



**Egg  
Track**  
**2019  
REPORT**

**COMPASSION**  
in world farming  
[ciwf.com](http://ciwf.com)





A foreword from  
**Barilla**

Last year, **2018**, represented another year of encouraging results for Barilla Group, thanks to all the people that choose our products every day, **appreciating and enhancing our way of doing business.**

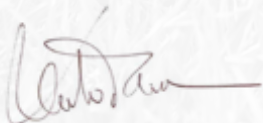
We are aware that food is not only what we eat: **it reflects on people's quality of life, on the wellbeing of animals, and the planet.** Our Mission, "Good for You, Good for the Planet," guides us constantly and allows us to undertake new paths quickly and decisively. We have invested money and resources to improve standards across our supply chain to ensure that all our products contribute to sustainable and nutritionally rich diets.

We have worked on the supply chains of our most important raw materials to make a positive contribution to farmers, communities and the planet. Today, we engage with over 5,000 companies through cultivation contracts, ensuring a fair price to farmers and guaranteeing premiums for high quality. We ensure that all our **suppliers of raw materials of animal origin comply with the highest standards**, in compliance with the **Barilla Guidelines on Animal Welfare**, developed in collaboration with Compassion in World Farming.

When it comes to eggs and egg products, Barilla Group believes that **confinement is a harmful practice for the wellbeing of laying hens** and has therefore decided to abandon this farming practice throughout its supply chain by using exclusively cage-free eggs. The journey started in 2012 in Europe and was fully completed in 2019, one year in advance of our initial target of 2020.

2019 is the year of **Americas** for Barilla Group, and the goal was to move, where possible, to **plant-based proteins**. This is a key element of the "Good for You, Good for the Planet" approach, lowering GHG emissions while also improving nutritional benefits of our products. To meet this goal, starting in **April 2019** we **eliminated egg protein from** our top selling item, **Pasta Plus®**, replacing it with an alternative protein source. We then converted all the remaining eggs in our US and Brazilian pasta products, where eggs are a substantial element and cannot be eliminated, to cage-free.

All these results have been achieved thanks to an **active dialogue with our stakeholders, such as Compassion in World Farming**, which has been based on the principles of candor, collaboration and mutual respect. Over the years this dialogue has become a fundamental part of Barilla Group's way of doing business. We are pleased to **introduce the EggTrack report this year**, as Barilla is committed to transparently communicating our progress and sharing our journey to meeting higher standards with the wide breadth of stakeholders involved in this work.



**Leonardo Mirone**

Global Purchasing Director, Raw Materials  
Barilla Group

# Key Messages

- A. The industry is at a critical moment in the shift to cage-free eggs.** Over 200 US companies have cage-free egg commitments that will need to be met over the course of the next six years. To ensure as smooth of a transition as possible, purchasers must begin working towards commitments now, setting incremental sourcing targets along the way. In turn, these targets and expectations for cage-free egg sourcing must be clearly communicated to suppliers, who can then plan for new construction and renovation of systems to build the necessary cage-free egg supply.
- B. 2019 saw more companies reporting and updating reporting than any previous year.**
- a. Fifteen companies - Albertsons, Aramark, Barilla Group, Campbell Soup Company, Compass Group USA, Delaware North, Dunkin' Brands, Kellogg's, Kroger, Mondelez International, Panera Bread, Papa John's Pizza, Sodexo, Starbucks, and Unilever – updated their reporting to reflect their most up-to-date progress from 2018.
  - b. Fifteen companies that hadn't reported previously in 2017 and 2018 - Darden Restaurants, Dine Brands Global, General Mills, Hilton, Marriott International, Mars, McDonald's, Nestle, PepsiCo, Sprouts Farmers Market, Sysco, TGI Fridays, The Cheesecake Factory, and Walmart (including Sam's Club) - reported for the first time ahead of the 2019 report.
  - c. Thirteen companies – B.GOOD, Blue Apron, Danone, Epicurean Feast Cafes, Farmer Boys, Gelson's Markets, IKEA, Mollie Stone's Markets, Nordstrom, SeaWorld, Spectra, Epicurean Feast Cafés, and Whitson's Culinary Group - that were included in EggTrack for the first time this year reported cage-free egg progress.
  - d. Two companies – Earth Fare [2005] and Hy-Vee Market Grille [2016] have failed to publicly report whether they have met their commitment deadlines.
- C. The cage-free flock is growing and the market is evolving.** As companies have begun working towards their commitments, the cage-free egg market has begun to evolve and take shape, with 20.5% of the US laying hen flock now cage-free.<sup>1,2</sup> However, there is still a significant gap between the current number of cage-free laying hens and the additional 142.32 million laying hens needed to meet the remaining demand of all companies with cage-free commitments.
- D. Transparency is now the expectation, not the exception.** With more information available at our fingertips now than ever before, consumers expect their favorite brands to freely offer a window into how their food is raised and sourced. Reporting transparently on progress against farmed animal welfare commitments demonstrates a company is serious about making progress towards their targets, lending confidence to consumers, investors, and other stakeholders that companies aren't just paying lip service to farmed animal welfare, but are actually taking action to improve conditions in their supply chain.
- E. Investment into the right cage-free systems is critical.** Now is the time for industry to ensure the next wave of production systems truly meet the needs of the laying hens, producers and consumers alike. This means choosing systems that are both fit for purpose – to deliver a good quality of life for the hens – and fit for the future, so that they stand the test of time against rising consumer expectations. For example,

investment into combination systems or limited-entry systems, which allow for temporary or permanent confinement and can seriously compromise hen welfare, are not a strategic long-term investment.

- F. Progress reporting continues to rise on the corporate agenda.** As Environmental, Social, and Governance [ESG] issues continue to rise on the corporate agenda, more and more companies are integrating cage-free reporting alongside other responsible sourcing and supply chain commitments. In the inaugural EggTrack report, 20 of 73 companies [27%] reported progress. In 2018, we began to see reporting trend upwards to 27 of 100 companies reporting [still 27%, but a notable overall increase in reporters]. This year, we have seen public reporting on cage-free progress build significant momentum, with 51 of 128 companies [40%] reporting, an increase of 24 companies reporting progress this year – and in greater detail than ever before.

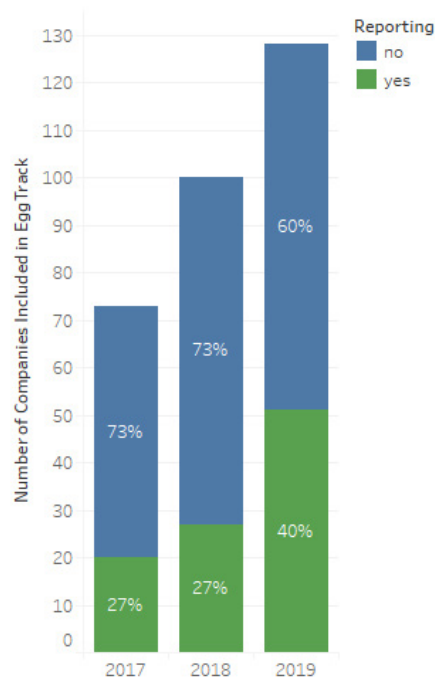


# Overview

*EggTrack aims to create transparency in the market and catalyze business-to-business conversations that will drive a stable and successful transition to a cage-free future. This report is intended for use by the sustainability experts, supply chain managers, buying teams, and executives who are responsible for the day-to-day implementation efforts and decision-making needed to meet cage-free goals.*

Compassion in World Farming launched EggTrack three years ago to track the progress food companies were making towards their commitments to purchase 100% cage-free eggs, recognizing that while making a commitment is an important first step, real impact for laying hens comes with companies working towards and meeting those commitments. By tracking companies' progress, EggTrack identifies leaders and laggards, encourages and reinforces transparency in the marketplace, and serves as a platform for deeper engagement with CIWF's Food Business team, which supports companies with strategic analysis, technical resources, and animal welfare expertise.

