Agenda

- Background on Farm Forward
- Farmed animal welfare matters
- Impact of institutional purchasing
- Framework for more humane dining
- Strategies for more humane dining
- Leadership Circle
PUTTING ANIMALS BACK IN THE CENTER
Eaters care about farmed animal welfare
Demand for high-welfare is growing

Consumers are looking for products that align with their values

Sources
Edge Research - Humane Treatment of Chickens Raised for Food. 2014
Demand for high-welfare is growing

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81% say that chicken should be treated humanely.

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Demand for high-welfare is growing

Consumers are looking for products that align with their values

81% say that chicken should be treated humanely.

78% think that raising chicken humanely leads to safer products.

76% say that they wish there were more humanely raised products available near them.

Sources
Edge Research - Humane Treatment of Chickens Raised for Food. 2014
Consumers want to support companies that prioritize treatment of both workers and animals

Desirable Company Attributes

- Provides QUALITY Products
- Avoids INHUMANE Treatment of ANIMALS
- Provides Safe WORKING CONDITIONS for Employees
- Supports US Economy *
- Sells Products/Services at LOW PRICES
- Provides Products that directly BENEFIT ME
- Provides Good WAGES/Benefits to its Workers
- Tries to Reduce WASTE & POLLUTION
- Truly Cares about COMMUNITIES where it does Business
- Supports LOCAL Economy *
- Tries to Reduce ENVIRONMENTAL IMPACT of Production
- Avoids Unnecessary PACKAGING
Consumers want to support companies that prioritize treatment of both workers and animals.

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Sustainable-Receptive Diners

48% 52%

Median age: 41 years old

41% 27% 32%

- Millennials
- Gen X
- Boomers+
truth and transparency in the food industry
1. Transparency from restaurant operations
truth and transparency in the food industry

1. Transparency from restaurant operations

2. To order healthier, higher-quality foods
“Wal-Mart said its own research showed 77 percent of its shoppers said they will increase their trust and 66 percent will increase their likelihood to shop at a retailer that improves the treatment of livestock.”
CSU and UC goal
RFC and STARS goals
How universities lead positive change in animal agriculture
Why Institutional Purchasing Matters

• Food service is a $72 billion market in North America

• Large buyers are a powerful lever for the food system

• Leadership in university purchasing has had a huge impact on farming practices and has helped build a more humane food system
The Yolk of Oppression: Eggs Are Latest Front In Humane-Food

By KATY MCLAUGHLIN Staff Reporter of THE WALL STREET JOURNAL
Oct. 18, 2005

It’s getting easier to make a politically correct omelette.

In a move that signals the increasing importance of animal-welfare issues to the food industry, a large food-service company is expected to announce today that it will buy eggs only from hens that have not been confined in cages.

The action by Bon Appétit Management Co., which operates 200 cafeterias in colleges and corporate campuses, comes on the heels of similar bird-liberating pledges by retailers and colleges around the country.

In January, Whole Foods Market Inc., which has 177 stores nationwide, began selling only eggs and foods that include eggs from hens not raised in cages. Wild Oats Markets Inc., with 80 stores, adopted a similar policy last spring.

The policies promoting cage-free eggs are the latest examples of how animal-welfare issues have moved into the mainstream. Last year, California passed a law banning the force-feeding of birds to create foie gras; a number of states have similar bills on the table. And several restaurants around the country only serve veal from calves raised in a
“Grinnell College in Grinnell, Iowa, began purchasing only cage-free shell eggs and liquid eggs at a cost of an extra five to six thousand dollars a year. Since April, George Washington University in Washington, D.C., has sold only cage-free eggs in its student grocery store, and Vassar College in Poughkeepsie, N.Y., says it plans to start serving only cage-free shell eggs, pasteurized egg whites, liquid eggs and all other egg products.”
Corporate commitments

We also continue to work on ensuring that 25% or more of our total meat, poultry, and egg purchases come from producers whose practices have been certified by the independent animal-welfare monitors Humane Farm Animal Care (HFAC), Food Alliance, Animal Welfare Approved, or Global Animal Partnership.

