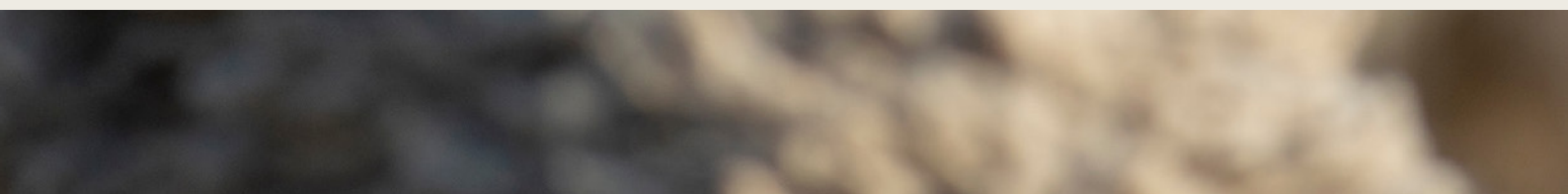
Wear it Kind

FOUR PAWS Animal Welfare. Worldwide.

Certification Insights Report:

A FOUR PAWS Review of Textile Standards Incorporating Animal Welfare



Executive Summary

Overview

For fashion brands that continue to use animal-derived materials (ADMs), sourcing exclusively from supply chains certified to higher welfare standards can be a meaningful step towards improving animal welfare and reducing risk when implemented effectively. While reducing the use of ADMs and moving beyond sole reliance on certifications is strongly encouraged, adopting textile standards with progressive animal welfare requirements remains a valuable starting point for enhancing transparency, traceability, and accountability.

In this report, the term 'standards' refers to both certifications and assurance schemes, limited to supply chains involving domesticated animals – such as sheep, alpacas, cashmere goats, and angora goats (mohair) for fibre, and ducks and geese for down. Although standards can play an important role in mitigating animal welfare risks, it is also important to acknowledge that no standard can guarantee good welfare with complete certainty.

FOUR PAWS undertook this review to assess the strengths and limitations of existing textile standards, and to identify where fashion brands can address gaps within their own supply chains and advocate for improvements with standard owners. At a minimum, brands should use the strongest available standards as a baseline when sourcing ADMs.

Overall, our review found that, while standards continue to play an important role in reducing risks and encouraging better practices, they remain limited in their ability to ensure strong animal welfare outcomes. Across all standards reviewed, there is clear room for improvement, and both standard owners and brands must take further action to better protect animals within their supply chains.

This report does not provide a comprehensive review of all animal welfare needs that should be addressed within each standard. Instead, it focuses on key issues that span the Five Domains of animal welfare. We evaluated each standard against 19 criteria: 8 considered 'foundational criteria' and 11 'spotlight issues' recommended as current industry priorities. While the 'spotlight issues' highlight challenges and opportunities

for reform, the 'foundational criteria' represent FOUR PAWS' baseline expectations for fashion brands selecting standards and engaging with supply chains.

This report is designed to help brands better understand the current landscape and support stronger decision-making, but it should not be relied on in isolation. Additional due diligence and direct engagement with standard owners and suppliers remain essential.

How standards performed

Of the 12 standards reviewed, 8 currently meet – or are committed to meet – almost all (at least 7 out of 8) of FOUR PAWS' 'foundational criteria'. Again, these criteria are by no means comprehensive – but a basic starting point as to what brands should be seeking within a standard.

Standards that meet almost all FOUR PAWS' 'foundational criteria':

Alpaca

- Responsible Alpaca Standard

Cashmere

- The Good Cashmere Standard
- Sustainable Fibre Alliance

Down

- NIL

Leather

- NIL

Mohair

- Responsible Mohair Standard

Wool

- ZQ
- Responsible Wool Standard
- NATIVA
- Sustainable Cape Wool Standard

**Note: While FOUR PAWS made efforts to engage with all known ADM standard owners that had an animal welfare component, some standards may have been missed. FOUR PAWS is not currently aware of any leather specific animal welfare focused standards.*

Performance across the 'spotlight issues' was more varied, with most standards showing important gaps or limited progress in these priority areas. This highlights the need for greater and more consistent ambition across the industry to ensure animal welfare keeps pace with evolving expectations for animal care.

Key Insights

- **Pain relief** for all painful conditions, procedures, and injuries, is not mandated in 11 out of 12 animal welfare standards reviewed. The Good Cashmere Standard (GCS) is the only standard that fully meets this requirement.
- **Live lamb cutting and live feather plucking.** Live lamb cutting (also known as mulesing) is prohibited under all sheep wool standards reviewed including Authentico, NATIVA, Responsible Wool Standard (RWS), ZQ, SustainaWOOL, and Sustainable Cape Wool Standard (SCWS). However, none of the down standards currently mandate live feather plucking bans at the parent farm level where animals are at greatest risk. DOWNPASS has committed to requiring parent farms in their new geese standard but not for ducks. Additional modules are however available, but accessibility is unclear.
- **Stunning before killing.** Tightening pre-stunning provisions is essential, with only 2 of the 12 standards – DOWNPASS and Sustainable Cape Wool Standard (SCWS) – requiring pre-stunning in all cases. Besides DOWNPASS and SCWS, the Good Cashmere Standard (GCS) is the only fibre standard that requires pre-stunning on-farm but not yet at the abattoir level due to country-specific issues. Ensuring full compliance throughout the supply chain, including both on farm and at slaughter, remains an ongoing challenge. FOUR PAWS encourages industry to urgently seek solutions, as killing animals by knife or otherwise, without pre-stunning can cause immense suffering.
- **Regular on-farm third-party, and pre-certification on-farm audits** for all farms are only mandatory under ZQ. Other standards may require this for independent farms only (not those in a group model), and/or apply a risk-based approach. FOUR PAWS maintains that minimum audit thresholds must apply to each individual farm, and that greater efforts are needed to expand and strengthen auditing practices across all supply chains.
- **Shade and/or windbreaks** are mandatory at all times (not only if necessary) in only 7 of the 12 standards reviewed being Authentico, DOWNPASS, The Good Cashmere Standard (GCS), Responsible Down Standard (RDS), Sustainable Cape Wool Standard (SCWS), Sustainable Fibre Alliance (SFA), and SustainaWOOL. ZQ has committed to meeting this requirement. This is an essential provision for many reasons, particularly in sheep production where lamb mortality rates can be very high.
- **Video surveillance.** No standard currently mandates the use of video surveillance during fibre collection. While all criteria matter, this one is a critical safeguard for textiles companies. Fibre removal is carried out specifically for the use by the textiles industry and presents elevated risk for animals and brands. Mandatory video surveillance would protect animals and provide assurance for brands and growers committed to higher standards.

