

2021

THE HUMANE LEAGUE   
UNITED KINGDOM

STATE OF THE CHICKEN INDUSTRY

*changing the face of the chicken industry*

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## KEY POINTS

- Since the development of the Better Chicken Commitment (BCC), commitments to higher chicken welfare are on an **UPWARDS TREND**
- Over **210 COMPANIES** in the UK and EU have committed to improving chicken welfare
- **A QUARTER OF THE UK CHICKEN SUPPLY IS NOW COMMITTED**
- The UK supermarket sector is lagging behind, while big progress has been made in the restaurant, foodservice, meal kit and manufacturing sectors
- The BCC is backed by the latest science, poultry producers and consumers. Recent research in 2020 has highlighted just how crucial the change to breed is for the welfare of the birds
- **HIGHER WELFARE CHICKEN & REDUCED CONSUMPTION IS OUR FUTURE**



# INTRODUCTION

Since the 1950s, the broiler chicken industry has intensified at every turn. This has meant the domestic chicken - once eaten as a special treat no more than once a week - is now the most farmed and consumed land animal in the UK and globally. Raising and killing over 1 billion chickens for their meat every year, the UK is the second-highest producer of chickens in Europe, behind Poland<sup>1</sup>. For every second that goes by, 35 chickens are slaughtered here<sup>2</sup>. Chickens have been made the poster child of factory farming.

## BREAKING THE STATUS QUO

Until recently, the trend of intensification showed no signs of slowing. However, in 2017, leading animal protection groups from across Europe jointly developed a new initiative: the Better Chicken Commitment (BCC). This set of higher welfare criteria aims to drastically reduce the suffering of chickens by giving more space, natural light, enrichment, less painful slaughter methods, and ensuring third party auditing. Crucially, the BCC prohibits the use of fast-growing breeds, meaning chickens can no longer be bred to grow at such an extreme pace that it causes suffering and numerous health conditions as they can become trapped by their own body weight.

## THIS REPORT

This report sets out to examine the progress made in all sectors of the food industry in advancing broiler chicken welfare, against the backdrop of the history of chicken production. It demonstrates that while broiler chickens are one of the most intensively farmed land animals in the UK, continuing on the current trajectory should bring about a tipping point in which we're able to move beyond the age of the frankenchicken - which some scientists are calling the 'geological age of the chicken'<sup>3,4</sup>, remarking that chickens "symbolize the transformation of the biosphere to fit evolving human consumption patterns."

