Better chicken, better business
– a guide for hospitality and foodservice

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FOOTPRINT INTELLIGENCE

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Introduction

The RSPCA was founded 200 years ago this year in a London coffeehouse by a group of like minded individuals, motivated by a desire to improve the treatment of farmed animals. RSPCA Assured was founded 30 years ago, to enable us to continue in that same spirit, working together with businesses to drive improvements in the lives of animals in their supply chains.

We're delighted to partner with Footprint on this guide to better chicken in the foodservice sector. In the UK, we slaughter over a billion chickens annually, yet the number of those who enjoy a good quality of life lags far behind other species like hens or pigs. The report highlights the positive impact of higher welfare sourcing and ways to achieve this.

We know that for some businesses there may remain barriers to adoption, and we look forward to working together to overcome these, so that millions more chickens can enjoy a better quality of life.

Cliona Duffy
Head of Corporate Partnerships - RSPCA Assured

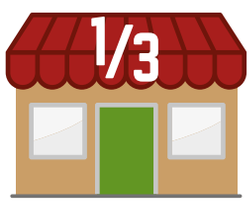
Executive summary

Such is the enthusiasm for chicken that the amount being consumed has nearly doubled in the past thirty years. It is more widely eaten than beef, and billions of birds are reared for their eggs and meat. There are thirty chickens for every ten people on the planet, and farmed poultry comprises 70 per cent of all birds on Earth.

But the environmental reality behind our insatiable appetite for chicken is sobering. It accounts for 8 per cent of the livestock sector's total emissions.[1] Producing the soy to feed these billions of birds has led to forest clearance. And that pushes wildlife into extinction and accelerates climate change.

Animal welfare is also a major issue: conditions for most birds farmed in the UK are overcrowded and uncomfortable. This is an emotive issue. Consumer research conducted for this report found:

- More than 80 per cent of the UK public care actively about both farm animal welfare and climate change



- One third want higher welfare chicken when they eat out

- Over a quarter think restaurants have a responsibility to make chickens' lives happier

Industry insiders interviewed for this research agree – often passionately – that meat and eggs served in hospitality and foodservice *should* come from chickens who have a happy life, free from suffering – but that achieving this is an industry-wide challenge that they have neither the agency nor the market share to achieve on their own.

The producers, wholesalers, hospitality and foodservice operators, industry bodies and NGOs consulted also agree that it is vital to reduce the climate impact of chicken, but that facilitating such a transition is hugely challenging.

The situation appears complicated. Convoluted supply chains prevent operators from alerting producers of their desire to buy higher welfare products. And there is a common perception that higher welfare has a higher carbon impact.

But our research suggests better chicken equals better business. It provides hope that hospitality can supply higher welfare chicken and eggs, yet still meet carbon targets, keep costs down and satisfy customers.

Our research reveals that fewer than

25%

of people understand the marks that identify higher welfare chicken

Chapter 1

Understand the current landscape sets out the state of chicken in the hospitality and foodservice sector today. It clarifies the differences between certifications and highlights the power and progress of vehicles such as the Better Chicken Commitment (BCC). It also reveals the level of confusion within the British public regarding the reality of chickens' lives.

"Our consumer research revealed that almost a third of people in the UK believe British welfare standards mean chickens in the UK have had happy lives."

Regarding eggs, confusion is also rife. Nearly a quarter (24 per cent) think hens in enriched cages have as much space as they want. Thirty-eight per cent didn't know – and only 20 per cent understood – that if the space is shared equally, chickens in enriched cages have only the equivalent of a piece of A4 paper each.

Industry insiders agree that many working in hospitality and foodservice are similarly confused. Committing to the BCC, and therefore ensuring chicken and egg products meet customers' expectations, helps avoid potentially damaging reputational risk.

Chapter 2

Connect sustainability, climate and welfare finds the examples that demonstrate that higher welfare chicken can be cost and greenhouse gas (GHG)-comparable when compared to conventional chicken. It sets out how tackling feed can reduce GHG impacts while building business resilience, and shares evidence that interventions to improve welfare can also tackle GHG emissions and reduce costs and reliance on antibiotics. Planting trees for free range hens, for example, sequesters carbon, absorbs polluting ammonia, reduces chicken stress and deaths, and makes a return on investment in mere months. It considers the part that transformative approaches to chicken and egg production could play, and how using less but better quality chicken and eggs can keep cost and carbon impacts down.

Chapter 3

Solve supply chain challenges discusses how convoluted supply chains can be overcome. It sets out the key roles of collaboration and communication, and the case for an industry convener. Such a convener could bring players together so producers get the message that there is strong demand for BCC chicken. It could enable operators to access the product that is already on the market. It could also matchmake operators and retailers to provide better carcass balance – an important strand in reducing the cost per portion of higher welfare meat (it's common for operators to be charged for a whole bird when they only want the breast).

It considers the costs of higher welfare, tried and tested approaches to lower GHG impacts, the impacts on yields, how welfare can be used to build market share and communicate quality to customers, the importance of pushing for better policy and the benefits to farmers of producing and serving better chicken.

CHAPTER 1 Understand the current landscape

Understand the current landscape

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of people believe that British welfare standards mean chickens in the UK have happy lives

Poultry accounts for half of the meat eaten in the UK.[2] We are on course to growing 1 billion birds every year.[3] The vast majority of these are chicken. Alongside this, 40.5 million egg-laying hens are farmed in the UK each year.[4] Foodservice accounts for 7 per cent of the market for chicken meat,[5] and 15 per cent of the market for shell eggs.[6]

The conditions in which these birds are kept, and the resultant welfare and environmental impacts, vary widely. Our consumer research revealed that almost a third of people in the UK believe that British welfare standards mean that chickens in the UK have had happy lives. Yet, according to RSPCA Assured, more than 90 per cent of meat – or broiler – chickens "are bred to grow too quickly and are reared in bare, dimly-lit and overcrowded conditions. They have little room to move around freely and perform natural behaviours like perching and preening."[7]Around 35 per cent of the UK's egg-laying hens, meanwhile, are kept in cages for most of their lives.[8]

The UK's 1 billion broiler chickens are reared to the following standards:

- **80 per cent** Red Tractor indoor
- **15 per cent** higher welfare indoor (all schemes: Red Tractor Higher Welfare, BCC, retailer own, etc.)
- **4 per cent** are free range
- **1 per cent** organic

Source: British Poultry Council [9]

For eggs packed – though not necessarily produced – in the UK, allowing for avian flu restrictions reclassifying 'free range' as 'barn' from March-May 2022: [10]

- **61 per cent** were free range
- **28 per cent** were enriched cage
- **7 per cent** were barn
- **4 per cent** were organic

Source: Defra 2023

Meet existing consumer expectations

Our research revealed that consumers are confused about the differences between standards and accreditations, and believe chickens are reared in much better conditions than they are in reality.

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When it comes to chickens, which has higher welfare standards?

Red Tractor	**34%**
RSPCA Assured	**23%**
UK Government Standards	**6%**
All have equally high standards	**29%**
None of the above	**8%**

Nearly a quarter (24 per cent) thought chickens in enriched cages were free to roam; 38 per cent didn't know; and only 20 per cent understood that, if the space is shared equally, chickens in enriched cages have only the equivalent of a piece of A4 paper each.

Our research also revealed that only one fifth (22 per cent) of people understood the reality that chickens in the UK can be reared in bare, dimly lit and overcrowded conditions. This means that operators who are serving chicken products reared to basic standards face a severe reputational risk if consumers make the link between the difference in their expectation of how that chicken has lived and the reality behind the meat or egg that is on the plate.

Ensuring products meet customers' existing expectations by serving higher welfare food therefore helps avoid potentially damaging reputational risk.

Clarify and communicate the differences between certifications

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think all accreditations have equally high standards

There is also poor understanding of the welfare differences between certifications. Our poll revealed more than a third of people think Red Tractor standards are higher than RSPCA Assured, and 28 per cent think all accreditations have equally high standards. Less than a quarter (23 per cent) correctly identified RSPCA Assured as the accreditation with the highest welfare standards.

