



The Business Benchmark on Farm Animal Welfare Nordic Report

2020

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About the Business Benchmark on Farm Animal Welfare

The Business Benchmark on Farm Animal Welfare (BBFAW) is the leading global measure of farm animal welfare management, policy commitment, performance and disclosure in food companies. It enables companies, investors, NGOs and other stakeholders to understand corporate practice and performance on farm animal welfare and to encourage transparency and disclosure within the food industry. BBFAW drives – directly and through the efforts of companies, investors and others using this tool – corporate improvements in the welfare of animals reared for food.

The global BBFAW programme published its ninth report in March 2021. The annual benchmark covers 150 of the world's leading food producers, retailers and restaurants. The assessment focuses on publicly available information related to farm animal welfare management, governance, innovation and reporting. The BBFAW methodology has been developed together with leading animal welfare organisations and is supported by a large number of investors. These investors use the BBFAW ranking to inform their company engagements, their decision-making and as part of the risk screening process of companies.

The BBFAW Secretariat is managed by Chronos Sustainability, which also manages extensive engagement programmes with companies and with investors and provides practical guidance and tools for companies and for investors on key animal welfare issues. The global programme is supported by the BBFAW's founding partner, Compassion in World Farming and funding partner, FOUR PAWS International. Together, these organisations provide technical expertise, guidance, funding and practical resources to the programme.

BBFAW Nordic was initiated in 2019 as the first ever regional chapter of the benchmark. MatPrat (Opplysningskontoret for egg og kjøtt) in Norway worked with Chronos Sustainability to create a localised version of the programme, and the first assessment of 26 of Norway's leading food companies was conducted in 2020 using the BBFAW methodology. The findings of this assessment are presented in this report. As of early 2021, KLF has become the main supporting partner of BBFAW Nordic in Norway.

The objectives of BBFAW Nordic are to:

- Document and improve welfare standards in leading Norwegian food companies by providing a practical tool for working with animal welfare
- Provide consumers with reliable and credible information about Norwegian food companies' commitments to animal welfare
- Provide companies with confidential feedback annually on their management and reporting on animal welfare
- Contribute to the improved welfare of production animals in Norway and to position Norway as a pioneering country in ensuring the welfare of production animals.

The intention is to expand BBFAW Nordic in the coming years to Denmark, Sweden and Finland as a tool to support advancements in farm animal welfare within the Nordic food industry.

More information on the BBFAW Nordic programme can be found at <https://bbfaw-nordic.com>

More information on the global BBFAW programme can be found at www.bbfaw.com



Chronos Sustainability

The BBFAW and BBFAW Nordic programmes are managed by an independent Secretariat provided by Chronos Sustainability Ltd. In this role, Chronos Sustainability is responsible for providing the Executive Director and the other resources necessary to deliver the annual Benchmark, to conduct the company research and evaluations, and to engage with investors, companies and other stakeholders. Chronos Sustainability is based in the UK and works with many of the world's leading companies, investors and NGOs on managing the risks and opportunities related to sustainability and related issues. More information can be found at <https://www.chronossustainability.com/>



KLF

The Meat and Poultry Industry National Association (KLF) was founded in 1910 and is an industry organisation that represents the privately owned, independent part of the meat, egg and poultry industry in Norway. As of 2020, the organisation has around 140 member companies spread across approximately 150 facilities and generating a combined turnover of around NOK 21 billion. The size of the companies varies from small companies with one or two employees to large slaughterhouse and meat processing companies with several hundred employees. The member companies consist of egg packers, egg product factories, slaughterhouses, meat industry, import companies, small-scale companies and meat shops. More information can be found at: <https://kjottbransjen.no/>.

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Foreword



Norwegian agriculture and their customers in the food industry have for decades emphasised good health in the livestock population. A lot of work, time and resources have been invested.

For all animal species, there has long been active health services and significant collaboration across the industry in order to succeed. The concrete actions that provide good animal welfare naturally occur in the production systems. But without Animalia's efforts to run the health services and other support tools needed, it would have been difficult to raise the national standard of farm animal welfare, something Norway has succeeded in doing.

In the 2000s, Norwegian livestock production and the entire value chain for meat and eggs have been increasingly challenged by society to further improve animal welfare. Expectations of good animal welfare from consumers are clear, which constitutes more than ensuring good health. However, knowledge and understanding of animal welfare in Norwegian livestock production and its value chains is lacking. This is partly due to the fact that there are fewer farmers keeping livestock and that the animals are less "visible" due to the growing need to protect the animals from diseases such as MRSA and avian influenza. The increasing distance between the livestock farmer and the consumer can create more doubt and uncertainty in consumers' minds.

In the industry, we are confident that Norwegian standards of farm animal welfare have never been better. This does not mean that it cannot be improved further; we are continuing to work hard and systematically to make this happen.

In 2013, the industry's animal welfare programme for chicken came into place. Since then, the industry has established animal welfare programmes also for pigs, chickens, and turkeys and hatcheries, while work on cattle and sheep/lambs is well underway.

With the introduction of BBFAW in Norway, this provides an additional tool to drive animal welfare standards across the food industry. We believe it provides a collaborative way of working that involves all links in the value chain in raising the level of animal welfare for all farmed animal species. It also gives us the opportunity to communicate to society at large on a complex topic in a unified, transparent and credible way.

The Norwegian findings of the first BBFAW Nordic assessments, provide a new and exciting opportunity to compare our performance in Norway with other countries. The fact that Chronos Sustainability, as an internationally respected, independent third-party is involved, is an important factor in ensuring that the company evaluations are credible, objective and methodologically robust, and should inspire confidence in the results presented.

We look forward to working jointly with the Norwegian agriculture industry to demonstrate how good welfare and good transparency can bring benefits to farmers, consumers and animals alike.

Bjørn-Ole Juul-Hansen

Administrative Director, The Meat and Poultry Industry National Association (KLF)



1. The 2020 Benchmark Highlights

This is the first BBFAW Nordic Report. It analyses the publicly available farm animal welfare policies, management systems, reporting and performance of 26 of Norway's leading food companies across 37 criteria. The BBFAW methodology has been established and tested globally over nine years and, as such, it is the most authoritative and comprehensive global account of corporate practice on farm animal welfare.

1: Norwegian food companies are starting from a stronger base than global food companies

When the global BBFAW benchmark was first conducted in 2012, the average score for the 68 global food companies was just 25% of the total maximum score available. For the 26 Norwegian food companies assessed as part of the first BBFAW Nordic benchmark in 2020, the average score for the 26 companies is 32%. This indicates that food companies in the BBFAW Nordic benchmark are starting from a stronger base than the global universe of food companies, and that companies in Norway are generally managing and reporting on animal welfare to a reasonable level of competence. It also shows us that farm animal welfare in Norway is today a more mature issue than it was for global food companies in 2012. One factor contributing to this relatively strong performance, is the reporting of certain data related to animal welfare that is already a required practice for most Norwegian food companies. Such data can be useful to customers, investors and other stakeholders in evaluating company commitments to animal welfare. Given that this is only the first year of the Nordic benchmark, it appears that there is potential for the Norwegian food industry to demonstrate leadership on farm animal welfare globally.

2: Performance reporting on farm animal welfare is more advanced in Norwegian companies, but there is limited disclosure on companies' management approaches

When comparing the BBFAW Nordic results with the global results for 2020, we can see that Norwegian food companies have outperformed global food companies in the Performance Reporting and Impact section (average score of 15% compared to the global 13.6%). This indicates that the reporting of farm animal welfare performance data is a more mature issue in Norway than it is in other geographic regions. However, Norwegian food companies perform less strongly than global food companies on describing their management processes and systems for farm animal welfare (as part of the Governance and Management section) and on describing their contribution to advancing animal welfare within the industry (as part of the Leadership and Innovation section). This suggests that many Norwegian companies have yet to adequately describe their internal management and efforts taken to improve welfare practices within the company and the food industry as a whole.

3: Certain standard animal welfare practices in Norway give Norwegian food companies an advantage over global companies

Agricultural practices in each country are influenced by tradition as well as regulatory requirements. When evaluating the specific welfare issues covered by the BBFAW assessment, it is evident that certain common and regulated practices in Norway provide Norwegian food companies with an advantage over their global peers. For instance, the avoidance of non-therapeutic (prophylactic) antibiotics and the requirement to stun animals prior to slaughter are mandatory. This suggests that if Norwegian companies were to describe their standard production practices (many of which are based on regulatory requirements), it would become clearer to consumers that Norwegian companies operate to higher animal welfare standards than those of many other countries around the world.

4: For many Norwegian food companies the BBFAW provides a useful framework for structuring their farm animal welfare management and reporting

Since the BBFAW first engaged with the Norwegian food industry in 2019, it has become evident that many companies have started to adopt the BBFAW framework as a useful tool for structuring their management practices and reporting on farm animal welfare. The 2020 results reveal that Norwegian food companies are broadly represented across the BBFAW Tiers, which range in ascending order from Tier 6 to Tier 1, with two companies already achieving the highest ranking of Tier 1. Whilst there is more to be done to strengthen company disclosure on farm animal welfare, it is encouraging to see so many Norwegian food companies already recognising the value in improving and adopting a structured approach to farm animal welfare management and disclosure, and in better understanding the relative strengths and weaknesses of their current approach as well as the areas for improvement.