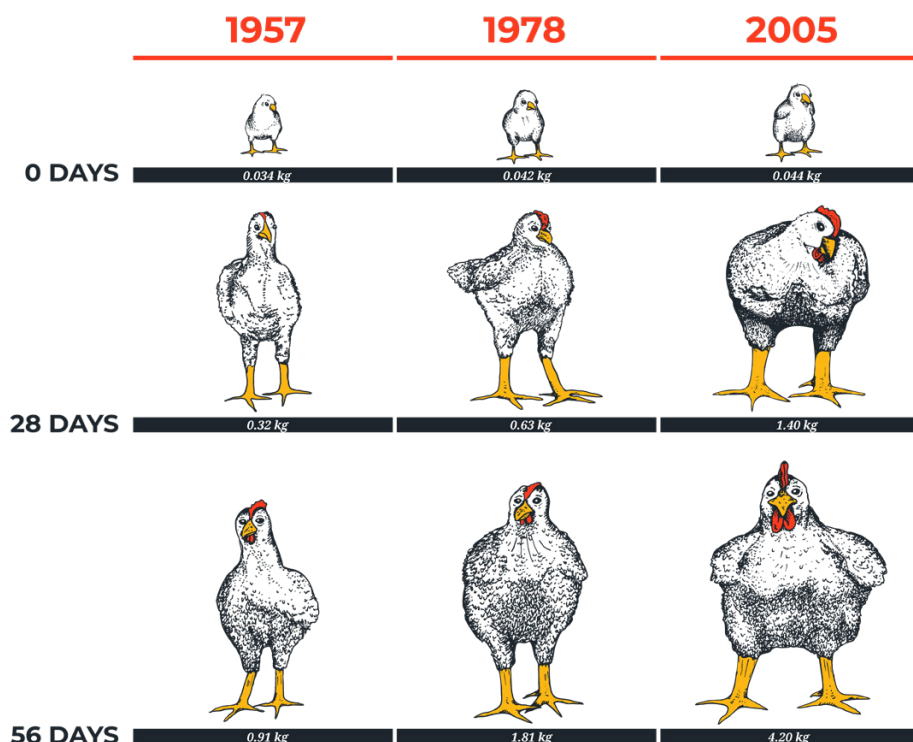


# THE CHICKEN INDUSTRY TO DATE

## HOW IT STARTED

The development of the current fast-growing breeds of chicken which dominate the industry globally can be traced back to 1947, when the United States Department of Agriculture organised the 'Chicken of Tomorrow' contest. Its aim was to engage farmers to create "one bird chunky enough for the whole family—a chicken with breast meat so thick you can carve it into steaks, with drumsticks that contain a minimum of bone buried in layers of juicy dark meat, all costing less instead of more<sup>5</sup>." The contest resulted in a race to 'improve' breeds and get as much meat on the bone - and therefore profit - as possible. And so, through careful genetic selection and crossbreeding, what was once a lean, leggy bird became oversized and top-heavy. Throughout this, there was little to no regard towards the impact on the health and wellbeing of the bird.

Globally there are just three breeds of chicken used for all standard intensive farming: Ross 308, 708 (owned by Aviagen) and Cobb 500 (owned by Cobb, a subsidiary of Tyson). Now, 70% of all broilers slaughtered in the EU are from the Aviagen Ross breeds<sup>6</sup>. This is the same in the UK where Aviagen reported producing birds for 70 - 80% of the market and Cobb 20 - 30%<sup>7</sup>.



Source : University of Alberta Meat Control

### GENETIC SELECTION OF CHICKENS SINCE THE 1950S

- 400% increase in growth rate<sup>8</sup>
- Market weight achieved in 60% less time<sup>8</sup>
- Breast muscle increased by two-thirds<sup>8</sup>
- From egg to slaughter in 35 days<sup>9</sup>

### WHAT ARE THE ISSUES WITH FAST GROWTH?

Along with cramped conditions, intensive chicken breeds are the source of the majority of welfare issues encountered in the industry. This results in higher levels of mortality where chickens die before even reaching the slaughterhouse.

#### LAMENESS

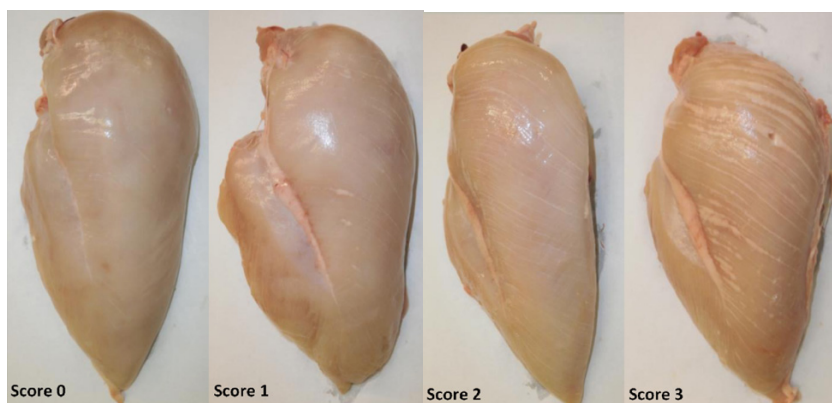
A 2008 UK study on lameness in broiler chickens showed that nearly a third had poor walking ability and 3.3% were almost unable to walk<sup>10</sup>. Most recently, a study to assess all three conventional breeds used in the UK industry found over 88% scored 2 or higher for walking ability in pen trials, indicating poor leg health in the majority of birds<sup>11</sup>.

#### GREEN MUSCLE DISEASE

Chickens can suffer from Green Muscle Disease, where the cells of the breast muscle become necrotic and die from lack of blood supply to the muscle fibres, creating areas of green, unsightly flesh that are dead and decaying<sup>12</sup>. This is due to the fast growth of the breast muscle.

#### WHITE STRIPING

A result of intensive breeding, white stripes run through the flesh, increasing the fat content and decreasing nutritional value. A 2020 [investigative report](#) by The Humane League UK showed that over 8 in 10 standard supermarket chicken breasts examined were affected by the disease<sup>13</sup>.



#### WOODEN BREAST SYNDROME

Wooden breast, a condition affecting fast-growing chickens, causes the breast muscle to harden and while the welfare impacts are still unknown it is believed highly likely it impacts the welfare of the chicken. In a recent study, over 50% of fast-growing birds weighing 2.1kg suffered from mild or severe wooden breast<sup>14</sup>.