Year on Year Reporting



**The 2019 EggTrack Report finds 51 companies publicly reporting, representing 40% of all 128 companies included this year.** This is compared to 27 of 100 companies that reported in the 2018 EggTrack Report and 20 of 73 companies reporting in 2017. As animal welfare continues to rise on the corporate agenda, more and more companies are beginning to standardize reporting against animal welfare alongside other ESG goals and targets. Although there is a positive trend towards increased disclosure and reporting and more companies are reporting cage-free egg progress than ever before, this year's EggTrack findings show that the majority of companies still have not indicated whether they have made progress or have a plan for making progress in place. There is still work to be done.

In tracking progress across sectors, EggTrack provides a bird's eye view of industry-wide progress in the transition to cage-free eggs. The egg footprints of companies covered in this year's report represent approximately 79% of the projected future cage-free market [all companies with commitments tracked by the USDA]. <sup>3</sup> We will continue to expand the scope of EggTrack in future years to capture as much of the future cage-free market as possible.

The 2019 EggTrack Report not only highlights trends in reporting, but also lays the groundwork for understanding the magnitude of the work that remains to transition the industry away from cages, explores strategies for ensuring both producers and purchasers can achieve a successful transition away from cages, and seeks to provide companies with the information and support they need to improve the lives of laying hens in their supply chains.



Now is the time for companies to begin road-mapping this transition, setting sourcing targets, and reporting progress to pace this shift accordingly. Communication and coordination between companies and their suppliers will be key to ensuring a responsible and timely shift to a cage-free supply chain.

We look forward to our continued work with food companies to support them in their transition, identify solutions to challenges, and help them meet their cage-free egg goals.

CIWF encourages all companies to:

- Clarify the scope of commitments;
- Report progress against all commitments;
- Ensure commitments cover all eggs in the supply chain, i.e. shell, liquid, ingredient eggs;
- Work with suppliers now to set incremental sourcing targets and ensure there is a plan in place for transitioning; and
- Ensure investment in the best cage-free systems, which are fit for purpose (provide a good quality of life for hens) and fit for future (are acceptable for the lifetime of investment).



## Why do we need to go cage-free?

As the momentum towards cage-free egg systems builds, it is important to not lose sight of the fundamental reason why cage-free is a sensible and more ethical choice: It will create a meaningful baseline of welfare for millions of laying hens. Laying hens housed in cages, whether battery or newer “enriched” cages, have an inherently lower welfare potential since these systems do not provide for their basic behavioral or physiological needs. Alternatively, well-designed cage-free housing allows hens to express their natural behavior and can provide a significantly higher level of physical and mental well-being under good management. Cage-free housing for laying hens includes barn systems with litter-covered floors and either single tier structures or multi-tier aviaries with nest boxes and perches.

Hens kept in cages are provided limited physical space, which restricts their movement so they are unable to walk, sit, turn around, or stretch their wings without touching another bird. The lack of space in caged systems prevents hens from engaging in load-bearing exercise, which leads to poor health, pain, and mortality from disuse osteoporosis, cage layer fatigue, and fatty liver haemorrhagic syndrome.<sup>4,5,6,7</sup> A recent study revealed more than 75% of mortalities in caged layers were due to fatty liver haemorrhagic syndrome, whereas less than 1% of hens died from this condition in cage-free barn or free range systems.<sup>8</sup>

In caged housing, the lack of sufficient space and access to necessary resources, like littered floors, nests, and perches, prevents hens from performing most of their natural behavior and significantly compromises their welfare. Exposure to a more complex system means cage-free layer flocks show less fear, frustration, and flighty behavior from greater environmental variation.<sup>9,10,11</sup> Cage-free housing allows birds to move more freely throughout their environment and engage in more locomotory activity through walking, running, jumping, and short bouts of flying, to achieve a better level of health.<sup>12,13</sup> Cage-free systems provide nest boxes<sup>14</sup> and perches for hens to perform these high priority natural behaviors.<sup>15,16,17</sup> Domestic hens can spend more than 50% of their daily active time performing foraging, ground pecking, and scratching, so the provision of litter and suitable manipulatable enrichments [e.g., straw bales, plant material] in cage-free systems is fundamental for meeting the behavioral needs of laying hens Rodenburg et al., 2008].<sup>18,19</sup> Access to litter in cage-free housing also gives laying hens appropriate substrate to dustbathe, a key comfort behavior that functions to maintain their feather health and integrity.<sup>20,21</sup> The expression of comfort behaviors [e.g., preening, wing flapping and stretching] in cage-free housing signifies hens are experiencing a positive state of welfare or ‘good life’.<sup>22,23,24</sup> In contrast, barren caged environments lack the physical space needed for laying hens to engage in comfort behaviors, which negatively impacts their mental wellbeing.

Caged housing systems have lower welfare potential as result of physically confining birds and restricting their expression of highly-motivated natural behavior, which leads to poor physical health, frustration, pain, and fear. Overall, the move to cage-free systems is central to meet the behavioral, physical, and psychological needs of laying hens and help ensure they experience good welfare and a life worth living.



# What will it take to go cage-free?

*Forging a path towards  
industry-wide progress  
and improving the lives  
of laying hens*



## Evolution of the cage-free egg market to date:

The call to transition away from cages started with consumers, whose concern for farm animal welfare has been on the rise and only continues to grow. In 2015, a Consumer Reports' Natural Food Labels Survey found that better living conditions for farm animals are viewed as “very important” to 52% of consumers and “important” to an additional 32%. <sup>25</sup> Moreover, a survey by Ketchum in 2018 found that Americans ranked animal welfare alongside children’s education and hunger as causes they were most likely to support in 2018. <sup>26</sup>

This growing consumer concern has translated into increased scrutiny of product claims, an increasing willingness to pay more for meaningful higher welfare assurances, and an expectation that companies will take action to implement meaningful baseline standards within their supply chain in alignment with their own beliefs. A survey by Crestline found that 68% of Americans want to use their power as consumers to support companies that share their social, political, and environmental values. <sup>27</sup> In turn, companies have begun to respond. A 2016 Packaged Facts Report, “Animal Welfare: Issues and Opportunities in the Meat, Poultry, and Egg Markets in the U.S.” stated that, “Food companies at every level of the production and delivery spectrum, aware of both consumer and investor concerns, are taking significant steps to improve the quality of life of the animals in their supply chains. In addition to humanitarian concerns, corporate decisions to engage progressively in animal welfare issues is grounded in the mandate to be competitive in a changing marketplace and among a new generation of Millennial and Gen Z consumers.” <sup>28</sup>

In 2015, consumer concern focused sharply on battery cages. Hundreds of thousands of consumers signed petitions and engaged in company-targeted campaigns, resulting in over 200 US brands and companies committing to going cage-free by 2026 or sooner. The wave of company cage-free egg commitments between 2015 and 2016 set the stage for an industry-wide transition towards a cage-free future.

In addition to the demand that companies adopt cage-free egg policies, consumers are making their values and voices heard by passing state legislation to phase out the use of battery cages, banning both their usage in production within state jurisdiction as well as the sale of any eggs produced in battery cages, regardless of origin. Massachusetts [2016] <sup>29</sup>, California [2018] <sup>30</sup>, Washington [2019] <sup>31</sup>, and Oregon [2019] <sup>32</sup> were the most recent states to pass such restrictions. These laws follow ones in Michigan [2009] <sup>33</sup>, Ohio [2010] <sup>34</sup>, and Rhode Island [2018] <sup>35</sup> that banned or limited the use of battery cages in egg production in each respective state. As consumer concern for animal welfare continues to grow, we can expect that they will continue to vote for legislation that aligns with their values and beliefs. As companies supply chains become exposed to increased regulatory activity, it will be important for companies to invest in systems and practices that will withstand any future regulatory impacts.

