



2026 EGGSPOSÉ REPORT

THE STATE of CAGE-FREE

in the US Food Manufacturing Industry

EXECUTIVE SUMMARY

Food manufacturers are key players in the consumer packaged goods (CPG) sector, which is the backbone of the American grocery store. CPGs land directly in consumers' hands, in their kitchens and pantries and lunchbags. That proximity to consumers makes every sourcing decision a brand decision, whether a company treats it that way or not.

The US CPG market, which includes food manufacturers, is large and competitive, and consumer behavior is shifting. Shoppers are more discerning about whether a product is delivering value, be it on price, quality, or sourcing. Consumers increasingly evaluate brands not just on what's in the package but on what's behind it.

Shoppers care about how a product is sourced, whether a company's claims hold up, and whether its practices match its messaging.

As McKinsey noted in its 2026 State of Food & Beverage report, consumers are pursuing “[greater value and food with higher perceived benefits](#).” It's clear that food manufacturers need to find new ways to earn the consumer loyalty that was once taken for granted. Private-label and disruptor brands are responding to shifting consumer preferences effectively, competing on both quality and price and capturing a growing share of the market. **For legacy food manufacturers, building customer trust and a stronger value proposition is no longer optional. It's the core competitive challenge. A commitment to responsible sourcing standards, and following through on cage-free pledges, are clear ways to meet it.**

Published annually, our Cage-Free Eggsposé evaluates major food corporations on their progress toward transitioning to a 100% cage-free egg supply. This year, we're expanding our scope: for the first time, we're publishing three sector-specific reports to give each industry the focused scrutiny it deserves. This report assesses food companies that source eggs for manufacturing operations in the United States and that have 100% cage-free egg commitments.

Food manufacturers purchase billions of eggs every year in the US. About [31%](#) of US eggs are processed into egg products, primarily for use by food manufacturers. **When a food manufacturer doesn't follow through on its public commitment to source 100% cage-free eggs, the consequences are significant for the animals in its supply chain—and for the consumers who trusted the commitment in the first place.**

The good news is that many food manufacturers have acted. **The cage-free transition in this sector is not theoretical. It is well underway, and the companies that have completed the transition to 100% cage-free egg sourcing have demonstrated that it works.**

That progress is exactly why the remaining laggards are under scrutiny. Most companies in this sector gave themselves several years to phase out cages in their supply chains, aiming for cage-free fulfillment by 2025. The companies that haven't acted are not facing impossible circumstances. They are making a choice to maintain sourcing practices that the vast majority of consumers find unacceptable, and that most of their peers have already moved past.

Cover hen photo: Farm Transparency Project | Image is representative of factory farming

Corporate Cage-Free HALL OF FAME

✓ Fulfilled

These companies are leading the US food manufacturing sector in 100% cage-free egg sourcing. They fulfilled their public cage-free commitments within established deadlines and reported progress transparently.