### LEGISLATION: A MILESTONE?

Following a report by the Scientific Committee on Animal Health and Animal Welfare, in 2007 the EU Council developed Council Directive 2007/43/EC (Broiler Directive), which was intended to provide welfare protections for broiler chickens. It set out maximum stocking densities - space per chicken - as well as standards such as number of drinkers and feeders, litter cleanliness, ventilation, noise, light (artificial), and requirements for inspections<sup>15</sup>. These protections have been transferred into UK legislation with a cap on stocking density at 39kg/m<sup>2</sup> but they do not go nearly far enough to provide higher welfare for the birds by ensuring enough space, natural light or enrichments.

And, the legislation failed to address the most pressing issue affecting broiler chickens: the breed. EU Member States have varied in their implementation of the legislation: some, like the UK, have chosen to go beyond these requirements by implementing more stringent legislation or standards. As a result, standards and stocking densities across the EU can vary slightly, but remain firmly in the category of 'highly intensive', with none addressing the crucial issue of breed.

While species-specific legislation is undeniable progress, in neglecting the source of the most intense suffering for chickens, it does not go anywhere near far enough to safeguard their welfare. To progress chicken welfare faster, in recent years animal advocates have turned to pushing for change within the food industry itself - asking supermarkets, restaurants, food service companies and producers to commit to eradicating fast-growing breeds.

### THE BETTER CHICKEN COMMITMENT

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#### Six essential measures for chicken welfare:

- Comply with all EU regulations, regardless of country of production
- Give more space - a maximum stocking density of 30kg/m<sup>2</sup> or less
- Use higher welfare breeds
- Improve air quality, light & enrichment
- Reduce distress at slaughter by eliminating live shackling
- Implement third-party auditing and public reporting

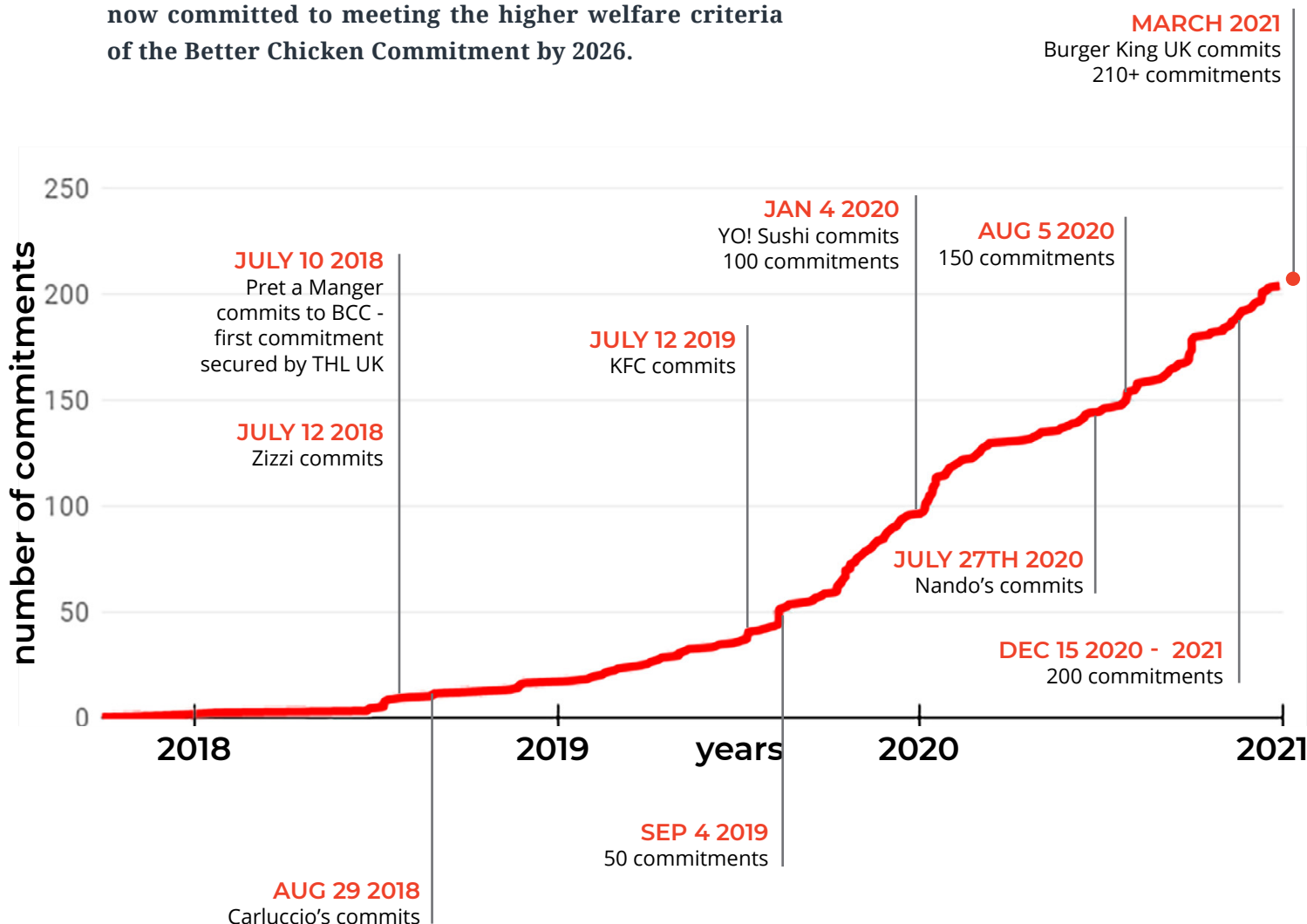
### WHAT ABOUT ASSURANCE SCHEMES?