And the industry insiders interviewed for this research felt this confusion prevails within the hospitality and foodservice sector too. They agreed (often passionately) that the chicken and eggs served in hospitality and foodservice *should* come from chickens who have had a happy life, free from suffering – but that achieving this was an industry-wide challenge that they couldn't achieve on their own.

Welfare is important – ethically and economically. Our research found that 88 per cent of UK adults say they actively care about farm animal welfare. These results are consistent with a poll published in February 2023 – based on an RSPCA survey[11] – that found nine out of ten people in the UK think the welfare of hens is important.

As Compassion in World Farming observes, people in the UK:

- expect – thanks to the ubiquity of misleading labelling and claims such as "farm fresh" and "free to roam" – that welfare is higher than it is in reality
- are likely to base their choices on what they can afford rather than what they believe to be ethically sound in the current economic climate
- do not apply the same standards to produce used in meals out as they do when shopping for themselves
- are unfamiliar with BCC criteria and standards[12]

Hospitality and foodservice has a responsibility to educate staff and customers on what welfare standards mean, and why work being done to improve standards is important.

The following tables endeavour to clarify the differences:

Poultry standards: what do different classifications mean?

	UK minimum standard	Red Tractor	Better Chicken Commitment (includes RSPCA Assured and Red Tractor Enhanced)	Red Tractor free range
Stocking density	39kg/m²	38kg/m²	30kg/m²	27.5kg/m² including access to outside space
Why it matters	Higher densities leave broilers at greater risk of leg lesions, hock and foot-pad burn, and impact on the ability to express natural behaviours. They increase stress and aerial contaminants, which may affect respiratory health.			
Breed	Fast-growing breeds allowed	Fast-growing breeds allowed	Slow-growing breeds only	Not specified but birds must not be slaughtered before 56 days (fast-growing breeds typically slaughtered at c.35 days)
Why it matters	Rapid growth rates are more likely to result in health problems such as leg disorders and heart failure, contributing to higher mortality rates.[13] Slow-growing birds are three times less likely to need antibiotics.[14]			

Continued	UK minimum standard	Red Tractor	Better Chicken Commitment (includes RSPCA Assured and Red Tractor Enhanced)	Red Tractor free range
Natural light provision	Minimum of six hours of darkness per 24 hour cycle, only four hours of which must be uninterrupted darkness[15]	Lighting follows a 24-hour rhythm, allowing enough light for normal behaviours, inspections and dark periods for rest	At least 8 hours of continuous light daily, and at least 6 hours of continuous darkness, throughout their lives	Lit to allow normal behaviours. Minimum of 8 hours of natural or artificial light is provided per day, and minimum of 6 hours of continuous darkness every 24-hour period
Why it matters	Adequate light and periods of darkness are necessary for meat chicken welfare, as they allow chickens to rest, be physically active and engage in natural behaviours[16], reducing the incidence of painful conditions such as leg disorders and hock and food pad burn.			
Enrichment provision	Recommended but not stipulated[17]	For every 1,000 birds: 1 bale, 2m perch space, 1 pecking object[18]	For every 1,000 birds: 1.5 straw bales, 2m perch space, 1 destructible pecking object (e.g. pecking blocks, brassicas), hanging wooden blocks[19]	For every 1,000 birds: access to outdoor range minimum 8 hours per day. Plus one bale, 2m perch space,[20] 1 pecking object
Why it matters	A stimulating environment – for example, containing straw bales, perches and objects to peck – encourages birds to be active, discourages negative behaviour (such as injurious pecking) and helps keep birds healthy.[21]			
Controlled atmospheric stunning	Stunning mandatory, unless exempt for religious purposes. Shackling allowed	Birds must be handled appropriately at electrical stunning and killing points[22]	Shackling while conscious forbidden. Controlled atmospheric stunning using inert gas or multiphase systems, or effective electrical stunning without live inversion[23]	Meets UK minimum standard
Why it matters	RSPCA Assured asserts that "controlled atmosphere stunning and low atmospheric pressure stunning have the benefit of not needing to handle and shackle live birds, reduced stress, and greater uniformity of the stun between birds."[24]			
Auditing to demonstrate standards compliance	Inspections according to the risk of pollution from the farm[25]	Every part of chain is audited and accountable[26]	Compliance via third-party auditing and annual public reporting on progress[27]	Compliance via Red Tractor Assurance Scheme certification bodies[28]
Why it matters	Stakeholders must be able to benchmark performance, to formulate realistic individual and collective targets.			

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If the space is shared equally, how much space do you think egg-laying chickens in enriched cages get per chicken?

Don't know	**38%**
As much as they want – they are free to roam	**24%**
A metre square	**19%**
The equivalent to a pancake or piece of A4 paper	**20%**
None of the above	**2%**

Egg-laying hens: what do different classifications mean?

Enriched cage

Contrary to public conception (see illo, above), 10 million hens – according to RSPCA Assured – are kept in cages in the UK, accounting for 28 per cent of domestic egg production.[29] These "enriched cages" have a maximum stocking density of nine hens per square metre and with, typically, 40-80 birds in each cage.[30] According to the RSPCA, such cages restrict birds' ability to move around and exhibit their natural behaviours, with little more usable space per hen than the size of a large pancake or a piece of A4 paper.[31] There is no maximum flock size.[32]

Barn

In the barn system, according to British Lion Eggs,[33] hens are able to move freely around the hen house, with a maximum stocking density of nine hens per square metre of useable area, and 15cm of perch per hen, and one nest box per five hens. Litter must account for one third of the ground surface. This is used for scratching and dust-bathing. There is no maximum flock size.

Free range

"Free range" hens must have space to move and a maximum stocking density of nine hens per square metre of useable area inside, plus an additional minimum of 4m^2 of outside space per hen[34] (for at least half of their lifetime). They must have continuous daytime access to these open-air runs, which must be mainly covered with vegetation. The maximum flock size is 16,000 hens.[35]

Organic

Organic hens are always free range, with continuous daytime access to open air space. They have a maximum stocking density of six hens per square metre. The Soil Association specifies 10 square metres of outside space per hen.[36] Flocks must be no larger than 3,000 hens. Smaller flocks encourage more use of the whole range.[37]

Support the BCC: a vehicle for driving change

Concerns about welfare mean that many operators have committed to sourcing higher welfare chicken products. Many have signed up to the European Chicken Commitment (ECC) or the UK-specific Better Chicken Commitment (BCC), and have committed to using free range shell eggs. ECC/BCC standards – which, in this report, will be referred to as BCC for simplicity – have been shown to reduce disabling and excruciating pain in chickens by two thirds[38] and have been adopted by the industry and NGOs alike as a unifying vehicle to improve welfare standards.

The BCC does not itself offer certification – it monitors audit compliance. Certification to demonstrate a product adheres to its standards is provided by RSPCA Assured and Red Tractor Enhanced.

Producer commitment

The UK and France lead the way among European signatories to the BCC, of whom there are more than 350. But of the six UK broiler chicken producers, only two – PD Hook (Hatcheries) Ltd and 2 Sisters Food Group – have pledged to supply chicken to BCC standard.

According to a 2022 BCC update report, approximately 28 per cent of the UK chicken supply is now committed, affecting around 300 million birds. As retailers are the only ones with the market share to drive producers to shift to higher welfare systems, if all UK supermarkets also signed up, this would rise to 89 per cent.[39]

Retailer commitment

Among UK retailers, only two have signed up. Marks & Spencer is 100 per cent compliant for all its fresh chicken. This accounts for nearly a third of all the chicken it sells. The remainder is compliant only for natural light, enrichment and controlled atmospheric stunning (CAS). Meanwhile, Waitrose & Partners is 100 per cent compliant for stocking density, natural light, enrichment and CAS, but not the all-important breed change.

Hospitality and foodservice commitment

Hospitality and foodservice (HaFS) operators – even the major, chicken-centric ones – don't, on their own,

Retailer snapshot

While they haven't yet committed to the BCC, some retailers in the UK have introduced BCC-compliant fresh chicken tiers: Tesco's 'Room to roam' range was introduced in 2020, and Morrisons's 'Space to roam' range was introduced in 2021. While admirable and welcome, these initiatives typically make up only a small proportion of the companies' full chicken offer. Meanwhile, Sainsbury's reduced the stocking density of its own-brand chicken to 30kg/m^2 in March 2023. But it has yet to commit to breed change, which is central to affording chickens a better quality of life.

