



**FAIR**

and

**FOWL**

CAGE-FREE EGG REPORT  
GLOBAL RESTAURANTS 2023



# THE GLOBAL RESTAURANT REPORT

Across countries and continents, people increasingly have something in common when they sit down to eat at a restaurant: They expect the food on their plates to come from good sources. In a 2022 survey, three-quarters of people across 14 different nations agreed: **“the welfare of farmed animals in [my country] is important to me.”** And that includes expecting their eggs to be cage-free.

The world’s most powerful restaurant chains have been working to keep up with changing consumer demand. To date, over 2,500 major food corporations have announced cage-free egg commitments. These companies have promised to stop serving eggs that come from hens confined to archaic cages, a cruel and outdated form of extreme confinement.

## BUT WHAT’S A PROMISE WITHOUT A PLAN?

The vast majority of food brands have promised to eliminate cages from their supply chains by the year 2025. Now, with their deadlines fast approaching, we’ve arrived at the next step: accountability. Which companies are following through on their promises? And which companies are failing animals—along with customers who trusted them?



WHEN IT COMES TO  
ANIMAL WELFARE  
COMMITMENTS, ARE  
GLOBAL RESTAURANT  
CHAINS PLAYING  
FAIR... OR IS IT TIME  
WE CALL “FOWL?”

BLOGS | HENS AND TRENDS

100% cage-free eggs in US Krispy Kreme donuts by 2022

RETAIL · STARBUCKS

Starbucks says eggs will be cage-free by 2020

NEWS

World's largest food service provider goes totally cage-free

OPERATIONS

Burger King parent company commits to being cage-free by 2030

# THE RESTAURANT SECTOR: A BIRD'S EYE VIEW

## CHANGING COMPANIES

Over the last few years, the number of egg-laying hens confined to cages has plummeted. Driven by consumer demand, as well as increasing industry efforts toward corporate social responsibility (CSR) and environmental, social, and governance (ESG) goals, cage-free has become the industry standard. And as cage-free eggs become ubiquitous, companies are finding it easier to globally source them and make good on their promises to consumers.

According to the Open Wing Alliance's 2023 Fulfillment Report, 89% of cage-free egg commitments with deadlines of 2022 or earlier have already been completed. And not only that—the annual percentage of companies completing their cage-free transitions is steadily increasing year over year. At this point, fulfilling cage-free pledges and publicly reporting progress for animals is the norm, not the exception. And as corporate progress on animal welfare gets better and better, the companies lagging behind are looking worse and worse.

In looking at corporate animal welfare policies and increasing legislation, there's a simple truth that companies can't deny: the future is **cage-free**. The question is, which brands will lead the way on ending cages—and which will face the consequences of lagging behind their competitors?

This report by the Open Wing Alliance, a global coalition of 100+ organizations across 70 countries in six continents, ranks global restaurant chains on the status of their cage-free egg transitions.

## CONSCIOUS CONSUMERS

It's a well-known fact that today's consumers are more CSR- and ESG-minded than ever before, seeking out socially responsible companies that align with their values. Animal welfare has risen to the forefront as one of these core consumer values. In a 2022 poll, 80% of likely voters stated that preventing animal cruelty was a matter of personal moral concern, with 82% agreeing that companies should be required to be transparent about their animal protection measures.

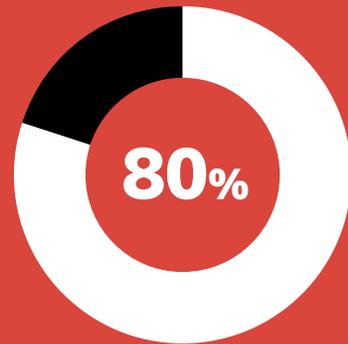
A recent study from McKinsey & Company found that "consumers are indeed backing their stated ESG preferences with their purchasing behavior." Over the past five years, cumulative growth for packaged food products with ESG claims on their labels has been higher than that for products without ESG claims.

Additionally, more and more consumers are recognizing the health risks of caged eggs. According to the European Food Safety Authority, cage egg production is associated with a higher risk of salmonella. For companies looking to meet the evolving expectations of their customers, eliminating cages is truly a low-hanging fruit.