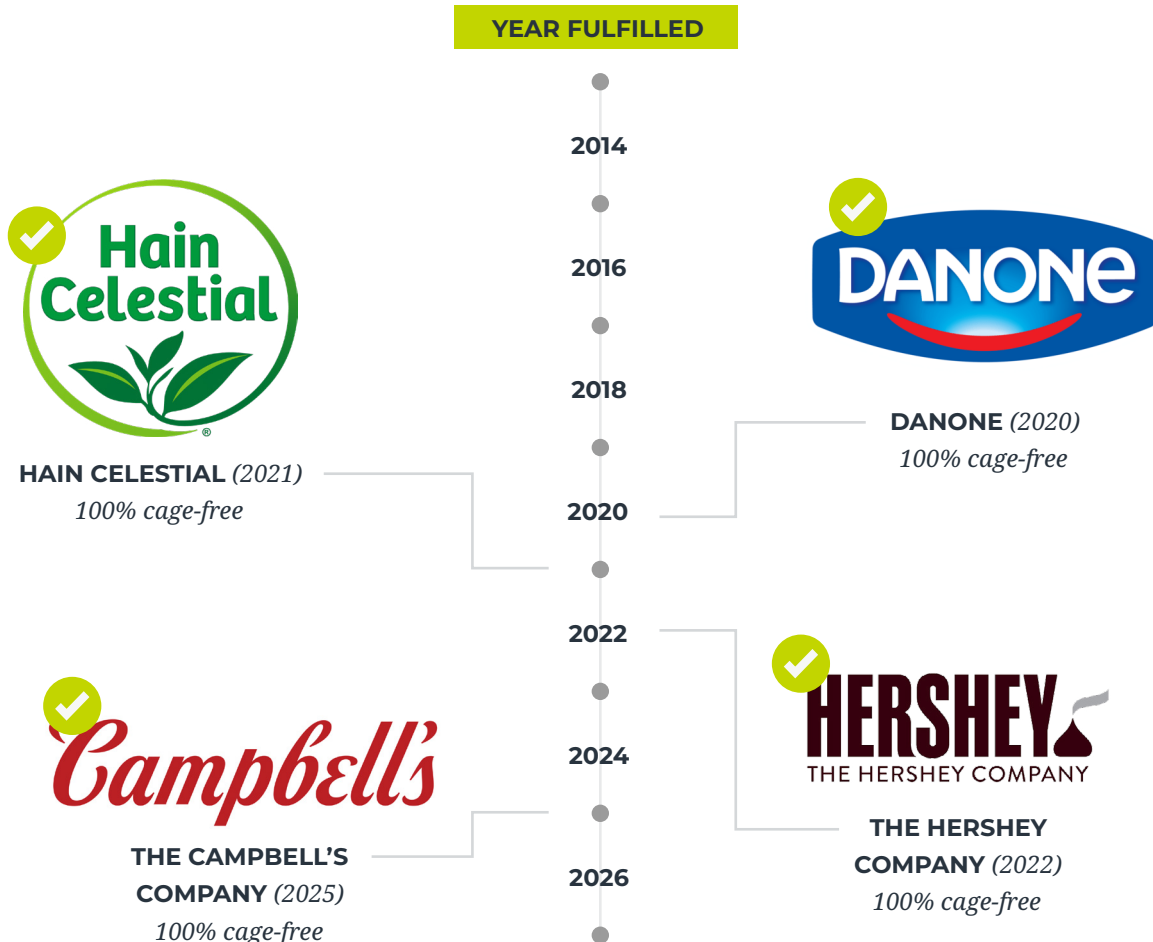
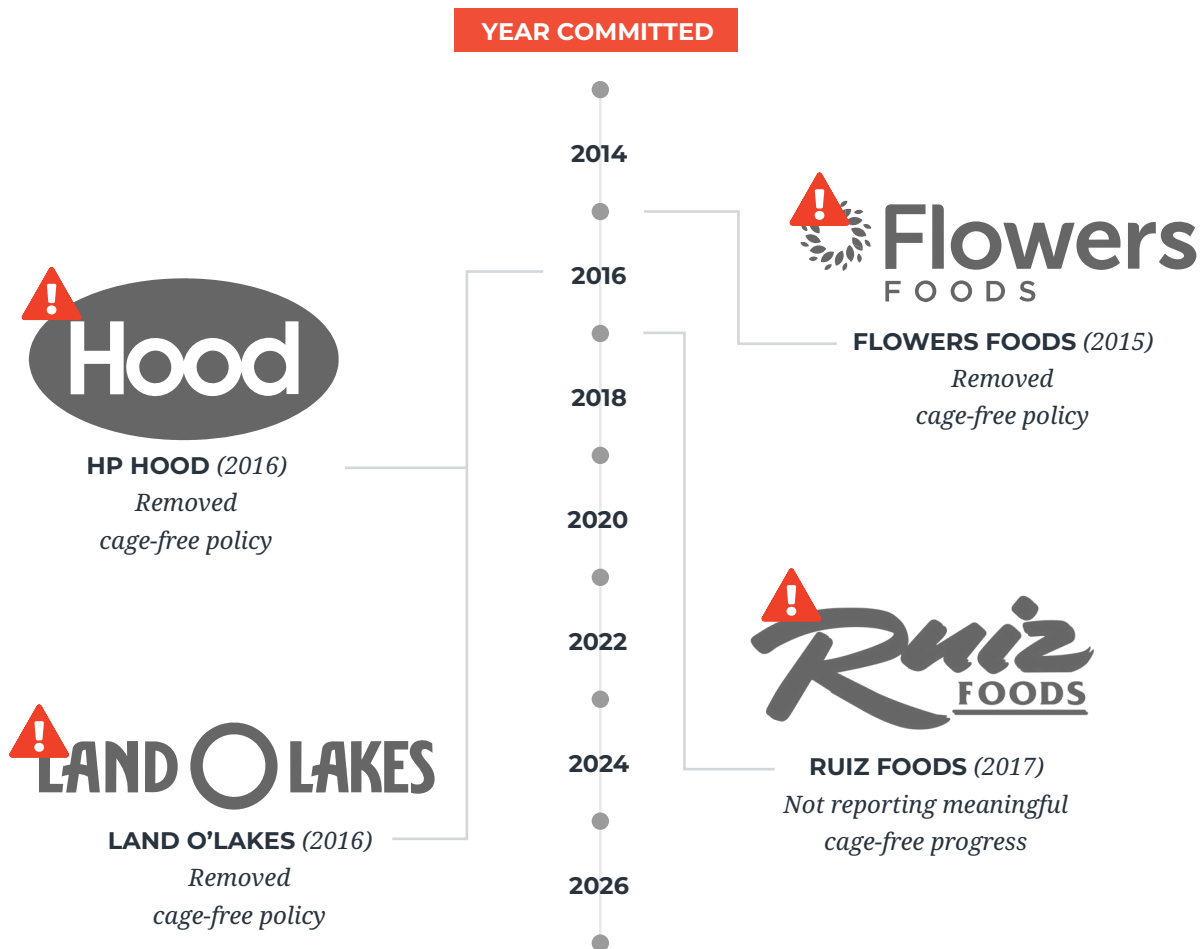


