



broiler watch

2026 | 3rd EDITION

Pathways to Integrating Animal Welfare into Strategic Decision-Making



alianima



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animal

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Picture: Anil Öztas – WikiCommons

1. ABOUT ALIANIMA

Alianima is a non-profit organization that works in close collaboration with food industry leaders to identify and address the primary challenges faced by the animal production chain. We offer partnerships, consultancies, and free technical support to companies committed to improving animal living conditions, assisting in the implementation of sustainable and animal welfare practices.

We rely on a specialized technical team that bases all actions and materials on technical-scientific data. Our goal is to foster an industry that is more attentive to and concerned with animal suffering, and consumers who are better informed about the origin of their food, encouraging critical and conscious consumption.

Learn more about our work at alianima.org



Picture: Istock

2. ABOUT ANIMAL WATCH

Animal Watch is a platform developed and managed by Alianima to provide visibility to public animal welfare commitments made by the food industry in Brazil, facilitating monitoring by various audiences, such as the production sector, consumers, research institutions, and government agencies.

Annually, four reports are published — [Broiler Watch](#), [Egg Watch](#), [Fish Watch](#), and [Pig Watch](#) — addressing animal categories heavily impacted by the production systems in which they are reared. These chains are particularly relevant due to both the large number of sentient individuals involved and the low level of animal welfare resulting from certain regular farming practices. Among these chains, broilers and fish still require greater awareness from the stakeholders to begin the adoption of structured public animal welfare commitments in Brazil.

Animal Watch also gathers information and news about our activities and the reality of the food production chain, highlighting the industry's role in implementing significant changes in animal treatment. The initiative seeks to expand transparency, strengthen corporate responsibility, and stimulate concrete advances in animal welfare in the country.

Access at observatorioanimal.com.br



2.1 ABOUT BROILER WATCH

The Brazilian broiler industry stands out globally in production and exports but still faces the challenge of structuring a clear and transparent roadmap for the evolution of animal welfare. In recent decades, the sector has undergone an intense modernization process, with relevant sanitary, technological, and productive gains. This progress occurred, however, in parallel with the progressive reduction of certain environmental attributes historically associated with animal welfare in farming systems.

While different initiatives related to the theme are already present in the chain, they remain mostly fragmented among companies and without a common trajectory of evolution. As a result, the country continues practically without structured public commitments in this area, both among producing companies and companies that source broiler meat.

In the international scenario, especially in the Global North, there is a consolidation of commitments aligned with the Better Chicken Commitment (BCC). In this context, and considering the recent agreement between Mercosur and the European Union, the absence of clear targets and a defined implementation roadmap increases regulatory, reputational, and competitive risks for the Brazilian poultry sector, reinforcing the need for animal welfare to become more directly integrated into the national debate.

At the same time, the immediate and full adoption of international standards like the BCC faces structural limitations in Brazil, such as the local unavailability of genetic strains approved by the BCC and the absence of technologies that avoid the inversion of conscious birds during stunning by electronarcosis. These barriers help explain why many companies still avoid assuming formal public positions on the subject.

In this scenario, the adoption of a phased approach emerges as a technically viable alternative to transform isolated initiatives into a common animal welfare agenda, compatible with the country's technical and productive conditions, while providing greater predictability across the value chain.

Thus, this report seeks to offer a strategic perspective on the evolution of good agricultural practices in broiler production in light of the global scenario and to propose a progressive technical roadmap to guide the construction of solid public animal welfare commitments.

Access at observatoriodofrango.com.br



3. OVERVIEW OF BROILER PRODUCTION IN BRAZIL

Brazilian broiler meat production recorded growth in 2025, surpassing the 15 million-ton mark. This volume corresponds to the total slaughter of **5.7 billion birds** under Federal Inspection during the year¹. The domestic market remains the main destination for national production, absorbing approximately 65% of the total produced.

Brazil continues as the largest exporter and the third largest global producer of broiler meat. Among the producing states, Paraná, Santa Catarina, and Rio Grande do Sul remained in the lead. Paraná maintained its position as the country’s largest producer and exporter, with 2.2 billion birds slaughtered in the period, equivalent to 38.9% of the country’s total¹.

Global Production 2025	Production Percentage (%)	Total (thousand t)
United States	20.3	21,812
China	15.1	16,200
Brazil	14.2	15,289
European Union	11.0	11,820
Russia	4.7	5,030
Others	34.7	37,242
Total		107,393

Source: [ABPA](#)

Global Export 2025	Export Percentage (%)	Total (thousand t)
Brazil	36.5	5,324
United States	20.8	3,034
European Union	12.0	1,750
Thailand	8.6	1,250
China	7.2	1,050
Others	14.8	2,159
Total		14,567

Source: [ABPA](#)

On the sanitary and commercial front, the industry faced temporary export restrictions in the first half of 2025 following the detection of Avian Influenza in May at a commercial breeder farm in Rio Grande do Sul. This episode led to the temporary suspension of exports to more than 30 commercial destinations, including China and countries in the European Union.

Despite these early-year restrictions, export performance recovered in the second half of the year. By December, shipments had increased by 13.9% compared to the same month of the previous year, resulting in an annual accumulated export value 0.6% higher than in 2024¹.