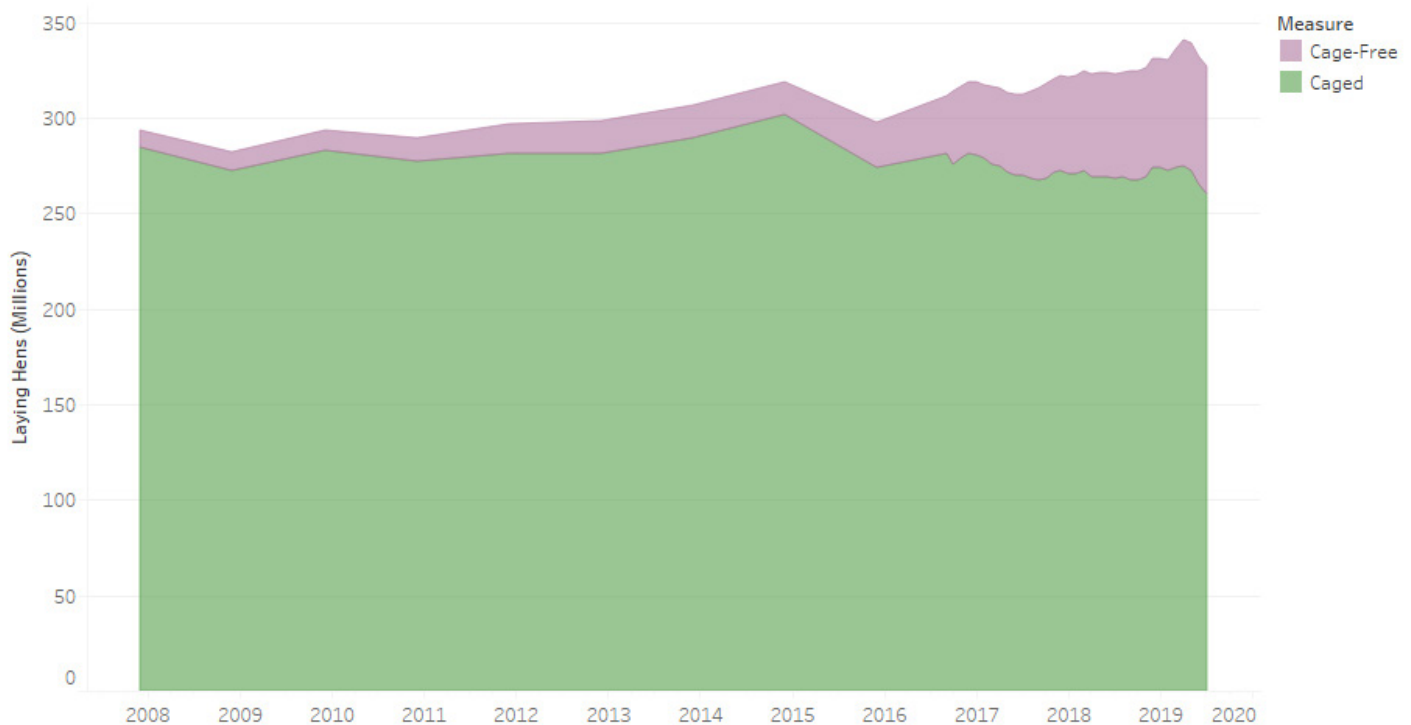
## State Laws

- **Oregon:** 2019 legislation that prohibits the production and sale of eggs and egg products from caged hens, as well as establishing minimum space and enrichment requirements. The State Department of Agriculture will adopt rules for administering and enforcing this law by January 1, 2023, to take effect January 1, 2024.
- **Washington:** 2019 legislation that prohibits the production and sale of eggs and egg products from caged hens, as well as establishing minimum space and enrichment requirements. The legislation is set to take effect January 1, 2024.
- **California:** 2018 ballot initiative that phases out cage confinement for egg-laying hens, breeding pigs, and calves raised for veal and the sale of shell and liquid eggs, whole cuts of pork, and veal from productions that do not meet these standards, as well as establishing minimum space and enrichment requirements. The State Departments of Agriculture and Public Health will jointly publish rules and regulations for implementation of this law by Sept 1, 2019, to phase in beginning January 1, 2020.
- **Massachusetts:** 2016 ballot initiative that bans confining egg-laying hens, breeding pigs, and calves raised for veal in a manner that prevents them “from lying down, standing up, fully extending the animal’s limbs, or turning around freely,” and the sale of shell eggs, whole cuts of pork, and veal from productions that do not meet these standards, as well as establishing minimum space requirements for egg-laying hens. The state Attorney General will publish rules and regulations for implementation of this law by January 1, 2020, to take effect January 1, 2022.
- **Rhode Island:** 2012 [sows and veal calves] and 2018 [egg-laying hens] legislation that prohibits the confinement of egg-laying hens, gestating sows, or calves raised for veal in a manner that prevents them from “turning around freely, lying down, standing up or fully extending the animal’s limbs,” as well as establishing minimum space requirements for egg-laying hens. The legislation is set to take effect July 1, 2026.
- **Ohio:** 2010 regulations phasing out battery cages by placing a moratorium on construction of battery cage systems for farms not defined as an existing farm, as well as establishing minimum space requirements. The regulations also phase out veal crates [by 2017] and gestation crates [by 2025].
- **Michigan:** 2009 legislation that bans confining egg-laying hens, gestating sows, or calves raised for veal in a manner that prevents them from “lying down, standing up, or fully extending its limbs...[and] turning around freely,” as well as establishing a minimum space requirements for egg-laying hens. Effective October 1, 2012 for veal calves and March 31, 2020 for gestating sows and egg-laying hens.

## Where is the cage-free market today?

As of July 2019, 20.5% of the US laying hen flock was cage-free.<sup>36,37</sup> When the USDA first began tracking cage-free egg data in September 2016, the cage-free laying flock stood at 9.8%.<sup>38</sup> This growth shows that the number of cage-free laying hens has more than doubled from 30.5 million to 67.1 million between September 2016 and July 2019, while the battery-caged laying hen flock declined from 281.2 million to 259.9 million during the same time period. Over almost three years, there was a total increase of 36.6 million laying hens living in cage-free housing compared to a 21.3 million decrease in the number of laying hens living in cages.

Cage-free Flock v Caged Flock 2008-2019



While the cage-free egg market is clearly growing, to meet the demand of all the companies with cage-free egg commitments by 2025, we have estimated the US industry will need 209.4 million cage-free laying hens. This figure is based on the USDA's estimated egg-footprint of all cage-free egg commitments documented by the agency.<sup>39</sup> Assuming egg demand remains relatively constant and that an average hen produces roughly 289 eggs/year,<sup>40</sup> an additional 142.32 million laying hens will need to be introduced to cage-free housing over the next 6.5 years – an average of 22.18 million laying hens a year. To date, the rate of conversion has averaged out to about a 12.91 million increase per year. This gap means that producers must begin converting

<sup>39</sup> Because not all companies with cage-free commitments are included in the USDA report, this is likely a slight underestimation of the number of eggs that will be needed in 2025. However, to avoid speculating based on unavailable data we have performed our calculations based only on what is available in the public domain.



## Where is the cage-free market today?

and/or building new housing to grow the cage-free laying hen flock at 1.72 times the current rate to meet projected demand by the end of 2025 [for more detailed calculations, see the appendix]. While the rate of transition needed to meet demand is higher than what it has been to date, it is not unachievable, especially if companies begin making the necessary investments in their supply chain now and in turn further facilitate producers' conversions to cage-free systems.