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A call to action for fashion brands

Brands play a critical role in lifting animal welfare standards across the fashion industry. FOUR PAWS urges brands to read this report in full and actively engage with standard owners and supply chains to close the gaps in animal welfare outlined.

For brands using ADMs, we recommend four key actions:

- **Seek robust standards as a baseline**
  Set targets to achieve 100% certified sourcing but recognise that certification is only the starting point, and gaps persist.
- **Call for stronger standards**
  Urge and support standard owners to improve welfare requirements and assurances. Issues outlined within this report are a good place to start.
- **Address gaps and provide support directly with your supply chain**
  Build long-term relationships with growers, clearly stipulate the need to close specific animal welfare gaps, enhance auditing requirements, and invest in infrastructure, training, and on-farm welfare initiatives.
- **Consider reducing the use of ADMs**
  While refining practices and improving supply chains is essential, another important way to reduce risk is to replace animal-derived materials with animal-free, environmentally friendly alternatives. Leather is a particularly strong candidate for reduction commitments, given the lack of robust animal welfare solutions available.

By taking these steps, brands can help ensure animal welfare is not treated as an afterthought but embedded at the core of how materials are produced and sourced. We also urge brands to consider not only how they can improve animal welfare, but how they can reduce their reliance on animal-derived materials – particularly virgin animal derived materials and where meaningful welfare solutions are still lacking.

For further information or support, contact FOUR PAWS at wearitkind@four-paws.org

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Glossary

Assurance Scheme

A system designed to give confidence to buyers and stakeholders that specific standards - such as those relating to animal welfare - are being met. Unlike full certifications, assurance schemes don't always include independent auditing, product labelling, or full traceability, though some elements may be present depending on the scheme.

Certification

A formal process confirming that a product, process, or supplier meets defined standards, often verified through third-party (independent) audits.

Five Domains Model

A science-based framework to assess animal welfare by considering nutrition, the physical environment, health, and behavioural interactions – all of which shape the animal's mental state, i.e. how the animal feels. These feelings then determine the animal's overall welfare.

'Foundational criteria'

The core requirements we used to determine whether a standard has the potential to deliver meaningful value in mitigating animal welfare risks, and what brands should be looking for as a starting point when seeking standards.

Live lamb cutting

A practice, also known as mulesing, where strips of skin are cut from lambs' hindquarters, generally carried out without adequate pain relief, to reduce flystrike risk in sheep types more susceptible to the condition.

Standards

Structured systems designed to improve or verify animal welfare in supply chains, based on defined animal welfare requirements. In this report, the term refers to both animal welfare certifications and broader assurance schemes.

Standard owner

An organisation that develops and maintains the criteria and framework for a certification or assurance scheme.

'Spotlight issues'

Animal welfare concerns identified as needing additional attention due to their severity, prevalence, or insufficient coverage in existing standards.

Introduction

FOUR PAWS and the textiles industry

FOUR PAWS has focused on animal welfare in textiles since its inception over 35 years ago. Since 2013, it has played a role in shaping major standards, as a leading animal welfare stakeholder throughout their development and during subsequent revisions. FOUR PAWS consults with fashion brands globally and leads targeted campaigns to address some of the cruellest practices, including the use of fur, live lamb cutting (also known as mulesing), and live feather plucking in the down industry. As a critical friend to the fashion sector, FOUR PAWS engages across all levels of the supply chain, including directly with farmers.

The number of animals used annually to produce fibres and leather for textiles and fashion is astonishing. It is estimated that over five billion animals are used each year[1], sentient beings capable of experiencing both positive and negative welfare states. These animals are not only vulnerable to suffering, but their production can also have significant environmental and human health impacts, meaning our textile choices cannot be overlooked. While some materials experience a high rate of certification, only 5% of the global supply of sheep wool is currently certified to animal welfare in textiles standards.[2] This low level of assurance significantly increases the risk of poor animal welfare, with limited traceability or oversight of how animals are treated.

As awareness of animal welfare continues to grow among fashion consumers, it has become an increasingly important consideration for fashion brands. Animal welfare is now formally recognised by the Organisation for Economic Co-operation and Development (OECD) as a requirement for responsible business conduct, reinforcing its

1 FOUR PAWS. 2023. Animals in Fashion Factsheet. Available from: https://media.4-paws.org/5/f/0/c/5f0cbd5c4a229ff1b40dfaa14fd360fd82cb8036/2023-03_FAN_animals_in_fashion_factsheet_EN.pdf

2 Textile Exchange. 2024. Materials Market Report 2024. Available from: https://textileexchange.org/app/uploads/2024/09/Materials-Market-Report-2024.pdf

global relevance.[3] The United Nations has also identified it as a key component in the future of Sustainable Development Goals.[4]

FOUR PAWS' 'Wear It Kind' (WIK) programme improves welfare for animals used in textiles through research, evidence-based policy development, and targeted campaigns addressing the industry's most severe welfare issues. While supporting fashion brands holistically, FOUR PAWS also campaigns globally to end the use of animals for fur, as well as cruel practices such as live lamb cutting and live feather plucking. It is strongly opposed to the use of wild animals for textiles, including species with wild counterparts such as yak and camel, due to the inherently high welfare risks.

3 Organisation for Economic Co-operation and Development (OECD). 2023. OECD Guidelines for Multinational Enterprises on Responsible Business Conduct. Available from: https://www.bmwk.de/Redaktion/EN/Downloads/M-O/oecd-guidelines-for-multinational-enterprises-on-responsible-business-conduct-2023.pdf?__blob=publicationFile&v=2

4 International Institute for Sustainable Development (IISD). 2024. Animal Welfare Matters for Sustainable Development – UNEA 5.2 Is an Opportunity for Governments to Recognize That. Available from: https://sdg.iisd.org/commentary/guest-articles/animal-welfare-matters-for-sustainable-development-unea-5-2-is-an-opportunity-for-governments-to-recognize-that/

The role of standards and animal welfare

FOUR PAWS believes that animal welfare standards can offer a range of benefits when developed transparently, in consultation with animal welfare experts, and implemented with rigour. Well designed and applied standards can:

- Inform consumers about the minimum standards of animal care within animal-derived textile supply chains
- Improve welfare outcomes, reduce risk, and enhance quality assurance
- Provide financial and social incentives for farmers and supply chains to adopt higher-welfare practices
- Establish baseline standards that go beyond typical industry or regulatory requirements
- Support One Welfare outcomes for animals, people, and the environment, and align with the Five Domains Model aims.