In the UK, around 95% of poultry producers are members of the Red Tractor assurance scheme<sup>16</sup>. Under the basic entry level, the standards go barely beyond minimum legislation. More encouragingly, however, in 2020 Red Tractor unveiled a new 'enhanced' scheme for members to go further which meets all requirements of the BCC<sup>17</sup>.

## THE CHICKEN INDUSTRY TO DATE

### CURRENT LANDSCAPE

This new direction for advancing chicken welfare means that **in the UK today 25% of the UK chicken demand is now committed to meeting the higher welfare criteria of the Better Chicken Commitment by 2026.**



### KEY COMMITMENTS



KraftHeinz



Waitrose



GREGGS

10 years ago over 95% of chicken production was standard highly intensive. Now, 11% of production is higher welfare<sup>18</sup> - meeting or exceeding the BCC requirements.



## SECTOR BREAKDOWN

### CORPORATE PROGRESS

% OF TOP 10 COMPANIES BY  
REVENUE COMMITTED TO HIGHER  
WELFARE - AS OF MARCH 2021

### FOOD SERVICE 100%

- |                 |                       |
|-----------------|-----------------------|
| ✓ Compass Group | ✓ Interserve Catering |
| ✓ Sodexo        | ✓ SSP                 |
| ✓ Aramark       | ✓ Newrest             |
| ✓ ISS UK        | ✓ OCS Group           |
| ✓ Elior Group   | ✓ Apetito             |

### MEAL KITS 100%

- |               |                     |
|---------------|---------------------|
| ✓ Hello Fresh | ✓ Pasta Evangelists |
| ✓ Gousto      | ✓ Jane Plan         |
| ✓ Abel & Cole | ✓ Fit Kitchen       |
| ✓ COOK UK     | ✓ Detox Kitchen     |
| ✓ Riverford   | ✓ Fit Kitchen       |

### MANUFACTURERS 70%

- |                |                     |
|----------------|---------------------|
| ✓ Nestle       | ✓ Nomad Foods       |
| ✓ Danone       | ✓ Continental Foods |
| ✓ Kraft-Heinz  | □ Samworth Brothers |
| ✓ Unilever     | □ Premier Foods     |
| ✓ Oetker Group | □ Princes           |

### RESTAURANTS 50%

- |                   |                  |
|-------------------|------------------|
| ✓ Greggs          | □ Starbucks      |
| ✓ Pret A Manger   | □ Costa Coffee   |
| ✓ KFC & Pizza Hut | □ Domino's Pizza |
| ✓ Nando's         | □ Subway         |
| ✓ Burger King     | □ McDonalds      |

### RETAILERS 20%

- |                   |             |
|-------------------|-------------|
| ✓ Waitrose        | □ Morrisons |
| ✓ Marks & Spencer | □ Aldi      |
| □ Tesco           | □ Co-op     |
| □ Sainsbury's     | □ Iceland   |
| □ Asda            | □ Lidl      |

### HOTELS 10%

- |                                       |                            |
|---------------------------------------|----------------------------|
| ✓ Accor                               | □ Britannia Hotels         |
| □ Whitbread (Premier Inn)             | □ Best Western             |
| □ Travelodge                          | □ Marriott                 |
| □ InterContinental Hotels Group (IHG) | □ Wyndham Hotels & Resorts |
| □ Hilton                              | □ Jin Jiang (Raddisson)    |

✓ Committed

□ Yet to commit



## SECTOR BREAKDOWN

### THE UK RETAIL SECTOR IN FOCUS:

With BCC trials and higher welfare indoor chicken products on sale, THL UK estimates BCC-compliant chicken now accounts for 5% of the chicken sold in UK supermarkets.