Photo: Haig • World Animal Protection • We Animals

Corporate Cage-Free HALL OF SHAME

⚠ Broken promise

These companies are lagging behind in the US food manufacturing sector's transition to 100% cage-free sourcing by not being transparent about their cage-free commitments.



WHAT'S AT STAKE

In cage systems, each hen is provided less floor space than a standard sheet of paper—unable to spread her wings, perch, nest, or dustbathe, all strong instinctual behaviors essential to her welfare. The vast majority of the American public agrees this is unacceptable: **85% of US adults oppose the confinement of hens in cages, making it the most opposed practice in all of animal agriculture.**

Cage conditions are indefensible. Presumably this was at least one factor as to why the companies in this report chose to make a cage-free commitment. The companies that have since removed those commitments, or aren't reporting on them, have not changed the reality of what battery cages—enriched or otherwise—do to animals. They've simply chosen to ignore it.

THE FINAL RATINGS

THE RESULTS ARE IN

Ratings are based on publicly available
information from each company.

Rating	Company	Meaningful and public policy	US cage-free status
		Yes*	Fulfilled
		Yes*	Fulfilled
		Yes	Fulfilled
		Yes*	Fulfilled
		Yes*	Fulfilled
		Yes*	Fulfilled
		Yes	Fulfilled
		Yes*	Fulfilled
		Yes	Fulfilled
		Yes	Fulfilled
		Yes*	Fulfilled
		Yes*	Fulfilled

* Indicates company with global policy

Rating	Company	Meaningful and public policy	US cage-free status
	kewpie 	Yes*	Fulfilled
		Yes*	Fulfilled
		Yes*	Fulfilled
	Dr'Schär	Yes*	Fulfilled
		Yes	Fulfilled
		Yes	Fulfilled
		Yes	Fulfilled
	Mondelēz International	Yes*	Fulfilled 
		Yes*	Fulfilled, Policy excludes pet food 
	MARS	Yes	Fulfilled, Policy excludes pet food
		Yes	Reporting
	 THE J.M. SMUCKER Co	Yes	Reporting, Policy includes pet food

* Indicates company with global policy

 Mondelēz International reduced the geographic scope of its global policy, making progress unclear