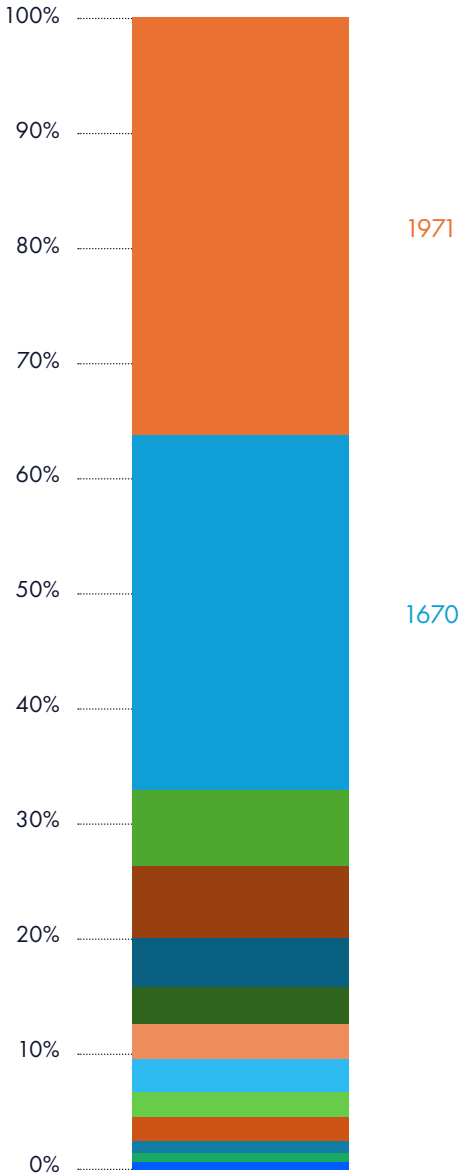
Regarding market distribution, the Middle East accounted for 29.8% of exports, followed by Asia (27.4%) and Africa (22.5%). Brazilian products reached 153 countries, with the United Arab Emirates as the main destination (479.9 thousand t), followed by Japan (402.9 thousand t), Saudi Arabia (397.2 thousand t), South Africa (336 thousand t), and the Philippines (264.3 thousand t)¹.

¹ [ABPA \(2026\)](#)

Among the main producing companies in the country are Seara, part of the JBS group, and MBRF, the entity created following the corporate reorganization involving Marfrig and BRF. Together, these companies account for about two-thirds of national broiler production.

This industrial consolidation amplifies the potential for coordination and the diffusion of production standards, including advancements in animal welfare practices and commitments. Following them in volume are major cooperatives such as Lar Cooperativa, Aurora Alimentos, Copacol, and C.Vale.

Company	Heads Produced (millions/year)
JBS/ Seara	1,971
MBRF	1,670
Lar Cooperativa	360.3
Aurora Alimentos	343.2
Copacol	215.5
C Vale - Cooperativa Agroindustrial	159.6
GT Foods	154
São Salvador Alimentos	133
Jaguá (Grupo BTZ)	120.2
Pif Paf Alimentos	100
Coopavel	57
Mauricea Alimentos	45
Diplomata	35
Flamboiã	30

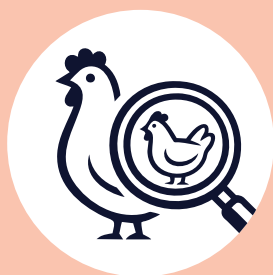


Ranking of the largest broiler producing companies in Brazil in 2025.
Source: [WATT Global Media 2025](#)

4. HOW IS THE WELFARE OF BROILERS IN BRAZIL?

Brazil's leading position in the global poultry trade has been accompanied by international scrutiny regarding the factors sustaining its **competitiveness**. Among the aspects frequently mentioned in this debate, animal welfare² is cited as one of the elements associated with **cost differences** compared to countries in the European Union.

There is still a **gap in sectoral and regulatory information** regarding broiler welfare across the different production systems in Brazil³. In this context, **international critiques** associating the absence of such information with a perceived lack of interest in the issue within the country **have resurfaced**⁴ in the current debate⁵, especially given the progress of trade negotiations between Mercosur and the European Union.



In a context where **transparency** and **predictability** have become competitive assets in global chains, understanding how the animal welfare agenda is integrated into Brazilian poultry farming requires observing both the sector's **transformation** over the last decades and the way companies have started to **communicate their intentions** in this area.

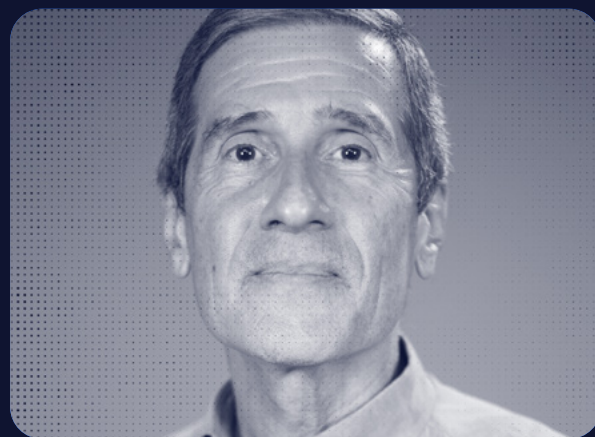
“In a world where information circulates very quickly, transparency constitutes an important requirement for brand value and corporate reputation, intangible assets capable of leveraging strategic positioning.”

Celso Funcia Lemme

Associate Professor

COPPEAD Institute of Administration

Federal University of Rio de Janeiro



2,4. [Van Horne, PLM \(2015\)](#) 3. [Alianima \(2024\)](#) 5. [AVEC \(2025\)](#)

4.1 FROM MISSED OPPORTUNITY TO THE NEED FOR ACTION

Over the last decades, the modernization of Brazilian broiler production has been marked by the **progressive replacement** of traditional wire-mesh and curtain-sided poultry houses, referred to throughout this report as **conventional systems**, by enclosed, climate-controlled poultry houses. This transition significantly altered certain **characteristics** typical of conventional farms that were associated with **higher levels** of animal welfare, such as natural lighting and lower stocking densities^{6,7}.

At the same time, the scientific literature began to consolidate **new benchmarks** for broiler welfare, including lower stocking densities, access to natural lighting, and conditions that favor the expression of natural behaviors. In Brazil, however, the modernization of poultry farms was predominantly oriented in the **opposite direction**, establishing a consistent pattern of adopting solutions focused on economic efficiency without adequate assessment of the **risk and trade-offs** associated with the animal welfare.

Due to its production volume and operational characteristics, the country was in a position to anticipate these trends and structural adjustments while **preserving elements** potentially **strategic for animal welfare** in the new housing models being adopted. Scientific evidence indicated that the level of animal welfare in conventional farms in Brazil was **higher** than that observed in climate-controlled farms in the European Union⁸. However, the sector's modernization occurred with limited incorporation of these benchmarks, and the opportunity for Brazil to assume a leadership role in this agenda did not materialize, leaving the country lagging behind, in the **background** of global decision-making.

