 76.8 million rabbits⁴ are slaughtered in the EU each year, with roughly 94% of those, including breeding does, kept in cages⁵. Unlike laying hens, there is no specific legislation to protect the welfare of meat rabbits, allowing the use of barren cages. In these cages, rabbits are confined in small groups on wire mesh floors, with less than the area of an A4 sheet of paper each (500–600cm²), severely restricting movement and natural behaviours. Breeding rabbits are individually housed in wire cages, impacting doe-kit interactions. Some farms use 'enriched' cages, but space limitations persist, hindering freedom of movement and natural behaviours. Despite a 2017 European Parliament **report** recommending cage-free alternatives, no progress has been made in introducing legislation to protect farmed rabbits.

Cage-free alternatives

Cage-free alternatives for meat rabbits have already been implemented at scale, consisting of park or pen systems, providing larger enclosures without height restrictions. These systems offer more space (800–1,200cm² per rabbit), along with comfortable non-wired flooring and enrichment, allowing for movement, comfortable lying and the expression of essential species-specific behaviours.

Successful adoption of cage-free systems has been achieved in countries implementing bans on cages

for meat rabbits, such as Austria (since 2012) and Belgium (since 2016). Other nations are also shifting away from barren cage systems (e.g., Netherlands since 2016, Germany from 2025). Belgium is also set to ban cages for breeding does from 2025.

Leaders in the cage-free transition

In countries without a national cage ban for meat rabbits, numerous proactive producers and food companies are voluntarily phasing out cages, successfully transitioning to cage-free systems.

In France, leading producers have adopted cage-free pen systems, resulting in an estimated increase in cage-free rabbit production from 1% to 11% of the total production between 2015 and 2022⁹.

Since the launch of Compassion's Good Rabbit Awardⁱ in 2015, 27 companies, including **Carrefour France, Système U, Colruyt Belgique, Danone ELN, BreFood, Terrena Nouvelle Agriculture, LDC Nature d'Éleveurs, Elior France** and **Compass Group France**, have been recognised for their commitments to use cage-free systems for meat rabbits in their supply chain, **set to benefit over 9 million rabbits annually**.

Four companies developing innovative cage-free systems for meat rabbits are featured below in this report and include: German retailer **Kaufland**, German manufacturer **BreFood**, French producer **ALPM** for the brand **Lapin & Bien**, and French company **ADM**.

ⁱ For more information about Compassion's Good Rabbit Award: <https://www.compassioninfoodbusiness.com/awards/good-rabbit-award/>

CASE STUDY

BEYOND BARS: MAKING CAGE FREE A REALITY FOR RABBITS

"Kaufland plays a pioneering role in the German food market, and we campaign for improved animal welfare in conventional livestock farming. For us, responsible rearing means enabling animals to lead a more species-appropriate life – one that doesn't involve cages."

"We are proud of the rabbit systems we have developed. Even before there were legal minimum requirements nationally or across Europe, we initiated a pilot project to promote a cage-free form of production which has now developed into a new benchmark."

Anna Spiess,
Purchasing CSR/Animal Welfare, Kaufland



© Kaufland

Kaufland is an international retail company with over 1,500 stores in eight countries (Germany, Poland, Romania, Czech Republic, Slovakia, Bulgaria, Croatia and the Republic of Moldova). The company is part of the Schwarz Group, one of the leading food retail companies in Germany and Europe.

Kaufland has a significant commitment to farm animal welfare and was one of the first German retailers to source **exclusively cage-free eggs and egg products**, for which it received Compassion in World Farming's Good Egg Award in 2013 and 2015. It is now working closely with its suppliers to achieve 100% cage-free status in other countries by 2025.

Since 2008, Kaufland has been dedicated to developing alternative cage-free housing systems for rabbits, with the goal of enhancing animal welfare and streamlining operational processes for farmers.

In 2009, Kaufland became the first German retailer with 100% of its fresh rabbit meat sourced from cage-free pen systems, followed by 100% of its frozen rabbit meat in 2011. It received a Good Rabbit Commendation from Compassion in World Farming in 2015 for these outstanding achievements.

100%

cage-free rabbit meat

In close collaboration with its supplier **Bauer Kaninchen**, Kaufland developed a new cage-free pen system, where meat rabbits are provided with ample space (**1,200 cm² per rabbit**), without any height restriction, comfortable plastic flooring, and enrichment including platforms, hiding places and gnawing substrates, to allow rabbits to move around, jump, explore, hide and gnaw.