While standards can support improved on-farm welfare through enhanced auditing, reporting, and incentive mechanisms, they also carry limitations. **Poorly developed or carelessly applied standards can contribute to 'welfare-washing' and provide brands and consumers with a false sense of assurance.** Many animal welfare standards do take a resource-based approach - focusing on inputs like feed, shelter, or space allowance - rather than animal-based measures like body condition, lameness scores, or behavioural indicators. This means they primarily assess whether the conditions could allow for good welfare, but they cannot confirm whether the animals are actually experiencing it. For this reason, standards do not, in any way or form, replace on-farm welfare assessments, and third-party audits should be a regular occurrence on all farms.

The aims of this report

This report aims to highlight key opportunities and challenges within ADM supply chains and certification systems, helping fashion brands to identify critical animal welfare gaps and promote meaningful improvements. This report is not intended to be a comprehensive assessment. Instead, the criteria, information, and review offer a top-level overview of key foundational requirements for standards according to FOUR PAWS, along with key 'spotlight issues' to help encourage industry focus and action.

Standards reviewed for this report included sheep wool, cashmere, alpaca, mohair and down certifications. FOUR PAWS is not currently aware of any domesticated animal leather standards that mitigate animal welfare risks from farm to garment. We therefore caution brands against the use of leather and to prioritise making reduction commitments on this material.

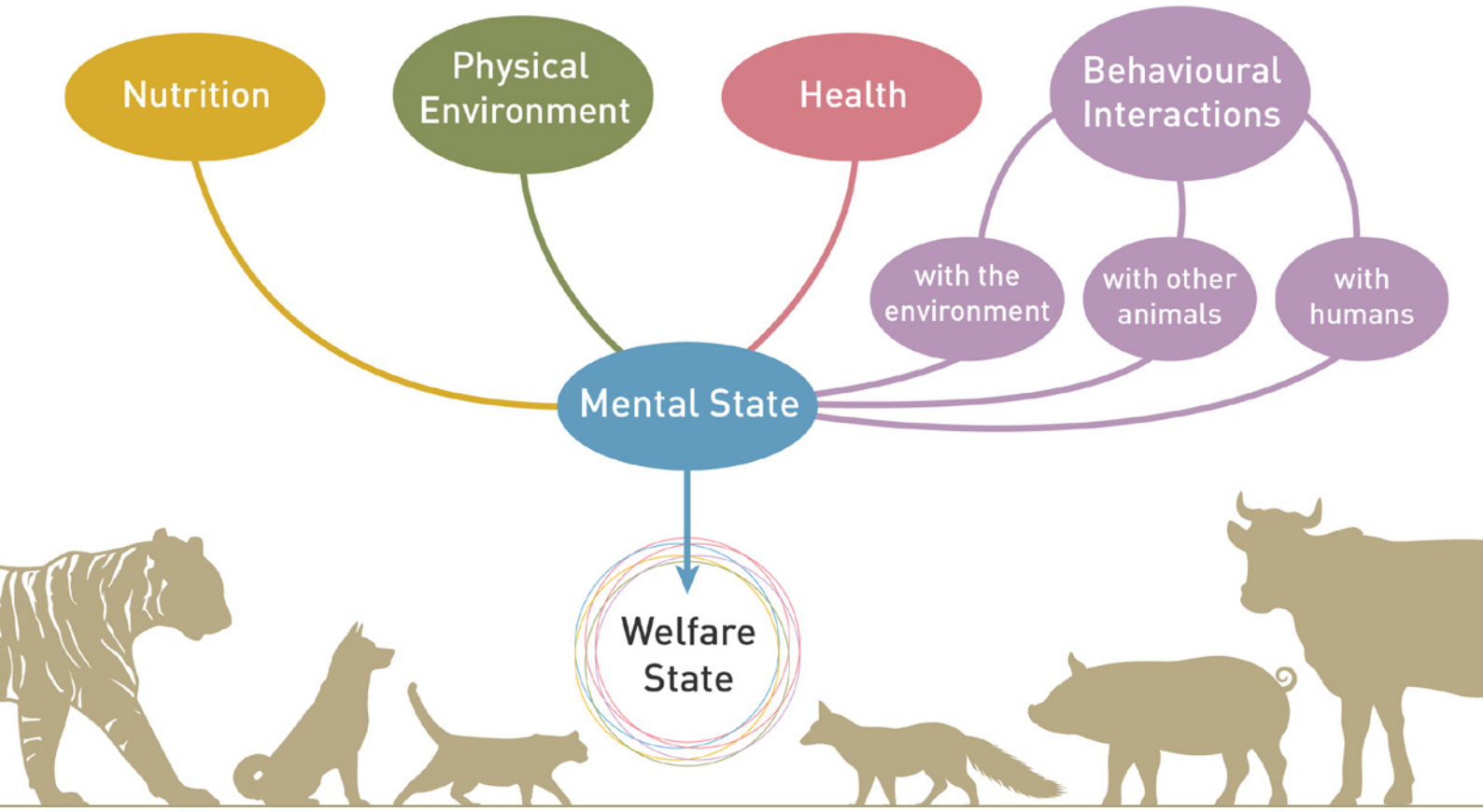
As certifications and assurance schemes update their standards, FOUR PAWS will regularly revise this report to ensure it remains current and accurate. To support this, we have asked standard owners to keep us informed of their progress in strengthening animal welfare, traceability, and overall robustness. In saying this, FOUR PAWS does not intend to act as a representative of the standards mentioned, and further clarification should be sought directly from standard owners.

General Approach

Core concepts

Animal welfare

FOUR PAWS uses the Five Domains Model[5] as a framework to guide its animal welfare assessments. This model includes four physical areas: nutrition, environment, health, and behavioural interactions. These areas work together to shape the fifth domain — the animal's mental state, or how the animal feels emotionally.



5 Mellor DJ et al. The 2020 Five Domains Model: Including Human–Animal Interactions in Assessments of Animal Welfare. Animals. 2020;10(10):1870. https://doi.org/10.3390/ani10101870

In simple terms, the model helps us understand how an animal's care — including its food, health, living conditions, and ability to behave naturally (and interact with others) — affects its emotional well-being. When animals are well cared for, they are more likely to feel positive emotions like comfort and pleasure. But if conditions are poor, they may feel fear, frustration, or distress.

Animal welfare is considered good when positive experiences outweigh the negative ones. The goal is to keep negative experiences as mild and rare as possible, while helping animals enjoy many positive and enriching experiences throughout their lives.

According to the Five Domains Model, a positive animal welfare state is based on fulfilling the four functional domains (1-4) of animal welfare:

1. Good nutrition
2. Good physical environment
3. Good health
4. Appropriate behavioural interactions

Leading to the fifth domain:

5. Positive mental experiences

Substandard and cruel practices that elicit pain, fear, and distress, can result in prolonged suffering and behavioural changes (or suppression of behaviours) in animals, leading to negative welfare states. Negative animal welfare states can easily be caused by common industry and management practices, a lack of resources or poor environment, poor training, and/or negative human-animal interactions. FOUR PAWS urges fashion brands, standard owners, and textiles supply chains to be free of all substandard and cruel practices and offer animals in their care the best chance to achieve a positive mental state overall.

