



# The Pecking Order 2023



In association with



**HUMANE SOCIETY  
INTERNATIONAL**  
EUROPE



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**Cover photo:** Chicks drinking from a water fountain at Windstreek, a higher welfare farm in the Netherlands. The farm uses slower-growing breeds and provides space for the birds to move around, leading to improved welfare outcomes. Credit: Valerie Kuypers / World Animal Protection



# Foreword

According to Yuval Noah Harari, the world-famous historian and author of bestsellers such as *Sapiens* and *Homo Deus*, 'the fate of industrially farmed animals is one of the most pressing ethical questions of our time.' This is especially true for the meat chicken. Every year, tens of billions of these sentient beings, each with complex sensations and emotions, are packed in factory farms and forced to live miserable lives. Every year, all these birds, each with remarkable cognitive abilities, are destined to die agonizing deaths in slaughterhouses designed to cut costs rather than to kill painlessly. Harari used even stronger words: 'If we accept a mere tenth of what animal-rights activists are claiming, then modern industrial agriculture might well be the greatest crime in history.'<sup>2</sup>

Except, it's not so much animal-rights activists making claims, but rather scientists putting forth the evidence. Take space allowance. Earlier this year, the European Food and Safety Authority (EFSA) published an extensive report on the welfare of meat chickens (or rather lack thereof) in European industrial farms. To safeguard their welfare and based on all available science, it recommends a maximum stocking density of 11 kg of chickens per square metre – which means about five birds at slaughter weight.<sup>3</sup> But the current reality of European farming is almost four times as much, about *twenty* chickens per square metre. When these birds approach their slaughter age, they are so packed together that they can barely move, let alone express their innate behaviors. And this is just one of the many wrongs that plague meat chicken production.

Clearly, something needs to be done. To this end, the European Chicken Commitment (ECC) was designed, a simple set of production criteria that addresses the worst animal welfare problems. It's a compromise, striking a better balance between animal welfare and the reality of the current market. For example, it allows for maximum 14-15 birds (30 kg) per square meter. That's still too many animals in too small an area, but nevertheless signifies a substantial improvement in their lives. And it's entirely feasible from a business point of view.

In other words, implementing the ECC is the very least companies should do. There's no excuse for inaction, no excuse for half-measures. Many companies have acknowledged this, either because they value animal welfare or because they care about their reputation and about the expectations of their customers and their staff. Or both. Also, they understand it's better to be prepared when legislation will get more stringent, which will happen sooner or later. Still, too many companies are lagging behind – sometimes, ill-informed, hiding behind misguided excuses about climate footprints. Moreover, the implementation of the commitment is thus far uneven, with some but limited progress being made ahead of the 2026 ECC deadline.

Which companies take their responsibility seriously and which companies don't? That's the essence of The Pecking Order (TPO). Annually, this report ranks fast-food restaurants on their progress towards the ECC. It is a united project by World Animal Protection, the Albert Schweitzer Stiftung, L214, Essere Animali and the Humane Society International/Europe. I'm proud to announce that this year, its geographical scope has expanded to Poland and Romania.

TPO is both a chart of fame and a chart of shame. But in either case it should propel companies to take next steps on the journey towards better welfare. Now.



**Dirk Jan Verdonk**  
Country director  
World Animal Protection Netherlands

1. Yuval Noah Harari. 'Industrial farming is one of the worst crimes in history.' *The Guardian*, 25 September 2015.  
2. Yuval Noah Harari. *Sapiens. A Brief History of Humankind* (2011).  
3. <https://efsa.onlinelibrary.wiley.com/doi/epdf/10.2903/j.efsa.2023.7788>







**Photo:** 35-day-old broiler chickens on a standard intensive farm in the UK. The farm contained four sheds, each housing at least 40,000 birds, giving them very limited space to move around and perform their natural behaviours. Credit: World Animal Protection / Tracks Investigations

## The Pecking Order 2023: Project overview

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Chickens used for meat, or broiler chickens as they are also known, are the most farmed land animals on the planet and some of the most abused. We developed The Pecking Order (TPO) in order to improve their welfare worldwide. Companies that use chickens in their supply chains must be held accountable for ensuring their wellbeing.

