

The Missing Ingredient in Asia's Cage-Free Transition: the 2025 Tracker

highlights problematic gaps in Corporate Transparency

Jakarta, 26 December 2025 – Asia's food system is experiencing a defining moment. As companies across the region face the deadline for their 2025 cage-free commitments, momentum is unmistakably growing, but what appears to be progress at first glance reveals itself to be disconnected from what is happening on the ground.

This year's Asia Cage-Free Tracker captures this inconsistency. The 2025 edition evaluates 95 food companies across India, Indonesia, Japan, Malaysia, and Thailand, painting a picture of a region moving, but at different speeds and with vastly different levels of transparency. These five markets form the backbone of Asia's egg economy and collectively shape global access to cage-free ingredients. Their progress or lack thereof, will determine whether multinational brands can meet their animal welfare commitments, and whether millions of hens remain confined to cages or begin transitioning into higher-welfare systems.

Across Asia, companies are beginning to respond to rising consumer expectations, pressure from global brands, and growing recognition of animal welfare issues. But the Tracker reveals that while engagement is increasing, implementation is not keeping pace. 70.5% of companies now disclose some level of progress, a slight increase from 69.8% in 2024, yet still insufficient given the scale of Asia's influence on global egg supply chains. Nearly a third or 29.5% have no public updates at all. And perhaps most strikingly, only 14.7% of companies are fully cage-free or on track to meet their commitments by the end of 2025, despite many having pledged transitions several years earlier.

Asia's central role in the global egg economy makes this slow pace especially concerning. The region produces the majority of the world's commercial eggs. Thailand serves as a major exporter of eggs and processed ingredients, with supply chains that reach far beyond Asia. Indonesia and Malaysia shape domestic and regional supply stability. India continues expanding its presence in egg powder and processed ingredients, feeding international manufacturing sectors. Japan, one of the world's highest per-capita egg consumers, relies heavily on imports to meet demand. Because of this interconnectedness, the speed at which Asia transitions to cage-free systems will decide whether global brands can meet their own commitments.

Yet across much of the region, battery cages remain the default production system. Hens spend their entire lives in spaces smaller than an A4 sheet of paper, unable to stretch their

wings, nest, perch, dust bathe, or express any natural behaviours. These systems have been banned or phased out in places like the European Union, Canada, and New Zealand due to serious welfare concerns. In Asia, however, the transition remains slow and uneven, despite growing corporate pledges.

The 2025 Tracker ranks companies across nine tiers, revealing clear leaders and a substantial group falling behind. Brands such as Aman Resorts, Capella Hotel Group, Illy Caffè, Lotus Bakeries, Shake Shack, Starbucks, Pizza Marzano, and The Cheesecake Factory have already achieved full implementation across Asia, showing that cage-free sourcing is both feasible and scalable. Others, including Bali Buda, Groupe Holder, Groupe Savencia, IKEA, Pizza Express, and ViaVia Restaurant, have confirmed that they will complete their transitions by the end of 2025.

At the same time, the Tracker highlights companies that remain opaque or unresponsive: 33 companies report only global progress with no Asia-specific breakdown, making it impossible to assess regional implementation, and 28 companies provide no public reporting at all. This lack of transparency undermines consumer confidence and slows the region's overall progress.

Differences between countries further illustrate the fragmented landscape.

- Indonesia has the highest number of participating companies but inconsistent implementation.
- India shows strong reporting, but follow-through varies widely between brands.
- Japan has the lowest transparency rate among the reviewed markets.
- Thailand demonstrates solid engagement but limited advanced implementation. Malaysia continues to grow in participation, yet most companies still lack region-specific disclosures.

These disparities reflect differences in supply-chain development, ingredient accessibility, and local market readiness.

Engagement also varies by sector. Restaurants, cafés, and hospitality groups make up the largest share of participating companies, while manufacturers, critical for processed egg ingredients used globally, display the most uneven progress. This unevenness is especially important because ingredient manufacturers are essential for ensuring that cage-free commitments translate into actual products available to consumers.

Despite the growing momentum, the Tracker underscores that transparency remains the missing ingredient in Asia's cage-free transition. Without clear, verifiable reporting, it is

impossible to measure progress, identify bottlenecks, and ensure that commitments translate into meaningful changes on farms.

As the 2025 deadlines approach, companies are expected to publish detailed updates, share Asia-specific timelines, outline next steps, and document real-world implementation. Consumers across Asia increasingly want clarity about how their food is produced, and companies that fail to meet these expectations risk losing trust, not only from the public, but from global partners and investors.

“We’re seeing movement, but not at the pace required,” said Nurkhayati Darunifah, Corporate Accountability Lead – Asia and author of the report. “The year ahead is crucial. Companies that delay or withhold updates risk falling behind as expectations for transparency and responsible sourcing continue to rise.”

Asia’s food sector now stands at a crossroads. The choices made in the coming year will determine whether the region becomes a global leader in animal welfare or a bottleneck that challenges international progress.

One thing we know, it is only through transparent reporting, accountable commitments, and meaningful implementation can companies drive a transition toward a food system where no hen is confined to a cage.

Sinergia Animal will continue monitoring progress, engaging with companies, and advocating for a future where hens across Asia live free from cages, and consumers across the region can access food systems grounded in responsibility, transparency, and compassion.

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