2. Background to BBAFW Nordic and overall results

Food companies all over the world are under increasing pressure to demonstrate higher welfare standards. This is due to a number of reasons, which include, for example, growing consumer and investor concerns about the sourcing, safety and quality of food products and ingredients, greater interest and investment into non-animal protein, and changing societal expectations of more sustainable and efficient livestock systems. In response, food companies are acknowledging the need to provide greater supply chain transparency, and to equip consumers, business customers and investors with reliable information to help them evaluate how effectively companies are managing farm animal welfare within their business operations and supply chains.

The Business Benchmark on Farm Animal Welfare supports food companies through:

- Helping companies to understand the expectations and interests of key stakeholders (e.g. customers, consumers, investors).
- Providing guidance and clear expectations on how to structure companies' management processes and reporting.
- Enabling companies to benchmark themselves against their industry peers.
- Enabling comparisons to be made within companies (e.g. between internal business units or product lines) and enabling strengths and weaknesses to be identified.

For Norway and the wider Scandinavian region, farm animal welfare is covered by comprehensive legislation, with its implementation monitored by the responsible authorities. However, with many food companies operating within a global marketplace, there is a need for them to further respond to changing societal expectations of the food industry on a range of social and environmental issues, including farm animal welfare. In recent years, recurrent revelations in the media across Scandinavian countries have highlighted concerns about the mistreatment of animals on farms and a lack of adequate enforcement of the governing legislation. It has therefore become critical for food companies to restore consumer confidence in their products and their brands through improved management and disclosure on farm animal welfare practices and performance. Companies increasingly understand that adopting good animal welfare practices is important for protecting their business interests both through managing the downside risks associated with poor animal welfare, and through realising business opportunities associated with promoting higher welfare products to business customers and to consumers.

Global BBAFW (2020):

150 companies from 24 countries:

63 Food Producers, 52 Retailers and Wholesalers, 35 Restaurants and Bars

BBAFW Nordic (2020):

26 companies from Norway:

20 Food Producers, 4 Retailers and Wholesalers, 2 Restaurants and Bars

Table 2.1: Universe of Norwegian companies by category

| Producers & Manufacturers | Retailers & Wholesalers | Restaurants & Bars |
|----------------------------|-------------------------|----------------------|
| Den stolte hane | Coop Norge | Nordic Choice Hotels |
| Fatland | Norgesgruppen | Scandic Hotels |
| Furuseth Slakteri | Rema 1000 | |
| Gårdsand | Reitangruppen | |
| Grilstad | | |
| Horn Slakteri | | |
| Jens Eide | | |
| Kavli Holding/Q-meierierne | | |
| Nomad Foods/Findus Norge | | |
| Nordfjord kjøtt | | |
| Nordlaks | | |
| Norsk Kylling | | |
| Nortura | | |
| Orkla Foods | | |
| Salmar | | |
| Scandi Standard | | |
| Scandza/Leiv Vidar | | |
| Tine meieri | | |
| Toten eggpakkeri | | |
| Ytterøy kylling | | |

Company Rankings and Performance

As with the global Benchmark, the BBFAW Nordic company scores are grouped into one of six tiers, as indicated in Table 2.2. Figure 2.1. presents a composite picture of overall average scores for BBFAW Nordic companies in 2020 compared to the overall average scores in the global BBFAW, both for all global companies and for the 51 European companies (excluding the UK) included in the global benchmark.

Table 2.2: BBFAW Tiers

| Tier | Percentage Score |
|---|------------------|
| 1. The company has taken a leadership position on farm animal welfare | >80% |
| 2. The company has made farm animal welfare an integral part of its business strategy | 62 – 80% |
| 3. The company has an established approach to a farm animal welfare but has more work to do to ensure it is effectively implemented | 44 – 61% |
| 4. The company is making progress on implementing its policies and commitments on farm animal welfare | 27 – 43% |
| 5. The company has identified farm animal welfare as a business issue but provides limited evidence that it is managing the issue effectively | 11 – 26% |
| 6. The company provides limited if any evidence that it recognises farm animal welfare as a business issue | <11% |



Figure 2.1. Comparison of overall average scores (BBFAW Nordic and BBFAW global)

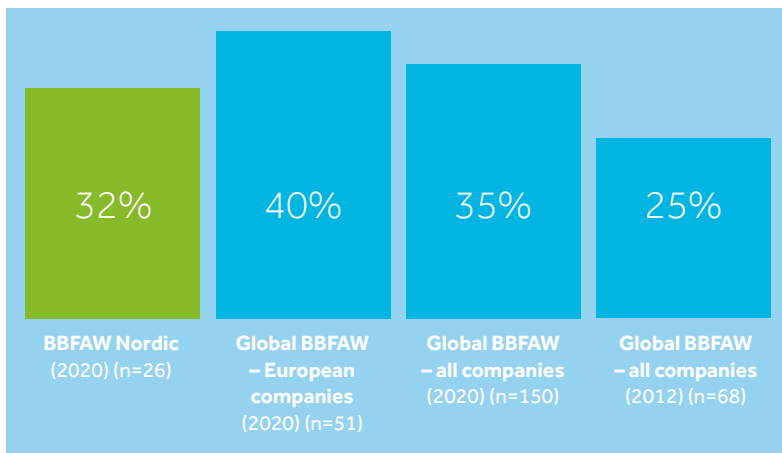


Table 2.3: BBFAW Nordic Company Rankings (2020)

| Tier 1 Leadership | Tier 2 Integral to business strategy | Tier 3 Established but work to be done | Tier 4 Making progress on implementation | Tier 5 On the business agenda but limited evidence of implementation | Tier 6 No evidence on the business agenda |
|----------------------------------|---|--|---|---|--|
| 2 | 0 | 5 | 9 | 3 | 7 |
| Den Stolte Hane Norsk Kylling | | Furuseth Orkla Nordlaks Scandi Standard Tine | Norges Gruppen Nomad Foods/Findus Norge Nortura Grilstad Jens Eide Rema 1000 Fatland Meat Coop Norge Nordic Choice Hotels | Toten Eggpakkeri Salmar Nordfjord Kjøtt | Reitangruppen Horns Slakteri Kavli Holding Scandza/Leiv Vidar Ytterøykylling Scandic Hotels Group Gårdsand |

Overall Findings

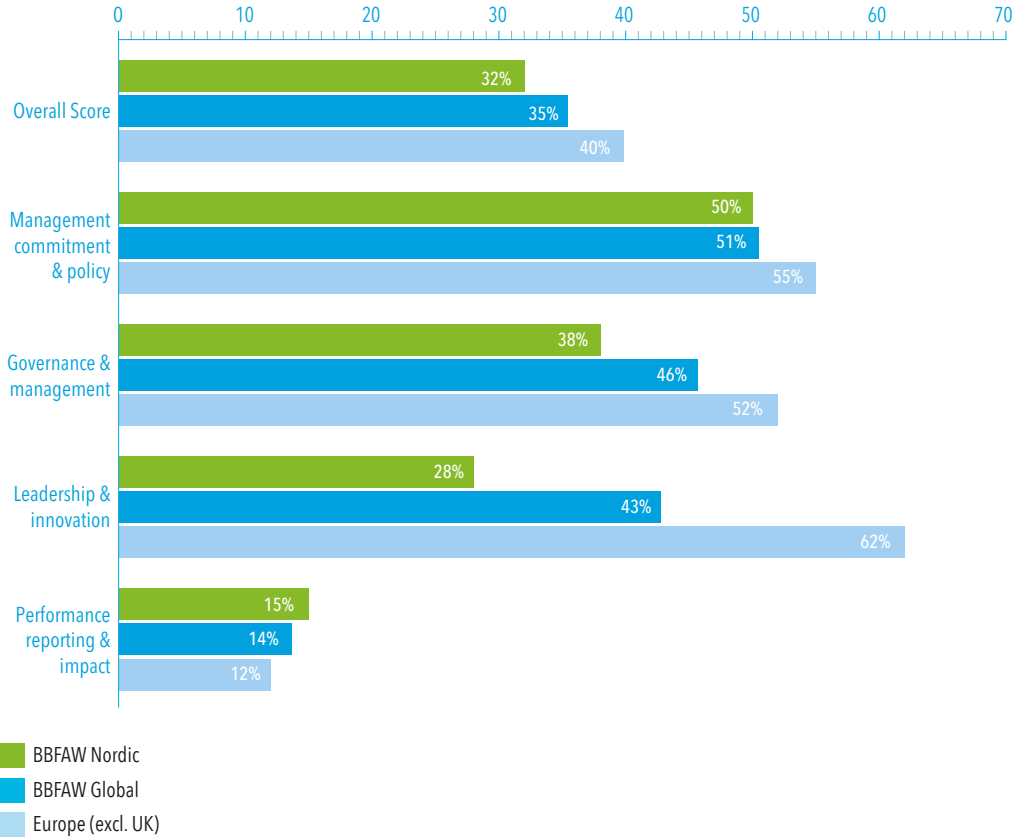
In 2020, the overall average score for BBAW Nordic companies was 32%, which is close to the global overall average score of 35% for the same year. The slightly lower overall average score for BBAW Nordic is to be expected given that the global BBAW is an established programme that has been developed over nine years, and, therefore, global companies have had time to become familiar with both the methodology and the assessment process. When compared to the first global benchmark in 2012, when global companies achieved an overall average score of 25%, the BBAW Nordic overall average score is encouraging.