Despite the divergence between the evolution of production systems in the country and international animal welfare evidence, Brazil still remains in a privileged position to define its strategic roadmap for progress and exercise **global leadership**.

In this new cycle, the sector's progress is expected to involve a **rebalancing** of the production system, in which animal welfare ceases to be treated as a peripheral component and becomes **increasingly integrated** into a broader sustainability and ESG agenda.

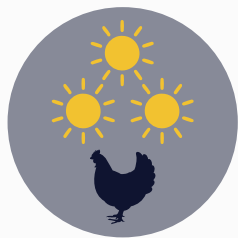
The following figure presents the main transformations related to broiler welfare that have shaped the national scenario.



Picture: Magnific

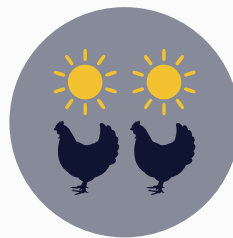
6. [Alianima \(2025\)](#) 7,8. [Tuytens, FM et al. \(2015\)](#)

PRODUCTION



1990

Predominance of wire-mesh and curtain-sided poultry houses



2010

Production intensification and structural changes in housing systems

ANIMAL WELFARE

1990

Emphasis on good agricultural practices (GAP) without a structured welfare agenda

2010

Emerging agenda, still centered on isolated GAP initiatives

Efficiency as the key driver

- Animal welfare in Brazil was commonly treated as an extension of good agricultural practices, focused on nutrition, animal health, management and housing conditions aimed at zootechnical performance.

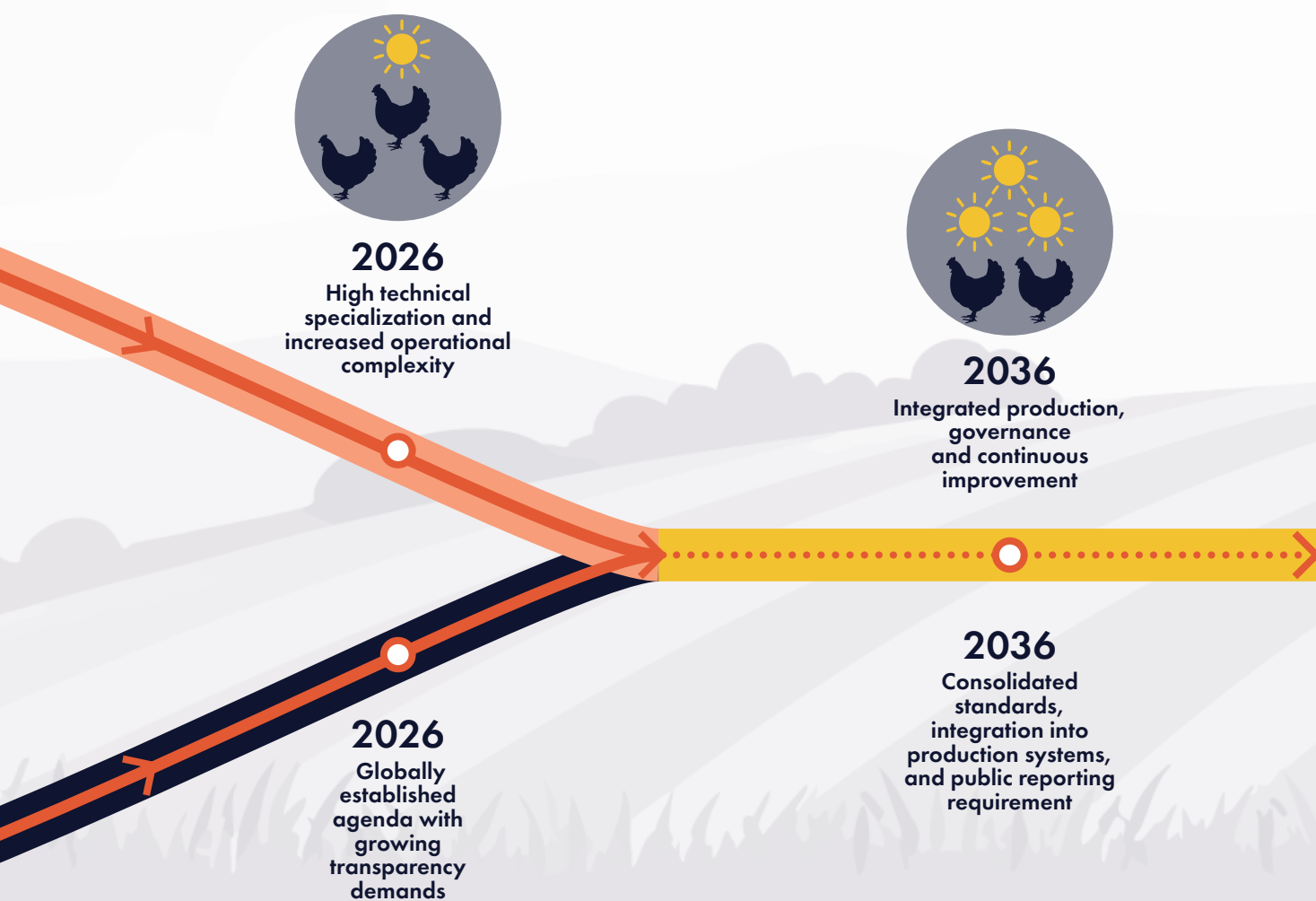
- Scientific literature pointed to the negative impacts of fast-growing genetics, increased stocking densities, and low lighting levels^{9,10}.

- Conventional poultry houses were still common in Brazil, especially in the Southern Region, with stocking densities around 30 kg/m².

- Transition toward more intensive production systems aligned with Global North standards¹¹: fully climate-controlled houses, absence of natural lighting, low light intensity, and stocking densities approaching the European Union's maximum limits (39 kg/m²).

- Limited presence of animal welfare certifications, still largely focused on environmental and sanitary aspects¹².