Robustness

Robustness considers the systems and processes in place to enable a standard's requirements to be implemented and verified. The robustness of a standard can be evaluated by identifying the extent to which its implementation mechanisms mitigate risks and ensure compliance. For example, the independent, third-party auditing of farms to ensure unbiased assessment, or the application of certification suspension or revocation protocols for non-compliance.

Traceability

Traceability refers to the systems and processes that allow materials to be tracked at each stage of the supply chain - from the farm or raw material source through to the finished garment. The traceability of a standard can be evaluated by examining how effectively it documents the origin, movement, and ownership of materials, and whether this information is accessible, verifiable, and reliably maintained. Tools such as transaction certificates and frameworks like Textile Exchange's Content Claim Standard (CCS) help ensure that certified materials are properly identified and not mixed or substituted throughout the supply chain.

Standards reviewed

Our review draws on publicly available information as well as insights provided directly by certification and assurance schemes through multiple one-on-one exchanges with standard owners. These exchanges took place via email, virtual meetings, and/or in-person sessions. In total, 12 standards were reviewed – 11 certifications and 1 assurance scheme (marked with an asterisk) – managed by 9 standard owners and covering sheep wool, cashmere, down, mohair, and alpaca.

The table below provides an alphabetical list of the standards reviewed alongside their relevant textile material. With the exception of The Good Cashmere Standard which was updated in 2024, all standards are undergoing, or are planned to undergo, revisions or amendments to their certifications in 2025.

Given the high number of standards up for review this year, FOUR PAWS hopes to see this table be positively updated with even more standard owners achieving our 'foundational criteria' and further 'spotlight issues' within the next 12 months or sooner.

Table 1. Standards included and reviewed within the report

Fibre Type	Abbr.	Standard	Standard Owner
Sheep wool	AUTH	Authentico	Schneider Group
	NAT	NATIVA	Chargeurs Group
	RWS	Responsible Wool Standard	Textile Exchange
	SCWS	Sustainable Cape Wool Standard	Cape Wools SA
	SW	SustainaWOOL*	Australian Wool Exchange (AWEX)
	ZQ	ZQ	The Zentera Wool Company
Cashmere	GCS	The Good Cashmere Standard	Aid by Trade Foundation
	SFA	Sustainable Fibre Alliance	Sustainable Fibre Alliance
Down	DP	DOWNPASS	Downpass e.V.
	RDS	Responsible Down Standard	Textile Exchange
Mohair	RMS	Responsible Mohair Standard	Textile Exchange
Alpaca	RAS	Responsible Alpaca Standard	Textile Exchange

**Assurance scheme*

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Standards review criteria

For our inaugural Certification Insights Report, FOUR PAWS developed 8 'foundational criteria' and 11 'spotlight issues'. These were selected based on their impact on animal welfare, international relevance, and the opportunity and/or urgency for change. While not comprehensive, they provide a strong starting point and will be updated over time.

The 'foundational criteria' reflects cornerstone elements FOUR PAWS considers necessary to determine whether a standard is likely to deliver meaningful outcomes in the three key concepts of animal welfare, traceability, and robustness. The report highlights standards that meet at least 7 of the 8 criteria, or 5 of the 8 with a clear commitment to meet one or more additional criteria within 12 months, or within their next standard update.

These criteria are informed by a combination of FOUR PAWS' internal policies and established best practice. The 'foundational criteria' are also featured within our Animal Welfare Policy Development Guidelines for fashion brands. We strongly encourage fashion brands to prioritise standards that at least meet these requirements.

Overall industry performance for each criterion was rated as 'poor', 'needs work', or 'good', based on how many of the 12 standards were met and committed to:

- **0–6/12** = poor performance, showing major gaps
- **7–9/12** = needs work, with some progress but room for improvement
- **10–12/12** = good performance, showing alignment and commitment across the industry

Findings

Insights from the ‘foundational criteria’ review

The standards that currently meet – or are committed to meet – almost all (7 out of 8) of our ‘foundational criteria’ are the Responsible Wool Standard (RWS), Responsible Mohair Standard (RMS), Responsible Alpaca Standard (RAS), The Good Cashmere Standard (GCS), Sustainable Fibre Alliance (SFA), NATIVA, Sustainable Cape Wool Standard (SCWS) and ZQ. While the remaining certifications and assurance schemes do not yet meet these foundational criteria, we will continue to engage with these standard owners and hope they can meet or develop clear pathways to meet these criteria in the near future.

Table 2. Insights from the 'foundational criteria' review by standard

Fibre type	Standard	Number of criteria currently met°	Number of criteria committed to meeting*
Met or have committed to meet at least 7 out of 8 foundational criteria (and met at least 5)			
Sheep wool	NAT	6	1
	RWS	7	0
	SCWS	7	0
	ZQ	7	1
Cashmere	GCS	7	0
	SFA	7	0
Mohair	RMS	7	0
Alpaca	RAS	7	0
Were unable to (yet) meet/commit to at least 7 out of 8 foundational criteria (or met less than 5)			
Sheep wool	AUTH	4	2
	SW	6	0
Down	DP	5	1 (+ partial commitment for geese only)
	RDS	6	0

°*including N/A – criteria which are not applicable to specific industries*

**Certification has committed to meeting criteria within the next 12 months and/or within their next standard update.*

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Findings by 'foundational criteria'

**Note 'Foundational Criteria' are not presented in any specific order.*

1. Certification was developed to enhance animal welfare within textiles supply chains and includes detailed animal welfare requirements.

Standards meeting criterion: 12/12 – All

Overall industry performance: Good

Insights: All standards included in the review were said to have been developed with animal welfare as a core objective. While this was a minimum requirement for inclusion, the actions behind the stated intent still vary across standards. This underscores the importance of assessing not only a certification's stated purpose but also how effectively it translates that intent into meaningful outcomes for animals.

2. Certification was developed to work toward fulfilling the General Welfare Aims of the Five Domains.

Standards meeting criterion: 10/12 – AUTH, GCS, NAT, RAS, RDS, RMS, RWS, SCWS, SFA, SW

Standards committed to meeting criterion: 2/12 – DP, ZQ

Overall industry performance: Good

Insights: The shift towards the Five Domains Model reflects an evolution in how animal welfare could be defined and assessed across the textiles certification landscape. By embracing this science-based framework, standards have the capacity to move beyond minimum compliance and towards recognising the mental and emotional wellbeing of animals – not just their physical condition.