 Nestlé needs a new deadline for its global policy

Rating	Company	Meaningful and public policy	US cage-free status
		Yes	Reporting
		Yes	Reporting
		Yes	Reporting
		Yes*	Reporting, Pet food policy unclear, Needs new deadline
		Yes*	Reporting stalled progress, Needs new deadline 
		Yes*	Not reporting North America progress, Needs new deadline
		No, removed*	Removed policy, Reporting declining progress, Missed 2025 deadline
		No, policy scope unclear	Policy scope unclear, Not reporting, Missed 2025 deadline
		No, removed	Removed policy, Not reporting
		No, removed	Removed policy, Not reporting, Missed 2025 deadline
		No, removed	Removed policy, Not reporting, Missed 2025 deadline

* Indicates company with global policy

 Kraft Heinz is reporting declining progress globally



TRUST AND TRANSPARENCY

Liz Fergus

Sr. Corporate Relations Manager, US

Consumer trust is both scarce and valuable to companies that manufacture and market food products. Many of the sector's leading brands are the ones that can demonstrate transparent sourcing across their supply chains. **Cage-free egg commitments are one of the most direct tests of that principle, because they are public, specific, and verifiable.**

A cage-free commitment is a public promise, made to consumers, investors, and stakeholders, that a company will eliminate cages from its egg supply chain by a deadline it sets itself. **Follow-through on a cage-free egg commitment is one of the clearest measures of whether a brand is trustworthy.** Companies that fulfill their commitments to source 100% cage-free eggs demonstrate the integrity that builds consumer confidence. Companies that remove their policies, or aren't reporting on their progress, are misleading consumers and permitting animal cruelty in their supply chains.

Trust earned over years of brand-building can be undone by a single broken promise—and in a market where private label and disruptor brands are ready to absorb customers, that trust may not come back.

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Holding businesses accountable for the promises they make isn't antibusiness; it's vital for marketplace trust.

—Mary K. Engle, EVP of Policy at the Better Business Bureau National Programs



Photo: Jo-Anne McArthur • We Animals
Image representative of factory farming



ESG AND THE CAGE-FREE TRANSITION

Mia Fernyhough

Sr. Associate Director of Animal Welfare

Cage-free sourcing aligns with the value shoppers seek. When a consumer picks up a product marked “cage-free,” they’re getting something they value: the assurance that their purchase didn’t require hens to spend their lives in a cage.

The business case for ESG-related claims like “cage-free” is persuasive. A 2023 [McKinsey and NielsenIQ study](#) tracked five years of extensive US retail purchasing data. Products with ESG-related claims on their packaging averaged [28% cumulative growth](#) over that period, versus 20% for products without them.

Animal welfare was one of six ESG claim categories McKinsey and NielsenIQ analyzed, including claims like “cage-free” and “cruelty free.” While no single claim type dominated across every category, **products making [multiple types of ESG claims](#) grew about twice as fast** as those making only one, which suggests that layering claims conveys authenticity and a real commitment to ESG.

ANIMAL WELFARE IS A PRODUCT ATTRIBUTE SHOPPERS VALUE:

- ▶ **80%** of US consumers would [support a state-level ban on cages for farm animals](#)
- ▶ **78%** of US consumers express [concern about the welfare of animals raised for food](#)
- ▶ **72%** of [Gen Z shoppers look for animal welfare](#) as a value when choosing food
- ▶ **77%** of Americans say they prefer to buy [eggs from hens not kept in cages](#)



For food manufacturers still treating animal welfare as distinct from their environmental commitments, the international [One Health framework](#)—the principle that the health of humans, animals, and ecosystems is interdependent—suggests that this distinction is increasingly out-of-step with both the science and consumer expectations.

[81%](#) of US residents agreed that sustainability should include the health and welfare of animals, humans, and the planet—indicating that consumers do not view animal welfare as separate from sustainability. **Critically, an unfulfilled cage-free commitment undermines whatever ESG story a brand has built around its products, costing the company invaluable consumer trust.**



Both academic research and industry discussion have pointed out that animal welfare may be one of [the] strongest marketing tools to influence consumer behavior.