The Co-op ruffled feathers in 2023 when company directors overruled 96 per of the company's 32,000 members who voted at the AGM for the mutual to adopt the BCC, citing concerns of the impact on affordability for its customers. Co-op has however committed to reducing stocking density by the end of 2024.

Lidl and Aldi have committed in some European regions, but not the UK.

BCC in a nutshell

The Better Chicken Commitment (BCC) sets standards for

- stocking density (maximum 30kg/per m^2)
- breed change (away from unnaturally fast-growing varieties)
- natural light provision
- enrichment provision
- controlled atmospheric stunning
- being audited to BCC compliance

have the market share to drive changes to higher welfare production methods. And their supply chains are more convoluted than retail, making identifying and communicating with producers challenging. So there is a sense that some operators are waiting for others – such as retailers – to transform the market and solve challenges that they haven't the clout or capacity to change on their own, so they can piggyback on these efforts.

This is why Compassion in World Farming, The Humane League and other NGOs are focused on persuading UK retailers to commit to the BCC and help create a market shift. Matthew Melton, corporate relations manager, The Humane League UK, notes that, in part as a result of its partnership with M&S, around 20 per cent of the 2 Sisters Food Group's chicken production is in line with BCC standards.[40] "They also supply Co-op," he notes. "If Co-op had also fully adopted the BCC (see **Retailer snapshot**), that would add another 50 million or so chickens every year, which would be a huge improvement in conditions. I imagine the efficiencies and economies of scale that would result would also be beneficial."

In the hospitality and foodservice sector, KFC – responsible for four per cent of the chicken market – became the first of its peers to commit to meet all standards set out in the European Chicken Commitment for 100 per cent of the chicken in its UK and Ireland supply chains, by 2026. It is already reporting progress.[41,42]

Sodexo, Compass, CH&CO, Nando's, IKEA, Pret, Itsu, Wagamama, Burger King, the Azzurri Group, Pret A Manger, the Restaurant Group and others have also committed.

And improvements have resulted. Signatory Subway has ensured 59 per cent of its broiler chickens are compliant and are provided with natural light. Sixty-three per cent have perches and pecking substrates; one fifth meet the more humane controlled atmospheric stunning slaughtering standards; and 61 per cent of third-party suppliers have been audited.

By 2022, Greggs had ensured 49 per cent of its broilers were raised at the 30m^2 stocking density. The bakery chain is working on breed change trials with its producers. Pizza outlet Papa Johns is 60 per cent compliant for stocking density, 50 per cent compliant for natural light and 56 per cent compliant for enrichment.

Restaurant chain Wahaca signed but has since superseded the commitment with a pledge to serve only free-range chicken. These examples show that improvements are being made, but more BCC signatories need to report progress against specific criteria.[44] And operators that haven't yet signed need to consider the reputational risk of not doing so.

Be transparent

The different certifications and actions make it challenging to introduce, build and measure change, as illustrated by the varied progress detailed above. Some operators are concerned they won't be able to achieve all six BCC criteria by the 2026 deadline. However, it is likely leeway will be given to signatories who demonstrate action in easier-to-implement areas such as enrichment, light and stunning – and who have developed well-thought-through plans for those that require substantial financial and infrastructure investment, such as stocking density and breed change.

"When companies have solid outcome measures and data collection from their supply chain, they can report granularly on how it's moving," observes Øistein Thorsen, CEO, FAI Farms. "You can say, 'We're completely in line with the requirements on environmental enrichment and slaughter, but we have only sourced 15 per cent of our volume on slower-growing breeds.'

"If you're a signatory to the BCC and you're able to report at that level of granularity, it shows you're taking the issue seriously, even if you've not achieved the commitment in full. Being transparent about your performance reduces your reputational exposure."

It is vital to support those who are putting their heads above the parapet and taking action, especially as breed changes and stocking density reductions are not something that single operators have the market power to change on their own. They require the industry to come together, to demand change collectively and to commit to purchasing BCC products when they are available. This will give manufacturers the confidence to make costly investments in infrastructure that support lower stocking densities and slower-growing breeds.

So, advises Thorsen, a first step is to mandate your suppliers to report on an established list of welfare outcome indicators that broadly correspond with the BCC criteria, and support their efforts to do so. Subsequently, you can correlate sales volumes with this data to ascertain how BCC achievements measure up alongside commercial criteria. Action to improve BCC compliance can then be built into internal and supplier KPIs.

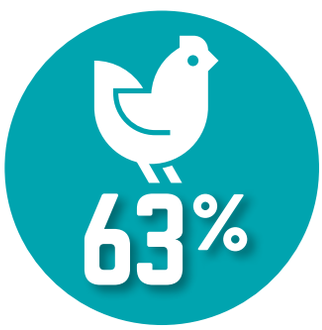
CHAPTER 2

Connect sustainability, climate and welfare

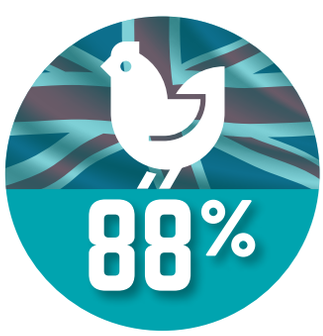
Connect sustainability, climate and welfare

"Farm animal welfare must be a major driver in producer and operator sustainability programmes."

Dr Tracey Jones, director of food business, Compassion in World Farming



of HaFS professionals say animal welfare is more important than the carbon footprint of the poultry they procure



of HaFS professionals say higher welfare is more important than British origin in chicken procurement

Source: SRA and Soil Association industry roundtable 2022

Prioritise welfare AND climate

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Which of these issues do you actively care about?

Farm animal welfare	**88%**
Climate change	**82%**
Deforestation	**75%**

In our survey, farm animal welfare came in top as an issue of concern for people in the UK, at 88 per cent. Climate change (82 per cent) and deforestation (75 per cent) also scored highly, with more than half of the respondents saying they cared equally about all three issues – and many specifying that they want to be able to support those values when they're eating out.

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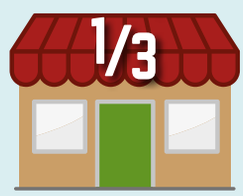


want to eat higher welfare chicken and eggs when eating out

of UK citizens believe that restaurants and caterers should do more to make chickens' lives happier

Globally, livestock contributes 14.5 per cent of all human-related greenhouse gas emissions. Poultry accounts for more than half of meat consumption – more than any other meat. Chicken meat and eggs contribute 8 per cent of the livestock sector's total emissions.[45]

We are being encouraged to replace beef and lamb with pork and chicken. The UK's Committee on Climate Change report *Net zero – The UK's contribution to stopping global warming* includes a 20-50 per cent reduction in beef and lamb in its net zero scenarios. In modelling, those meats are replaced by pork and chicken.

The shift in the industry to using ingredient and recipe footprinting tools is also driving an uptake in white meat. Analysis by CH&CO on its ingredients found that red meat is three times more carbon intensive (13 per cent) than chicken and pork (4 per cent).

Yet chicken performs poorly compared to beef or lamb on other indicators, such as welfare conditions and pollution. And chickens are inefficient in converting feed – much of which could be eaten directly by humans – into protein. They require three times as much feed per kilo of protein produced than other farm animals such as cows.[46]

This discrepancy could widen as innovations in regenerative agriculture for ruminants – such as mob grazing and silvopasture (where trees are introduced into livestock foraging systems) – are adopted. These have the potential to improve soil carbon sequestration and

reduce the ratio of soy in ruminant diets. However, there is increasingly compelling evidence that there are ways to reduce chickens' climate impacts while improving welfare standards and controlling costs.

It isn't a choice between welfare or climate

Let's start with a massive portion of positivity. There is a common perception that higher welfare chicken has a higher carbon impact. This is assumed because the birds live longer, eat more and require more light, heat and space. Indeed, the National Farmers Union calculates that BCC-compliant birds have 23 per cent higher greenhouse gas (GHG) emissions per live weight.[47]

This narrative enables some operators to park action on higher welfare by positioning themselves as prioritising carbon reduction. However, research from higher welfare systems indicates that in practice, when action is taken holistically, GHG impacts aren't higher for higher welfare, so action on welfare and climate can be compatible.