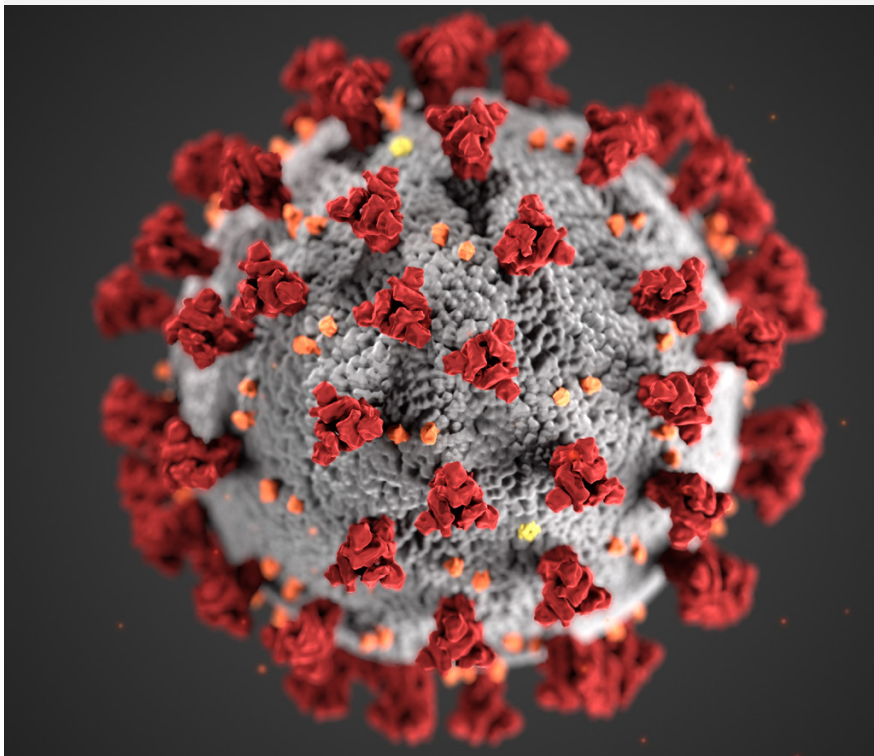
“Supermarkets once led the way in advancing animal welfare. Now, they’re dragging their feet.”

**Vicky Bond**

*Managing Director, THL UK*

## COVID-19 IMPACT

Like other industries, COVID-19 has had a significant impact on the broiler farming industry. Producers faced difficulties sourcing PPE and outbreaks on plants led to closures of processing factories<sup>19</sup>. Birds had to be culled on-farm before reaching the slaughterhouse. However, the pandemic also resulted in consumers being more interested in the origins of their food, and higher welfare including free-range and organic have been experiencing firm demand<sup>19</sup>.



## CASE STUDIES

### KFC

In July 2019 fast-food company KFC became the first in its sector to sign on to the BCC in the UK, Germany, the Netherlands, Belgium and Sweden. As one of the most recognisable chicken brands in the world, KFC's capacity to influence change among the industry is immense. Chicken bought by KFC represents around 4% of the UK chicken market and 1% of the European poultry market. All in all, 72 million chickens will lead better lives thanks to this commitment.

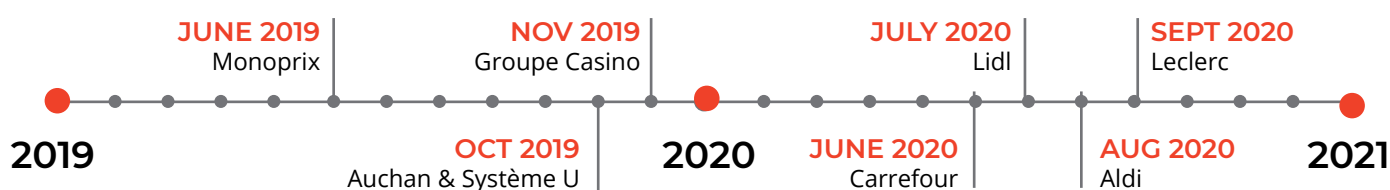
KFC also announced new software to collect data from its suppliers to monitor health and welfare and committed to publishing this data publicly.