This pioneering work was awarded with the Best Retailer Innovation Award in 2013 by Compassion in World Farming and started a **ripple effect across Europe**, with other rabbit producers soon transitioning to cage-free pen systems.

Kaufland's leadership in the cage-free transition has been demonstrated once again more recently, as it became the first German retailer able to meet, for 99% of its frozen rabbit meat products, the Level 4 of the certification scheme *Haltungsform*, which requires permanent access to an **outdoor run**.

Kaufland is continuously evolving its pen systems for rabbits and is currently trialling further innovations with its supplier Bauer Kaninchen in line with *Haltungsform* Level 3 standards.

**READ MORE
ABOUT KAUF LAND**



CASE STUDY

BREAKING THE MOULD: REVOLUTIONISING RABBIT FARMING

"We are proud to be cage-free and to partner with retailers who are just as passionate about animal welfare as we are, putting it at the heart of our joint business practices. We believe this is the future of the industry."

"We fully support the call for a legislative ban on cages in Europe, which is urgently needed to create a level playing field and to raise the bar for rabbit welfare."



**Ricarda-Maria
Heidmeyer,**
General Manager,
BreFood



© BreFood

BreFood is a German wholesaler, supplying cage-free rabbit meat to renowned retailers across Germany such as Kaufland, Edeka, Netto, Globus and others. Since 2009, BreFood has stood out as a leader in cage-free rabbit farming, holding 70% of the market share and producing 1,400 tonnes of rabbit meat a year.

100%

cage-free rabbit meat

For more than a decade, rabbit welfare has been at the centre of its business model. It has collaborated with universities, certification institutes and animal welfare organisations to introduce

a ground-reared system that has restored the trust of consumers and the industry when it comes to rabbit meat.

BreFood has worked with its supplier in China to develop cage-free systems for rabbits, for which it received Compassion's prestigious Rabbit Innovation Award in 2014. In 2022, it further evolved its system with the addition of a **wintergarden** (enriched outdoor patio) on some of its supplying farms.

Rabbits are reared in spacious **(1,250 cm² per rabbit)** enriched enclosures featuring soft bamboo flooring, in groups of up to 80 animals, with natural light and a range of enrichments including large platforms, hiding tubes, gnawing substrates and hay racks.

BreFood reports a 2-3% reduction in mortality rate with the transition from cages to cage-free pen systems, and there is minimal use of antibiotics attributed to good hygiene standards.

**Benefiting
1.2 MILLION
rabbits per year**

BreFood conveys its commitment to higher welfare through on-pack labels and its website and promotes its 'Rabbit Care' initiative to educate consumers to make informed purchases.

**READ MORE
ABOUT BREFOOD**

CASE STUDY

HIGHER WELFARE RABBIT MEETS CONSUMER DEMAND

"Our project began when consumer research highlighted that society was beginning to object to how rabbits were farmed. We could see cage-free was the future of the market and didn't want to wait until we were obliged to make the shift."

"We developed the Lapin & Bien brand based on a more humane rearing system – a better way to farm that is also economically viable. We then sell at the right price to customers looking for high-value and high-quality products. It gives consumers more choices, particularly at a time of increased living costs - there are organic and free-range options but there is also this higher welfare product."



Matthieu Loeul,
ALPM President



© Compassion in World Farming

Lapin & Bien is a brand of Eleveurs et Bien, a partnership launched in 2019 between three major players representing around 60% of the French rabbit meat industry – CPLB Groupe CAVAC, Terrena and LOEUL & PIRIOT.

Loeul & Pirirot is the leading French rabbit processor and sources from 200 partnering farms. Lapin & Bien currently represents 10% of their total volumes, with almost 750,000 rabbits slaughtered per year.

750,000
cage-free rabbits
per year

Cage-free products sold under the Lapin & Bien brand are available at all French retailers. Eleveurs et Bien

is actively pursuing the development of retailers' own-brand ranges, engaging in educational initiatives around the competitive advantages associated with higher welfare and superior quality products.

Lapin & Bien won Compassion in World Farming's Rabbit Innovation Award 2019 for its cage-free pen system. This system includes '**day quarters**', without any height restriction, and burrow-style '**night quarters**' allowing rabbits to hide and feel safe.

The pens, measuring at least 10m², provide ample space, with **800cm² per rabbit**, and opportunities to express species-specific behaviours, thanks to the provision of platforms, enrichment such as

compressed hay blocks to gnaw on, and natural lighting or LED lighting with a dimmer. Additional features, such as an easily accessible circular feed dispenser and easy-clean plastic slatted floors have been developed with both welfare and ease of management in mind.