3. Standards are publicly available within 48 hours of a request.

Standards meeting criterion: 12/12 – All

Overall industry performance: Good

Insights: FOUR PAWS has long advocated for the public availability of standards as a basic and essential form of transparency. Textile Exchange, SFA, DP, and GCS have set a positive example by consistently making their standards immediately accessible. More recently, all our reviewed standards have committed to making their standards readily available.

4. Certification ensures live feather plucking ON-ALL FARMS & PARENT FARMS, as well as live feather harvesting, and live lamb cutting are eliminated from relevant supply chains.

**This requirement only applies to sheep wool and down. It does not include cashmere, mohair or alpaca.*

Standards meeting criterion for wool: 6/6 – AUTH, NAT, RWS, SCWS, SW, ZQ

Standards meeting criterion for down: 0/2 – None

Standards committed to meeting criterion: 0/8 – None fully. DP has committed for geese (not for ducks)

Overall industry performance: Good for wool. Poor for down.

Insights: While DP and RDS both exclude the cruel practices of live feather plucking and live feather harvesting on certified farms, the highest risk for these practices is on parent farms. DP has committed in their new standard to include parent farms for geese but not ducks – while appreciated this is not ideal. FOUR PAWS looks forward to further information from DP as to how this commitment will be fulfilled. Neither DP nor RDS yet mandates all types of parent farms to be included in their certified supply chains, but both offer optional modules to include parent farms. From our experience in working with brands, we have noticed there is minimal use of these optional modules, which we feel likely means either brands have not sought to use it, or navigating the use of these additional modules has been difficult.

5. Standards claim to comply with ISO and/or ISEAL principles of good practice: FP is referring to ISO9001:2015, and ideally 26000:2010.

Standards meeting criterion: 10/12 - DP, GCS, RAS, RDS, RMS, RWS, SCWS, SFA, SW, ZQ

Standards committed to meeting criterion: 1/12 – NAT

Overall industry performance: Good

Insights: Good governance is foundational to the credibility and effectiveness of certifications. FOUR PAWS encourages certifications to move beyond stated compliance and work towards full accreditation under preferably ISEAL full membership, or ISEAL community membership, or at a minimum the current ISO 9001 with ISO 26000 alignment.

We recognise the significant difference between formal accreditation and a claim of alignment with ISO 9001 or ISEAL principles. Several standard owners including Textile Exchange, Cape Wools SA and AWEX have achieved full ISO 9001 accreditation. However, in line with a continual improvement approach, we currently acknowledge standards making progress towards these types of standards. As such, our 2025 Certification Insights Report focuses on only alignment, but this criterion is likely to be revised in future editions.

6. Standards are developed with at least one, if not two, animal protection organisations.

Standards meeting criterion: 11/12 – DP, GCS, NAT, RAS, RDS, RMS, RWS, SFA, SCWS, SW, ZQ

Standards committed to meeting criterion: 1/12 – AUTH

Overall industry performance: Good

Insights: FOUR PAWS is encouraged to see that many standard owners are actively engaging with animal protection organisations. Such collaboration is vital for strengthening animal welfare provisions and promoting transparency. However, the level of engagement varies considerably across standard owners. To ensure this input is meaningful, standard owners should provide adequate notice of consultations, set realistic timeframes, and clearly communicate how expert recommendations are considered in decision-making. We also encourage all standard owners to

retain in-house animal welfare expertise and/or formally engage qualified animal welfare consultants throughout the development and revision of standards. The primary role of animal protection organisations is to offer informed, independent review of draft and current standards – and importantly from an animal welfare (not only production) viewpoint.

7. Regular on-farm auditing of **all** farms by an independent 3rd party certified auditing body, is a mandatory part of the standard.

Standards meeting criterion: 1/12 - ZQ

Standards committed to meeting criterion: 0/12 – None

Overall industry performance: Poor

Insights: ZQ is the only certification that guarantees all farms are independently audited within a minimum timeframe, and in their case every three years, by an accredited third-party. In contrast, most other standards rely on risk-based or square root audit models, where not all farms are routinely visited and some may never be. This creates unnecessary risks to animal welfare, reputation, and supply chain integrity. While some standards do include third-party audits for individually certified farms, this may not always extend to group certification models, where only a sample of farms is typically audited. FOUR PAWS acknowledges SCWS performs second party on farm audits every other year and that several standard owners are performing internal audits. We also appreciate the social value of group models, particularly for smallholders. However, we believe the most effective assurance to support the welfare of every animal in textile supply chains comes from regular third-party independent auditing of every farm. Recent investigations exposing poor and inhumane shearing and handling practices, even within certified supply chains, highlight the urgent need for more consistent and comprehensive on-farm auditing.

8. **The certification must enable farm-to-garment traceability and product labelling, underpinned by robust content claim rules.**

Standards meeting criterion: 10/12 – DP, GCS, NAT, RAS, RDS, RMS, RWS, SCWS, SFA, ZQ

Standards committed to meeting criterion: 1/12 – AUTH

Overall industry performance: Good

Insights: Farm to garment traceability has become the new baseline for responsible sourcing of ADMs. This criterion assesses whether standards include a formal chain of custody system, such as Textile Exchange's Content Claim Standard (CCS), and whether they enable credible labelling or content claims. Most standards reviewed require full supply chain traceability from farm through to finished product and enable garment labelling. While technologies such as blockchain can enhance security of traceability, they must also be underpinned by robust, independently verified chain of custody requirements. Some standards are partnering with traceability providers to strengthen their systems. However, some still lack formalised traceability frameworks through to garment labelling requirements.

Insights from the 'spotlight issues' review

Alongside the 8 'foundational criteria', FOUR PAWS assessed an additional 11 'spotlight issues' using a simple yes or no approach. These were selected based on key FOUR PAWS policies and met most of the following attributes: they applied to most species; were easily communicated and measurable; represented high-impact and imminently actionable concerns; and were already recognised to some extent within the industry. FOUR PAWS strongly encourages standard owners, the textile industry, brands and animal protection organisations to form, commit to, and actively engage in working groups to address these key issues.