The calculations on the previous page highlight that while the market has begun to evolve and show positive signs of market growth for cage-free eggs, significant investment and effort is required across the industry to ensure that producers have the resources to meet the demand of cage-free egg commitments. Importantly, responsibility for ensuring the market's transition cannot sit solely with egg producers. Purchasing companies cannot wait to start sourcing cage-free eggs until their commitment deadline, as producers need significant headway to build up the needed supply. From permitting to construction to stocking, new cage-free houses can take over two years to build and become operational. The time required to retrofit old houses and secure related financing are important elements of building a cage-free egg supply which should be considered and incorporated into not only producers', but purchasers' timelines, as well. For producers to ramp up cage-free egg supply in a steady and responsible way, they must be able to forecast a concurrent, steady increase in demand from their purchasers.

If it hasn't been done already, now is the time for companies to assess their egg supply needs and current suppliers, create a cage-free egg sourcing plan that will meet their commitment deadline, and begin communicating their cage-free egg needs and sourcing plans with current and/or potential suppliers. These sourcing plans should include incremental sourcing targets that have been agreed upon internally across relevant departments. Targets should be publicly communicated and regularly reported on, providing an opportunity to transparently celebrate progress, share challenges, and demonstrate that the company takes its animal welfare commitments seriously and is willing to hold itself publicly accountable. Public disclosure of progress shows that a company has adequately prioritized their animal welfare commitments, demonstrating a high level of managerial competency.



Clear communication of incremental sourcing targets and expectations around cage-free system design and management between purchasers and producers is crucial to a successful transition.

Companies and producers must communicate with each other to not only ensure a stable and successful shift to cage-free systems, but to ensure investment in the right types of cage-free systems that are fit for purpose and fit for future—namely, systems that are able to deliver meaningful improvements to the lives of hens and can stand the test of time of societal acceptability. Since cage-free system designs can range from highly-intensive and multi-tier to more spacious aviaries, it is important to set minimum standards for key criteria needed to deliver an acceptable level of welfare for the laying hen.

Examples of acceptable cage-free housing systems include multi-tier aviary systems and single tier/flat deck housing. Examples of unacceptable cage-free system are combination systems (also called “combi” systems or “hybrid” systems), which feature doors on each tier/level of the structure; and limited or select access systems, which limit movement into or out of the system to doored openings on the bottom tier. Openings limited to a single level of these systems can lead to crowding and could prevent hens from easily accessing resources, including food, water, and perches. Both combi and limited-access systems are non-complaint forms of cage-free housing, as birds can potentially be confined in these caged structures routinely or even permanently, which restricts the hens from freedom of movement and their access to the littered floor.

#### **Combination Systems and Limited Access Systems:**

Combination systems are multi-tiered structures that have doors and within-tier internal partitions that convert the unit into a caged system when the doors are closed, and restrict movement through the tier irrespective of doors. See our overview of the downsides of combi systems [here](#).

Limited access aviaries are multi-tiered system (with or without internal partitions within tiers) that limit the hens access to the litter to only doored openings at the bottom tier, which can convert the system to a fully caged environment when these doors are closed.



For producers with existing “combi” systems or limited access systems, the doors should be taken off, partitions should be removed [while maintaining structural integrity], and movement between the tiers should be assessed and ensured. Investment into the construction of new “combi” and analogous systems that do not provide a truly cage-free environment compromises the welfare of the hen, presents reputational risk, and represents a misguided investment in defiance of trends in consumer sentiment and cage-free legislation. Purchasers, in turn, should strive to be as informed as possible on the various cage-free system designs and available third-party certifications to clearly communicate to producers the company’s expectations for their cage-free egg sourcing. This will ultimately ensure that when purchasers publicly report cage-free progress, the systems underlying those claims will truly be cage-free.

#### Other CIWF Resources:

- See our [certification matrix](#) that compares the available third-party certifications for laying hens and how they stack up to CIWF’s standards
- [Building a Better Hen House](#); a comprehensive guide to designing higher welfare systems for laying hens

By combining the aforementioned strategies for implementing a stable, successful, and meaningful transition to cage-free laying hen systems, companies can begin and continue to make progress on their cage-free egg commitments, delivering on consumer and stakeholder expectations while transforming the lives of the millions of laying hens in our food system for the better.

## Methodology

This year's report includes 28 new companies, bringing the total number of tracked companies to 128. All companies selected for the report have made a commitment to sourcing only cage-free eggs by 2026 or sooner. Companies were selected on the basis of size, egg footprint, market influence, and commitment deadline. The expansion of the tracker is consistent with our aim of creating a representative snapshot of progress across sectors in the shift to cage-free eggs. Companies were asked to publicly disclose their cage-free egg percentages ahead of July 31, 2019. For progress numbers to be included in the annual report and displayed on the tracker, the relevant information must be publicly available on a company's website or other document including, but not limited to, an animal welfare policy, a CSR or progress report, or a press release. A company receives the coveted 100% cage-free ribbon when it has achieved its goal of ensuring that all egg types used in its supply chain come from cage-free hens.



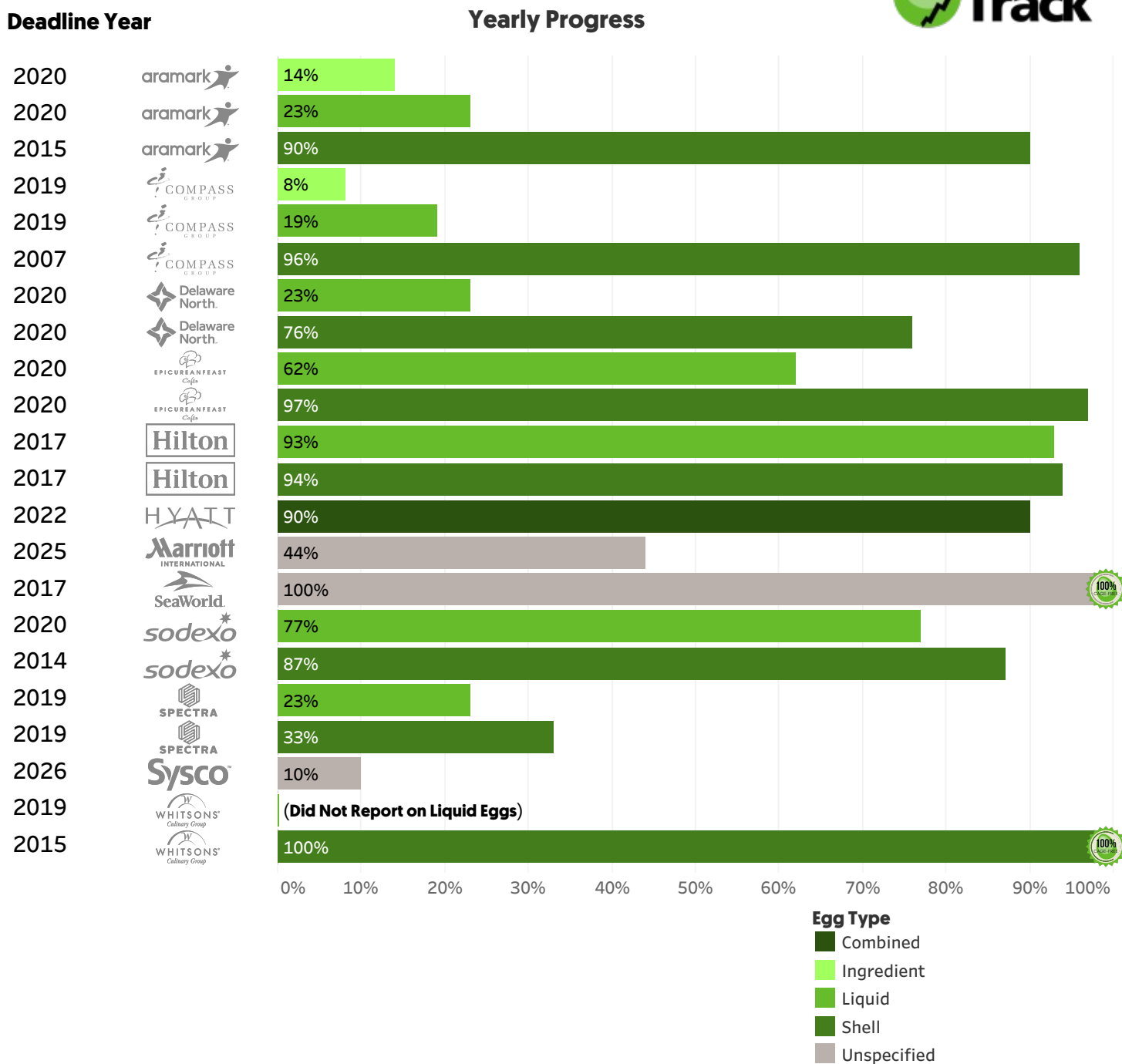
Transparent reporting is the cornerstone of EggTrack, as all information in the tracker is based on companies' publicly disclosed information. Transparent and public progress reporting demonstrates that a company holds itself accountable to the commitments it makes—communicating to investors, customers, and other key stakeholders that the company takes its social responsibility targets seriously. Additionally, public disclosure of progress shows that a company has adequately prioritized their animal welfare commitments, demonstrating a high level of managerial competency.