After transitioning to cage-free systems, Lapin & Bien managed to accommodate nearly the same number of rabbits as before, which **benefitted production costs**.

Farmers have expressed satisfaction in seeing their rabbits engage in more natural behaviours.

**READ MORE ABOUT
LAPIN ET BIEN**

CASE STUDY



CAGE-FREE RABBIT FARMING: BETTER LIVES, LOWER COSTS

"Our cage-free system prioritises the health and natural behaviours of rabbits, ensuring the suitability of their habitat and the nutritional benefits of their feed. We are very conscious of the evolving consumer expectations around this."

"The system also makes it easier for farmers seeking to enter the market, as it incurs lower costs compared to traditional cage systems."



Chantal Davoust,
Rabbit Nutrition Expert,
ADM



© ADM

ADM (previously WISIUM) is a global leader in human and animal nutrition. It is a French service provider for producers of various species such as rabbits, offering farming system concepts, feed, nutrition and health consultancy. ADM has a market share of 30% for premixes sales for rabbits in France.

Since 2018, ADM has collaborated with its customers in the rabbit sector to develop an innovative alternative to caged housing, focusing on enriching the rabbits' environment and promoting natural behaviours, notably through the provision of a **wintergarden** (covered outdoor area).

ADM's cage-free system includes large pens accommodating 100 rabbits each, along with wintergardens, platforms,

gnawing substrates, hiding tubes, more comfortable plastic-slatted floors, and provision of natural light and ventilation. There is **1,144cm² of space per rabbit**, so there is more room for them to stand up, jump and move around freely, and their feed is enriched with nutritional additives.

ADM's cage-free system is currently operational in two farms in France. There are plans for 10 new sheds to be built or converted by the end of 2025, with the potential to increase the total production to 150,000 rabbits per year.

Set to benefit

150,000
rabbits per year

Advantages for rabbit producers include **lower investment costs** (around €400 per doe, compared with €800 – €1000 for a caged system), **increased production capacity** (despite a higher space allowance per rabbit, thanks to an optimised space use in the shed), and **better working conditions** (easier observation of rabbits, natural lighting, raised pens for easier handling of animals).

ADM has received various awards for its innovative cage-free system WELLAP, including Compassion in World Farming's 2022 Rabbit Innovation Award, the Sommet d'Or and INNOV' SPACE 2* in 2020.

**READ MORE
ABOUT ADM**

CONCLUSION AND RECOMMENDATIONS



The past decade has seen an unprecedented surge in cage-free commitments from leading food companies globally, with over 2,400 cage-free egg pledges made since 2015, including 1,300 in Europeⁱ.

Responding to consumer demand, businesses are swiftly progressing towards their cage-free targets, with approximately half already completing their transition. Notably, those embracing cage-free production are not only affirming the commercial viability of their investment but also experiencing benefits such as reduced antibiotic use, improved working conditions and better human-animal relationships. Producers investing in cage-free systems are securing contracts with their clients, often retailers, to ensure the long-term viability of their investment. Meanwhile, food companies are engaging consumers in the cage-free journey through their marketing and communications.

The absence of a European legislative framework to phase out cages does, however, risk stalling progress. The commitment of the European Commission in 2021 to introduce a legislative proposal by 2023 to ban the use of cages in the EU is overdue and eagerly anticipated. Many producers are waiting for further details on the timelines, conditions and financial support accompanying such

legislation before going ahead with new investments, causing a potential slowdown in voluntary cage-free transitions.

Compassion in World Farming strongly urges the European Commission to fulfil its commitment by promptly presenting a comprehensive legislative proposal to phase out cages for all farmed species covered in the 'End the Cage Age' ECI. It is crucial that the new Commission tables this proposal as a priority from the start of the new mandate. This must incorporate ambitious measures, in line with consumer demand, and implement financial support mechanisms to facilitate producers' transition to cage-free systems within reasonable timeframes. Furthermore, consistent rules should be applied to imported products to ensure a level playing field and avoid European producers potentially being undercut by cheaper, lower-standard imports.