It is also encouraging to see the spread of companies across the BBAW tiers. Ten companies are ranked in the lowest two tiers (Tier 5 and Tier 6) of the BBAW, indicating that these companies have yet to publicly acknowledge farm animal welfare as an important business issue or they have yet to formalise their farm animal welfare commitments. Nine Norwegian food companies appear in Tier 4, indicating that these companies are making progress on implementing their policies and commitments on farm animal welfare.

It is important to acknowledge that 2020, as a result of the COVID-19 pandemic, has been a particularly difficult trading year for most industries. Within the food sector especially, this has resulted in resource constraints and limited audits throughout company operations and supply chains, which may have hampered some companies' ability to publish detail on their farm animal welfare management or performance.

Notwithstanding this, seven of the 26 companies are ranked in the top three tiers, indicating that they have an established approach to farm animal welfare and that there are clear systems and processes in place to effectively manage farm animal welfare throughout their business operations and supply chains. Two food producers have achieved a Tier 1 ranking, indicating that farm animal welfare is effectively integrated into these companies' operations, and that the companies are effectively reporting on their farm animal welfare performance.

Figure 2.2. Overall average score for BBAW Nordic companies by section (2020)



3. The 2020 Benchmark Results in detail

The BBFAW methodology consists of 37 criteria across four sections: Management Commitment and Policy, Governance and Management, Innovation and Leadership, and Performance Reporting and Impact. These sections carry different weightings, with the Performance Reporting and Impact section at 35% representing the highest weighting of all the sections. This is in line with the BBFAW's objective to drive corporate performance on farm animal welfare and to drive improvements in the welfare of animals on the ground. (For more information on the BBFAW methodology, see Appendix 1.)

Section 1. Management Commitment and Policy

In this section companies are scored for having acknowledged farm animal welfare as a relevant business issue and for having a commitment to farm animal welfare in a policy statement or position. They are also scored for having specific commitments to eight issues of particular relevance to farm animal welfare: the avoidance of close confinement, the provision of species-specific environmental enrichments, the avoidance of genetic modification and cloning, the avoidance of growth promoting substances, the avoidance of prophylactic antibiotics, the avoidance of routine mutilations, the provision of pre-slaughter stunning and the avoidance of long-distance transportation (defined as more than eight hours).

Twenty-four (92%) of the 26 companies covered by the 2020 BBFAW Nordic Benchmark acknowledge farm animal welfare as a relevant business issue, 17 (65%) have a broad commitment to farm animal welfare in a policy statement and 16 (62%) have formal overarching policies on farm animal welfare. Whilst this is encouraging, it is evidence that almost one third of the assessed companies provide limited or no information about their approach to farm animal welfare or have yet to formalise their management of this issue.

62%

Norwegian companies have published a farm animal welfare policy.

Of the 26 BBFAW Nordic companies:

- **24 (92%)** companies acknowledge animal welfare as a business issue
- **17 (65%)** companies have a broad commitment to farm animal welfare in a policy statement and 14 of these include a description of the processes in place for implementation
- **16 (62%)** companies have a formal farm animal welfare policy
- **20 (77%)** companies have some commitment to the avoidance of close confinement
- **16 (62%)** companies have some commitment to the provision of environmental enrichment for animals
- **9 (35%)** companies have some commitment to the avoidance of genetic modification and cloning
- **11 (42%)** companies have some commitment to the avoidance of growth promoting substances
- **15 (58%)** companies have some commitment to the reduction or avoidance of antibiotics
- **14 (54%)** companies to have some commitment to the avoidance routine mutilations
- **15 (58%)** companies have some commitment to the provision of pre-slaughter stunning
- **15 (58%)** companies have some commitment to the avoidance of long-distance transport

Interestingly, more companies have made some commitment to the avoidance of close confinement than companies publishing a farm animal welfare policy. This suggests that the issue of close confinement (e.g. the avoidance of eggs from laying hens kept in cages) is for many companies an entry point for paying attention to farm animal welfare and a first step towards defining a more comprehensive approach to farm animal welfare.

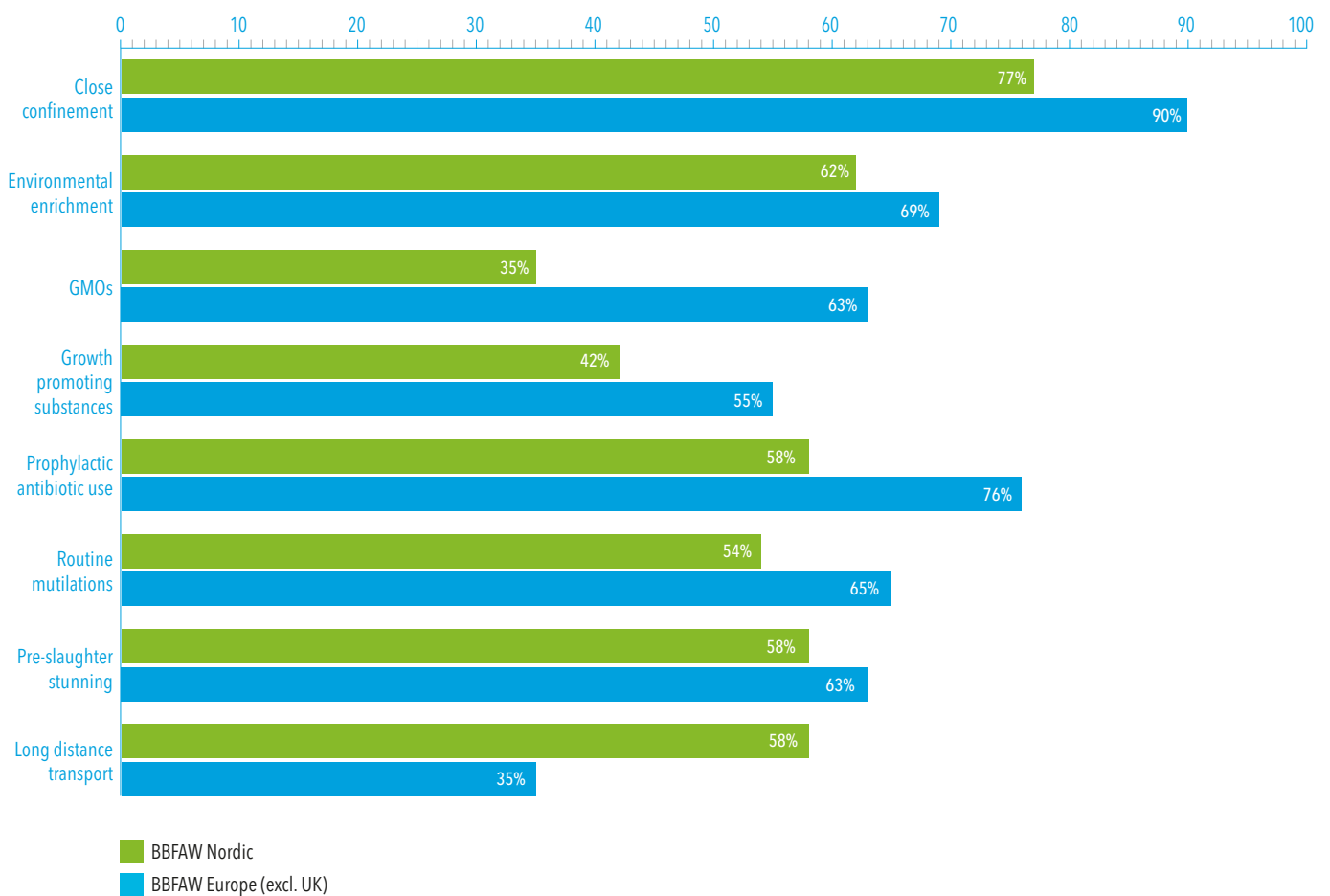
Figure 3.1 shows the proportion of companies with management commitments related to the eight key welfare topics assessed by the BBFAW. The main welfare topics addressed by the BBFAW Nordic companies are: the avoidance of close confinement; the provision of species-specific environmental enrichment; the reduction or elimination of routine antibiotics; the provision of pre-slaughter stunning; and the avoidance of long-distance transportation. It is important to note that these commitments are typically partial in scope, meaning that they are limited to a particular species, product type or geography.

The average score for BBFAW Nordic companies for the Management Commitment and Policy section was 49,6%, which is only slightly lower than the average score of 54,8% for European companies (excluding the UK) in the global BBFAW.

77%

Norwegian companies have published some commitment to the avoidance of close confinement.

Figure 3.1. Companies with commitments to specific welfare issues (2020)



Section 2. Governance and Management

In the Governance and Management section of the BBFAW, companies are evaluated on the strength of their governance systems and processes for ensuring the effective implementation of their animal welfare commitments internally and through their supply chains.

Of the 26 BBFAW Nordic companies:

- **14 (54%)** companies have defined some management responsibility for farm animal welfare
- **16 (62%)** companies have set farm animal welfare related improvement targets/objectives
- **8 (31%)** companies provide some training to staff on farm animal welfare
- **11 (42%)** companies have a contingency plan in place in case of non-compliance
- **16 (62%)** companies include farm animal welfare in at least some of their supplier contracts
- **15 (58%)** companies include farm animal welfare in their monitoring and auditing of suppliers
- **14 (54%)** companies provide support and/or training to suppliers on farm animal welfare
- **18 (69%)** companies use an animal welfare assurance standard for at least a percentage of animal products

These findings suggest that the management systems and processes for governing farm animal welfare in the Norwegian companies could be strengthened. For example, almost half of the companies do not appear to have assigned management responsibility for farm animal welfare, either on a day-to-day basis or at senior management level. Assigning accountability for farm animal welfare, and having both strategic and operational oversight, are important for ensuring effective management control of this issue.