The data included in the tracker was compiled during the first three weeks of August 2019. Notes and special considerations concerning how progress is presented in the tracker are also included in this report in the Appendix. EggTrack aims to track progress across a company's entire supply chain by tracking all the egg types relevant to the business (shell, liquid, and ingredient eggs). Relevant egg categories vary by company; therefore, EggTrack looks for transparency on the egg categories covered by an individual commitment.

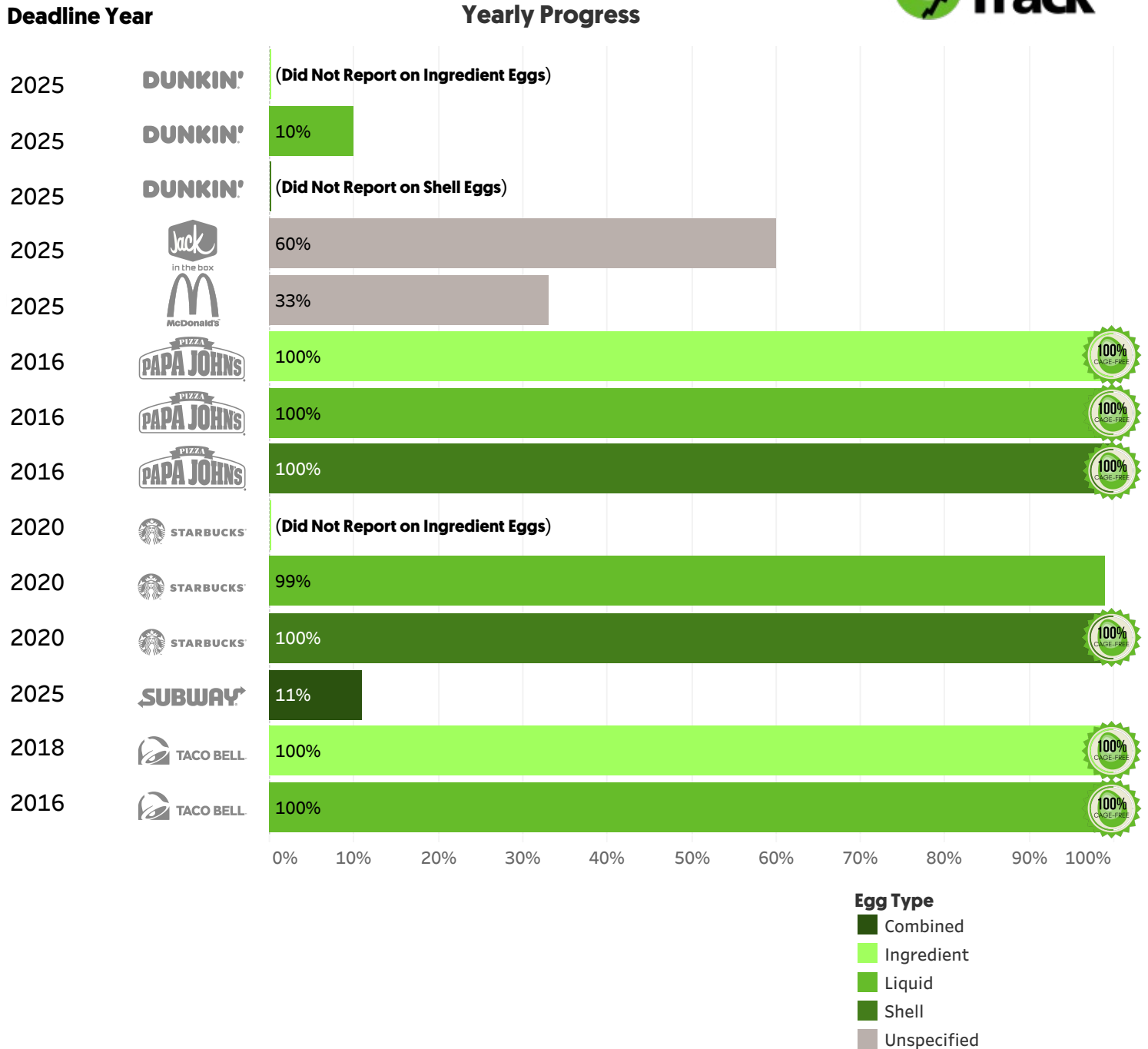
In terms of geographic scope, to date EggTrack has sought to prioritize US progress reporting for companies with US-specific time bound commitments as our immediate aim is to track progress and offer a lens into the state of the US market. However, we have also included global reporting as some companies only have global commitments and therefore report progress globally. There are a number of companies that have both US-specific commitments, in addition to global commitments. As these companies make progress against and meet their US goals we will expand the tracker to include global reporting where relevant as well.