Europe holds a unique opportunity to show genuine leadership in farm animal welfare by permanently banning cages. Producers and food companies are ready for it, consumers are increasingly demanding it, citizens want it, and scientists are calling for it. **Now is the time to turn this opportunity into a reality.**

ⁱOver 1,400 cage-free commitments for laying hens to date in Europe, including over 1,300 since 2015.¹

PROGRESSIVE MEMBER STATES LEADING THE WAY

Member States with national bans on cages or commitments to phase them out:

	Laying Hens	Sows	Rabbits
Austria	All caged systems banned since 2020.	Dry sows: sow stalls limited to 10 days since 2013. Farrowing sows: farrowing crates to be banned with temporary crating limited to 6 days from 2033.	Cages for meat rabbits banned since 2012.
Belgium	All caged systems to be banned in Wallonia ¹ by 2028.		Cages for meat rabbits banned since 2016 and cages for does to be banned from 2025.
Czech Republic	All caged systems to be banned from 2027.		
Denmark	<i>88.8% egg production in cage-free systems.</i>	Dry sows: sow stalls limited to 3 days (for individuals based on problems with aggression) in new buildings since 2015 and in all buildings from 2035 (inclusive of the observation period ²).	
Finland		<i>Temporary confinement of farrowing sows up to 5 days for 40% of sows.</i>	
France	Partial ban: Installation of new caged systems banned since 2018.		
Germany	All caged systems to be banned from 2026 ³ . <i>96.2% egg production is cage-free.</i>	Dry sows: sow stalls to be banned by 2028 (inclusive of the observation period ²). Farrowing sows: farrowing crates to be banned with temporary crating limited to 5 days from 2035.	Barren cages to be banned from 2025 ⁴ .
Luxembourg	<i>100% egg production is cage-free.</i>		
Netherlands	<i>89.9% egg production is cage-free.</i>	Dry sows: sow stalls limited to 4 days since 2013.	Barren cages banned since 2016 ² . <i>60-70% of meat rabbits are cage-free.</i>
Slovenia	<i>82.8% egg production in cage-free systems.</i>		
Sweden	<i>97.3% egg production in cage-free systems.</i>	Dry sows: sow stalls banned since 1994 (inclusive of the observation period ²) Farrowing sows: farrowing crates banned since 1987; no routine crating permitted.	

Significant cage-free production in Member States without a legislative ban is indicated in italic.

¹ One of the three regions in Belgium home to approx. 1/3 of the population

² Observation period: period (typically 4 weeks) from weaning until pregnancy diagnosis

³ Or 2028 in exceptional cases

⁴ Enriched cages still permitted

APPENDIX II

Overwhelming scientific evidence supporting the need to end caged systems

The urgent need to eliminate caged systems is backed by robust scientific evidence, including the latest Scientific Opinions from the European Food Safety Authority (EFSA):

- While barren battery **cages for laying hens** have been banned in Europe since 2012, so-called 'enriched cages' are still allowed and are used to rear nearly 40% of the European laying hen flock. In these cages, insufficient space (750cm²/hen, around the size of an A4 sheet of paper), competition for resources and inappropriate design (e.g. low perches, inadequate head height, foraging and dustbathing provision), mean the behavioural needs of the hens are largely not met¹⁰. This has been acknowledged in the recent EFSA Scientific Opinion on the welfare of laying hens which has recommended that cages should no longer be used¹¹.
 - While the duration in **sow stalls** has been reduced in Europe since 2013, they are still permitted for the first 4 weeks after insemination, and **farrowing crates** are still used during the whole farrowing and lactation period (i.e. from one week before the expected time of farrowing and until weaning of the piglets, which typically occurs at 21-28 days of age, so in total 4-5 weeks). Sows therefore spend about 40% of their productive life in stalls and crates, leading to severe behavioural restriction as they are unable to turn around, walk, nest build or bond adequately with their piglets.
- This results in frustration, stereotypic behaviours (e.g. repetitive biting of the metal bars) and depression. In its 2022 Scientific Opinion on the welfare of pigs, EFSA recommended that sows should not be kept in sow stalls or farrowing crates¹².
- **Rabbits** are predominantly reared in **cages**, preventing them from stretching fully, hiding, standing on their hind legs when performing vigilance behaviour, or even doing more than one hop due to the limited space available. EFSA highlighted the detrimental impacts of conventional cages on rabbit welfare in its 2020 Scientific Opinion on the welfare of farmed rabbits¹³, while enriched cages were given a poor welfare score for growing rabbits.
 - The vast majority of **laying quail** are reared in **cages**¹⁴, while most **ducks** used in foie gras production spend the last two weeks of their lives in **cages**¹⁴. These birds lack adequate space to move around, develop posture and gait abnormalities, wing lesions and sores on their feet, and cannot perform important behaviours such as preening, or prelaying and nesting behaviours (layer quail). In its most recent Scientific Opinion on the welfare of ducks, geese and quail (2023), EFSA recommended that caged systems should be avoided¹⁴.



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