#### JENNY PACKWOOD, HEAD OF BRAND ENGAGEMENT AT KFC UK & IRELAND, SAID:

“Chicken is central for us – it's what we do and it's in our name, and it's vital that we are trusted with what is at the heart of our business. Our customers rightly want and expect the chicken we serve to be good quality and reared with care. So we're committed to working towards best practice and improving the welfare of every single chicken across all of our suppliers. Whether it's creating more space in barns, moving towards slower-growing breeds or implementing stricter auditing processes, we're leaving no stone un-turned in our journey towards improvement.

### FRENCH RETAILERS

Thanks to French animal protection organisations all the major supermarkets in France have committed to the BCC. The majority of them have gone beyond the BCC and also specified that at least 20% of their supply chain has access to the outdoors.



#### PRODUCER PLEDGES

Over the past three years, an increasing number of producers have pledged to supply chicken which meets the BCC to any current or future customer. This has helped strengthen the cross-industry support for the BCC, as an early concern for companies was being unable to source higher welfare chicken.

**2 Sisters Food Group**, the fifth largest producer in Europe and UK's largest producer, became the first major producer to make this pledge in 2018. More recently, **Jan Zandbergen Group**, the leading importer of meat into the EU, also voiced its support. Jochem Versloot, one of the directors, explains that they intend to "encourage various producers worldwide to meet the standards of Better Chicken Commitment" and "make efforts to assist them in this transition to adapt to the BCC welfare standards."

# RECENT STUDIES IN 2020 SUPPORT THE SCIENTIFIC CASE FOR SLOWER-GROWING, HIGHER WELFARE BREEDS.

### SCOTTISH ROYAL COLLEGE STUDY<sup>11</sup>

The RSPCA commissioned the Scottish Royal College to run a trial using the RSPCA broiler assessment protocol to compare the slower-growing breed named JA757 against the three leading fast-growing breeds (Cobb500, Ross308 and Hubbard Flex) known as 'conventional breeds'.

**Conclusions:** overall, the JA757 had improved welfare due to increased activity and welfare measure scores compared to the conventional breeds. They found that conventional breeds required more wood shavings, had worse leg health, more pink and/or swollen hocks (backs of their legs above the ankle), spent more time feeding and less time walking, dust-bathing and foraging and perching. Most had a moderate degree of white striping and two of the three conventional breeds have a significantly greater proportion of wooden breast.

### GUELPH STUDY<sup>14</sup>

Commissioned by Global Animal Partnership (GAP), a US animal welfare auditing program, and conducted by the University of Guelph, this study tested over 7,500 birds from 16 strains of chicken breeds. They measured key welfare indicators, assessing three conventional and 13 slower-growing breeds.

**Conclusions:** when compared to the slower-growing breeds, conventional breeds had lower activity, poorer leg health, worse foot and hock health and increased rate of muscle diseases. While the conventional breeds grew faster and had a higher yield of breast meat, this growth is coupled with poorer welfare outcomes.

### NORWEIGAN UNIVERSITY OF LIFE SCIENCES<sup>20</sup>

This study carried out by researchers from FAI Farms, the University of Bristol and The Norwegian University of Life Sciences assessed commercial-scale farm trials of one slower-growing breed at 30 kg/m<sup>2</sup> stocking density, a second slower-growing breed at 30 kg/m<sup>2</sup> and 34 kg/m<sup>2</sup>, and the welfare outcomes were compared to those of a standard fast-growing breed at 34kg/m<sup>2</sup>.

**Conclusions:** the study found that slower-growing chickens are healthier and have 'more fun' than conventional breeds of birds. While there were little differences in the slower-growing breeds stocked at different densities, there were much greater differences between the fast-growing breed at 34kg/m<sup>2</sup> and the slower-growing breeds. Conventional birds suffered higher levels of mortality, hock burn and inflammation of their feet. They also used the enrichment less, perching less and showing fewer periods of play or exploratory behaviour.

### FAI FARMS, UNIVERSITY OF BRISTOL AND THE



## LATEST RESEARCH

### HIGHER WELFARE = FEWER ANTIBIOTICS

Over the past decades, millions upon millions of chickens have been given antibiotics, each time risking producing resistant bacteria. This risk increases further if the animal is not actually sick at the time, and this preventative type of mass treatment is common.

The UK poultry industry has significantly reduced antibiotic use. While this is positive, it's also indicative of the sheer scale of antibiotic usage previously. Advancing the welfare of chickens and all animals raised for food is a crucial part of the puzzle we face in solving the antibiotic resistance crisis.