9. [European Commission \(2000\)](#) 10. [EFSA \(2010\)](#) 11. [Souza,APO e Molento,CFM \(2015\)](#) 12. [Souza,APO e Molento,CFM \(2015\)](#)



Legend:



Natural lighting



Stocking density

Production with an integrated system approach

- Animal welfare science establishes the role of genetics in improving bird health while also underscoring the importance of lower stocking densities, environmental enrichment, and access to natural lighting^{13,14,15}.
- In Brazil, the scientific literature highlights the risks associated with changes in production systems in the absence of animal welfare risk assessment and alignment with global trends¹⁶.

- Certification protocols expand their scope, and the topic also begins to gain space in product labeling aimed at the domestic market.
- Demand for transparency increases.
- Animal welfare becomes increasingly integrated into companies' value creation and sustainability agendas.
- Companies advance in animal welfare programs, but structural issues such as stocking density and genetics remain sensitive and continue to receive limited attention.

13. [Schuck-Paim,C e Alonso,WJ \(2022\)](#) 14. [EFSA \(2023\)](#) 15. [AWISH \(2024\)](#) 16. [Souza,APO e Molento,CFM \(2015\)](#)

4.2 INTENTIONS AND PRACTICES: WHAT ARE COMPANIES REPORTING?

In the context of ongoing global changes in the broiler industry, the analysis of companies' **public commitments** and animal welfare policies across the poultry supply chain provides a clear view of how the **sector** has been responding to the evolution of this agenda



WHAT IS AN ANIMAL WELFARE COMMITMENT?

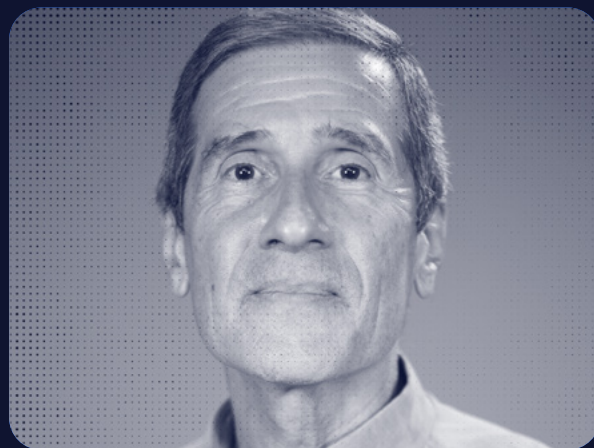
Public commitments are **voluntary** instruments through which companies establish strategic **direction**, measurable **targets**, and **transparency** mechanisms to track progress within corporate governance frameworks. Unlike isolated initiatives, their relevance does not lie in ensuring immediate compliance, but rather in their capacity to **reduce uncertainty**, **structure pathways** for progress, and enable external **monitoring**.

“In the face of innovation and change, the dilemma always arises between taking the lead in transformations or waiting until others move. Sometimes, we forget that the cost of making a change may be lower than the risk of not acting and ultimately being penalized in the marketplace. Animal welfare can be incorporated into this context, creating opportunities for development and leadership for those who understand these transformations, assume commitments, define a roadmap for continuous improvement through consecutive stages, and clearly communicate their initiatives.”

Celso Funcia Lemme

Associate Professor

COPPEAD Institute of Administration
Federal University of Rio de Janeiro



4.2.1 Methodology

Based on the WATT Poultry list of the country's largest producers (see Chapter 3), animal welfare information disclosed on companies' official websites was evaluated.

The analysis focuses on the **governance structure** and the **degree of maturity** of public commitments, without implying any judgment on the quality of the requirements adopted or on the actual level of animal welfare implemented on farms.

The review of this information was organized based on four dimensions expected for public animal welfare commitments:

CRITERION	DESCRIPTION
Specificity	Clarity of scope, definition of metrics, and explicit description of technical criteria, including animal welfare requirements, adopted standards, and established thresholds
Scope	Extent to which commitments cover different stages of the production chain and farming systems, including product lines, specific markets, and production coverage
Timeframe	Existence of defined deadlines and intermediate milestones, when necessary
Verifiability	Existence of monitoring and reporting mechanisms

The analysis adopted an inductive approach, through which recurring patterns, gaps, and different levels of structuring were identified in the animal welfare information published by the companies. Based on these findings, a **maturity matrix** composed of **progressive levels** was developed, which was then used to inform the classification of companies according to the degree of their commitments.

The result is an **analytical overview** of the sector, capable of distinguishing institutional statements from effective management instruments, and of highlighting companies' capacity to respond to growing demands for transparency in production practices.