—[Tim Wall, Senior Reporter,](#)
[WATT Global Media](#)

PET FOOD:

For CPG companies that manufacture pet food, animal welfare carries more weight in purchasing decisions than almost any other sustainability metric. Research recently published in *Frontiers in Veterinary Science* found that “while people value both factors when choosing pet food, [animal welfare was significantly more important in driving pet owners’ choices](#) relative to the environment.” Consumer survey data presented at Pet Summit 2026 indicated that “[90%](#) said they would be likely to switch brands if they knew another brand sourced from farms that treat animals better.”



Evermore Pet Food has always prioritized animal welfare above all else, not just for the pets we feed, but also the farmed animals that provide their sustenance. That’s why we work only with accountable farmers and maintain transparency about our sourcing.

— [Hanna Mandelbaum,](#)
[Co-Founder of Evermore Pet Food](#)



SUPPLY SIDE PROGRESS

Michael Windsor

Sr. Director of Research & Insights

At our current trajectory, more than half of all US hens will be living cage-free by 2027. The direction of producer investment is unambiguous: the industry is building cage-free capacity and letting caged capacity shrink.

For food manufacturers, this has practical implications for egg sourcing. As caged egg supply contracts and cage-free supply expands, companies that haven't transitioned to cage-free will find themselves competing for a shrinking pool of caged eggs that fewer producers want to supply, sold at prices likely to fluctuate as volume and demand declines. Long-term cage-free contracts, by contrast, offer the supply stability and price predictability that manufacturers need to plan production.

Farmers themselves strongly support this direction. A survey of egg-laying hen farmers found that **63%** support cage-free laws like California's Proposition 12 and Massachusetts' Question 3. Not one respondent opposed cage-free legislation.

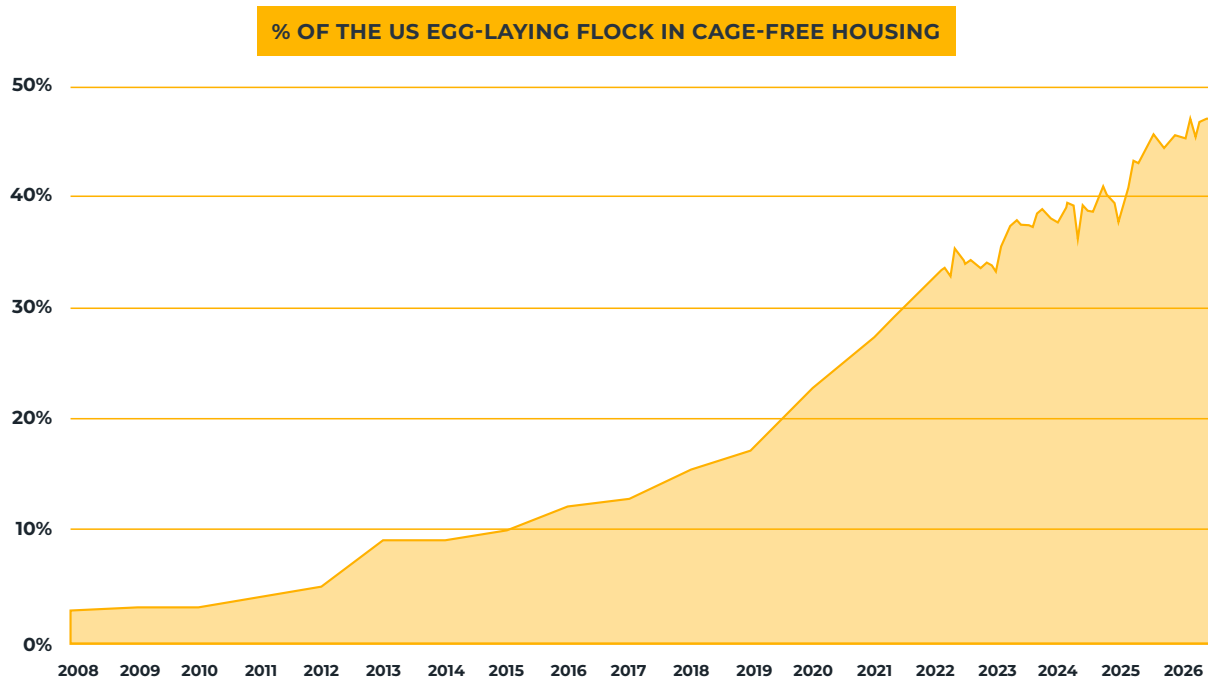


The reality of the situation (is) we are fully cage-free here in Michigan, and yet our egg costs have remained low... We spent more than a decade getting ready, converting barns, raising birds in the appropriate environment. We think it's good for the birds. We think it's working.