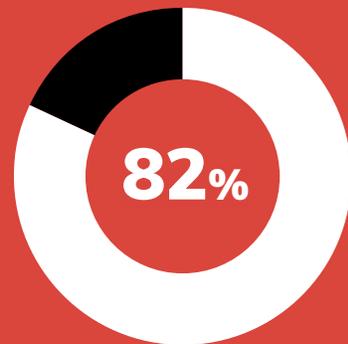


**Since 2017 all the eggs in our UK supply chain have been free range and we remain committed to achieve 100% cage-free egg sourcing in our global supply chain by 2025. It's important to us, and to our customers.**

–Spencer Playle, Supply Chain Director at PizzaExpress



of likely voters stated that preventing **animal cruelty was a matter of personal moral concern**



agree that companies should be **required to be transparent about their animal protection measures**



## EVOLVING LAWS

It's not just consumers who are demanding better animal welfare policies. Numerous countries have addressed the cruelty of battery cages by banning them entirely, conventional battery cages have been banned in the EU since 2012. France has banned the installation of new cages, and all cage systems for hens are already banned in Austria, Luxembourg, and Switzerland. Germany, the Czech Republic, and Slovakia have enacted bans that will come into force in the coming years. In 2022, the European Commission voted to phase out cages across the entire European Union, with cages potentially poised to be banned across all of Europe by the year 2027.

The United States is also making strides, with [bans on battery cages](#) across 11 different states and counting. When the 2023 Ending Agricultural Trade Suppression (EATS) Act threatened to unravel these laws, 202 legislators across 35 states signed a letter voicing their opposition to the bill. In short, restaurants that fail to make good on their promises will face serious scrutiny from their stakeholders, peers, and lawmakers.

So, for companies facing down a cage-free deadline, what happens next? With the 2025 deadline looming, we recommend companies follow three simple steps to deliver on their animal welfare commitments:

- Publicly report a global cage-free percentage, whether on their websites or in CSR/ESG reports.
- Publicly report regional percentages to cover all their areas of operation to demonstrate global equity.
- Publish a roadmap to achieve 100% cage-free by their deadline year.

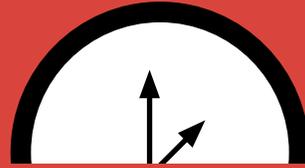
With consumers increasingly prioritizing value-aligned spending, the time has come for companies to show their true colors regarding animal welfare. Those that follow through with a clear plan to eliminate cages—demonstrating transparency and integrity to their customer base—will inevitably see positive results reflected in their public reputation, consumer trust, and, ultimately, the success of their brand.

# WHAT'S LIFE LIKE IN A BATTERY CAGE?

Each hen has just



—smaller than an iPad—  
on which to live her entire life



On average, an egg-laying hen spends  
**10,000 HOURS**  
suffering in a battery cage



Battery cages restrict a hen's  
natural behaviors, leading to  
extreme psychological distress

## The laying hen is one of the most statistically exploited animals in the world.

Around the globe, 6 billion laying hens are confined to cages—each of which can hold as many as ten chickens in a space the size of a cabinet drawer. Unable to express their natural behaviors or even spread their wings, hens suffer extreme stress, pain, and frustration. Their feet and feathers can become caught in the sharp wire bars as they jostle each other for space to breathe. Some hens die in confinement, and their bodies are left to decay beneath the feet of their companions.

Cage-free systems allow hens to move around, stretch their wings, and walk on solid ground. They also allow hens to engage in natural activities like dust-bathing and nesting, dramatically improving their quality of life. Eliminating cages from their supply chains will benefit companies in countless ways—but above all, ending cages is simply the right thing to do.

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**Pokeworks is proud to partner with The Open Wing Alliance on improving animal welfare. We're committed to using only cage-free eggs in all of our products by the end of 2023**

# COMPANY SPOTLIGHTS



Companies seeking to deliver on their cage-free egg commitments can look to **Famous Brands** as a fantastic example. While the company originally committed to transition to 100% cage-free eggs globally by 2025, Famous Brands fulfilled its commitment impressively ahead of schedule—meeting its goal early in 2022, with support from the Open Wing Alliance. How has the transition benefited the company?