Progress made in The Netherlands clearly demonstrates this. The Dutch poultry industry has taken strict measures on antibiotic use, with major producers using higher welfare breeds of birds and giving them more space too. Figures published in 2019 show that higher welfare, slower-growing breeds used three times less antibiotics than intensive fast-growing breeds<sup>21</sup>.

### THE CONSUMER & PRODUCER CASE FOR HIGHER WELFARE BREEDS

Chicken farmers are reporting to prefer rearing higher welfare breeds over conventional fast-growing breeds. There are far fewer chickens dying prematurely and they like seeing the birds more active. They also prefer natural light in the sheds, making it a nicer environment to work in.



“Standard birds eat, eat, eat, grow, grow, grow, but these birds rush around and by [...] 18 days they are on bails and perches, building their frame and building strength.” - **GLOUCESTERSHIRE BROILER GROWER CHARLES BOURNS, WHO GROWS FOR HOOK2SISTERS**

“I like growing these birds” - **BROILER GROWER SIMON BARTON, WHO GROWS FOR HOOK2SISTERS AND SITS ON THE NFU POULTRY BOARD**

“For the farmers that have grown this chicken, they wouldn't want to go back,” **SAYS A SENIOR MANAGER AT HOOK2SISTERS<sup>22</sup>**

And, consumers are demanding increased animal welfare, and have said they are willing to pay more for animal products reared to higher standards: 94% said protecting the welfare of farm animals is important, and 59% of all European citizens are willing to pay 5% more for animal-friendly products<sup>23</sup>.



# THE FUTURE OF THE CHICKEN INDUSTRY

## HAVE WE SEEN PEAK FACTORY-FARMED CHICKEN?

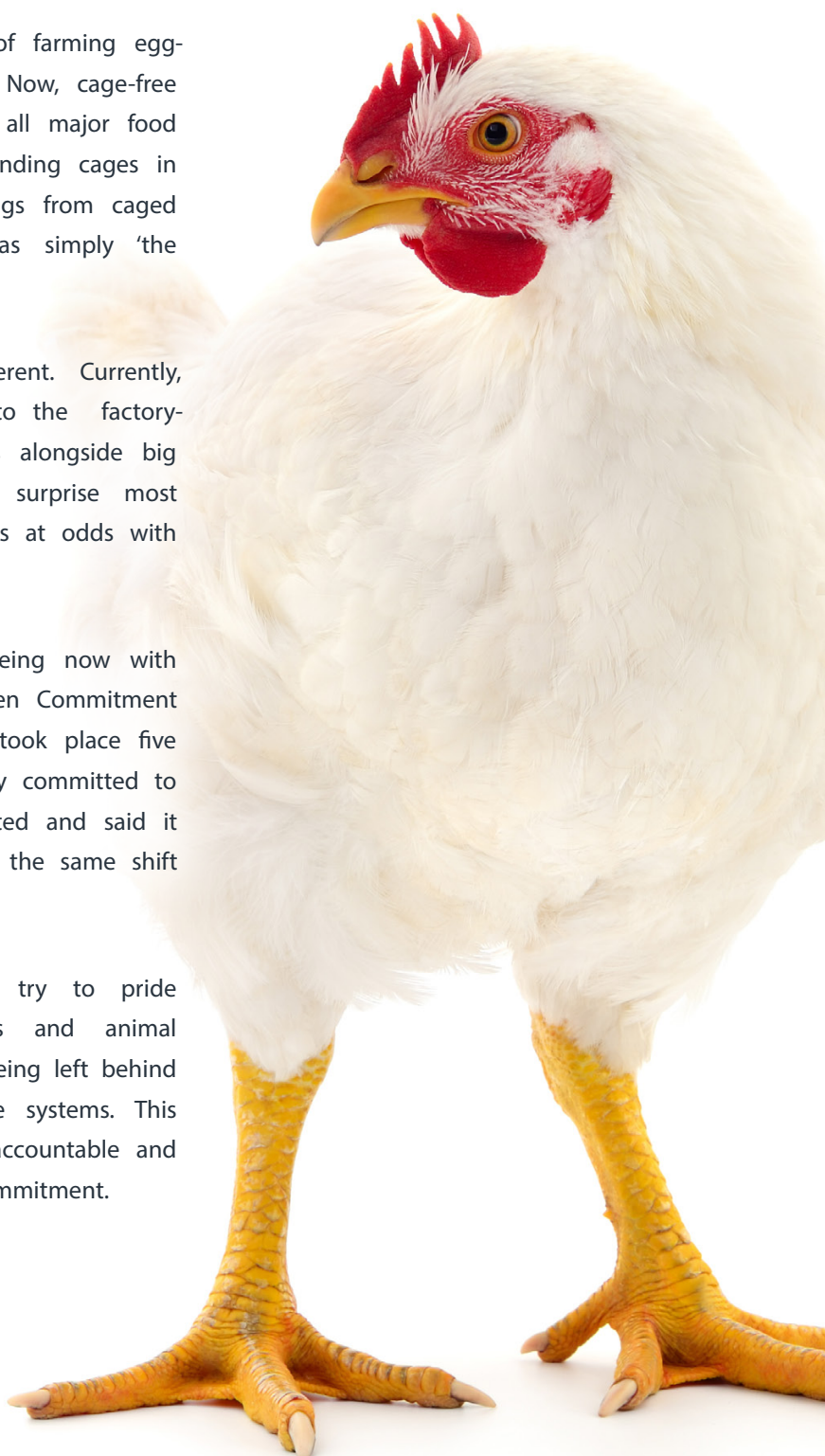
*Comment from Vicky Bond, Managing Director,  
The Humane League UK:*