Table 3. Insights from the 'spotlight issues' review by standard

Fibre type	Standards	Number of spotlight criteria currently met°	Number of criteria committed to meeting*
Sheep wool	AUTH	3	3
	NAT	2	3
	RWS	6	0
	SCWS	7	0
	SW	3	0
	ZQ	5	2
Cashmere	GCS	7	0
	SFA	5	0
Down	DP	3	3
	RDS	6	1
Mohair	RMS	6	0
Alpaca	RAS	6	0

°including N/A – criteria which are not applicable to specific industries

**Certification has committed to meeting criteria within the next 12 months and/or within their next standard update.*

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Findings by 'Spotlight Issues'

**Note 'Spotlight Issues' are not presented in any specific order.*

1. Certifications ensure outdoor access to pasture is mandatory during daytime hours.

Standards meeting criterion: 6/12 – GCS, RAS, RMS, RWS, SCWS, ZQ

Standards committed to meeting criterion: 2/12 – AUTH, NAT

Overall industry performance: Needs work

Insights: Access to pasture, fresh air, and the ability to choose one's environment are essential for all animals, supporting both their nutritional needs and their ability to express natural behaviours. While all wool fibre standard owners required some level of outdoor pasture access during daylight hours, neither of the down standards mandated this. Some standard owners considered pasture access a given and therefore unnecessary to state explicitly. However, with increasing intensification of animal agriculture, including feedlotting even within sheep farming in Australia[6], it is critical that standards clearly specify that pasture access is always mandatory – or mandatory during daylight hours. We recognise that, in clearly defined emergency conditions, indoor keeping may be necessary, and this is not a factor that has prevented standard owners from receiving approval in this context.

2. Certifications ensure health is considered through mandatory animal health reporting.

Standards meeting criterion: 9/12 – GCS, NAT, RAS, RDS, RMS, RWS, SCWS, SW, ZQ

Standards committed to meeting criterion: 1/12 – DP

Overall industry performance: Good

Insights: Routine reporting of mortality, animal diseases, injuries, and other health conditions is essential to maintain a strong focus on health; ensure welfare issues are addressed appropriately; and identify patterns that could help prevent

6 Meat & Livestock Australia (MLA). 2020. Production feeding for lamb growth: A guide for producers. North Sydney (AU): MLA. Available from: https://www.mla.com.au/globalassets/mla-corporate/extensions-training-and-tools/creative-commons/a-producers-guide-to-production-feeding-for-lamb-growth.pdf

future harm. This highly important practice should be mandated across all standards. Almost all standards already made this a requirement, or have committed to doing so.

3. Certifications ensure that shade and/or windbreaks that offer shelter are always available.

Standards meeting criterion: 7/12 – AUTH, DP, GCS, RDS, SCWS, SFA, SW

Standards committed to meeting criterion: 1/12 – ZQ

Overall industry performance: Needs work

Insights: Well-designed, purpose-built shelters can offer best practice protection, however natural forms of protection, such as trees, shrubs, or hedgerows, also play an essential role. This criterion focuses on whether, at a minimum, shade and windbreaks are available. It is inexcusable for animals to be exposed to all kinds of weather and increasingly extreme weather conditions. Protection from heat, wind, and prolonged rain at all times is a basic welfare requirement that all standards should require, regardless of the farming model. Natural shelter has been proven to combat persistent welfare concerns, including lamb mortality and it also enhances biodiversity and supports more sustainable land management. Unfortunately, several standard owners have yet to meet this requirement, with some suggesting that farmers will move animals to sheltered paddocks if necessary. However, from our perspective, this approach is unreliable and introduces unnecessary risk. Animals should always have the opportunity to independently seek shelter when conditions require it.

4. Certifications ensure adequate pain relief is required for all painful conditions, procedures, and injuries.

Standards meeting criterion: 1/12 – GCS

Standards committed to meeting criterion: 1/12 – AUTH

Overall industry performance: Poor

Insights: GCS is currently the only certification that requires adequate pain relief for all painful procedures, conditions, and injuries, with only Authentico committing to include this criterion. However, there are some other standards that require pain

relief for some conditions and in some regions. Ensuring access to pain relief for all instances where pain is caused, should be considered a basic standard of care for all animals. FOUR PAWS acknowledges that there are legislative barriers in some countries creating additional challenges. However, most fibre and down-producing countries do have the capacity to provide pain relief. We urge the industry to come together and prioritise this issue, committing to make the provision of pain relief a mandatory requirement for all painful procedures, injuries, and conditions. Some standard owners are further looking into this issue, for example ZQ. We also know that Textile Exchange is undertaking research into how best to overcome barriers to pain relief. From this, the industry must work together to develop a clear action plan to ensure this essential need is finally addressed. In the meantime, we encourage brands to actively support and engage with their supply chains to ensure animals receive adequate and timely pain management.

5. Certifications ensure animals must be fit for transport.

Standards meeting criterion: 10/12 – AUTH, GCS, RAS, RDS, RMS, RWS, SCWS, SFA, SW, ZQ

Standards committed to meeting criterion: 2/12 – DP, NAT

Overall industry performance: Good

Insights: Ensuring animals are fit for transport is not a legal requirement in all countries, nor is it explicitly required in every standard. While we hope most producers already assess animals before transport, this must be clearly stipulated. Standard owners and brands must mandate this to meet even the most basic animal welfare expectations. Encouragingly, all standards reviewed include this requirement, or have committed to do so.

6. Certifications ensure positive low stress handling is required.

Standards meeting criterion: 9/12 - AUTH, GCS, NAT, RAS, RDS, RMS, RWS, SCWS, SFA

Standards committed to meeting criterion: 2/12 – DP, ZQ

Overall industry performance: Good

Insights: Many standards include some provisions to avoid negative handling, with also setting out clear and comprehensive expectations for good or positive handling and management of animals. We recognise that many producers may already be applying such practices, however, we call on all standards to explicitly require positive and low-stress handling as a minimum criterion for better animal welfare. Standard owners should regularly provide guidance on low-stress handling techniques, as well as requirements for training, and prohibitions on physical force or fear-based methods. Encouragingly, many standard owners have committed to strengthening their mandatory requirements in this area beyond our current requirement to implement not only some, but ideally all provisions for low stress handling.

7. Certifications ensure dehorning, disbudding, and bill trimming are banned from relevant standards.

**This requirement does not include alpaca.*

Standards meeting criterion: 6/11 – GCS, RDS, RMS, RWS, SCWS, SFA

Standards committed to meeting criterion: 1/11 – AUTH

Overall industry performance: Needs work

Insights: With the right management practices, mutilations such as dehorning (primarily performed on cattle, but also sheep and goats), disbudding (mainly of goats and calves), and bill trimming (of geese and ducks) can be eliminated entirely. While not all farms rely on these procedures, FOUR PAWS strongly encourages standard owners and brands to strictly prohibit them – except where genuinely required for the direct welfare benefit of the individually affected animal, under direct veterinary advice, and with the use of appropriate anaesthesia and pain relief. We were pleased to find that some standards like the RDS and DP go above and beyond by including

additional protections for waterfowl, such as banning castration, declawing, and flight restraint. These certifications set a commendable example for others to ban most types of animal mutilations.