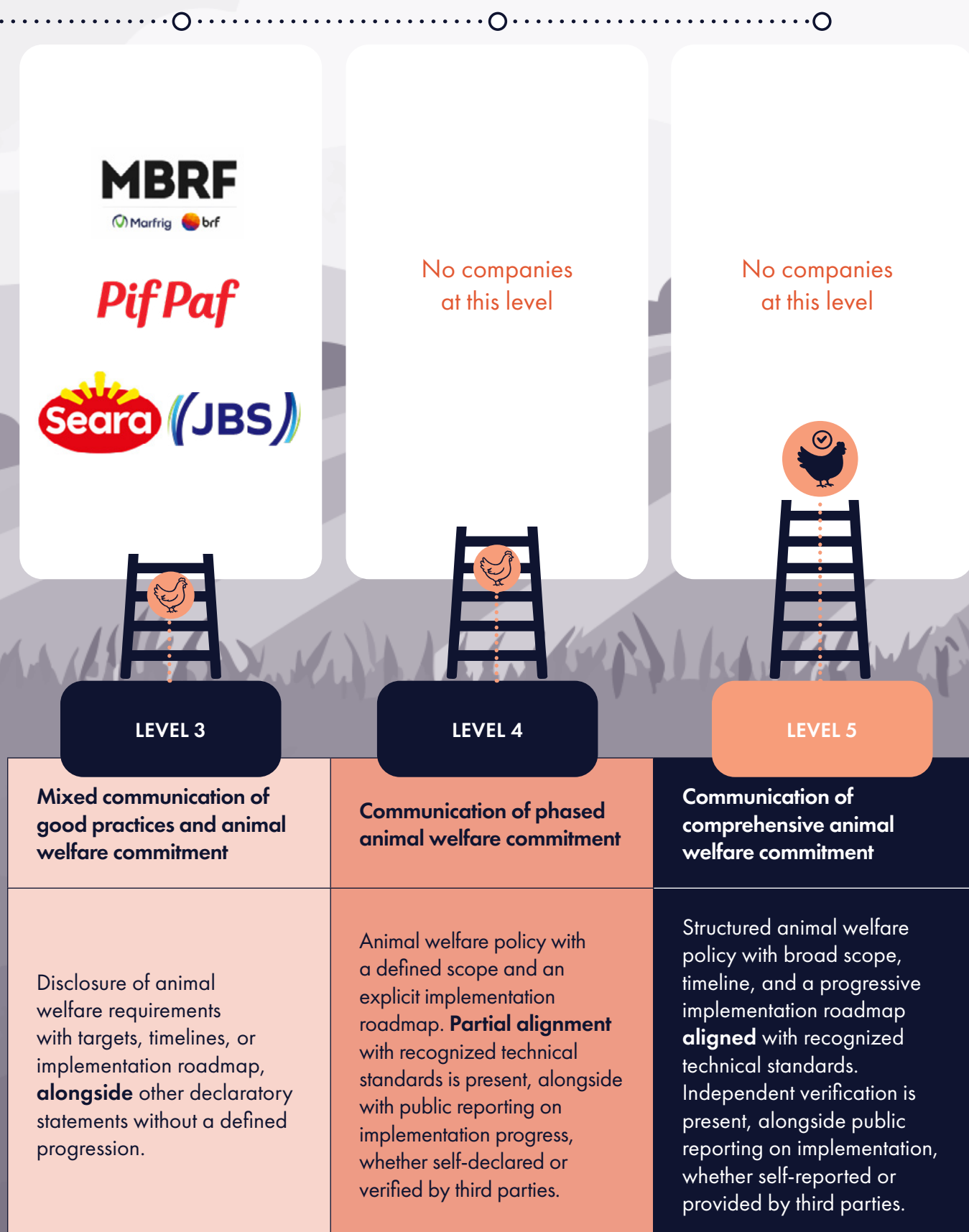


Picture: Magnific

4.2.2 Results

The communication of a total of 14 companies was analyzed. The results obtained were [compiled](#) and are presented in the following **animal welfare commitment maturity matrix**:





The analysis of the sector shows that most companies are rooted in established **ethical and governance frameworks**, such as the United Nations Sustainable Development Goals (SDGs), as well as recognized **animal welfare references** such as the Five Freedoms and the Five Domains. This theoretical and institutional alignment is relevant; however, in isolation it results in an abstract and only partially operational form of communication.

At the operational level, the sector shows consistent advances in **technology**, with increasing adoption of real-time monitoring systems, automation, and controlled-environment poultry houses. Other practices reinforce a sector-wide pattern, such as continuous training programs, biosecurity control, and responsible use of antibiotics, while the use of environmental enrichment emerges as a key **differentiating factor**. On the other hand, natural lighting remains incipient; and structural issues such as stocking density, adoption of genetic lines with improved welfare performance, and advances in humane slaughter are generally presented as descriptions of the current situation rather than as planned pathways for future development.

In this context, commitments tend to be communicated in a **fragmented, inconsistently standardized, and non-referenced manner**. Initiatives such as the [Better Chicken Commitment](#) (BCC) provide a relevant and internationally recognized technical and scientific reference; however, its adoption **remains limited**¹⁷, occurring selectively and without defined criteria or implementation timelines.



INSIGHT

Although the poultry sector shows interest in incorporating ethical principles into its activities, strengthening animal welfare commitments requires **turning state-ments into structured strategies** with clear targets, defined timelines, and management systems capable of guiding their evolution over time^{18,19}. This shift enhances transparency and enables a more objective understanding of the sector's direction and **intended future state**.

“There is no doubt that animal welfare must be part of any sustainable food production system. It is an integral component of responsible corporate policy, operational efficiency, risk management, and value creation. Moving forward, strengthening shared responsibility and coordination across the value chain is essential, aligning expectations and objectives and enabling collaboration to drive sector-wide improvements.”

Elisa Tjarnstrom

Executive Director, COBEA (Brazilian Food Industry Collaboration for Animal Welfare)



17. [Santos, P. R. et al. \(2025\)](#) 18. [Main, D. C. J. et al. \(2014\)](#) 19. [Souza, A.P.O. e Molento, C.F.M. \(2018\)](#)

5. BUILDING THE NEXT STEPS

5.1 RISKS AND COMPETITIVENESS: ANIMAL WELFARE AS A STRATEGIC FACTOR

The Brazilian broiler industry has presented several animal welfare initiatives, although with varying degrees of implementation and transparency. This configuration results in different levels of risk exposure among companies. In this context, the **absence of animal welfare commitments** is no longer a neutral position but **active positioning**, with potential implications for future commercial relationships.

This asymmetry not only exposes companies individually, but also **weakens the coherence of the sector's narrative**, increasing vulnerability to external pressures and undermining coordinated positioning. In practice, it limits the sector's ability to anticipate and respond to growing demands, contributing to greater uncertainty around Brazilian production and potentially reducing credibility.

In this context, the SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) highlights the **internal and external factors** shaping the sector, showing how risks are distributed and where structural interventions become most necessary to **guide decision-making**.