Only one third (31%) of the companies assessed provide some form of training to staff on farm animal welfare, and less than half of the companies (42%) describe what actions are taken in the event of non-compliance with their farm animal welfare policies.

Encouragingly, 62% of the companies have set some farm animal welfare-related improvement objectives or targets. Objectives and targets are important because they enable companies to take decisive action to implement policy commitments in business processes and systems by allocating resources and assigning responsibility for achieving defined outcomes within a set time period.

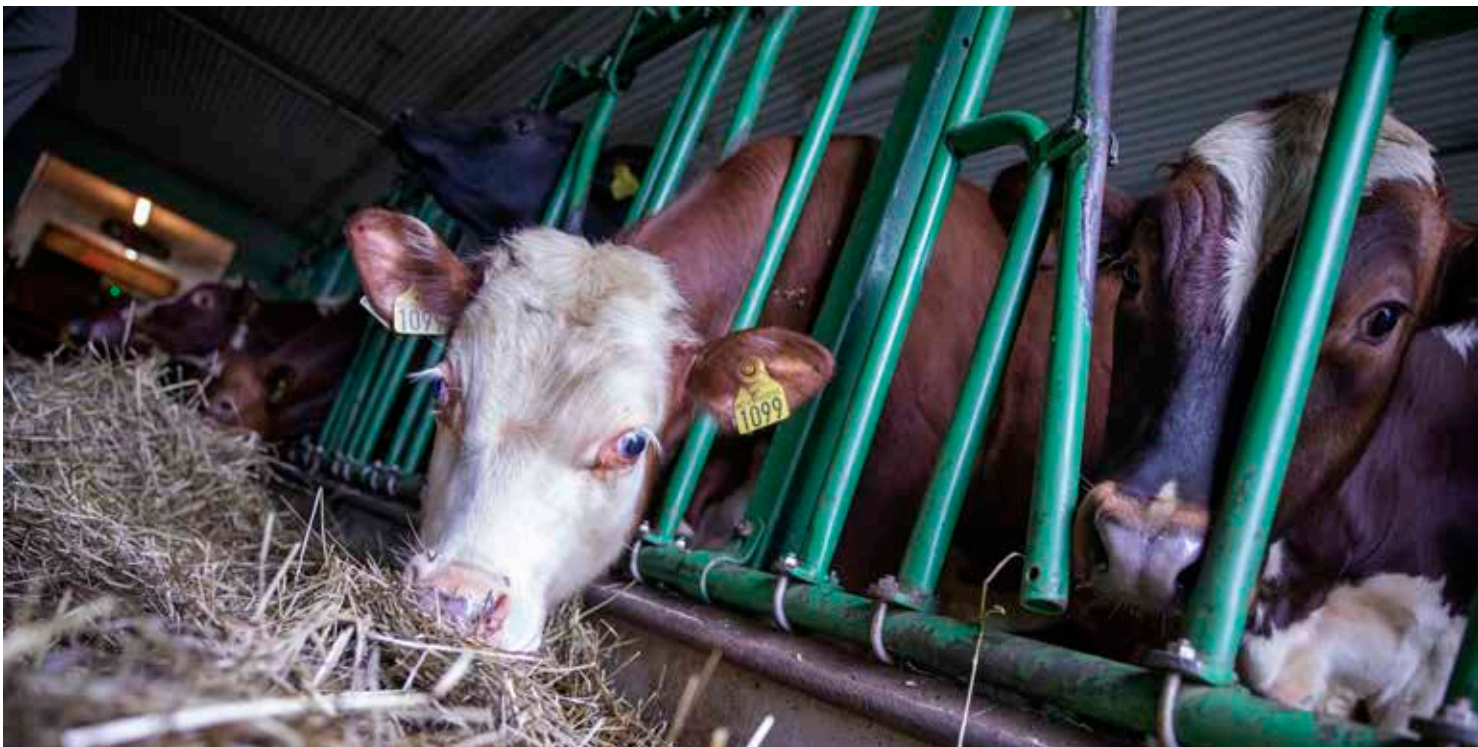
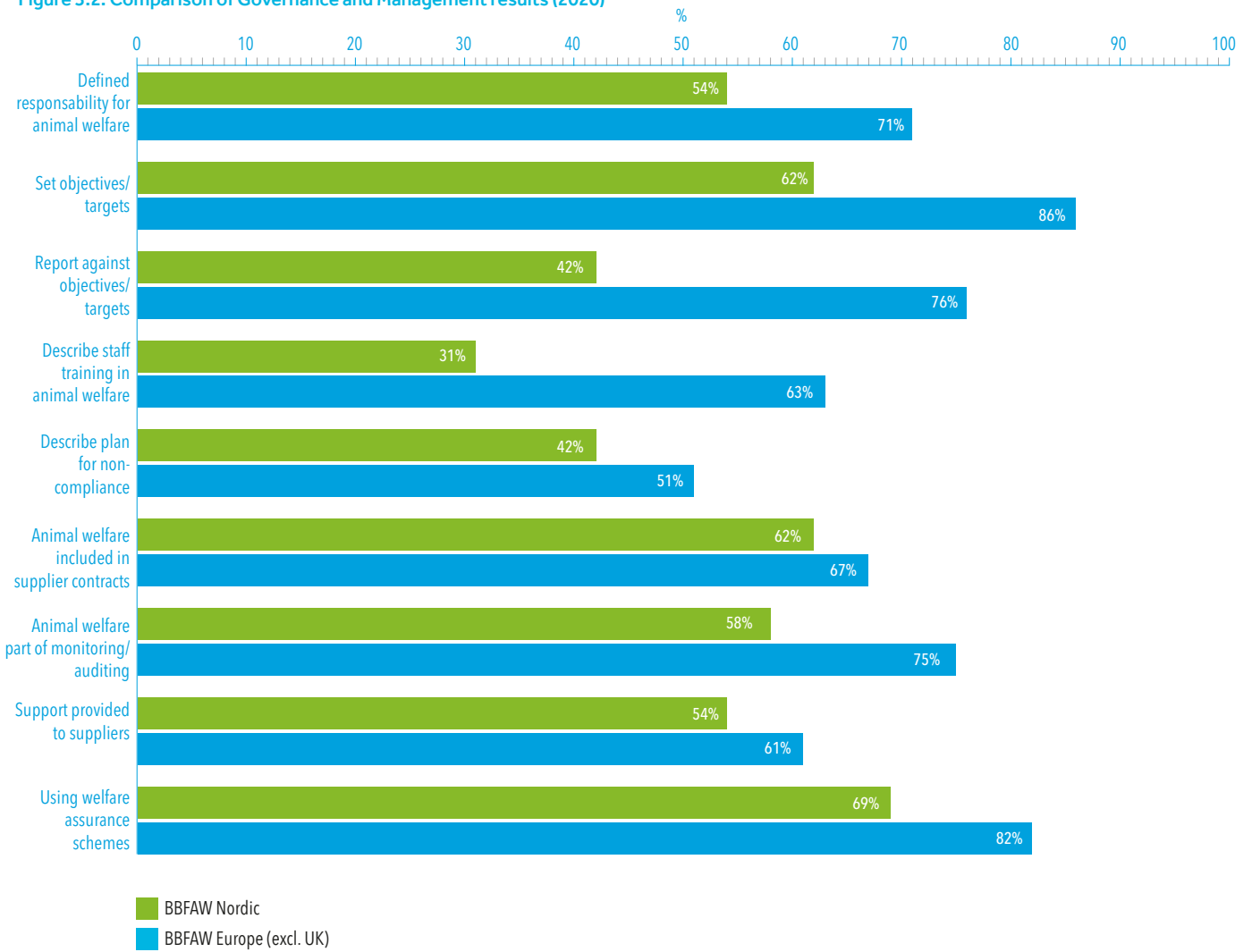
More than half of the companies work with their suppliers to advance farm animal welfare, through, for example, incorporating animal welfare into supplier contracts (62%), through including animal welfare as part of supplier audits (58%) and through providing education and support to suppliers on farm animal welfare (54%). Encouragingly, more than two thirds (69%) of the companies use some form of farm assurance standard or certification scheme for their products. This is supported by the fact that in Norway, industry welfare assurance programs exist for most of the key species of farm animals (e.g. pigs, chickens, turkeys and hatcheries), with programs for cattle and sheep/lambs underway.

The Governance and Management section shows the most divergence in scoring between BBFAW Nordic and BBFAW European companies. The average score for BBFAW Nordic companies was 38,3% compared to 51.7% for the European countries in the global BBFAW in 2020. Specifically, 62% of BBFAW Nordic companies have set farm animal welfare-related objectives and targets (compared to 86% of BBFAW European companies) and 58% of BBFAW Nordic companies (compared to 75% of BBFAW European companies) describe how they monitor and audit the implementation of their farm animal welfare policies. It is important to acknowledge that the global BBFAW Benchmark continues to see year-on-year improvements in the way in which companies are strengthening their internal processes for ensuring the effective implementation of company policies. We therefore expect companies in the BBFAW Nordic Benchmark to similarly improve their scoring in this section over time.