8. Farmers must not directly sell animals for live export overseas for slaughter.

Standards meeting criterion: 5/12 – RAS, RMS, RWS, SFA, ZQ

Standards committed to meeting criterion: 2/12 – NAT, RDS

Overall industry performance: Needs work

Insights: Live export by sea for slaughter remains legal in many countries, despite the significant suffering it causes in often cramped, unhygienic, hot, and stressful conditions that can last for weeks at a time. FOUR PAWS urgently calls on all standards and brands to mandate, and actively take steps to ensure, that animals in their supply chains are not knowingly sold into the live export trade. While auditing this criterion can be complex, and some standards have cited this as a reason for not yet including it, complete inaction is not acceptable. Practical measures can be taken, including farmers requiring written declarations from buyers - stating that animals will not be exported live for slaughter. These declarations, and or sales records, should be subject to random audits by third party auditors and, where possible, verified against livestock movement data. While half of the standards reviewed have met or committed to meet this criterion, we urge those yet to act to take an immediate stand against live export for slaughter.

9. Certifications ensure mandatory effective and competent stunning before killing for all animals on-farm and at the abattoir.

Standards meeting criterion: 2/12 - DP, SCWS

Standards committed to meeting criterion: 0/12

Overall industry performance: Poor

Insights: A key component of humane slaughter is to ensure animals are killed in accordance with international best practice which includes mandatory, effective pre-stunning in all scenarios. While access to stunning equipment (which includes a rifle) on-farm can be limited in some regions, these barriers must be overcome

to provide suitable alternatives to one of the most basic of animal welfare requirements. Some standards still allow on-farm euthanasia by knife without prior stunning - a method fraught with welfare risks, as animals may remain conscious for extended periods after being cut.

When it comes to slaughter at abattoirs, we recognise the challenge of engaging with a sector that may be unwilling or challenged to implement pre-slaughter stunning. However, we believe standards should, at a minimum, commit to allowing the sale of animals only to facilities where stunning equipment and trained staff are in place.

At present, only DP and SCWS require stunning before killing for all animals slaughtered both on-farm and in abattoirs. GCS mandates pre-stunning for all on-farm killing but does not apply this requirement to abattoirs, citing the difficulty of enforcing standards in third-party facilities.

Although a confronting topic, open dialogue about the need to ensure animals experience a death free from pain and distress is vital - and failing to do so also presents reputational risks for brands. FOUR PAWS calls on standards, producers, and brands to work together to close these gaps. We also recognise the importance of clearly distinguishing between on-farm and abattoir slaughter in our criteria, and we will aim to reflect this more clearly in future versions of the report.

10. Certifications ensure video surveillance is used during fibre collection.

**This requirement only applies to sheep wool, cashmere, mohair and alpaca. It does not include down.*

Standards meeting criterion: 0/10

Standards committed to meeting criterion: 0/10

Overall industry performance: Poor

Insights: While some standard owners are considering this need, no standard currently mandates video surveillance during fibre collection. This safeguard is particularly critical for the textiles sector. Fibre removal is conducted solely for textile production and represents a high-risk moment for both animals and brand reputations. Mandatory video oversight would help prevent rough handling and abuse, while offering assurance and protections to brands, growers, shearers, contractors,

and consumers committed to higher standards. Without it, breaches to animal welfare and certification requirements during fibre collection are likely to persist, undermining the credibility of certifications. Some farmers have indicated a willingness for voluntary support for this measure, but consistent application is key. Introducing this requirement would also align fibre collection sites with other parts of the supply chain such as in abattoirs, where CCTV is now mandatory in several regions globally.

In this report, we did not assess down standards against this criterion due to the complexity of feather removal at the abattoir stage, where third parties are generally involved. It is also a more recently emphasised area of focus for FOUR PAWS – however this is something we will look to include in future iterations.

11. Certifications ensure farms are audited on-farm prior to entering a scheme (internally or externally) and by an independent accredited 3rd party within the first year, and at least every 3 years thereafter.

Standards meeting criterion: 1/12 - ZQ

Standards committed to meeting criterion: 0/12

Overall industry performance: Poor

Insights: ZQ is currently the only certification that ensures all farms are audited on-farm every three years. SCWS does at least provide second party audits every other year but still uses the square root approach for independent accredited 3rd party audits. Most standards still rely only on risk-based or square-root sampling approaches at least in part. Some standard owners only mandate routine audits for independently certified farms, which means this level of oversight is not guaranteed under group certification models. In other cases, not all farms are independently on-farm audited before joining a scheme.

In summary, this means that in some cases, some certified farms may never receive an on-farm audit by an independent third-party auditor. This creates significant risks to animal welfare, standard integrity, and brand reputation. Regular on-farm third-party audits of all farms should be a baseline expectation for any credible certification. Brands and consumers alike expect this level of assurance. While some have raised concerns that predictable audit intervals could lead to complacency, this can be addressed through the addition of random audits as a complementary safeguard.

Recommendations and Conclusion

Animal welfare certifications can be a valuable tool to recognise and incentivise producer efforts, support good governance in fashion supply chains, and guide consumers toward higher-welfare products. At the same time, no certification or assessment is perfect. Continuous improvement is essential as farmers move toward best practice, and as our collective understanding of animal welfare evolves in support of One Welfare – the interconnected well-being of animals, people, and the planet.

Our review found that while many current standards can help brands mitigate animal welfare risks, several avoidable gaps remain and must be addressed.

The gaps highlighted within this report that are poor or need work across the industry are

- prohibition of **live feather plucking on parent farms**
- **on-farm auditing** prior to entering a scheme (internally or externally) and by an independent 3rd party within the first year, and every at least 3 years thereafter
- **access to pasture** – Note: In the fibre sector, this is mainly a wording issue, as most certifications already include it by default, but it still needs to be explicitly stated in the standard
- **shade and/or windbreaks** always available
- **adequate pain relief** for all painful conditions, procedures, and injuries
- prohibition of **dehorning/disbudding** and **bill trimming**
- prohibition of **live export overseas** for slaughter
- effective and competent **stunning before killing** for all animals on-farm and at the abattoir
- **video surveillance** for fibre collection

(see the Annex for a break down of which standards are yet to fulfil these issue areas)

FOUR PAWS calls on fashion brands, certification and assurance schemes, farmers, retailers, and supply chain actors to work together to close these gaps and drive the highest possible welfare outcomes for animals. Achieving this requires sustained collaboration and investment.

A Call to Action for Fashion Brands

Brands have a critical role to play in raising animal welfare standards across the fashion industry. To eliminate animal welfare and reputational risks associated with animal-derived materials (ADMs), brands can opt for alternative or next-generation materials. Choosing whether to engage with animal-based supply chains is a distinct area of risk and should be carefully assessed in line with your organisation's capacity as well as your values.