This is because of the impacts of BCC-related commitments on feed consumption, feed profile and feed sourcing, and reductions in mortality and shed yields. For example, according to Compassion in World Farming, slower-growing breeds require less protein-dense diets and less intensive daily feed volumes; thus, they are better able to tolerate reductions in GHG-intensive soy percentages – see more in **feed impacts**. Feed makeup can therefore be altered to address soy's considerable GHG impacts, such as by switching to homegrown sources of energy and protein, or by using North American or European soy suppliers to reduce deforestation.

Lifecyle assessment research, published in *Poultry Science*, found that, overall, higher welfare broilers had lower GHG emissions than conventional broilers. When looking at the broiler farm stage, for example, higher welfare birds had emissions three per cent lower than conventional broilers and 11 per cent lower than Dutch Retail Broilers.[48]

Norwegian higher welfare producer Norsk Kylling's life cycle assessment found that, when comparing breeds, the slower-growing Hubbard had a one per cent lower climate footprint than the fast-growing Ross.[49] The benefits came from reductions in feed volumes and composition, mortality, transport needs (because of the higher weight of new chicken) and fodder consumption.

Infrastructure changes can also make a big difference to climate impacts. For example, Norsk Kylling's new slaughterhouse facility is "designed for energy efficiency. It will use surplus heat from a neighbouring smelting plant for heating, seawater for cooling and solar panels for electricity. A smart energy storing system is being developed for the surplus heat and cooling. The entire facility will run

on renewable energy, and the CO2 emissions will be reduced by 75 per cent compared to the industry standard."[50]

Lakes Free Range Eggs has a naturally energy-efficient hen-rearing house that reduces energy use by 70 per cent compared to conventional standards. This has helped the business be carbon neutral for its scope 1 and 2 emissions since 2016. It is also considering interventions such as creating sheds with rounded corners, to tackle the ammonia blindness that strikes in winter when damp conditions mean ammonia builds up in hard-to-ventilate corners. Welfare and ventilation bills would therefore improve at a stroke.

And while not all higher welfare chicken might yet be comparable for GHG impact, leading operators are still prioritising welfare without compromising their net zero commitments. Nando's – which has reduced its footprint by 40 per cent since 2015 – has committed to "reducing the carbon footprint of a Nando's meal by a further 50 per cent by 2030 while pledging significant improvements to chicken welfare by 2026".[51]

Less chicken-focused operators find addressing welfare and climate even less of a conflict. "We can prioritise welfare by working towards achieving the BCC because chicken isn't our biggest problem," says Samantha Davis, group procurement and supply chain director at contract caterer CH&CO. "Even though we use a lot of chicken, for impact it's red meat and dairy – we use so much milk in the coffee shops, etc. These are the big things that really move the dial on carbon.

"For eggs, we have been able to up the standard to free-range RSPCA Assured, by developing a direct relationship with egg producer St Ewe in Cornwall. This keeps the management of the relationship – and the prices – in CH&CO's hands. We keep our relationship with our wholesaler by using them as a logistics partner."

This kind of cutting out the middleman can make wholesalers and butchers twitchy: will they lose business if people form direct relationships with producers? But, says Davis, CH&CO's preference would be for its wholesalers to guarantee a certified supply, be more transparent and work with caterers to ensure higher welfare is the norm, not the exception, without it having to go direct to producers.

Tackle feed to combat carbon impact

Chicken's environmental footprint stems principally from scope 3: feed and land use. A *Current Biology* study published in 2023[52] found:

- feed for farmed chickens accounts for at least 78 per cent of the participating industries' environmental pressures
- farming broiler chickens disturbs nine times more land than farming salmon
- more than 55 per cent of the chicken farming industry's greenhouse gas emissions arise from feed activities

Norsk Kylling's lifecycle assessment of its higher welfare chicken production found that 82 per cent of emissions related to its raw chicken products arose from feed.[53]

Soy is the main ingredient of feed, favoured for a rich nutritional profile that is hard to match with plants such as barley, oats or peas. It's also an extremely efficient crop, requiring few inputs and producing high yields. Up to 75 per cent of all soy grown

goes into livestock feed,[54] and the UK imports more than three million tonnes per year.[55]

The broiler industry's tightly controlled diets and environments ensure chickens finish on weight and on schedule. But producing the soy to feed these billions of birds has led to forest clearance, particularly in Brazil – a major soy-producing nation. That pushes wildlife into extinction and accelerates climate change.[57]

The problem is that minute changes to feed – for example, to rebalance the proportion of soy – can interfere with birds being finished at the appropriate time. This plays havoc with orders and sales, because unfinished chickens take up space in sheds designated for the next flock.

Consider alternative feeds as tools to build business resilience

Research flocks are needed to pilot alternative feeds, to create profiles that match soy for nutrition and timing. But with farmers struggling with increased feed, energy and employee costs, producers admit it's hard to prioritise committing the time, cost or capacity for such investment. However, if operators continue to push – and provide support – for trials of lower impact product, this should incentivise action.

Alternative feeds can also strengthen business. Producers and chicken-focused operators, according to Zero Carbon Forum director Bob Gordon, should be asking: how do I change my production systems to increase my resilience? "Farmers will be much more likely to change," he says, "if we focus on the positives: how do we make money in this industry? The price of soy is a significant risk to the chicken supply chain because weather patterns in the Amazon are changing, and the area is converting to dry savannah unsuitable for growing crops.

"At some point in the next 20 years, drought in South America could lead to failed crops. Soy is a fundamental commodity that drives all protein and meat markets. If soy fails, what do brands that rely on it for their hero product do? They have either got to find a more resilient, more sustainable way of producing that product, or transition away from it. I don't think major chicken brands currently have a solution, because it's really hard. I don't think customers are ready, I don't think boards are ready and I don't think the alternatives are ready. Boards are risk-averse. At the moment, a board is probably saying, 'We're not prepared to move away from chicken – it's the country's most popular meat.' But it is clear that investing in alternative feeds, and reducing reliance on soy, will protect supply chains today and in the future."

Source soy according to country of origin

"Exposure to deforestation is the biggest reputational risk liability," observes Øistein Thorsen, CEO, FAI Farms. But little of the soy supply chain is traceable to farm

level. "With the passing of the EU Deforestation Regulation, tracing the soy supply chain to farm level has become the highest priority for many companies operating in Europe. UK businesses have an opportunity to get ahead through industry-wide collaboration. Salmon farming companies in Norway banded together to pressure feed suppliers to ensure all soy they used was deforestation-free. The UK poultry industry could do something similar."

Hospitality and foodservice operators and retailers are already taking action to reduce the impact of deforestation. McDonald's, for example, aims to eliminate deforestation in its supply chain by 2030. Tesco, Asda, Lidl and Avara Foods have set their sights on deforestation-free soy by 2025. This can mean using soy from North America or Europe, even though this is imperfect because North American soy does not currently have a deforestation-free certification.

More transparency is urgently needed, and hopefully will be driven in the UK by the EU Deforestation Regulation, which came into force in 2023. This compels those who bring products to the EU market to prove that they do not originate from recently deforested land and have not contributed to forest degradation. Those who can't face hefty fines.[58]

Soy typically needs a warm climate, but warming weather and new variants more suited to the UK mean that it may increasingly be grown closer to home, offering another potential lower-impact option.[59]

According to the Soil Association,[60] other environmental threats are associated with Latin American soy production for UK animal feed. These include high volumes of hazardous pesticides used on crops, which present significant risks to pollinators, wildlife and the health of farm workers and their families. The Soil Association is asking supermarkets to remove highly hazardous pesticides from their supply chains, to phase out their reliance on soy and to look at alternative feeds, such as British peas and beans. Operators can join this movement: the Soil Association is keen to work with the restaurant sector.