—Nancy Barr, Executive Director,
Michigan Allied Poultry Industries



Photo: Tom Woolard • We Animals
Image representative of factory farming



EGG REPLACEMENTS

Food manufacturers are increasingly reducing and replacing egg ingredients in their products to achieve their responsible sourcing goals and complement their cage-free egg commitments.

In recent years, [egg alternatives have become more attractive](#). Commercially available egg replacements can now perform key functions within virtually every category of manufactured food product. This ranges from emulsification in mayonnaise and dressings, to binding in bars and processed foods, to partial egg reduction in bakery through enzyme systems. Even complex bakery applications, historically the hardest to replicate, are seeing new entrants utilizing pea protein to deliver gelling, binding, foaming, and emulsification in one clean-label ingredient. Many alternatives are clean-label and allergen-free, and they offer stable pricing that egg products cannot always guarantee, given avian flu outbreaks and supply volatility.

Consumer appetite for alternatives is growing. According to recent consumer research, [26% of US consumers actively try to reduce their intake of products containing eggs from industrial farming](#), and an additional 8% avoid such products altogether, reflecting growing concerns about ethical sourcing, sustainability, and transparency. Investments in egg alternatives are a smart complement to a company's cage-free egg policy; in addition to committing to higher-welfare eggs, companies can reduce their reliance on eggs by reformulating their offerings.

[Conagra Brands](#), [PepsiCo](#), and [CJ Schwan's](#) have each fulfilled their cage-free goals in North America, and they cite reformulation and egg reduction as part of their cage-free strategies. For example, to maintain cage-free fulfillment in the US and achieve 100% cage-free egg sourcing globally, [PepsiCo](#) states: "We aim to achieve these ambitions by reformulating certain products to incorporate egg-substitute ingredients and transitioning to cage-free egg suppliers."



CAGE-FREE STATE LAWS

Gabriel Wildgen

Sr. Associate VP of Public Policy

Ten US states have passed laws banning the sale and/or production of eggs from hens confined in cages. California's Proposition 12 and Massachusetts' Question 3 both passed with over 60% voter approval. No state has repealed a cage-free law, and proposals are advancing in additional states. The legislative trajectory has moved in one direction only: away from battery cage systems.

Manufacturers sourcing shell or liquid eggs in states like California are already legally required to source cage-free.

These laws reflect where consumer expectations and the broader market are heading.



BATTERY CAGE REGULATION BY STATE	
State	Law coverage*
Arizona	Sale + production
California	Sale + production
Colorado	Sale + production
Massachusetts	Sale + production
Michigan	Sale + production
Nevada	Sale + production
Oregon	Sale + production
Rhode Island	Production only
Utah	Production only
Washington	Sale + production

**Indicates whether the law regulates the sale and/or production of eggs from hens confined in cages*



CONCLUSION

Sustainability-marketed products are growing nearly [five times faster](#) than conventional ones. Consumers associate [animal-friendly sourcing](#) with quality, authenticity, and trust. Egg producers are investing in cage-free systems. Farmers support [cage-free laws](#). Egg replacement technology is giving manufacturers additional flexibility. And the cage-free legislative map is only expanding.

Against that backdrop, the companies failing to follow through on their cage-free commitments have made a choice that is difficult to justify to consumers, to investors, and to the retailers who carry their products. These companies have had years—in some cases, a full decade—to fulfill public commitments they made voluntarily.

The companies that act now are the ones that will define what responsible sourcing means in this sector for the decade ahead.

Reach out to our team to discuss your cage-free transition.

Contact us

corporaterelations@thehumaneleague.org