For brands that choose to use ADMs, sourcing certified materials, to standards that at minimum meet most of the FOUR PAWS foundational criteria is essential. Ideally, brands should work with standards and suppliers that go beyond these. Ongoing engagement with standard owners, producers, and supply chains is also necessary to address spotlight issues and drive meaningful improvements.

For brands using ADMs, we recommend four key actions:

- **Seek more robust standards as a baseline** – Set targets to achieve 100% certified sourcing, and to the most robust animal welfare standards available but recognise that certification is only the beginning. As a starting point, look for certifications that meet FOUR PAWS foundational criteria, and understand their general strengths and weaknesses.
- **Push for stronger standards** – Urge the standard owners you currently work with to improve welfare requirements and assurances, particularly in the areas highlighted in this report.
- **Address gaps by directly engaging your supply chain** – Build long-term relationships with growers, clearly stipulate the need to close specific animal welfare gaps (e.g. you may choose to focus on pain relief and/or requiring adequate shelter to reduce infant mortality), facilitate improved auditing, and provide long-term contracts to enable farmers to further invest in infrastructure, training, and on-farm welfare initiatives.
- **Consider reducing the use of ADMs** – While refining practices and improving supply chains is essential, another important way to reduce risk is to replace animal-derived materials with animal-free, environmentally friendly alternatives. Leather is a particularly strong candidate for reduction commitments, given the lack of robust animal welfare solutions available.

By taking these steps, brands can help ensure animal welfare is not an afterthought, but a core principle in how materials are sourced and produced.

Next steps

We aim to keep this report up to date as the industry evolves and individual certifications improve, so please check back for updates. Future iterations may take a stronger position on specific areas or expand to cover additional issues or seek additional evidence of implementation. These may include a deeper review of alignment with relevant ISO and ISEAL standards (including whether certifications are formally accredited); closer scrutiny of practices such as tail docking; stronger requirements for emergency planning, and live export; evaluation of whether appropriate consequences are applied for breaches; and whether standard owners are providing dedicated animal welfare outreach and support to farmers – ensuring standards are fully understood and better followed. We will review and expand our review over time.

In the meantime, FOUR PAWS will continue to collaborate with growers, standard owners, fashion brands, and fellow animal welfare organisations to support the development of practical working groups and drive real improvements – ensuring all animals in the fashion and textiles industry experience a life worth living. Together, we can create meaningful pathways for change.

For further information or support, brands are encouraged to contact FOUR PAWS at wearitkind@four-paws.org

Annex

Table 4. Summary of standards overview table (table 5) by material type

Fibre type	Standard	Number of foundation criteria currently met or committed to meeting (or N/A)	Number of spotlight issues met or committed to meeting (or N/A)
Met or have committed to meet at least 7 out of 8 foundational criteria (and have met at least 5)			
Sheep wool	NAT	7	5
	RWS	7	6
	SCWS	7	7
	ZQ	8	7
Cashmere	GCS	7	7
	SFA	7	5
Mohair	RMS	7	6
Alpaca	RAS	7	6
Were unable to (yet) meet/commit to at least 7 out of 8 foundational criteria (or met less than 5)			
Sheep wool	AUTH	6	6
	SW	6	3
Down	DP	6	6
	RDS	6	7

Note: A total score cannot be given for each standard because the foundational criteria and spotlight issues serve different purposes.

Table 5. Standards overview table

8 FOUNDATIONAL CRITERIA		Sheep wool						Cashmere		Mohair	Alpaca	Down	
		AUTH	NAT	RWS	SCWS	SW	ZQ	GCS	SFA	RMS	RAS	DP	RDS
1	The certification was **developed to enhance animal welfare** within textiles supply chains and includes detailed animal welfare requirements.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
2	The certification was developed in consideration of and aims to fulfill the General Welfare Aims of the **Five Domains Model** over time.	Y	Y	Y	Y	Y	N*	Y	Y	Y	Y	N*	Y
3	The standards and procedures are **publicly available** (must be provided within 48 hours of request).	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
4	Relevant certifications must ensure **live feather plucking ON ALL FARMS & PARENT FARMS, as well as live feather harvesting,** and **live lamb cutting** are eliminated from farms, production, and supply chains.	Y	Y	Y	Y	Y	Y	N/A	N/A	N/A	N/A	N	N
5	The standards claim to comply with **ISO (9001 & 14020) or ISEAL's Principles** of good practice.	N	N*	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
6	Standards are developed in consultation with at least one but ideally two **animal protection organisations**.	N*	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
7	The certifications must make **regular on-farm auditing of all farms** by an accredited third-party mandatory.	N	N	N	N	N	Y	N	N	N	N	N	N
8	The certification must **enable farm-to-garment traceability** and product labelling, underpinned by robust content claim rules.	N*	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y

11 SPOTLIGHT ISSUES in 2025		Sheep wool						Cashmere		Mohair	Alpaca	Down	
		AUTH	NAT	RWS	SCWS	SW	ZQ	GCS	SFA	RMS	RAS	DP	RDS
1	Outdoor access to **pasture** is mandatory.	N*	N*	Y	Y	N	Y	Y	N	Y	Y	N	N
2	Health is considered through mandatory **animal health reporting.**	N	Y	Y	Y	Y	Y	Y	N	Y	Y	N*	Y
3	**Shade and/or windbreaks** that offer shelter must always be available.	Y	N	N	Y	Y	N*	Y	Y	N	N	Y	Y
4	**Adequate pain relief is mandatory** for all painful conditions, procedures, and injuries.	N*	N	N	N	N	N	Y	N	N	N	N	N
5	Animals must be **fit for transport**.	Y	N*	Y	Y	Y	Y	Y	Y	Y	Y	N*	Y
6	**Low stress handling** is mandatory.	Y	Y	Y	Y	N	N*	Y	Y	Y	Y	N*	Y
7	**Dehorning/disbudding** and **bill trimming** are banned from relevant standards.	N*	N	Y	Y	N	N	Y	Y	Y	N/A	N	Y
8	Farmers must not directly sell animals for **live export overseas for slaughter**.	N	N*	Y	N	N	Y	N	Y	Y	Y	N	N*
9	Certifications ensure mandatory effective and competent **stunning before killing** for all animals on-farm and at the abattoir.	N	N	N	Y	N	N	N	N	N	N	Y	N
10	**Video surveillance** for fibre collection is mandatory.	N	N	N	N	N	N	N	N	N	N	N/A	N/A
11	Farms are **audited on-farm prior to entering a scheme** (internally or externally) and **by an independent 3rd party within the first year, and at least every 3 years thereafter.**	N	N	N	N	N	Y	N	N	N	N	N	N

Green = meets criteria | **Orange** = committed to meeting criteria within the next 12 months and/or within their next standard update | **Red** = yet to meet criteria

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