Adopt slower-growing breeds to reduce soy reliance

"We need to view things holistically," says Øistein Thorsen, CEO, FAI Farms. "The feed protein requirements for a slower-growing breed are different to fast-growing breeds, which require a high-specification diet to support a rapid growth trajectory. A slower-growing bird has a different nutritional feed profile, which creates opportunities for innovation around other lower-carbon feed sources, including peas, beans, insects and algae."

Lakes Free Range Eggs has spent the past five years reducing the volume of soy in its feed without compromising on egg quality or hen health. A 70 per cent reduction in feed-related carbon has been achieved, in part by switching

to North American versus South American soy for feed. "Eighty-five per cent of our scope 3 emissions come from feed, and 75 per cent of that comes from soy," explains David Brass, CEO. "It originally made up about 19 per cent of the birds' feed ration. We're at about 8 per cent now, and we were trying to get to zero. But we've adjusted our target to about 4 per cent as, when we went below that, it impacted on the birds negatively; you have to get the amino acid balance right. But we're thinking creatively about alternative feeds. For example, if we can make it work legislatively, meal and bone could provide the right nutritional profile."

Feeds such as microalgae, insects, liquid amino acids, and meal and bone could help reduce the dependence on soy. A 2021 WWF report[61] estimates that using insect meal to feed fish and livestock could cut the UK's future soy footprint by a fifth, protecting critical landscapes like the Brazilian Cerrado.

The research also suggests that around 240,000 tonnes of insect meal per year could be sourced from UK insect farms, if the regulatory environment was more supportive. And the industry is working to explore that potential. Protein producer Cargill is exploring insect opportunities for feeding fish.[62] Tesco is working with WWF to develop a closed-loop system that uses food waste to feed insects, to eliminate waste and create low carbon animal feed.

There are, inevitably, costs associated with transitioning to more sustainable production methods. But there is great potential too. Of European signatories to the Better Chicken Commitment, the only one reported to be 100 per cent compliant across its entire chicken production is Norway's Norsk Kylling. Responsible for nearly a third of the Norwegian fresh and frozen chicken market, it has found that using the slower-growing Hubbard has increased its feed conversion ratios. This, combined with other factors, has enabled the birds to be sold to customers at no extra cost (see Mitigate cost impacts).

Address negative environmental impacts

Poultry farming has a significant environmental footprint. "Waste materials such as poultry litter and manure can pose a serious threat to environmental and human health," warns a report published in *ScienceDirect*.[64] "Poultry production and waste byproducts are linked to NH_3, N_2O and CH_4 emissions, and have an impact on global greenhouse gas emissions, as well as animal and human health. Litter and manure can contain pesticide residues, microorganisms, pathogens, pharmaceuticals (antibiotics), hormones, metals, macronutrients (at improper ratios) and other pollutants, which can lead to air, soil and water contamination, as well as formation of antimicrobial/multidrug-resistant strains of pathogens." Dust, odours and waste from slaughterhouses can also have an adverse impact on workers, local people, and adjacent land and waterways.

"Chicken excrement run-off from farms pollutes waterways and soil," observes Peta. "One example [is] in Herefordshire and the surrounding counties, where the River Wye has been described as 'pea soup'. The phosphate-rich excrement from chicken farms causes algal blooms, which remove oxygen from the water, killing aquatic life."[65]

There are no easy answers to these environmental challenges. "Investigating the influence of agricultural activity, including animal rearing, on water bodies is very difficult," concedes the *ScienceDirect* report, "but crucial for water quality protection. Novel approaches will have to be implemented to keep up with emerging challenges."

Peta adds: "The urine and excrement from chicken farms pollutes the air, too, in the form of ammonia gas. Residents living near chicken farms have complained of the dreadful stench, but this smell is not just disgusting, it's noxious. A 2019 study found that if ammonia emissions from UK farms were halved, 3,000 premature deaths per year could be prevented."

There are sustainable, welfare-supporting ways to address some of these impacts. Research conducted by Lakes Free Range Eggs with Natural England and the Environment Agency has demonstrated 60 per cent ammonia absorption as a result of the egg producer's policy to cover 20 per cent of its ranges with trees, which also improve hen wellbeing and egg quality.

Lakes Free Range Eggs is now working on a 10-year plan that balances dense tree-planting near chicken sheds, for maximum ammonia absorption, with planting in other areas for the 50:50 sunlight and shade that chickens prefer. This tree policy also sequesters carbon, contributes to net zero commitments and supports biodiversity – especially for species such as butterflies, moths, bats and owls, which thrive in dappled light. And trees draw surface water into the soil, which improves muddy conditions and prevents the runoff of contaminants, such as phosphates, into water courses. These research findings were instrumental in helping RSPCA Assured set minimum requirements for tree cover.

Mitigate antibiotic use

"The safe and responsible use of antibiotics has been prioritised by the poultry meat industry since 2011," observes British Poultry Council (BPC) chief executive Richard Griffiths. "Our BPC Antibiotic Stewardship has seen routine preventative application stopped and overall antibiotic use decrease by nearly 80 per cent."

In its 2023 report, the BPC summarises its achievements:

- 79.5 per cent reduction in the total use of antibiotics since 2012
- zero fluoroquinolones used in chicken meat production in 2022
- 98.7 per cent reduction in use of "critically important antibiotics" since 2012

These are encouraging trends. But disease is inevitable when large numbers of animals are housed together. Close confinement increases the risk of illnesses such as bird flu – and other dangerous disease-causing pathogens – developing and spreading, as stated in reports by the Food and Agriculture Organisation of the United Nations[66] and the US Council for Agriculture, Science and Technology.[67]

Slower-growing breeds may offer a way forward. "These breeds are more robust and their immune systems are stronger," notes Dr Tracey Jones of Compassion in World Farming. "They have lower mortality rates and are nine times less likely to require antibiotics, according to recent data from the Netherlands.[68] This has benefits in terms of antimicrobial resistance and reduced medical costs."

A 2022 RSPCA report[69] highlights the risk of campylobacter: a bacteria commonly associated with cattle and humans that is developing resistance "at an alarming rate". This "timebomb" has been linked to antibiotic use in poultry and threatens animals and consumers alike. "The actual number of retail chickens carrying enough campylobacter to infect a human," the report notes, "can be approximated at up to 270,000 birds for every one million reared." In a market so vulnerable to media scare stories, this presents a risk for even the largest operators. For smaller ones, just one real-life case might prove fatal.

"Antibiotics are routinely used to help chickens survive poor welfare conditions on factory farms," warns Compassion in World Farming, "making them less effective for humans – a dangerous scenario for modern healthcare… Higher welfare systems and the use of slower-growing breeds reduce the need for antibiotic use in animal farming."[70]

Phasing out excessive antibiotic use is not a pipedream. IKEA's Better Chicken programme – which shares elements with the Better Chicken Commitment – stated in 2018: "In line with the IKEA Food guidelines… there will be no routine use of antibiotics by 2020 and a plan to phase out highest priority antibiotics that are critically important to human health by 2025."[71] Meanwhile, Nando's says its chickens "are only given antibiotics when they're ill… Routine use of antibiotics is completely banned."

And while the short-term health of livestock may be a legitimate concern for producers, there could be a long-term cost for hospitality and foodservice providers who do not look closely at what's going into the chickens that they purchase. "In EU countries, 33,000 people die due to infection with antibiotic-resistant bacteria each year," warns the *ScienceDirect* report. "Chicken farms are believed to be large emitters of antibiotic-resistant strains." Again, the negative reputational impact of being associated with such a fatality could far outweigh the cost benefit of purchasing over-medicated meat. The solution, the report's authors suggest, is familiar: "The introduction of slower-growing broiler races, [which] has positive effects on the welfare of the animals and public health through a reduced use of antibiotics."

Rethink the system

To meaningfully tackle the climate crisis and to dramatically improve welfare standards – while keeping businesses profitable and productive

– wholesale transformation of the farming system is needed, rather than tweaks around the edges. And there are examples of innovative approaches that offer hope.

For example, Pasturebird in the US is piquing considerable interest. Its chicken coops are moved onto fresh pasture daily; the company even claims to have developed the world's first solar-powered, self-driving chicken coop.[72] The fresh pasture provides a refreshed diet of insects, grains, grass and legumes – and, the company says, contributes towards the birds having higher vitamin, mineral and fatty acid content than traditional chicken. The birds are free to explore, scratch and forage, and shelter in coops at night. The daily movement improves soil health, supports carbon sequestration – with manure enriching the soil (rather than causing run-off and pollution) – and prevents diseased pastures.