# Reporting:

## Food Service and Hospitality



# Quick Service

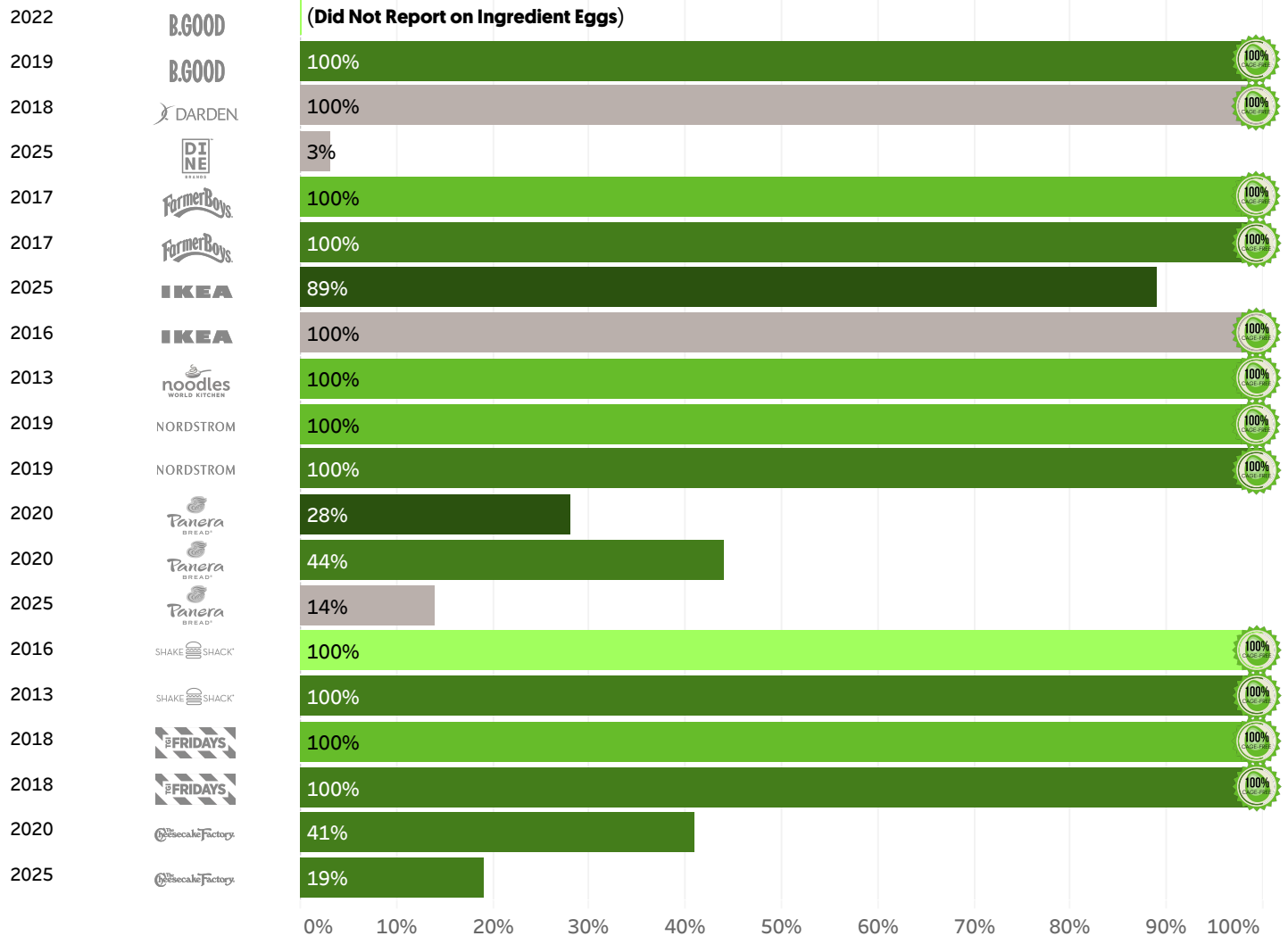


# Fast Casual & Casual Dining



Deadline Year

Yearly Progress



Egg Type

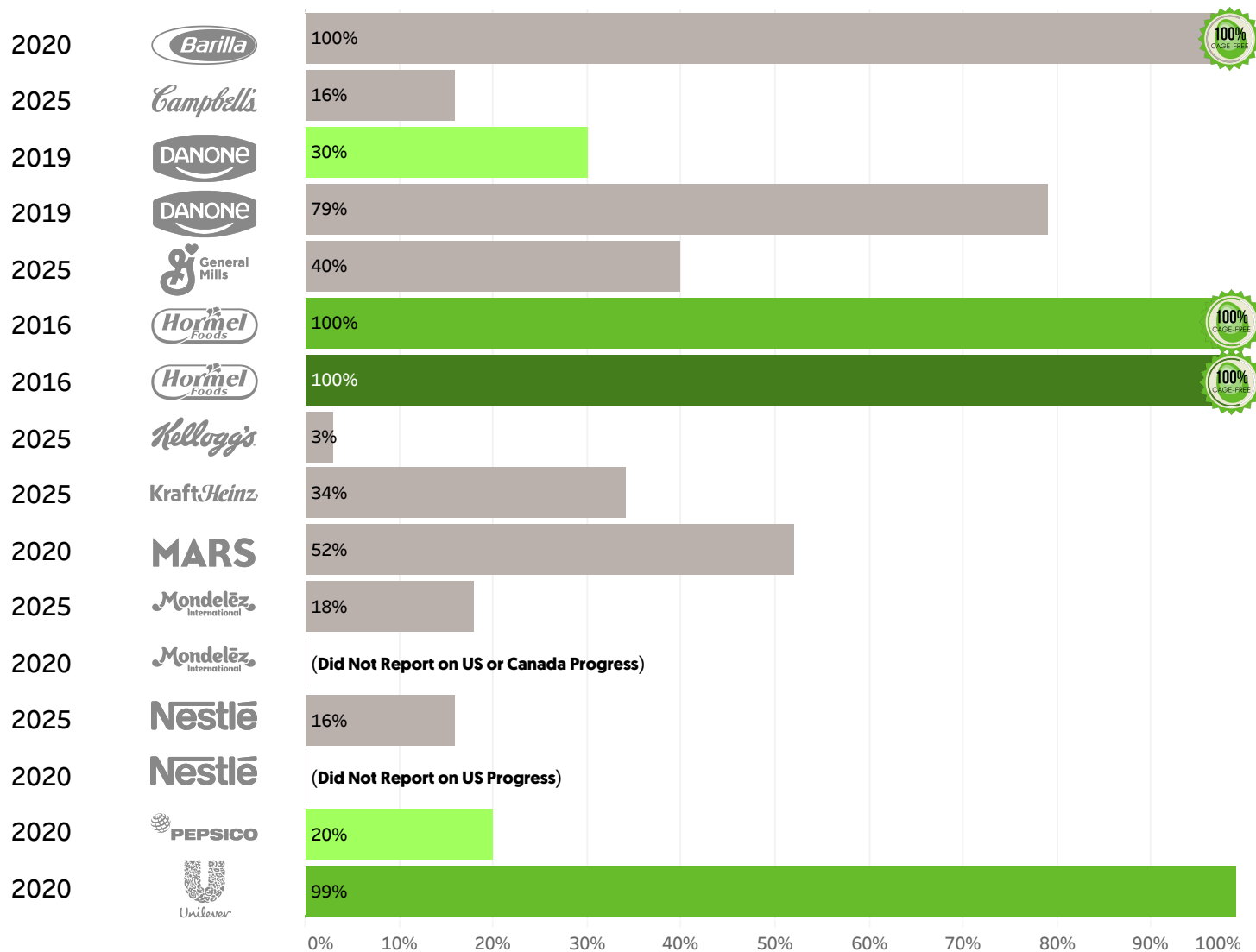
- Combined
- Ingredient
- Liquid
- Shell
- Unspecified