69%

of the companies
use an animal welfare
assurance standard for
at least some products

Figure 3.2. Comparison of Governance and Management results (2020)



Section 3. Innovation and Leadership

The Leadership and Innovation section of the BBFAW evaluates companies on their efforts to drive progress on farm animal welfare within the industry, through participation in relevant industry initiatives and through investment in farm animal welfare-related research projects. As part of this, it evaluates what actions are taken by companies to promote higher animal welfare to their consumers and their business customers. Companies have an important role to play in supporting research and development programmes to improve farm animal welfare, and in participating in initiatives focused on developing and promoting policy frameworks, incentives, knowledge and understanding across the industry.

Within this section, it is evident that few Norwegian companies publish any information related to their participation in industry initiatives or their investment in research and development work to improve farm animal welfare. Additionally, less than half (46%) of the companies appear to communicate to their customers/consumers on farm animal welfare, suggesting that there is an opportunity for Norwegian companies to demonstrate to consumers the value and importance of buying higher welfare products.

- **8 (31%)** companies invest in research and development in order to advance farm animal welfare
- **5 (19%)** companies take part in industry partnerships to promote farm animal welfare
- **12 (46%)** companies promote farm animal welfare to consumers/customers

The provision of information on farm animal welfare is important at all levels of the food supply chain if companies are to play a role in driving greater awareness, and greater demand and support for higher welfare products. Interestingly, in the global BBFAW Benchmark we have recently seen that the proportion of Producers and Manufacturers providing evidence of customer communication has increased significantly (from 40% in 2019 to 60% in 2020), indicating that food companies across the value chain are scaling up efforts to engage their customers – both business customers and consumers – on farm animal welfare.



Section 4. Performance Reporting and Impact

In the Performance Reporting and Impact section, companies are scored for reporting on farm animal welfare performance and impact data. The first part of this section scores companies for reporting on the proportion of all relevant species of animals in their global supply chains that are impacted by their commitments to the key welfare issues covered in Section 1. The second part of this section scores companies on the actual proportion of animals impacted (as a percentage of their global supply chains), with many of the 'impact questions' relating to specific species (namely laying hens, broiler chickens, pigs and dairy cattle).

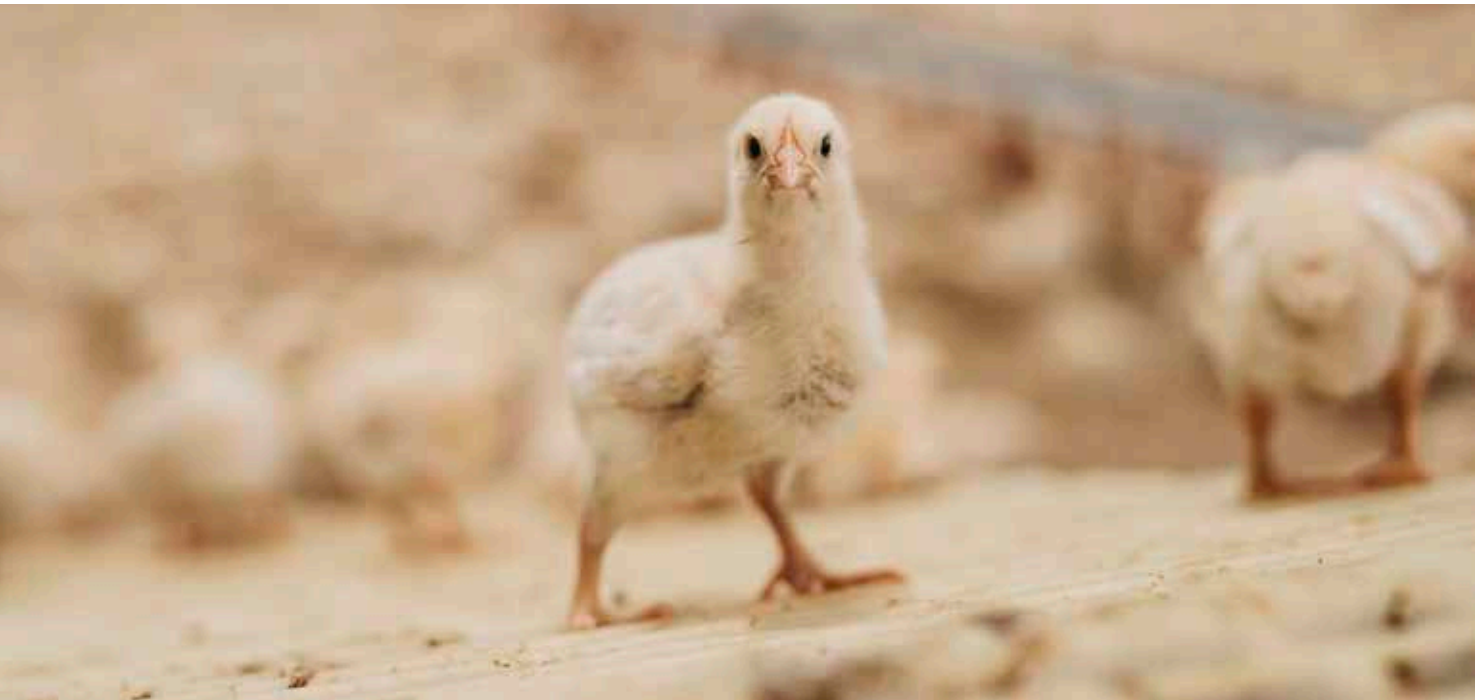
The BBFAW has incrementally increased the weighting of the Performance Reporting and Impact section in recent years. This aligns with the BBFAW's overall objective to improve welfare standards in global food supply chains. Thus, it is not only important for companies to publish animal welfare commitments and describe their governance of farm animal welfare, they must also show evidence of their impact on the welfare of animals through the effective implementation of these commitments.

Of the 26 BBFAW Nordic companies:

- **8 (31%)** companies report on the proportion of animals that are free from confinement
- **4 (15%)** companies report on the proportion of animals that are free from routine mutilations
- **4 (15%)** companies report on the proportion of animals that are stunned prior to slaughter
- **8 (31%)** companies report on transport times for animals
- **10 (38%)** companies report information related to welfare outcome measures
- **14 (54%)** companies provide some narrative around trends in farm animal welfare progress or performance
- **5 of the 15** companies for whom the question was relevant (**33%**) report on the proportion of laying hens that are cage-free
- **7 of the 15** companies for whom the question was relevant (**47%**) report on the proportion of chicken bred with slower growth/higher welfare potential
- **4 of the 26** companies (**15%**) report on the proportion of animals (excluding finfish) that are pre-slaughter stunned
- **7 of the 26** companies (**27%**) report on the proportion of animals (excluding finfish) transported within specified maximum journey times

BBFAW Nordic companies achieve a higher average score for this section, than global BBFAW companies (13.6%) and BBFAW European companies (12.2%) respectively. Given the work being done by Norwegian food companies to monitor and report on farm animal welfare performance data through, for example, the Norwegian food industry welfare programmes, it is apparent that there already exist some effective systems and processes to gather welfare data from farms. This in turn suggests that Norwegian companies are well positioned to adopt a global leadership position when it comes to publishing farm animal welfare performance data.

The most reported performance data among BBFAW Nordic companies relates to the close confinement of animals (31%) and to average transportation times (31%). These findings are similar to the global BBFAW, where close confinement continues to be the highest reported area of performance, with 65% of companies reporting at least some data. However, the majority of performance reporting on this topic remains limited to specific countries, species or product lines, with only 5% of companies reporting on the proportion of animals free from close confinement covering all relevant geographies, species and products.



Over half of the BBFAW Nordic companies (54%) provide some narrative around their progress against their policy commitments or improvement targets, which is positive. In addition, 38% report on welfare outcome measures (measures such as mortality rates, lameness in dairy cows, feather cover in laying hens and sea lice infection in farmed fish), which are important for evaluating the performance of farm animal welfare systems and practices. Despite their importance, only 23% of the global BBFAW-companies report on welfare outcome measures. Norwegian companies might be helped by the fact that they are required to measure and report data as part of adhering to the food industry standards.

Food companies, both in Norway and globally, generally fail to provide sufficient detail in their reported performance data to be able to accurately determine the proportion of animals in their global supply chains that is impacted by commitments and policies. It is, however, important to acknowledge the BBFAW's strict interpretation of the criteria for the questions relating to performance impact, which require companies to report a single figure reflecting their impact on the issue in question across 100% of their global supply chain.¹ For example, companies may report data for a particular country or a particular product line, but they do not provide any context for these data. In the absence of any clarity on what these data represent as a proportion of global supply, the BBFAW is unable to award companies more than minimal points.

Over the past few years, the emphasis on performance impact in the BBFAW has increased. Despite the generally low scores in this section, there are some encouraging signs of improvement in the global BBFAW data. For example:

- **83** (61% of those for which this question was relevant) of global companies report on the proportion of laying hens in their global supply chains that is free from close confinement (cage-free).
- Although low, the proportion of global companies that report on the proportion of broiler chickens of strains of birds with improved welfare outcomes and with a slower growth potential has increased to **13%** (of those for which this question was relevant) in 2020 from just **4%** in 2019.
- **31%** of global companies, compared to just 23% in 2019, now report on the proportion of animals (including fin fish) in their global supply chains that is pre-slaughter stunned.