Compass Group USA Becomes First Foodservice Company to Commit To 100% Healthier, Slower Growing Chicken by 2024 through Landmark Global Animal Partnership Agreement
Higher welfare animal products
Roaster
Without Neck & Giblets
ENHANCED WITH UP TO 17% OF A SEASONED SOLUTION**

USDA PROCESS VERIFIED

✓ All Vegetarian Diet
✓ No Animal By-Products
✓ Raised Cage Free

No Hormones or Standards Added‡
Buy Certified

Animal Welfare Approved

Certified Grassfed by AWA

global animal partnership

Certified Humane Raised & Handled

*Meets Humane Farm Animal Care Standards. Which include nutritious diet without antibiotics or hormones, animals raised with shelter, nesting areas, sufficient space and the ability to engage in natural behaviors.
Consumers are going to have get used to eating less meat - to paying more for better quality meat and eating significantly less of it.

— Jonathan Safran Foer —
Strategies for sourcing better meat
Higher-welfare products are increasingly available

**Existing Suppliers**
- Eggs: Sysco
- Chicken: Tyson
- Turkey: Jennie-O
- Beef: entegra

**Higher-welfare**
- Blue Sky Family Farms
- Smart Chicken
- Mary's Free Range Chicken
- Diestel Turkey Ranch
- Meyer Natural Angus Beef
## Chicken RFP Questions: Sustainability and Animal Welfare

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>What techniques does your company practice that promote environmental sustainability?</td>
</tr>
<tr>
<td>2</td>
<td>How are your operations managing used poultry litter?</td>
</tr>
<tr>
<td>3</td>
<td>Does your company use recyclable materials for packaging?</td>
</tr>
<tr>
<td>4</td>
<td>Are your products certified for humane practices? If yes, what third-party certification?</td>
</tr>
<tr>
<td>5</td>
<td>Do you provide chickens outdoor access or access to pasture? If so, please describe.</td>
</tr>
<tr>
<td>6</td>
<td>What is the average stocking density of chickens raised on your farms? Please give the average stocking density at placement. Adequate space is considered to be no greater than 6lbs/per square foot.</td>
</tr>
<tr>
<td>7</td>
<td>Are birds given environmental enrichments such as natural light and perches? If so, what enrichments?</td>
</tr>
<tr>
<td>8</td>
<td>Are your products from birds that have been selected for improved genetic welfare? If so, what is the average daily growth rate of chickens raised in your operation? Appropriate growth speed is likely equal to or less than 50g per day averaged over the growth cycle.</td>
</tr>
<tr>
<td>9</td>
<td>How much space chickens given during transportation? Appropriate space is considered 7lbs (3kg) per cubic foot (0.028 cubic meters).</td>
</tr>
<tr>
<td>10</td>
<td>Was atmospheric stunning employed during the slaughter? If so, please describe.</td>
</tr>
</tbody>
</table>
Product swaps
Reduce portion sizes
Bulk and group buying
Creative dining strategies for less meat
Dining design

Choice Architecture

In a primary school in England students were 2.5 times as to select the healthier food items based on nudge strategies:

- Position of food in the dining hall
- “Good for you” and smiley stickers
- Posters

Sources

Nutrients, open access, Food Choice Architecture: An Intervention in a Secondary School and it’s Impact on Students’s Plant-based Food Choices, 2015
## Menu design