# Manufacturers



Deadline Year

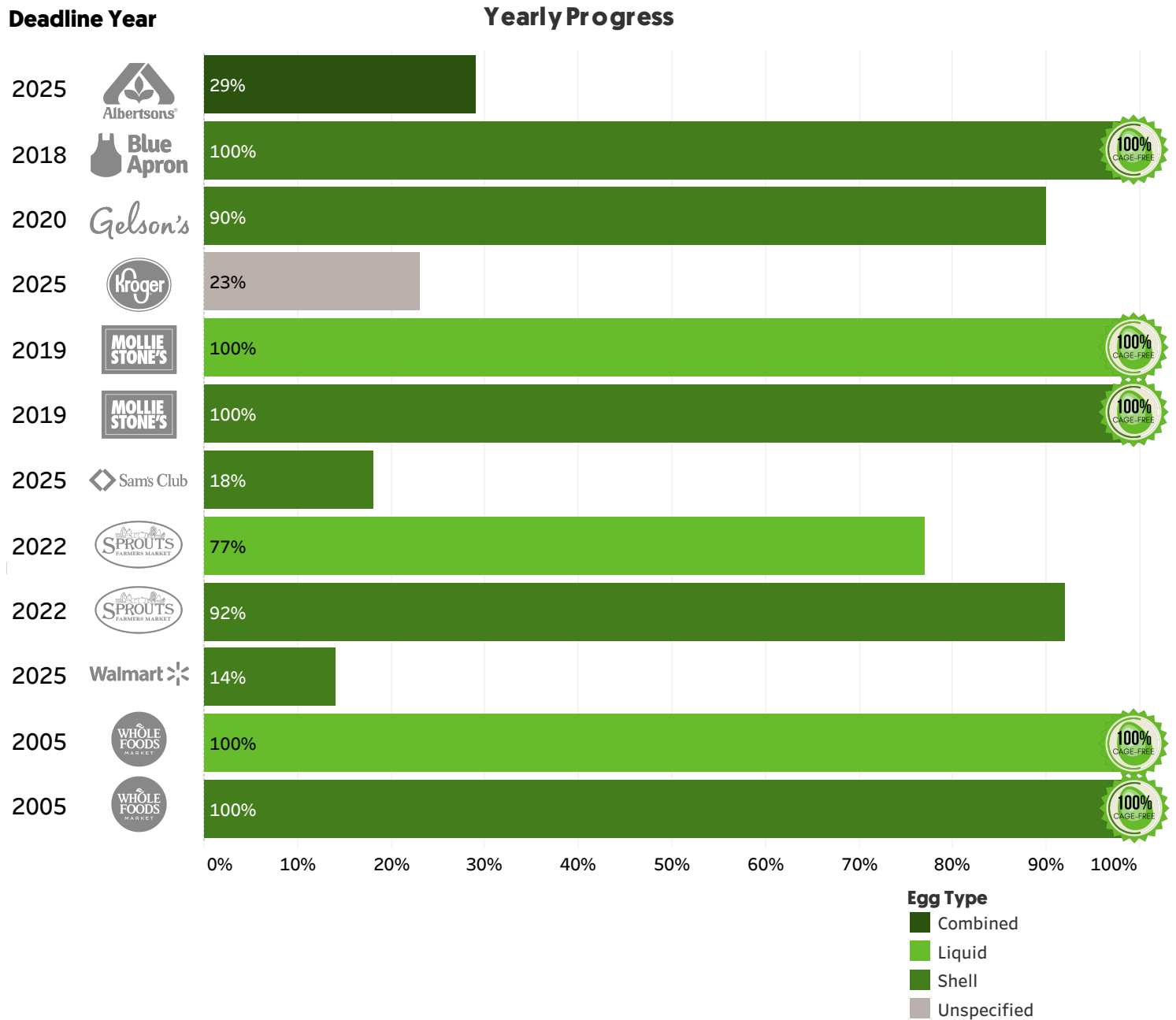
Yearly Progress



Egg Type

- Ingredient
- Liquid
- Shell
- Unspecified

# Retailers and Meal Kits





## Companies Not Reporting:

**Food Service & Hospitality:** AccorHotels [2025], AVI Foodsystems [2020], Caesars Entertainment [2025], Carnival Corporation & plc [2025], Eat'n Park Hospitality Group [2025], Elinor Group [2025], Four Seasons Hotels and Resorts [2019], Gordon Food Service [2026], InterContinental Hotels Group [2022], Metz Culinary Management [2020], Norwegian Cruise Line [2025], Performance Food Group [2026], Royal Caribbean International [2022], Schwan's Company [2025], Six Flags [2026], The Walt Disney Company [2016], Wyndham Destinations [North America 2020, Global 2025], Wyndham Hotels & Resorts [2025]

**Fast Casual & Casual Dining:** Black Bear Diner [2020], Bloomin' Brands [2025], Bob Evans Farms [2025], Brinker International [2025], California Pizza Kitchen [2022], Cracker Barrel [2026], Denny's [2026], Ruby Tuesday [2025]

**Manufacturers:** Conagra Brands [2025], Eggland's Best [2025], Flowers Foods [2025], Grupo Bimbo [2025], The Hershey Company [2020], The J.M. Smucker Company [2020]

**Quick Service:** Arby's [2020], Bojangles' Famous Chicken 'n Biscuits [2025], Burger King [2025], Caribou Coffee [2020], Chick-fil-A [2026], CKE Restaurants [2025], Dairy Queen [2025], Einstein Bros. Bagels [2020], FOCUS Brands [2026], Krispy Kreme [2026], Krystal [2026], Le Duff America, Inc. [2026], Peet's Coffee [2020], Quiznos [2025], Sonic Drive-In [2025], Tim Hortons [2025], Wendy's [2020], White Castle [2025]

**Retailers:** 7-Eleven [2025], Ahold Delhaize [2022, Stop & Shop, Giant/Martin's, Giant Food, and Peapod] [2025, Food Lion and Hannaford], ALDI [2025], Associated Food Stores [2025], BJ's Wholesale Club [2022, shell] [2025, liquid], C&S Wholesale Grocers [2025], CVS Health [2025], **Earth Fare [2005]**, Fresh Thyme Farmers Market [2022], H-E-B [2025], **Hy-Vee Market Grille [2016]**, IGA [2025], Ingles Markets [2025], Key Food [2025], Lidl [2025], Meijer [2025], Publix [2026], Raley's [2020], Southeastern Grocers [2025], Target [2025], The Fresh Market [2020], Trader Joe's [2020, Arizona, California, Colorado, New Mexico, Oregon, and Washington] [2025, US], UNFI [2018, UNFI] [2025, SuperValu], US Foods [2026], Wakefern Food Corp. [2025], Walgreens [2025], Wegmans [2025], Lucky's Market [2020]



## Conclusions and Looking Forward

We commend the 51 companies that have reported on or have updated their reporting of their cage-free progress ahead of this year's EggTrack disclosure deadline, which comprise 40% of the companies included in the report this year. This number indicates that while an ever-increasing number of companies are leading in their reporting efforts, most companies committed to sourcing cage-free eggs are not yet adequately reporting.

This year's EggTrack also saw more detailed reporting, with companies like Compass Group, Aramark, PepsiCo, and others clearly breaking out progress by each egg type (shell, liquid, and/or ingredient) relevant to their supply chain. However, there remains an overall need for companies to clarify the scope of their commitments and reporting. Most pressing, clarity is needed from many companies on the egg categories to which their commitment applies (i.e. shell, liquid and/or ingredient eggs) and, consequently, reporting should specify the proportion of cage-free eggs purchased for each relevant category, as well. Many commitments do not make it clear which egg product categories apply, most notably in pledges from several retailers. We encourage companies to be fully transparent on the progress towards 100% cage-free on all types of eggs used by their business, as well as the target date for each egg type.

As various stakeholders continue to monitor the delivery and management of animal welfare commitments, EggTrack will continue to identify industry leaders, as well as those lagging behind in transparently reporting their progress. As the market continues to make this shift, and as the demand for transparency continues to increase, we encourage companies to integrate annual progress reporting into their broader reporting procedures and disclose this information for all farm animal welfare commitments relevant to their business. We will continue to follow up with the non-reporting companies, as well as those reporting, to ensure we reach a 100% cage-free future and eliminate one of the worst-of-the-worst factory farm practices. Companies interested in doing this work may reach out to our Food Business team for more information. We look forward to continuing to work together to improve the lives of millions of laying hens.

# Appendix:

## Notes on the data:

'Unspecified' means that companies have not specified whether their reporting applies to shell, liquid, and/or ingredients eggs. We advise that companies provide clarity on commitments where necessary.

This year, we have included US timelines in the tracker for companies that have them, but have only reported against global progress to date. This applies to Mondelez International and Nestlé.

A number of companies reported progress up to the hundredth decimal point this year. Due to limitations in our tracker, we were not able to include decimal places, and therefore rounded down those numbers in the tracker to the nearest whole number. This impacted the numbers reported by Aramark [14.5% rounded to 14%], Dine Brands Global [3.5% rounded to 3%], Dunkin' Brands [10.25% rounded to 10%], Kellogg's [3.3% rounded to 3%], Kroger [23.4% rounded to 23%], and Starbucks [99.99% rounded to 99%].

## Egg category definitions:

**Shell:** Whole eggs that have not been mixed or blended with other eggs or ingredients.

**Liquid:** Combination of cracked eggs [egg whites and egg yolks] blended together in their entirety.

**Ingredients:** A further processed, frozen, dried, or liquid egg product such as egg whites, egg yolks, sugared egg yolks, salted yolks, dried whole eggs, egg white solids, scrambled egg mix, egg wash, stabilized yolk solids, etc.