This implies that increasingly, global food companies understand the importance of not only publishing commitments to improved farm animal welfare, but of regularly reporting on progress and performance. As Norwegian companies become more familiar with the BBFAW methodology, we would expect to see improvements in their reporting on farm animal welfare management and performance.

¹Note that for retailers and wholesalers some of these questions apply to own-brand products only.

4. Implications of the results and next steps

The Global Perspective

To provide broader context for the overall average score for BBFAW Nordic companies, we present a summary of comparative scores across different geographic regions. In the global BBFAW (2020), UK domiciled companies, with an average score of 64%, continue to outperform companies in other geographies. The UK had the world's first legislation related to farm animal welfare, and the issue has been a priority for many food companies and their consumers for several years. The second highest-scoring region is Europe (excluding the UK), which achieved an average score of 40%. In general, European companies outperform global companies on all benchmark sections except for the Performance Reporting and Impact-section. Although other geographic regions continue to lag behind UK and Europe, the overall average score for Latin American companies, at 32%, has overtaken North American companies, at 29%. Asia-Pacific was the only other geographic region to see a rise in average overall score in 2020, increasing from 12% to 15%. However, it is worth noting that this rise is from a very low base.

Improvements over time

Since 2012, the BBFAW has played an important role in defining expectations for – and encouraging disclosure on – the management of farm animal welfare, and we have seen a majority of the assessed food companies globally responding to meet these expectations.

As a relevant comparison to the BBFAW Nordic results, Table 4.1 shows how the 57 global food companies ranked by Global BBFAW since 2012 have improved (in most cases) their scores, indicating an increasing focus on effective farm animal welfare management and reporting. Acknowledging that some companies can move up and down tiers, Table 4.1 provides the net impact of these movements across tiers. In total, 45 companies (82%) have moved up at least one tier since 2012 and, of these, 13 (24%) have moved up one tier, 21 (38%) have moved up two tiers and 11 (20%) moved up three tiers. These improvements are even more striking given the tightening of the Benchmark criteria and the increased emphasis on performance reporting and impact over time and demonstrate the tangible impact of the BBFAW programme on food company practices.

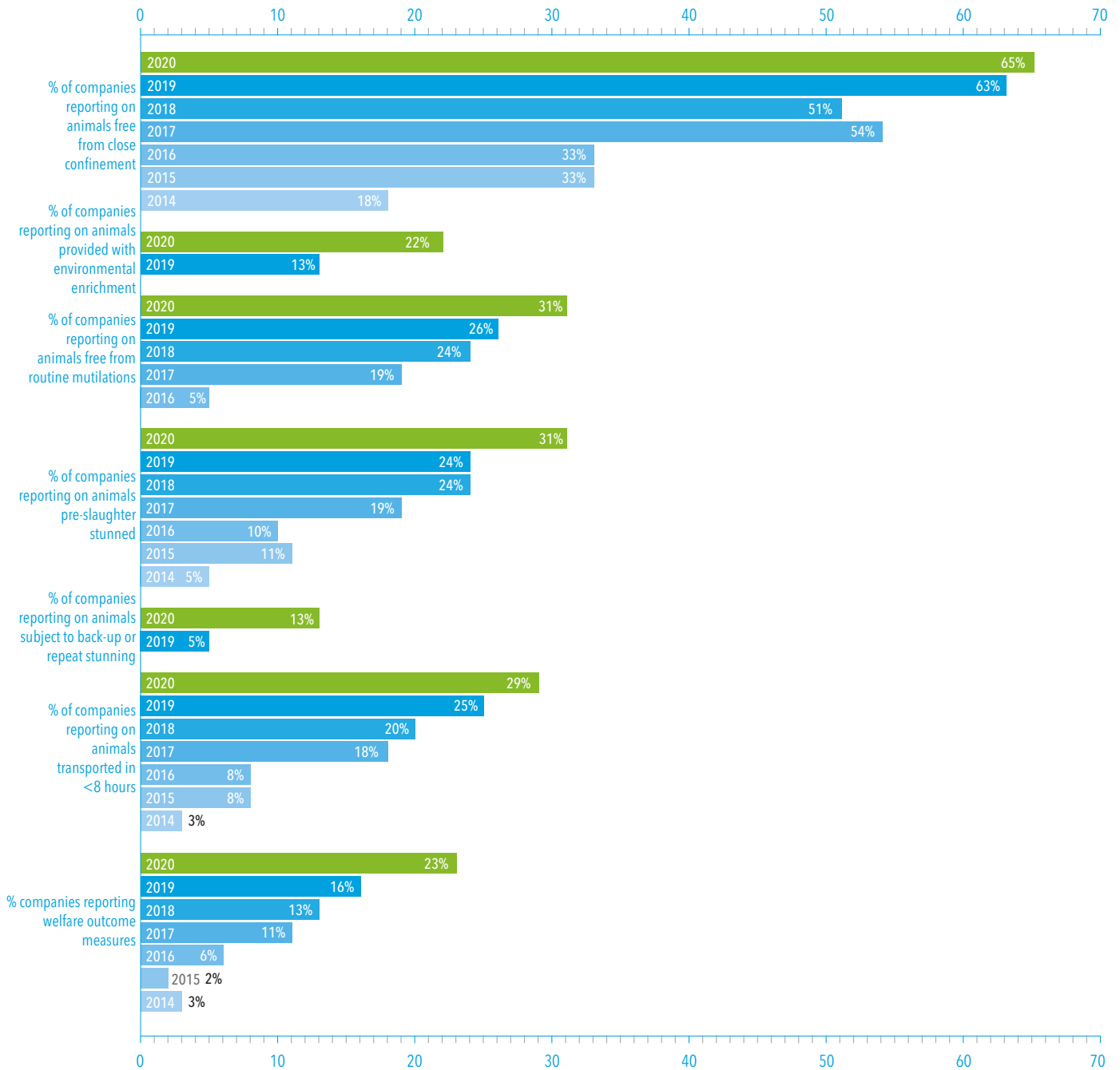
Table 4.1: Global BBFAW tier changes 2012 – 2020 (trend companies)

| Down 1 Tier | No Tier change | Up 1 Tier | Up 2 Tiers | Up 3 Tiers |
|---------------------------------|---|---|---|---|
| Subway/ Doctor's Associates Inc | Autogrill Co-op (UK) Gategroup Holding Groupe Lactalis ICA Gruppen McDonald's Corporation Müller Group Starbucks Unilever | Arla Foods Coop Group (Switzerland) Compass Group J Sainsbury Mars Mercadona Metro AG Noble Foods* Royal FrieslandCampina SSP Group Terrena Group Tyson Foods Umoe Gruppen Vion Food Group Wm Morrison | 2 Sisters Food Group ALDI Süd Aramark Associated British Foods Camst Carrefour Cremonini Danish Crown Groupe Danone JD Wetherspoon Lidl Stiftung & Co Marfrig Global Foods Marks & Spencer* Migros Mitchells & Butlers REWE Group Schwarz Unternehmens Treuhand KG/ Kaufland Tesco Walmart Inc/Asda Whitbread Yum! Brands | Auchan Holding Barilla Cargill Casino Cranswick* Elior Group Greggs Nestlé Premier Foods Sodexo Waitrose* |
| 1 | 9 | 15 | 21 | 11 |

*Tier 1 company in 2020

For companies serious about managing the business risks and opportunities associated with farm animal welfare, the first logical step is to formalise their commitments in a farm animal welfare policy before implementing these policy commitments internally and in their supply chains. As part of this implementation process, companies should instigate monitoring processes to measure progress against their policy commitments and related objectives and targets. The BBFAW is committed to driving improved welfare impacts for animals in global supply chains and encourages companies to demonstrate progress towards improved welfare standards through its annual assessments. To illustrate the evolution of company reporting on performance, Figure 4.1 shows how the global BBFAW companies have improved their reporting in the past six years. This highlights the function of BBFAW as a change process wherein stepwise improvements are made year on year, reflecting food companies' gradual maturity in their approaches to farm animal welfare management.

Figure 4.1 Global BBFAW Performance Reporting by Companies 2014-2020



Note to figure: Performance reporting questions were introduced in the global BBFAW Benchmark in 2014, with additional questions introduced in 2016, 2018, 2019 and 2020.

The BBFAW Benchmark is also driving change through enabling institutional investors to use its data to assess the business risks and opportunities associated with farm animal welfare for individual food companies. This data can be useful in providing insights into companies' quality of management, as well as for assessing the suitability of companies for inclusion in screened (ethical) funds, and to identify potential investment opportunities in the food sector. Investors also use the BBFAW data in their company engagements, both to prioritise companies for engagement (e.g. to identify leaders and laggards) and to define their expectations of companies (e.g. expectations that companies will achieve a specific BBFAW tier ranking within a particular period of time).

BBFAW and the investor community

Improving the welfare of all animals farmed for food is a collective responsibility; one that clearly extends to food companies and to their investors. Over the nine iterations of the global BBFAW Benchmark, we have proactively engaged with the investment community, encouraging investors to use their influence to urge companies to take effective action on farm animal welfare. We have established the first ever Global Investor Statement on Farm Animal Welfare and the Global BBFAW Investor Collaboration on Farm Animal Welfare; both of these are now supported by over 30 institutional investors with over £2.3 trillion in assets under management.