### Driving Consumer Ordering of Plant-based Dishes in Restaurants

<table>
<thead>
<tr>
<th>&quot;CONTROL&quot; MENU</th>
<th>&quot;VEGETARIAN&quot; MENU</th>
</tr>
</thead>
</table>
| **Risotto primavera (v)**  
Peas, mushrooms, lemon  14.00                                                  | **Lobster & crab roll**  
Avocado, lettuce, lemon mayonnaise  17.00                                         |
| **Lobster & crab roll**  
Avocado, lettuce, lemon mayonnaise  17.00                                        | **Sautéed king prawns**  
Chill, garlic & parsley, basmati rice  22.50                                        |
| **Sautéed king prawns**  
Chill, garlic & parsley, basmati rice  22.50                                       | **Deep fried haddock**  
Minted peas, hand cut chips, sauce tartar  15.50                                    |
| **Deep fried haddock**  
Minted peas, hand cut chips, sauce tartar  15.50                                    | **Chicken cacciatora**  
Roasted chicken breast, mushrooms, tomato, olives  14.50  
| **Chicken cacciatora**  
Roasted chicken breast, mushrooms, tomato, olives  14.50  | **Steak frites**  
Rump pavé, hand cut chips, béarnaise sauce  19.50                                    |
| **Steak frites**  
Rump pavé, hand cut chips, béarnaise sauce  19.50                                  | **Hamburger**  
Relish, hand cut chips  13.50                                                      |
| **Hamburger**  
Relish, hand cut chips  13.50                                                     | **VEGETARIAN DISHES**                                                        |
| **Ricotta & spinach ravioli (v)**  
Asparagus, butter & sage sauce  13.50                                               | **Risotto primavera (v)**  
Peas, mushrooms, lemon  14.00                                                        |
| v – suitable for vegetarians                                                        | **Ricotta & spinach ravioli (v)**  
Asparagus, butter & sage sauce  13.50                                               |
Menu design

% SELECTING A PLANT-BASED DISH

13.4% ("CONTROL" MENU) vs. 5.9% ("VEGETARIAN" MENU)

56% LESS LIKELY TO ORDER

Source: Linda Bacon, for her dissertation as part of the LSE Executive Masters in Behavioral Science
Food labeling and live prep
**Flipped plate**

### The Traditional Plate | 12
one entrée choice & two plant choices+

### The Flipped Plate | 8
two plant choices & one entrée choice++

### The Plant Forward Plate | 6
three plant choices

#### Entrée Choices:
- organic herb roasted chicken
- roasted spiced turkey
- grilled portabella mushroom cap VG
- grassfed sirloin with paprika
- harvest frittata: mushroom, leek, oregano, & toma cheese V
- root vegetable gratin VG

#### Plant Choices:
- brown rice, caramelized onion, & parsley pilaf VG
- green salad with lemon-herb dressing VG
- seasonal greens with garlic VG
- housemade classic hummus VG
- with paprika pita chips VG
- rosemary roasted potatoes VG
- sweet potato fries V
- cilantro slaw with broccoli stems & carrot VG
- roasted broccoli with cumin VG

*Item contains foods that are raw or less than thoroughly cooked.
Proudly serving Mary's Chicken, BN Ranch Turkey & BN Ranch Beef.

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**Cal Dining**

**brown's**
a california cafe
Introducing the Blended Burger Project™ Campus Edition, a contest open exclusively to chefs at U.S. colleges and universities!
Blend!
Blend!
Meat reduction
Meat reduction
Meat reduction
Meat reduction
Be recognized as a leader in ethical dining
Our goal is to leverage the buying power of universities, businesses, and restaurants to change the way animals are raised for food.

We help institutions align their supply chains with their values by providing a comprehensive set of tools and free hands-on consulting.

We believe that all animals deserve to be raised humanely, and together, we are creating a demand for higher-welfare farming.
Leadership Circle members commit

**Certified higher-welfare & Highest welfare**

100% Support

1. Commit to purchase 100 percent of at least one animal product (poultry, eggs, beef, or pork) from certified higher-welfare sources within 2 years.

2. Commit to continuous improvement: ongoing investment in and support for certified highest-welfare farms.
Thank you!

andrewd@farmforward.com