Insiders also note the opportunities presented by hierarchal systems, where farmers produce a range of products from the same land, rather than intensively focusing on one. Rolling Eggs, based on Hampshire's Kingsclere Estates, has a flock of chickens that follow the cattle, foraging for food and providing ecosystem services – such as pecking at dung and exposing bacteria within to withering sunlight.[73]

James Smith, managing director of Loddington Farm in Kent, is turning loss-making orchards into pasture and crop land. He has already introduced laying hens, using a pasture-based system in which a mobile coop and enclosure are put on fresh pasture each day. His plan is for other livestock – such as pigs, sheep and/or cows – to graze the same land before crops are sown in the regenerated, livestock-fertilised ground. This system offers the potential for three or four different intercrops.

"It's a move away from a reductionist way of thinking," says Smith. "Instead of massive chicken sheds and the issues that come from managing parasites, and huge volumes of excrement and ammonia, I'm taking degraded land, and building the soil health with the activity of the hens, and the manure of the chicken, and the other animals I follow them with.

"The system improves the land while creating a strong revenue stream, which is much more reliable and diverse than the orchard crops. Plus, customers love it – they can see the hens in the field and know they have a good quality of life." Such an approach, says Smith, is "infinitely scalable".

Use less but better

The less-but-better approach is another key prong in improving welfare, reducing environmental impacts – including achieving the UK government's own meat reduction targets – and managing costs. Transitioning to a low meat diet would enable the average person to reduce their dietary emissions by more than a third (35 per cent). Compassion in World Farming calculates[74] that a 50 per cent reduction in meat, dairy and eggs could reduce greenhouse gas impacts by up to 42 per cent.[75]

Reducing animal protein and increasing plants is also core to many operators' net zero strategies, with some companies' carbon analysis revealing that ingredients account for up to 99 per cent of their scope 3 emissions.

Operators are doing this in two ways. One, by rebalancing dishes so they have more plant protein and less animal protein. And two, by improved carcass balance and utilisation, so a wider variety of cuts is used. Consequently, more of the bird is used in restaurants and throughout the supply chain.

FOOTPRINT VYPR INSIGHT

Which chicken dish would you buy?

Thai curry: succulent chicken and colourful veg in a rich, spicy sauce **59%**

Thai curry: succulent chicken in a rich, spicy sauce **41%**

Meat-reducing diets – often described as flexitarian – are also a key consumer trend: people are actively reducing their animal product intake for health or environmental reasons. This means that adding plants can make dishes more appealing and increase customer satisfaction. Our research found that nearly a third more diners (59 per cent) would choose a chicken curry that highlighted its vegetable content over one that didn't mention vegetables (41 per cent) when asked to choose between the two dishes (see Which chicken dish would you buy?).

IKEA is replacing meat with plant-based restaurant dishes. It intends to be 50 per cent vegetarian by 2025 and to remove all dairy by 2030.

"We're adopting a plant-forward philosophy and we have to achieve climate net zero across scopes 1, 2 and 3 by 2030," says Ryan Holmes, culinary director, business and industry, Compass UK&I. "That includes a commitment to a 40 per cent switch towards plant-based protein by 2030.

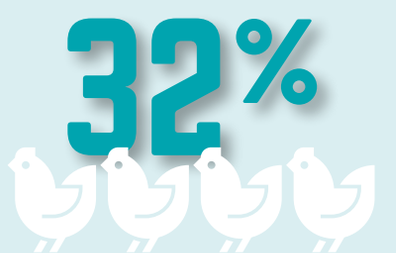
"To increase the quality and the welfare of the protein we are using, and to achieve our carbon reduction targets, we need to decrease the portion size. We do this by adding protein from other sources, which enables a better quality product with the same level of protein. So, with wet dishes, we go 50:50 meat to pulses, beans, legumes and so on. We did this with our chicken tikka masala and people loved the extra vegetables.

"Consumers would rather have quality, so let's make vegetables the heroes of a dish. We're also looking at how to replace eggs with vegan alternatives in products such as cakes. By reducing animal protein but making food taste amazing, we can take consumers on the journey towards healthier, plant-based diets."

> "The power of chefs is in their ability to influence consumer preferences towards sustainable diets – both through the dishes they serve, and by being influencers on social media."
>
> **Martina Dell, head of projects and consultancy, Sustainable Restaurant Association**

Align with consumer sentiment

FOOTPRINT VYPR INSIGHT



of people try not to eat 'fake' chicken products because they are ultra-processed

Creating dishes that rebalance the volume of chicken, and creating vegetable-based options rather than utilising plant-based chicken alternatives, chimes with increasing consumer concern about ultra-processed foods. This is especially relevant for the increasingly prevalent flexitarian consumer, who wants to reduce rather than exclude meat.

Industry insiders predict that savvy brands will increasingly move away from high carbon components such as chicken in their core offering, to allow flexibility in a plant-focused future. "While I can't comment on their motivation," observe the Zero Carbon Forum's Bob Gordon, "it's interesting to note that, by rebranding as just KFC (not Kentucky Fried Chicken), KFC has taken chicken out of its name. Who knows, in future, maybe Nando's will just have a chilli – rather than a cockerel – in its logo."

Cultivated meat may also have an impact on the number of animals reared for food, especially as the regulatory landscape is beginning to shift: the United States Department of Agriculture has joined Singapore in approving the sale of 'cultivated' chicken.[76] Production of such chicken has been found to be 83 per cent lower in greenhouse gas emissions, and 99 per cent lower in land use, than conventional chicken.[77]

CHAPTER 3 Solve supply chain challenges

Solve supply chain challenges

"It's more profitable to farm in a way that is environmentally sound and promotes better welfare. If you treat the chickens better, they lay better. If you plant trees, they absorb your ammonia, they provide shade, and the chickens like it, so they lay better. So why isn't everybody doing it?"

David Brass, CEO, Lakes Free Range Eggs

Map convoluted supply chains

"There's a huge piece of homework that needs to be done by food companies to map their chicken supply," says Dr Tracey Jones, director of food business, Compassion in World Farming. Many foodservice operators are so far removed from their suppliers that – although they are able to ensure produce meets their procurement standards, via certifications such as Red Tractor – they may not know who their suppliers are. Produce is typically supplied through intermediaries, who might source products from different national and international producers throughout the year, depending on availability and price volatility.

This fragmentation prevents market signals from operators requesting high welfare products reaching producers. Producers only see what gets sold; they don't hear what customers ask for.

Another barrier is that some wholesalers don't enable customers to easily filter products with well-established certifications such as Red Tractor or RSPCA Assured, let alone confirm whether they have signed up to commitments such as the BCC.

"Mapping your supply chain," notes Robin Sundaram, community regeneration lead, and former responsible sourcing manager for Nestlé UK&I at BCC signatory Nestlé UK, "means you can start engaging with them, to work out how to improve standards, and to measure progress."

Setting timescales for when operators plan to start sourcing at higher standards is also essential, because theoretical demand isn't enough to drive producers to adopt enhanced welfare practices. "We often get requests from operators on sourcing BCC product," shares Shelley Morris, sustainability projects manager, Bidfood UK. "But unless we know when our customers are going to want it, and that they will commit to buying it once producers have invested in building up supplies, we can't start sourcing or costing it.

"For producers to supply chickens to BCC standards, they need to have parent and grandparent flocks laid down, which takes a while to build up. So our suppliers may not have large volumes of BCC products on tap. But if they know we have customers who want it, they can probably make it happen – they can combine it with interest from other customers and start going to the producers to open those discussions."

Committing to higher welfare products ensures producers feel confident about switching to suitable systems. Marks & Spencer, for example, significantly extended its contract with 2 Sisters Food Group for its higher welfare Oakham Gold range, to provide a multiyear guarantee that wouldn't be impacted by market changes.

The next step is investing in third-party auditing to ensure compliance with your standards. Assurance schemes play a role: the Red Tractor Enhanced Welfare label and scheme and RSPCA Assured are both vehicles for the BCC.