The results of our engagement show that investors are increasingly likely to engage with companies to encourage them to better manage the issue of farm animal welfare. This engagement is widely cited by companies as a key driver for them to take action on farm animal welfare. Since the first BBFAW Benchmark in 2012, the investor perception of farm animal welfare has changed dramatically, from perception as a niche investment issue, to one where there is now widespread awareness of the importance of assessing and managing the investment risks and opportunities related to farm animal welfare.

Through engagement with companies on their approach to farm animal welfare, investors are increasingly looking for evidence that the management processes companies are putting in place are leading to impact on farm animal welfare in supply chains. As an example, in 2020, investors in the BBFAW Investor Collaboration wrote to the CEOs of all companies covered by the global BBFAW benchmark to commend leading and improving companies on their performance in the Benchmark and to challenge poorer performers to improve. In total, 69 of the 150 companies formally responded to investors, which is our highest response rate to date and reflects the influential role of investors in ensuring that farm animal welfare remains on the business agenda.

For BBFAW Nordic, the journey is just beginning, and the plan is for the assessments to continue on an annual basis, in Norway and, over time, in the other Nordic countries. Company engagement is central to the Benchmark process, and the BBFAW Nordic partners and the BBFAW Secretariat will continue to engage with companies and provide ongoing support on how they can use the BBFAW to guide and improve their farm animal welfare management and disclosure.

Based on the findings of the first BBFAW Nordic benchmark, our recommendations for Norwegian food companies over the coming year are to:

- Formalise their company positions on farm animal welfare, both generally and on specific welfare topics
- Provide more detailed descriptions on how animal welfare is governed and managed internally and through their supply chains
- Report on the standards already covered by legislation in Norway and what actions are being taken to ensure compliance with regulations
- Set clear targets for improvements to show that the company is continuously evolving in line with expectations on farm animal welfare
- Strengthen performance data reporting by indicating what proportion of animals in the total supply chain are represented by the data.

Appendix 1: The 2020 BBFAW Nordic Benchmark: Scope and Methodology

The structure of the BBFAW Nordic is consistent with the global BBFAW methodology and aligns with the way in which companies report on other sustainability-related issues. For any particular social or environmental issue, investors and other stakeholders generally expect companies to provide:

- Information on the company's activities to the extent that such information is necessary to put its social and environmental impacts into context.
- A description of the company's governance and management systems and processes for the environmental or social issue(s) in question.
- Details of their policies on the issue(s) in question.
- Their objectives, targets and key performance indicators for the issue(s) in question, together with a discussion of how they intend to deliver on these objectives and targets.
- A description of the company's engagement with relevant stakeholders on the issue(s) in question.
- An assessment of their progress towards meeting their objectives and targets, together with a discussion of the factors that have affected their performance.
- An assessment of their performance against their policies and against other commitments (e.g. codes of conduct) that they have made.

The BBFAW Nordic Benchmark has been designed to align with these reporting expectations as well as with input from leading animal welfare organisations on the key welfare issues in farming systems.

Within the BBFAW Nordic methodology, reference to national legislation or regulations is not considered sufficient, given that awareness of specific legislative or regulatory requirements are not generally understood outside of companies, and given that companies typically operate across geographic regions, where mandatory requirements will vary across different jurisdictions. Further, companies often operate to standards that extend beyond minimum requirements. For these reasons, companies are expected to provide a clear explanation of the standards to which they operate across all relevant geographies.

The BBFAW Nordic assessment covers four core areas as follows:

1. Management Commitment and Policy

1. Companies should provide a general account of why farm animal welfare is important to their business, including a discussion of the business risks and opportunities.
2. Companies should publish an overarching farm animal welfare policy that sets out their core principles and beliefs on farm animal welfare, and that explains how these beliefs are addressed and implemented throughout the business. The policy should include:
 - a. A clear statement of the reasons why farm animal welfare is important to the business.
 - b. A clear position on its expected standards of farm animal welfare.
 - c. A description of the processes (e.g. senior management oversight, commitments to continuous improvement, performance monitoring, corrective action processes, public reporting on performance) in place to ensure that the policy is effectively implemented.
 - d. A clear definition of the scope of the policy, specifically whether the policy applies to all relevant animal species or not (including whether the policy – or a separate policy – applies to finfish aquaculture), whether the policy applies in all geographies or not, and whether the policy applies to all products the company produces, manufactures or sells, or not. Note that a common reason for companies receiving partial points for questions in this section is due to it not being fully clear which species, product type or geography that a statement or commitment applies to.

3. Companies should set out their positions on priority farm animal welfare issues, including their positions on close confinement and intensive systems for livestock and finfish, on the provision of effective species-specific environmental enrichment, on the use of meat from genetically modified or cloned animals or their progeny or descendants, on the use of growth promoting substances, on the use of prophylactic antibiotics, on the avoidance of routine mutilations, on the avoidance of meat from animals that have not been subject to pre-slaughter stunning, and on long distance live transportation.

2. Governance and Management

1. Companies should specify who (i.e. the position/title of the relevant individual(s)) is responsible for managing farm animal welfare-related issues on a day-to-day basis, and who is responsible at senior management level for overseeing the company's farm animal welfare policy and its implementation.
2. Companies should define objectives for the continuous improvement of farm animal welfare and:
 - a. Publish these objectives. They may be process objectives (e.g. to formalise their farm animal welfare management systems, to introduce audits), performance objectives (e.g. to phase out specific non-humane practices, to ensure that specific standards are met for all species) or some combination of the two.
 - b. Specify the measures they are using to assess performance against these objectives and targets. c. Explain how these objectives and targets are to be delivered including, as appropriate, details of the capital and other costs that are expected to be incurred, and the timeframe for the delivery of these objectives and targets.
 - d. Report on their performance against the objectives and targets they have set for themselves.
3. Companies should describe their internal systems and controls for farm animal welfare. This should include discussion of:
 - a. Training in farm animal welfare for relevant employees.
 - b. The actions to be taken in the event of non-compliance with the farm animal welfare policy.
 - c. Monitoring processes in place to ensure compliance with the farm animal welfare policy.
4. Companies should describe how they implement their farm animal welfare policy through their supply chains. This should include discussion of:
 - a. How farm animal welfare issues are integrated into supplier contracts or codes of conduct.
 - b. How farm animal welfare is considered in performance reviews and included in monitoring and auditing.
 - c. How employee and supplier competencies to effectively manage farm animal welfare are promoted, developed and maintained (e.g. through training).
5. Companies should report on whether they assure their animals to a company-specific scheme, to a certified national farm assurance scheme or to third-party assured schemes (such as the animal welfare programs, RSPCA Assured, Label Rouge, GAP 5-step or EU organic standards.)

3. Innovation and Leadership

1. Companies should indicate whether they are involved in research and development programs to advance farm animal welfare, or in industry or other initiatives directed at improving farm animal welfare.
2. Companies should describe how they engage with their customers or clients on farm animal welfare. This could be through specific information on customer-facing websites, through brochures, labelling, marketing campaigns or live events etc.

4. Performance Reporting and Impact

1. Companies should report on their performance on farm animal welfare. Within this, they should report on commonly accepted welfare issues and the proportion of animals affected by their policies (e.g. on close confinement, on environmental enrichment, on routine mutilations, on pre-slaughter stunning, on stunning effectiveness, on average journey times, as well as on species-specific welfare outcome measures (e.g. gait score and footpad dermatitis in broiler chickens, tail-biting and lameness in pigs, bone breakage and feather coverage in laying hens, or those related to mental wellbeing and expression of natural behaviour).
2. Companies should provide a narrative related to trends in performance, including a discussion of the factors that have influenced performance (positively or negatively).
3. Companies should report on their impact on key welfare issues for specific species, as measured by:
 - a. The proportion of defined species (e.g. laying hens, sows, dairy cattle, broiler chickens) free from close confinement.
 - b. The proportion of defined species (e.g. laying hens, pigs, dairy cows) free from routine mutilations. c. The proportion of broiler chickens of a slower-growing breed with higher welfare potential.
 - d. The proportion of animals subject to pre-slaughter stunning.
 - e. The proportion of animals transported within specified maximum journey times.