“Ten years ago, the predominant method of farming egg-laying hens was in cruel, cramped cages. Now, cage-free eggs account for 60% of production and all major food companies in the UK are committed to ending cages in their supply chains by 2025. Shunning eggs from caged hens has entered public consciousness as simply ‘the right thing to do’.

But with the chicken we eat it's different. Currently, supermarkets are offering little alternative to the factory-farmed chicken they put on their shelves alongside big markups on higher welfare. So it's no surprise most chicken bought is factory-farmed. Yet this is at odds with the nation's attitudes to animal welfare.

I believe that the momentum we are seeing now with companies committing to the Better Chicken Commitment is mirroring the cage-free revolution that took place five years ago, when waves of companies finally committed to eradicating cages. The egg industry protested and said it couldn't be done, but it was. We're seeing the same shift in the broiler industry.

Supermarkets like Sainsbury's and Tesco try to pride themselves on caring about consumers and animal welfare but they are failing both and risk being left behind the obvious move towards higher welfare systems. This coming year we must hold supermarkets accountable and ensure they all commit to the Better Chicken Commitment.



# THE FUTURE OF THE CHICKEN INDUSTRY

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## FALLING COSTS

In 2019, the NFU commissioned a study which estimated that it costs 33p more per bird to rear a higher welfare chicken to BCC requirements compared to intensive production. However this study didn't fully account for the amount of wasted chickens that don't make it to the shelves due to significantly higher rates of disease and mortality. This difference is also likely to reduce further with economies of scale when higher welfare chicken becomes the norm rather than being only promoted as a premium product, as we have seen with cage-free eggs.

Supermarkets currently sell higher welfare chicken at a dramatic markup, knowing that when asked, consumers have said they are willing to pay more for higher animal welfare standards<sup>23</sup>. When consumers clearly understand the conditions animals are kept in - for example labelling of eggs from hens kept in cages - we have seen them choose slightly more expensive, higher welfare options.

An increasing number of companies known for value prices have signed up including KFC and Greggs - proving that giving chickens higher welfare is not exclusively for brands with higher price points.

## PLANT & CELL-BASED

As food companies are reporting a record uptake of plant-based options, all supermarkets are now delivering their own plant-based ranges. The alternative proteins market is at 8% annual growth. The Agriculture and Horticulture Development Board (AHDB), the statutory levy designed to inform farmers, growers and industry, reported in October 2019 that 1 in 4 younger shoppers and middle-aged health-conscious people were buying meat substitutes. This trend must continue and we must move away from our current increasing chicken consumption levels to protect the environment.

Cell-based meat also offers hope for dismantling factory farming. This meat is made in a lab by cultivated animal cells, therefore requiring much less animal involvement. Consulting firm Kearney predicts that by 2040, 35% of all meat will be cultured<sup>24</sup>. However, the process requires more work to enable it to be scaled up.





## CONCLUSIONS

As latest data shows, there has been an exponential rise in corporate commitments to the Better Chicken Commitment, and even among a global pandemic these show no signs of stopping. Consumers are increasingly demanding to know more about where their food comes from and how it is produced.

While there is cross-industry support for the BCC, with key commitments from restaurants, the foodservice sector, meal kit companies, and manufacturers, as well as pledges from chicken producers, there is still progress to be made. In particular, the UK supermarket sector must step up to the plate and take urgent action to reduce the suffering of chickens in their supply chains. Higher welfare chicken, like eggs, is the future.

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