With an annual revenue of \$490,000,000, Famous Brands' cage-free egg commitment applies to all of its 2,887 locations and the following sub-brands: Wimpy, Steers, House of Coffees, Tashas, Mugg&Bean, and 70 others. The company offers a helpful guide for how others can equitably raise animal welfare standards across their global supply chains.



At the end of 2021, the Open Wing Alliance worked with **Restaurant Brands International (RBI)** to establish a cage-free commitment—making RBI the first major restaurant group to commit to a truly global cage-free egg policy. In this momentous policy, RBI committed to 100% cage-free eggs (including shell, liquid, and ingredient eggs) globally in 92% of markets by 2025, with the remaining 8% of markets fulfilled by 2030. The policy applies to Burger King, Tim Hortons, and Popeyes.

While RBI is regionally reporting progress in North America, Europe, the Middle East and Africa, Latin America and the Caribbean, and Asia Pacific, the company still has a ways to go. However, with an annual revenue of \$4,970,000,000 and 28,000 locations, RBI sets a commendable example for how a massive global chain can successfully undertake a cage-free transition.

## PIZZA EXPRESS

**Pizza Express** is another successful example of a company making, and reporting, progress on its cage-free egg commitment. With a deadline of 2025 for serving 100% cage-free eggs across its global operations, Pizza Express has been regionally reporting progress in the United Kingdom, Ireland, Hong Kong, the United Arab Emirates, Indonesia, Kuwait, Cyprus, Gibraltar, Philippines, Spain, Macau, Singapore, and India.

With 570+ locations and an annual revenue of £322,907,000, Pizza Express is making a fairly equitable transition to cage-free eggs, reporting progress for all its locations and showing fulfillment across several. We applaud Pizza Express for its ongoing commitment to improving animal welfare.



# EARLY BIRDS

## Restaurants Leading the Way

TO DATE, 1,097 CORPORATE CAGE-FREE POLICIES HAVE BEEN FULFILLED ON TIME, WITH THESE RESTAURANTS EXPECTED TO FOLLOW SUIT.

Following through on cage-free commitments doesn't just benefit countless animals—it also stands to benefit companies themselves. And more and more of the world's leading restaurant companies are waking up to this fact. The following companies represent the gold standard in animal welfare, setting the bar when it comes to making cage-free commitments—and delivering on them.

|   |                      |
|---|----------------------|
|  famous   brands | Commitment Fulfilled |
| valora  | Commitment Fulfilled |
| HOTEL<br>Chocolat.  | Commitment Fulfilled |
| PIZZAEXPRESS  | Reporting Progress   |
|                | Reporting Progress   |
| rbi restaurant<br>brands<br>international   | Reporting Progress   |
| VAPIANO   | Reporting Progress   |
|                | Reporting Progress   |
|                | Reporting Progress   |
| GRUPE<br>LE DUFF  | Reporting Progress   |
| MINOR<br>FOOD   | Reporting Progress   |
|  GROUPE HOLDER | Reporting Progress   |

# EARLY BIRDS

Restaurants Leading the Way



Reporting Progress



Reporting Progress



Reporting Progress



Reporting Progress



Reporting Progress



Reporting Progress



Reporting Progress



Reporting Progress (on 2026 locations)



Reporting Progress (on own brand locations)



Will report by EOY



Will report by EOY



Reporting progress for US locations, published a US glidepath, and will publish a global update by EOY



Will report by EOY



Will report by Q1 2024



Will be reporting as per their benchmarks by EOY

# BAD EGGS

## Restaurants Lagging Behind

Although we've seen the vast majority of companies following through on their commitments so far, some of the world's most powerful brands are still being cagey about their cage-free commitments and underperforming on animal welfare. Despite feedback from their customers and stakeholders, the following companies are refusing to address cruelty in their supply chains—demonstrating a concerning lack of transparency and integrity.

|   |  |
|---|--|
|    | Previously reported progress but did not publish in CSP report |
|   | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
|  | Not Reporting  |
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