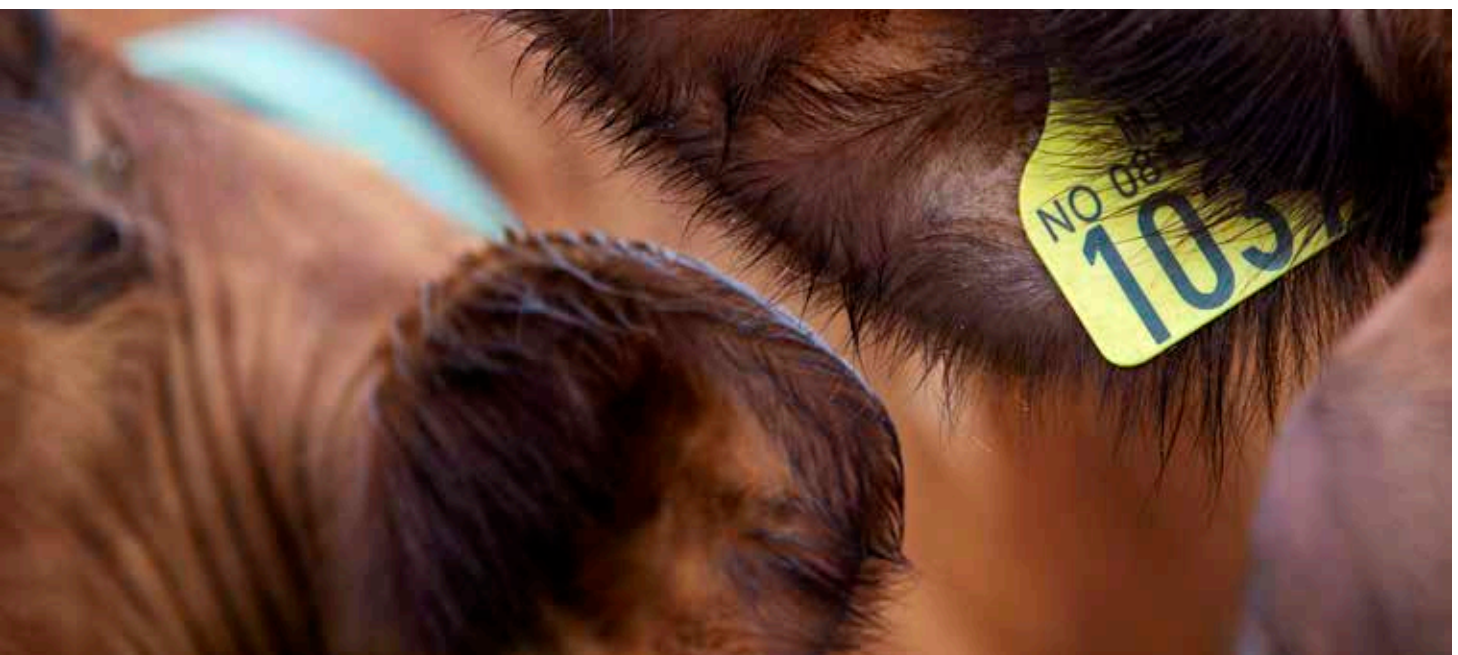
Note that in those cases where a complete estimation of scope or share of supply is impossible due to limited information (e.g. it is not clear if the data reported covers all products sold, in all geographies etc.), companies are awarded minimum or partial points

Weightings

In total, the BBFAW Nordic Benchmark comprises 37 questions, with points allocated to each of the four sections.

Table A1: BBFAW Nordic weightings across sections

| Section | % weighting 2020 |
|--|---|
| 1. Management Commitment (11 questions) | 26 |
| 2. Governance and Management (6 questions) | 28 |
| 3. Leadership and Innovation (2 questions) | 11 |
| 4. Performance Reporting and Impact (18 questions) | 35 (performance questions account for 40% and impact questions account for 60%) |



The 2020 BBFAW Nordic Benchmark universe of companies

The 2020 BBFAW Nordic Benchmark assessed 26 food companies. These companies were selected on the basis of their significance and scale in the Norwegian market. Within the initial selection, there is an emphasis on food producers and manufacturers (20 out of 26). In addition, four companies in the Retailers and Manufacturers and two companies in the Restaurants and Bars sectors were selected. A majority (18) are privately owned companies, five are publicly listed and three are cooperatives. Three out of the 26 companies are headquartered outside of Norway, but are included due to the importance of their operations in the Norwegian market.

The BBFAW-assessments are primarily aimed at owner (parent) companies rather than subsidiaries, although information from subsidiaries is included in the assessment. This reflects the aim of the BBFAW, which is to assess how a company overall manages farm animal welfare issues. BBFAW does however give credit for the actions of subsidiaries or for actions in specific geographic regions.

In addition to the selected owner companies, subsidiary companies in Norway were able to request a separate evaluation. The purpose of this was to provide consumers with information about businesses they know by trading name rather than by their owner companies' names. In addition, some owner companies operate both retail and producer companies. As a consequence, in 2020, three subsidiary companies (Den Stolte Hane, Norsk Kylling and Rema 1000) requested an independent assessment.

The BBFAW Nordic assessment process

Following the announcement of the BBFAW Nordic programme on the 29th of August 2019, training materials and technical briefings were offered to the selected Norwegian companies in order to facilitate uptake and understanding of the BBFAW methodology and process. Two workshops were organised in 2019 and 2020, with the first workshop hosted in Oslo and the second hosted online.

Reliance on published information

BBFAW assessments are based entirely on information published at the time of the assessments. The reasons for this are to encourage better disclosure, which is a core objective of the BBFAW, and to ensure that companies are assessed in a consistent manner (i.e. via an unbiased, objective evaluation of published information). Each company was thus assessed on the information that was publicly available at the time of the assessment period, which ran from December 2020 to January 2021. The information reviewed for each company included formal reports (e.g. annual reports, corporate responsibility reports), information on the company's corporate and consumer websites, and information provided in documents such as press releases and frequently asked questions hosted on the companies' websites. We conducted similarly thorough reviews of the websites of company subsidiaries and brands, and, where relevant, postings on social media (but only when these were signposted from the corporate websites). We did not give credit for information provided on the websites of other organisations but not by the company in the Benchmark scope. This is because the absence of information published by a company raises questions about the level of attention being paid by that company to farm animal welfare.

Quality assurance and company reviews

In order to ensure consistency in the assessment process, the assessors are recruited and trained by the BBFAW Secretariat (Chronos Sustainability). This ensures that all of the assessors are independent from the Norwegian market. The assessors receive annual training on the BBFAW methodology and research process. In order to ensure consistency in the assessment process, all company assessments were peer reviewed by a senior member of the global BBFAW assessment team. The aims of this review are to ensure the factual accuracy of the assessments and to ensure that the criteria have been interpreted and applied consistently.

Following the initial assessments, individual company reports were reviewed by Animalia² to check interpretation of language and factual accuracy of the content. The assessed companies were then invited to provide feedback on their preliminary reports. Companies were granted online access to their preliminary company reports and scores in February 2021. This review is important as it allows companies to highlight incorrect scores being awarded or any information that was in the public domain at the time of the assessment that had been overlooked or misinterpreted.

Eleven (42%) of the 26 companies assessed provided comments on their preliminary assessments. The comments from companies were mainly of an explanatory nature, with requests to clarify statements or in some cases to consider additional evidence. As a result of these comments, nine companies received improvements in their scores. The final confidential company reports and tier rankings, along with a summary report with recommended actions for improvement, were made available to the companies in April 2021.

For complete details of the BBFAW Methodology, see:

<https://bbfaw-nordic.com/publikasjoner/>

<https://bbfaw.com/media/1943/bbfaw-methodology-report-2020.pdf>

²Animalia is Norway's leading research and development specialist in meat and egg production and work closely with industry stakeholders such as MatPrat and KLF. For more information see [http:// https://www.animalia.no/en/](http://https://www.animalia.no/en/)



Appendix 2: 2020 BBFAW Nordic Companies

| | Company | Ownership | ICB classification | Country of origin / incorporation |
|-----|-------------------------------|-------------|--------------------------------------|-----------------------------------|
| 1. | Den stolte hane AS | Private | 3570: Food Producer | Norge |
| 2. | Fatland Meat AS | Private | 3570: Food Producer | Norge |
| 3. | Furuseth AS Avd Slakteri | Private | 3570: Food Producer | Norge |
| 4. | Gårdsand AS | Private | 3570: Food Producer | Norge |
| 5. | Grilstad AS | Private | 3570: Food Producer | Norge |
| 6. | Horns Slakteri AS | Private | 3570: Food Producer | Norge |
| 7. | Jens Eide AS | Private | 3570: Food Producer | Norge |
| 8. | Kavli Holding/Q-meierierne AS | Private | 3570: Food Producer | Norge |
| 9. | Nomad Foods/Findus Norge AS | Public | 3570: Food Producer | UK |
| 10. | Nordfjord kjøtt AS | Private | 3570: Food Producer | Norge |
| 11. | Nordlaks Holding AS | Private | 3570: Food Producer | Norge |
| 12. | Norsk Kylling AS | Private | 3570: Food Producer | Norge |
| 13. | Nortura SA | Cooperative | 3570: Food Producer | Norge |
| 14. | Orkla ASA | Public | 3570: Food Producer | Norge |
| 15. | Salmar ASA | Public | 3570: Food Producer | Norge |
| 16. | Scandi Standard | Private | 3570: Food Producer | Sverige |
| 17. | Scandza/Leiv Vidar AS | Private | 3570: Food Producer | Norge |
| 18. | Tine meieri SA | Cooperative | 3570: Food Producer | Norge |
| 19. | Toten eggpakkeri AS | Private | 3570: Food Producer | Norge |
| 20. | Ytterøykylling AS | Private | 3570: Food Producer | Norge |
| 21. | Coop Norge | Cooperative | 5337: Food Retailers and Wholesalers | Norge |
| 22. | Norgesgruppen ASA | Public | 5337: Food Retailers and Wholesalers | Norge |
| 23. | Rema 1000 AS | Private | 5337: Food Retailers and Wholesalers | Norge |
| 24. | Reitangruppen | Private | 5337: Food Retailers and Wholesalers | Norge |
| 25. | Nordic Choice Hotels AS | Private | 5757: Restaurants and Bars | Norge |
| 26. | Scandic Hotels Group AB | Public | 5757: Restaurants and Bars | Sverige |

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