Picture: Alexander Caminada/RSPCA Assured

RISK EXPOSURE IN THE ABSENCE OF ANIMAL WELFARE COMMITMENTS

SWOT ANALYSIS — STRATEGY, POSITIONING, AND COMPETITIVENESS



STRENGTHS

• Foundation for coordinated implementation

- Integrated and coordinated production system
- Consolidated infrastructure
- Expertise in quality management and biosecurity
- High potential for innovation and technological adaptation

► *Installed capacity favors a coordinated transition*



WEAKNESSES

• Current exposure to risks

- Regional disparities across the country
- Large production scale
- Misalignment with emerging global animal welfare standards
- Limited data transparency
- Limited understanding of the relationship between animal welfare and environmental impacts in existing production systems

► *Progress depends on the effective management and monitoring of regional asymmetries and production scale*



OPPORTUNITIES

• Positioning and anticipation

- Global market convergence toward ESG criteria
- Phased roadmap for the implementation of animal welfare commitments
- Technical reinforcement of One Health approach
- Reduced sanitary vulnerability through animal welfare and biosecurity
- Direct alignment with the United Nations SDGs
- Differentiation and access to higher-value markets

► *Competitive differentiation and sector resilience*



THREATS

External pressures

- Intensification of non-tariff barriers
- Reputational pressure and public exposure
- Loss of competitiveness in selected markets
- Sanitary risk (avian influenza)
- Antimicrobial resistance

► *Risk of sanitary crises and reactive transition under external pressure*



The SWOT matrix organizes the main internal and external factors that influence animal welfare in Brazil. The strategic readings alongside interpret these factors and guide actions.



STRATEGIC INSIGHTS

1

SECTOR CAPACITY AND THE CHALLENGE OF SCALE AND ALIGNMENT



The integrated structure of the Brazilian poultry industry demonstrates **strong management and response capacity**, as evidenced by the recent avian influenza outbreak on a breeder farm in southern Brazil. This track record reinforces the **sector's credibility** to pursue a **structured transition** toward improved animal welfare practices, particularly with the support of institutional partnerships. On the other hand, **regional heterogeneity** makes the standardization of practices more difficult, while **limited data transparency** reduces the visibility of progress. The scale of the national flock and technical decisions historically misaligned with animal welfare further increase the complexity, cost, and time required for the transition (see Chapter 4).

KEY MESSAGE

The sector has a consolidated foundation and the capacity for coordinated action to move forward, but the **effectiveness** of this transition will depend on the **robust management of asymmetries, strengthened transparency** of actions, and the **implementation of change process at scale**.

2

COORDINATED ROADMAP FOR SECTOR RESILIENCE AND STRATEGIC POSITIONING



The global convergence of markets around ESG and emerging regulatory requirements creates a **window of opportunity** for the sector. This integration must ensure that animal welfare acts as a structuring axis, giving **balanced consideration** to the factors affecting animals' quality of life alongside other criteria in poultry production²⁰.

This perspective aligns consistently with the United Nations SDGs, in which animal welfare is integrated across sustainable production systems²¹. However, its inclusion in sustainability reports only delivers real impact when supported by **measurable targets** and **verifiable reporting systems**, moving beyond a merely declaratory approach.

Operationalizing this progress requires a **phased roadmap**, with **coordinated** and **transparent commitments** that align technical capacity and investments with the complexity of the production chain. In this process, stocking density and genetics, historically oriented toward productivity goals, are key levers^{22,23}. Reorienting selection toward genetic lines with **improved welfare performance** makes it possible to mitigate diseases and carcass condemnations, reduce antibiotic use, and increase production efficiency through a reduction in the number of animals required per unit of product^{24,25,26,27}.

Finally, low levels of animal welfare amplify serious health risks, such as influenza outbreaks and antimicrobial resistance. Within the **One Health** framework, investments in animal welfare and biosecurity are essential to mitigate global public health threats and strengthen the **sustainability** and **competitiveness** of agribusiness.

KEY MESSAGE

Inaction tends to place the sector in a reactive position, limiting control over timelines, metrics, and adaptation costs. Progressing through a technically consistent **phased roadmap** will be critical to **mitigating** One Health risks and sustaining **leadership** in global trade.

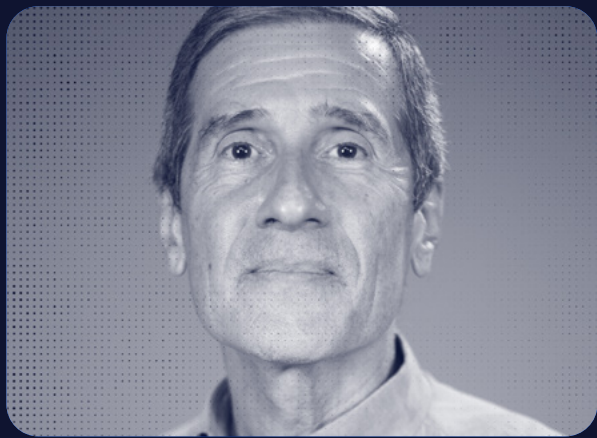
20. Schuck-Paim, C. et al. (2025) 21. Keeling, L. et al. (2019) 22. Shynkaruk, T. et al. (2023) 23. Van der Eijk, J.A.J. et al. (2022) 24. EFSA (2023) 25. Riber, A.B. e Wurtz, K.E. (2024) 26. Nicol, C.J. et al. (2024) 27. Dixon, L.M. (2020)

This assessment enables a clearer understanding of the sector’s current position and, above all, the establishment of a structured **pathway for progress**. A **phased roadmap** is proposed to organize priorities and strengthen the sector’s capacity for coordinated adaptation.

“Based on solid applied science, animal welfare can help guide the adoption of more sustainable business models, creating economic, environmental, and social opportunities. The ultimate goal is to deliver better business outcomes for producers, better products for consumers, better conditions for workers, and a better world for all forms of life.”

Celso Funcia Lemme

Associate Professor
COPPEAD Institute of Administration
Federal University of Rio de Janeiro



5.2. PHASED ROADMAP FOR THE EVOLUTION OF ROBUST COMMITMENTS

The evolution of public animal welfare commitments depends not only on intent but also on structural enablers, including clear **requirements** and defined **implementation timelines**. Without these elements, progress tends to be fragmented and unpredictable, reflecting misalignment between market expectations, production feasibility, and scientific evidence.

The global shift toward corporate commitments in the broiler sector, as reflected in initiatives such as the Better Chicken Commitment (BCC), is grounded in **science-based constraints** applied to interdependent components of husbandry practices, production systems, and poultry genetics. Together, these components address the underlying drivers of key welfare **challenges inherent** to current production systems²⁸.