Collaborate and communicate

Operators consistently report that lack of supply is a key barrier to procuring higher welfare chicken. Many say they are unable to calculate how much it would cost, because the supply isn't available.

However, this appears to be a misconception. According to the British Poultry Council, higher welfare, indoor-reared chicken currently accounts for 15 per cent of production. "It's definitely available for those who want to purchase it," says Kerry Maxwell, communications manager, British Poultry Council.

The feedback received from chicken working groups indicates that, when stakeholders get together, producers are stunned to discover how much demand there is from operators for BCC-certified product – and operators are shocked to discover that UK producers can supply it.

The convoluted supply chain prevents operator demand reaching the ears of producers who can pivot to supply it. But working groups, which break down supply chain barriers and facilitate communication, can facilitate dialogue and move the industry forward.

The need for a convener

Our research indicates an opening for a convener to bring a convoluted supply chain together in a noncompetitive way. It could

consolidate interest, efforts and resources, and create momentum to drive change. It could even collect funds to pay producers to do lifecycle assessments and make infrastructure investments, and act as a carcass matchmaker (see Incorporate carcass balance).

Traditionally, companies are wary of close collaboration, for fear of breaching competition law. However, draft guidance from the competition authority sets out how the law applies to agreements between companies on sustainability issues such as air and water quality, biodiversity conservation, use of raw materials, and net zero. The aim is to reassure firms that agreements that genuinely contribute to addressing climate change will be exempt. The regulation doesn't specifically mention welfare, but organisations such as RSPCA Assured are keenly investigating legal ways to collaborate and improve conditions.

Mitigate cost impacts

Higher welfare is perceived to equal higher purchase costs – and currently this tends to be true in the UK. But there are signs that savvy producers might come close to matching conventional production prices in future, especially when higher welfare scales up.

Norwegian food and poultry producer Norsk Kylling and its sister grocer REMA 1000 offer customers a higher welfare chicken without an increase in price. When they transitioned from the fast-growing Ross 308 to the slower Hubbard JA787, "The increased productivity of the parent flocks – in combination with the larger slaughter weights, higher yield rates, lower mortality and lower reject numbers – mitigated the higher costs associated with a longer life span of the bird, and an increase in feed conversion ratio."[78]

However, the production efficiencies of Norsk Kylling are yet to be standard practice. UK insiders report that, according to quotes received, sourcing higher welfare chicken today increases prices by up to 50 per cent. Understandably, operators – and the wholesalers who supply them – are so price-sensitive that few are prepared to pay more and risk losing customers or clients to cheaper competitors.

The British Poultry Council, which represents 85 per cent of UK poultry production, says the biggest barrier for producers seeking to ensure the sustainability, safety and affordability of the food system is the cost of living crisis. That's paralleled by a cost of production crisis. The prices of everything from energy to labour are rocketing, making it challenging to produce even standard broiler chickens at a profit.

However, forward-thinking operators have found addressing issues such as carcass balance (which enabled Pieminster to halve the number of birds it required), taking a less but better approach, and ensuring procurement budgets are aligned with high welfare commitments and corporate sustainability strategies (something that is not standard practice) can put more expensive, higher welfare chicken on the menu today. "Marks & Spencer was able to achieve 100 per cent BCC-compliant, RSPCA Assured on its fresh chicken," says Dr Tracey Jones of Compassion in World Farming, "because its sustainability policy is aligned with its buying and marketing strategy."

Egg shortages in 2023 drove up prices for caged eggs, putting them at a similar price point to free range for foodservice. This drove greater uptake of free range, which will hopefully weather future price decreases.

Many sustainable investments can also be cost-effective. At McDonald's supplier Lakes Free Range Eggs, investment in field-based solar panels and battery storage is expected to provide return on investment in four to five years, amid rising energy costs. It also improves welfare for hens, who shelter from weather and predators beneath the panels (reducing their stress levels).

Additionally, planting native trees across 20 per cent of the ranges on the farms provides cover for hens, and improves their wellbeing and egg quality – something that McDonald's and Lakes Free Range have studied extensively.[79] Payback is typically achieved within six months. Savings come through reduced mortality, reduced stress, lower levels of injurious feather pecking, improved conditions in sheds, and fewer deaths from chickens suffocating each other in doorways when panicking and running for cover; instead, they shelter beneath the trees. The trees also address issues such as costly ammonia pollution.

Think holistically about yield

One concern regarding slower-growing birds is yield. According to British Poultry Council data, the yield differences between birds are minor: standard birds yield about 72 per cent, slower-growing about 70 per cent. But when we produce around 1 billion birds a year, these differences add up.

However, the Welfare Footprint Project – which analysed the welfare impact of the BCC and the adoption of slower-growing breeds on broiler production – concluded that the "adoption of slower-growing birds reaching a similar slaughter weight as conventional breeds is also likely to lead to a reduction in the number of individuals needed to produce the same amount of meat, given reduced losses from mortality, as well as from disposal and rejection of carcasses and meat products

(e.g. lower incidence of muscle myopathies) at the production and consumer sides."[80]

BCC producer Norsk Kylling found that the slower-growing Hubbard had a 39 per cent lower daily mortality rate than the Ross 308, despite the longer life of the Hubbard (33 days for the Ross 308 versus 46.6 days for the Hubbard). Foot pad lesions were also 29 per cent lower, and average mortality during transport was down 75 per cent.[81]

"We were quoted at least 40 to 50 per cent extra per kilogram because we buy chicken pieces," explains one sustainability manager at a UK restaurant chain, "whereas chickens are raised – and costed – as whole chickens."

This means if you want only BCC breast, you essentially pay for the whole bird – or the whole shed of birds – needed to supply it, even though you need only part of a shed or part of a carcass. And even when producers have several operators asking for BCC product, it's not common for these requests to be matched up to help operators get better value, because each customer is priced in isolation. The costs are loaded as if the operator is buying the whole bird.

Incorporate carcass balance

Bringing down chicken-related GHG impacts and costs can be achieved with better carcass balance. But with operators short on resources to hunt out businesses with complementary needs, a carcass matchmaker is needed.

Retailers might be willing to help operators achieve carcass balance. "We have a dedicated supply of BCC into M&S and we've generated a product portfolio to deliver carcass balance," says Vivienne Harris, agriculture manager - poultry, M&S Food Department. "There may be opportunities for partnerships and collaborations going forward within retail more generally to support foodservice to help achieve carcass balance."

In the meantime, operators are finding their own solutions. Compass is moving towards a model in which it buys the whole bird, gets it butchered, and directs the constituent pieces to relevant parts of its business. It has also invested in menu development to incorporate a wider variety of cuts – such as thighs and back – into dishes, to ensure the whole chicken is utilised.

Pies with a conscience

Better Chicken Commitment signatory Pieminister has sourced 100 per cent of its chicken from a slower-growing breed since April 2022 and now complies with five of the six BCC criteria.[82] It has integrated carcass utilisation in its transition, allowing a greater balance of breast and thigh meat. This rebalance has nearly halved the number of birds required in Piemininster's supply chain, and helps mitigate challenges in availability and cost.

Compass has the scale and flexibility to make a difference. But what's needed is collaboration – sharing sheds and carcasses – to spread buying power between businesses. Organisations that don't have the cut flexibility or the volume of demand to devote substantial resources to solving these issues need support to achieve carcass balance.

What's needed is a carcass matchmaker who can help several operators buy the whole bird together, or match operators with retailers or noncompeting operators who have the cuts they need. (See also Collaborate and communicate.)

Breast is not best

Investing in a relationship with its butcher and shaping dishes around cuts of meat that aren't breast has helped Olympia London to buy cost-effectively and manage food waste. "A wider variety of cuts," says catering manager Abbey Short, "allows us the flexibility to use a lot more of the chicken: the bone for stocks and soups; the thighs in wet dishes or buttermilk burgers; the back in wet dishes like ramen or curries. And the wings are super-popular. We've had no complaints about using the dark meat.

"The butcher will also alert us to surpluses – such as when he's had someone buy a lot of breast, so he has the rest of the carcass surplus. We can incorporate those into our menus at a good price. If you take a well-thought-through gamble, and make bold decisions, it usually pays off. That's how you get a reputation for being a pioneer."