## Company-Specific Notes:

### Food Service:

**Aramark:** Aramark reports on cage-free progress for its ingredient egg supply chain; however, it is unclear based on public information which timeline that progress falls under. We have assigned that progress to Aramark's 2020 US commitment for the time being until additional clarification is publicly provided. As of June 2019, 32% of Aramark's eggs in the US came from cage-free hens. Globally, 33% of Aramark's eggs come from cage-free hens, including 14% cage-free eggs in Canada, and 42% cage-free eggs in Europe.

**Compass Group:** Compass Group reports on cage-free progress for its ingredient egg supply chain; however, it is unclear which timeline that progress falls under based on public information. We have assigned that progress to Compass's 2019 US commitment for the time being, until additional clarification is publicly provided.

**Sodexo:** Sodexo acquired Centerplate in 2017. Centerplate's supply chain has since been integrated into Sodexo's and reporting now represents the integrated supply chain.

**Schwan's Company:** Timeline was adjusted from 2020 to 2025. The company also specified that it plans to switch to cage-free eggs for all foods that contain more than 5% eggs by weight.

**Sysco:** Progress is reported as a percentage of sales.

## Hospitality:

**Hilton:** In 2015, Hilton announced that all hotels across five brands – Hilton Hotels & Resorts, Waldorf Astoria Hotels & Resorts, Conrad Hotels & Resorts, Canopy by Hilton and DoubleTree by Hilton – in 19 countries will switch to cage-free eggs by the end of 2017. Hilton's US progress included in the tracker represents eggs sourced for those five brands. Hilton also reports a 78% US progress figure for “cooked eggs.” Overall, 92% of spend for eggs sourced through Hilton Supply Management for these brands came from cage-free sources in 2018.

**Hyatt:** Current reported progress applies to managed hotel supply chains in US and Canada only.

**The Walt Disney Company:** Reported sourcing 100% shell and liquid eggs in September, 2019. As this is past the July 31st reporting deadline set for EggTrack we were unable to include the company's cage-free progress in 2019 but will include progress in the 2020 report.

## Quick Service Restaurants:

**Starbucks:** Commitment and progress applies to company-operated stores only. Licensee-owned operations are not currently included in the scope of the commitment or progress reporting.

## Fast Casual & Casual Dining:

**California Pizza Kitchen:** Commitment is no longer available online. The commitment was previously available via press release; however, press release archives no longer go back to the time of commitment.

**Darden:** While reporting is available, the original commitment is no longer publicly available.

**Panera Bread:** Extended its overall commitment timeline to 2025, but is still transitioning eggs used in salads and sandwiches [which makes up approximately 50% of the companies' eggs] to be cage-free by 2020. Panera acquired Au Bon Pain in 2017, which has been integrated into their supply chain reporting. We have included the progress for the entire menu across both companies – 14% in the tracker above. Additionally, within Panera's own supply chain in 2018, 28% of the shell eggs and egg whites used on sandwiches and salads in US bakery-cafes were cage-free and 100% of hard-boiled eggs were cage-free.

**Ruby Tuesday:** Ruby Tuesday had cage-free progress previously available, which was included in the 2018 report. However, the company's cage-free egg commitment and reporting are no longer publicly available.

**TGI Fridays:** While reporting is available, the original commitment is no longer publicly available. This included a 2024 commitment to transition ingredient-based supply chains to be cage-free by 2024. We have not awarded TGI Fridays a 100% cage-free egg ribbon for this reason and seek further clarity regarding progress against their ingredient egg commitments.

**Nordstrom Restaurants:** We have not awarded Nordstrom a 100% cage-free ribbon [despite reporting that 100% of shell and liquid eggs are cage-free] due to a statement on their website asking all suppliers of ingredient eggs to adhere to their 100% cage-free policy. This statement suggests ingredient eggs are not yet 100% cage-free, which is why we are not yet able to award Nordstrom with a ribbon

## Manufacturers:

**Mondelez International:** Has not yet reported against its 2020 commitment for the US and Canada. Progress included represents Mondelez International's global supply chain.

**Nestlé:** Has not yet reported against its 2020 commitment for the US and Europe. Progress included represents Nestlé's global supply chain.

## Retailers:

**UNFI:** UNFI acquired Supervalu in 2018. Supervalu was included in 2017 and 2018 EggTrack Reports, but will no longer be listed as an independent company. UNFI had a 2018 cage-free egg commitment, which it had previously reported progress against, however due to the ongoing integration of Supervalu's business [which has a 2025 cage-free egg commitment] we have made note that currently there is no commitment or progress available representative of the entire company's supply chain and thus have marked UNFI as "not reporting." We look forward to future updates.

**IGA:** Commitment is no longer available on their website. It was available in 2018.

**Gelson's Markets:** Progress is reported as a percentage of sales.

## Rate of Transition Calculations:

### Assumptions:

- Average laying hen produces 289 egg/year [UEP].
- We are counting the entire cage-free flock at the time of calculation as progress towards 223 million needed to meet commitments.
- Not all companies that have cage-free commitments are included in the USDA egg footprint document, which means our calculations may be a slight underestimation. However, companies with some of the largest egg footprints are included in the USDA calculations so we feel comfortable relying on that data to make the below calculations.
- We assumed an ultimate deadline of 2026 [Dec 2025] which means we calculated our rate of transition over the course of 77 months, or approximately 6.5 years.

### Progress to date:

- As of 7/20/19, the cage-free laying flock is at 67.092 million and the conventional laying flock is at 259.908 million.
- The total laying flock is at 327 million [the cage-free flock makes up 20.517% of this figure].
- We estimate that the average laying hen produces approximately 289 eggs per year.
- Growth over time:
  - We examined how much the cage-free laying flock increased by how much in the last 3 years:
    - First data point: 9/2016 = 30.5 million
    - Last data point: 7/20/2019 = 67.092 million
    - Total growth of [67.092 million - 30.5 million =] 36.592 million in the last 34 months
  - Growth rate of approximately 12.91 million per year [36.592 million / 34 months = 1.076 million x 12 months = 12.91 million]

How many eggs total are needed to meet companies' cage-free egg demand?

Total # of cage-free eggs needed to meet all USDA-monitored commitments --> 60.519 billion eggs

Total # of cage-free laying hens needed to meet all USDA-monitored commitments --> 209.409 million laying hens

### Rate of transition needed:

- What is the egg footprint of all companies with cage-free commitments monitored by the USDA?
  - $289 \text{ (eggs/hen/year)} \times 67.092 \text{ million [CF flock size as of July 2019]} = 19.39 \text{ billion [eggs/year produced by current CF flock]}$
  - Compare this # to total # of CF eggs needed to meet all USDA-monitored commitments --> 60.619 billion
  - $60.619 \text{ billion} - 19.39 \text{ billion} = 41.229 \text{ billion additional eggs needed to meet CF commitments by 2026}$
- How many more CF laying hens are needed by 2026 to meet all commitments made?
  - $41.229 \text{ billion eggs} / 289 \text{ eggs per hen} = 142.315 \text{ additional hens needed to meet CF commitments by 2026}$
- How many additional CF laying hens are needed, per year, over the next 6.5 years [from now until Dec 2025]?
  - $8/2019 \text{ through } 12/2025 = 77 \text{ months}$
  - $142.315 \text{ million} / 77 \text{ months} = 1.848 \text{ million per month} \times 12 \text{ months} = 22.179 \text{ million additional hens needed per year for the next approximately 6.5 years}$
- How many times faster is this than the conversion rate of the past 3 years?
  - $22.179 \text{ million} / 12.91 \text{ million} = 1.72 \text{ times faster}$

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