BETTER CHICKEN COMMITMENT

STUNNING AND SLAUGHTER

GENETICS



HUSBANDRY PRACTICES



STOCKING DENSITY



LITTER



AIR



LIGHTING



ENVIRONMENTAL ENRICHMENT

28. [Schuck-Paim C., Alonso, W. J. \(2022\)](#)

Currently, more than [600 companies](#) have adopted commitments aligned with the Better Chicken Commitment (BCC) across the United States, Canada, the United Kingdom, the European Union, Australia, and New Zealand. In Brazil, adoption remains limited, mainly due to the **lack of commercially available genetic** lines with improved welfare performance and the need to **improve stunning methods**. Under these constraints, structured commitments have been delayed, resulting in the communication of **fragmented initiatives without a common reference framework**.

WHAT WOULD BE MOST APPROPRIATE FOR THE BRAZILIAN CONTEXT?

The proposal of the Broiler Watch is to establish a **phased roadmap** capable of guiding the sector's evolution on a **technical and science-based foundation**. While genetic and slaughter-related criteria are not yet consolidated in the country, **husbandry practices** can already be improved within a **short-term** and plausible timeline that considers not only the urgency for the birds, but also the scale of the national flock and the country's regional variability.

This roadmap is supported by scientific evidence demonstrating that the **environment affects** animal welfare^{29,30}, with the potential to exacerbate pain (stress and suffering) and compromise the birds' recovery³¹. Advancing improvements in housing conditions and husbandry practices drives structural change that reduces risks and raises animal welfare standards. These are interventions that **benefit** current birds while also **preparing** production systems for future genetic lines.

“What distinguishes a company that leads the animal welfare agenda is the degree to which the topic is integrated into the business. Leading companies embed animal welfare into corporate strategy, with defined improvement targets, continuous evaluation, and transparency on progress, in a proactive approach that involves both executive and operational levels. These elements are essential to drive progress and consolidate animal welfare as a structural pillar of Brazilian poultry production.”

Elisa Tjarnstrom

Executive Director, COBEA (Brazilian Food Industry Collaboration for Animal Welfare)



29. [EFSA \(2023\)](#) 30. [AWish Project \(2024\)](#) 31. [Schuck-Paim, C. et al. \(2026\)](#)

PHASED ROADMAP FOR THE IMPLEMENTATION AND EVOLUTION OF BROILER WELFARE COMMITMENTS IN BRAZIL

1



2



3



PHASE 1 — IMMEDIATE IMPLEMENTATION (UP TO 2031)

Focus: Improving Husbandry Conditions

HOUSING

- **Maximum stocking density:** 30 kg/m²
- **System:** cages or multi-tier systems prohibited
- **Management:** thinning limited to 1x per flock

LITTER AND AIR QUALITY

- **Litter:** minimum depth of 7.5 cm
- **Ammonia (NH₃):** ≤ 20 ppm
- **Carbon dioxide (CO₂):** ≤ 3,000 ppm

LIGHTING AND STIMULATION

- **Photoperiod:** 8h light (≥ 50 lux, including natural light) and 6h dark (≤ 1 lux), continuous cycle
- **Enrichment:** 2 m of perching/platform + pecking substrate per 1,000 birds (from day 10 onwards)

TRANSPARENCY

- Public reporting of progress, including intermediate milestones and final targets



PHASE 2 — EXPERIMENTATION AND DATA ANALYSIS (UP TO 2033)

Focus: Pilot Testing and Data Analysis for Large-Scale Implementation

GENETICS

- Pilot studies on genetic lines showing improved animal welfare performance
- Assessment of adaptation capacity and production impacts

SLAUGHTER

- Studies to prevent inversion of conscious birds
- Feasibility studies for transition to controlled atmosphere stunning (CAS)

TRANSPARENCY

- Public reporting of progress and adjustments to the roadmap



PHASE 3 — CONSOLIDATION AND SCALING (UP TO 2036)

Focus: Evidence-Based Implementation

GENETICS AND SLAUGHTER

- Full implementation of Phase 2 findings

TRANSPARENCY

- Public reporting of progress, including intermediate milestones and final targets
- Production certification

WHAT TO EXPECT OVER THE NEXT FIVE YEARS?

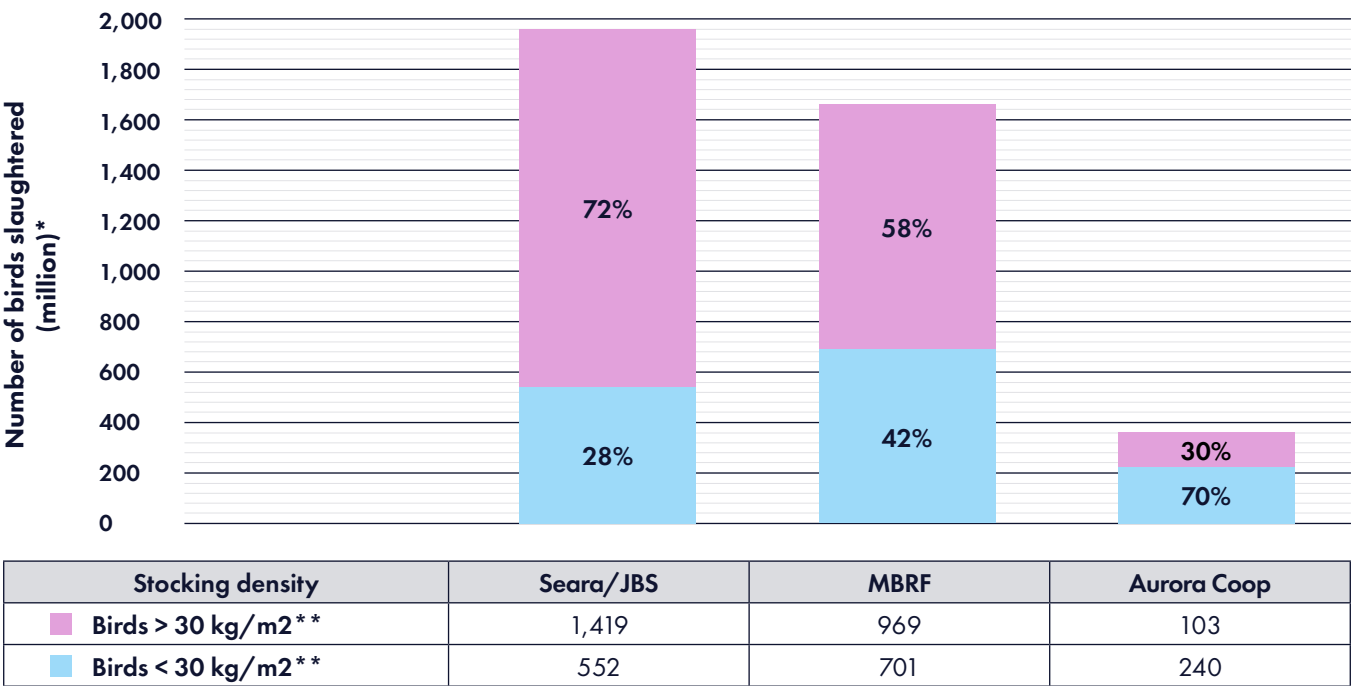
Based on the **animal welfare commitment maturity matrix** (see Chapter 4), the proposal is to **advance companies to Level 4** over the next five years. This level is characterized by **phased animal welfare commitments**, with **partial alignment** to recognized technical benchmarks. Given that more than 5 billion birds are slaughtered annually in the country, this transition could represent the **most significant advancement** in animal welfare in the **history of the broiler industry**, with the potential to position Brazil as a **global leader** in this area.