Ryan Holmes, Compass UK&I, agrees: "We switched our katsu to a deboned thigh. People thought it was delicious – more succulent and tasty. It's also practical: it's moist, so it can stay under the heat for longer. We started using wings more as a side dish, or with slaw and fries. It's budget-priced and, with inflation hitting our customers hard, they like saver options. We're also looking at how we can utilise the whole bird across our business, so the more cost-conscious sectors – such as education – get the better value cuts."

Be reassured about standardised sizes

Another perceived barrier to higher welfare is hospitality and foodservice's requirement for standardised cut sizes, which fit portions, recipes and cooking times, and provide certainty in costing (usually set per kilo). A larger or smaller breast requires adjustments, time and skill to ensure it is cooked properly, meets safety and recipe specifications, and doesn't contribute to waste.

But while free range or organic products can be more varied because feed and other inputs are less rigid, BCC chickens can still provide the consistency that operators need because its standards provide the uniformity hospitality and foodservice needs, so they can easily cost each item and predict the time it needs.

Sell on welfare quality

FOOTPRINT VYPR INSIGHT

Would you pay more for a chicken dish if you knew it had been:

Made with free range chicken	**49%**
Made with higher welfare chicken	**40%**
Made with British chicken	**36%**
Made with fresh (not frozen) chicken	**26%**
Produced at a farm I had heard about	**16%**

"'Chicken breast' and 'fresh' are seen as almost a reassurance of quality," observes Cliona Duffy, head of corporate partnerships, RSPCA Assured. And customers have clearly adopted a breast-is-best mentality. Our research found that people are more than twice as likely to choose a buttermilk chicken burger described as including breast over one described as including thigh. That's despite our insiders agreeing that juicy thighs are more suitable for such dishes, scoring highly with customers on taste. The answer is therefore to switch the focus from cut to other attractive attributes.

"What people like M&S are doing in retail – including ready meals – and restaurant environments is reformulating recipes so they use a variety of cuts, and shifting the message to make 'RSPCA Assured' the quality claim, rather than breast or fresh," says Duffy. This seems to be a smart move. Our consumer survey revealed that 40 per cent of people would pay more for a chicken dish made with higher welfare chicken, and nearly 50 per cent would pay more for free range, compared to the 26 per cent who said they'd pay more for fresh.

Use welfare to build market share

With UK higher welfare options a challenge to source, despite their apparent availability (see Collaborate and communicate), some operators are procuring higher welfare chicken from countries like Brazil or Thailand. This is ruffling feathers in the UK, with producers concerned that they may lose market share to international suppliers because of welfare requirements. International producers certainly see it as an area of opportunity: the Humane League reports expressions of interest from Brazilian producers. And investors considering building a North African facility have contacted the League to understand how they can produce to BCC standards and fulfil requests from the UK market.

Focus on farmer feel-good factor

"It's a more pleasurable way of farming." That's the feedback from insiders consulted for this report. Switching to higher welfare is better for farmers' mental health, from not having to deal with dead birds every day, to the enjoyment of seeing hens expressing natural behaviours as they forage among trees, surrounded by wildlife that the woodlands support.

"I'm really enjoying farming the M&S Oakham Gold chickens," says Martin Sweetland, M&S Oakham Gold farmer.[83] "Seeing them exhibit natural behaviours makes me proud, and I believe that translates into a more tasty bird. This is a real game-changer."

Support policy pushes

FOOTPRINT VYPR INSIGHT

41%

of people think the government should do more to improve the lives of chickens

"We need to stop producing low quality chicken now," advocates Edward Barker, executive head chef, Dunston Hall, QHotels Collection, expressing a concern voiced by many across the industry. "While there is the option to buy cheaper, there will always be businesses that do so. If we only have high quality, high welfare chicken available, that's how you change the industry."

A good proportion of the public agrees. In our survey, 41 per cent of people agreed that the government should do more to improve the lives of chickens and hens.

BCC was intended to be a pathway to higher welfare that Defra could harness. But, laments Compassion in World Farming, there is still no policy to support investment in higher welfare for broilers.

Post-Brexit welfare reforms have not just been slow to materialise: some areas appear to be moving backwards. For example, in a move criticised by welfare-orientated campaigners such as the Soil Association,[84] Defra has ditched planned consultation on proposals to roll out compulsory animal welfare labelling on food. This follows industry criticism, according to Farming UK.[85] Under those plans, products – initially pork, poultry and eggs – would have been categorised in tiers linked to methods of production.

According to the British Poultry Council, investment is hindered by cost of production pressures. "Disparity in energy support is a key example, where energy is prioritised for some parts of the supply chain and not others," observes Kerry Maxwell, communications manager, British Poultry Council.

The solution? Actors along the supply chain must apply pressure to government to drive policy.

Because better chicken equals better business.

About this report

Footprint Intelligence was commissioned to write this report by RSPCA Assured. The research comprised in-depth, semi-structured interviews with foodservice experts and sector thought-leaders; surveys with between 500-1,000 UK consumers, desk-based research, involvement in industry events and forums, and comments and insight from opinion leaders linked to the industry.

Footprint Intelligence is indebted to the industry experts who generously gave their time and insights, including those who did so anonymously. We particularly thank the following for their time and knowledge, which were essential.

Abbey Short, catering manager, Olympia London
Bob Gordon, director, Zero Carbon Forum
Cliona Duffy, head of corporate partnerships, RSPCA Assured
David Brass, CEO, The Lakes Free Range Egg Company
Edward Barker, executive head chef, Dunston Hall, QHotels Collection
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Juliane Caillouette Noble, managing director, Sustainable Restaurant Association
Julie Owst, head of sustainability, Bidfood UK
Kerry Maxwell, communications manager, British Poultry Council
Liam Hodgson, global animal welfare specialist, The Humane League
Martina Dell, head of projects and consultancy, Sustainable Restaurant Association
Matthew Melton, corporate relations manager, The Humane League UK
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Phoebe Connell, corporate relations coordinator, The Humane League UK
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Ryan Holmes, culinary director, business and industry, Compass UK&I
Samantha Davis, group procurement and supply chain director, CH&CO
Shelley Morris, sustainability projects manager, Bidfood UK
Dr Tracey Jones, director of food business, Compassion in World Farming
Vivienne Harris, agriculture manager – poultry, M&S Food Department
Will Waterer, general manager, Sutton Hoo Chickens

We are also grateful to consumer research expert Vypr for providing access to its consumer research panel. Surveys were published via Vypr's panel in September 2023 and April 2024, garnering more than 1000 responses per yes/no question, and over 500 responses per product comparison question.

Vypr is a leading predictive consumer intelligence platform that combines research into behavioural science with a well-segmented consumer panel. Vypr works with retailers including The Co-op Food and Starbucks, brands like Weetabix and Müller, and large manufacturing groups such as Cranswick PLC and 2 Sisters Food Group.

Report team

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About Footprint Intelligence

The ever-shifting sustainability debate makes it vital for businesses to have accurate intelligence for informed decisions. Footprint Intelligence is Footprint Media Group's research and analysis division, helping companies develop successful strategies in the context of responsible business practices. Footprint Intelligence aims to drive, promote and share best practice by helping industry resolve pressing sustainability issues. It asks tough questions and finds answers. It uses research and industry insight to bring businesses together to identify solutions, opportunities, trends and challenges.

About RSPCA Assured

RSPCA Assured is the UK's leading farm animal welfare assurance scheme, dedicated to improving the lives of farm animals and ensuring higher welfare standards across the farming industry. As a not-for-profit certification, it operates under the principles of the Royal Society for the Prevention of Cruelty to Animals (RSPCA) and covers farms, transport, and abattoirs, ensuring adherence to rigorous welfare guidelines. RSPCA Assured works closely with farmers, producers, and retailers to promote practices that provide animals with a better quality of life. By offering transparent welfare standards and engaging with consumers, the scheme enables shoppers to make more informed, ethical choices about the animal products they purchase. RSPCA Assured is committed to continuous improvement in animal welfare and strengthening consumer trust in ethical farming practices.

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