Considering Phase 1, **stocking density** presents the greatest resistance among producing companies. The higher-density production model associated with the replacement of conventional housing systems does not yet cover the entirety of national production. It is estimated that approximately **1.5 billion birds (27.7% of production)** are reared at stocking densities **below 30 kg/m²**, as illustrated in the chart below.

A **substantial number** of birds are already produced in Brazil at densities of **up to 30 kg/m²**, a volume equivalent to or greater than the annual slaughter output of major European poultry-producing countries such as [France](#), [Spain](#), [Germany](#), and [the United Kingdom](#). This figure may in fact be higher, given the limited availability of publicly disclosed sectoral data. This represents a condition that should be **maintained and expanded**, as it reinforces the country’s leadership position on this issue.



Progress in Brazil does not depend on eliminating all barriers, but **on the decision to begin**. Structuring and implementing **phased commitments** increases sector predictability and strengthens its competitive positioning.



*WATT Poultry; **Corporate reports

6. CALL FOR DIALOGUE

Strategic Partnership with Alianima

Alianima promotes consistent progress in broiler welfare through science-based evidence and dialogue with key stakeholders across the value chain, including producers, industry, and public policymakers.

Animal welfare is increasingly recognized as a cross-cutting issue linked to sanitary risk management, production efficiency, and market positioning. In this context, Alianima supports companies and institutions in developing technically feasible and coordinated strategies aligned with the realities of the sector.



Picture: Istock

Areas of action include:

- **Stakeholder engagement and corporate dialogue:** engagement with companies to support the development of animal welfare strategies, fostering internal alignment, prioritisation of actions, and greater consistency in decision-making.
- **Capacity building and technical dissemination:** delivery of trainings and lectures to companies and universities, tailored to different audiences, translating animal welfare principles into operational practices and management decisions.
- **Knowledge generation:** development of technical materials and applied analyses that support decision-making, reduce information asymmetries, and improve the quality of sectoral debate.
- **Institutional engagement:** dialogue with multiple stakeholders to promote the incorporation of animal welfare criteria into sector initiatives and public agendas, contributing to greater coordination and predictability.
- **Policy engagement:** monitoring and participation in legislative and regulatory processes, engaging with authorities and stakeholders to advance public policies that improve animal welfare across the food production chain, based on evidence and multi-stakeholder dialogue.

Organizations exploring next steps in this agenda are encouraged to engage with Alianima for objective technical dialogue.

7. CONCLUSION

The modernization of the Brazilian broiler industry enabled significant gains in productivity and efficiency, but **reduced traditional husbandry attributes** that are now associated with higher levels of bird welfare, creating a misalignment that has returned to the center of the technical and commercial agenda.

The current context does not require disruption, but rather **organization and planning**. The absence of a clear strategy, supported by public targets and progress reporting, keeps the sector exposed to commercial, regulatory, and reputational risks, regardless of the requirements adopted globally. In this context, the central risk lies not in isolated solutions themselves, but in the absence of a coherent technical response while other sectors and markets continue to advance.

The movement to review and strengthen animal welfare commitments is taking place within an international landscape that continues to evolve. The European Union continues to advance its regulatory framework, major retail and food service companies maintain formal commitments consistently across the Global North, and the trade agreement between Mercosur and the European Union is likely to simultaneously expand commercial opportunities and increase the level of requirements.

Broiler companies operating in Brazil have a **high level of operational capacity**, supported by **advanced process management and monitoring systems**. Animal welfare has been progressively incorporated into sustainability criteria, particularly within ESG frameworks, in alignment with evolving value chain dynamics. The gap, therefore, does not lie in the generation of information, but in how animal welfare requirements are **defined and communicated**, both by individual **companies** and by the **sector** as a whole.

The structured and phased adoption of commitments makes it possible not only to respond to external pressures, but also to **capture value** in an environment of increasing expectations and market differentiation. In this context, animal welfare emerges as a strategic tool to reduce these risks and **protect corporate brand value**, as well as the **reputation** and **competitiveness** of the national poultry industry, not only in markets that prioritize socio-environmental and ethical criteria, but across global trade as a whole.

The leadership of this movement will belong to those who take the **initiative**, break inertia, and establish targets with direction, prioritization, and consistency in communication. Brazil already has the capacity. Whether it leads or merely reacts will depend on **decision-making** and **organization**.

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9. CONTACT

Be part of this broader movement for animals!

If you would like to learn more about our work or clarify specific questions related to animal welfare, please contact us through the following channels:



**Alianima
Website**
alianima.org



**Animal Watch
Website**
observatorioanimal.com.br



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