TPO began in 2019 as an assessment of the commitments global fast-food brands were putting in place to address chicken welfare throughout their global supply chains, and how much progress they were making on implementing those commitments. Since 2022, the methodology has adopted a more localised approach, focused on evaluating how both international and national fast-food brands and food service companies are managing broiler chicken welfare within individual markets. TPO has further evolved in 2023, with a focus on European countries where we have seen some, albeit limited, progress on chicken welfare.



# The Pecking Order 2023: Methodology





The TPO 2023 European Methodology document provides detailed information on the purpose of the TPO benchmark, assessment criteria, approach and scoring system. The methodology document was made available to all companies being assessed prior to the start of the assessment period and can be requested from all participating partners.

The criteria for TPO are based on the European Chicken Commitment (ECC), which has been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific elements of the ECC (see Figure 1 below) provide a clear and consistent set of improvements that focus on stocking density, breeds, enrichments, broiler cages, slaughter process and auditing. More information on the ECC can be found at <https://welfarecommitments.com/europeletter/>.

**Figure 1: Elements of the European Chicken Commitment**



## Meet improved environmental standards, including:

-  Exposure to 50 lux of light, including natural light
-  Minimum of 2m of perching space and 2 pecking substrates per 1,000 birds
-  Air quality requirements as per the EU Broiler Directive
-  No cages or multi-tier systems



TPO has thirteen questions divided between two pillars<sup>4</sup>, with seven questions in the first pillar and six questions in the second. Each question focuses on a specific attribute of the ECC to improve chicken welfare. The pillars are reflected below:



### Pillar 1 – Commitments & Targets

Questions focus on published time-bound commitments to improve chicken welfare. The score in Pillar 1 reflects the scope and completeness of a company’s commitment to the specific criteria outlined in the ECC.



### Pillar 2 – Performance Reporting

Questions focus on reporting of progress against each of the elements of the ECC. The score in Pillar 2 reflects the extent to which a company has implemented its commitments in relation to the ECC criteria<sup>5</sup>.

In 2023, the scoring approach has been changed for one question in the Commitments & Targets section of the assessment. Q1.1, which asks whether the company has published a policy covering broiler chicken welfare, has been amended to introduce a partial points option to differentiate between companies that communicate their published broiler welfare commitments in-country, and those companies for which there is no evidence of in-country communication.

Each company receives a pillar percentage score for each of the two pillars, which when combined, with equal weighting, gives an overall percentage score. Scores are also translated into Tiers and Grades as shown in the table below.

**Table 1: Tier and Grade percentage thresholds**

Tier	Grade		Percentage bands
6		Very poor	0-25
5		Poor	26-49
4		Getting started	50-59
3		Making progress	60-75
2		Good	76-85
1		Leading	86-100

4. French companies are assessed on an additional question in each pillar. The questions concern the access to free range or the use of 'winter gardens'.

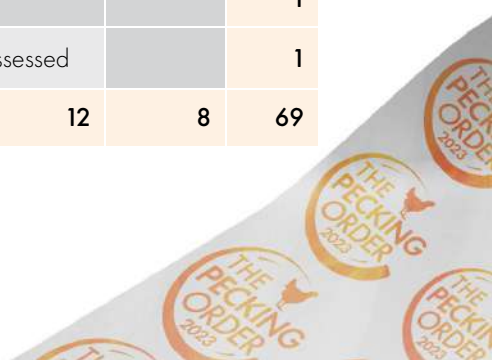
5. Companies are scored on the proportion of supply that meets the specific ECC requirement and companies score partial points when reporting is limited in scope (either 1 or 2 points, depending on whether the reported progress is less or greater than 50%).



TPO 2023 conducted a total of 69 assessments covering the markets of France, Germany, Italy, Poland, Romania, and Spain. Table 2 shows in which markets each company has been assessed. This report refers to number of 'companies' rather than 'assessments' to align with previous editions of TPO. Given companies have been assessed in multiple markets, it is worth noting that, for example, '10 companies' could include some assessments from the same company in multiple markets.

**Table 2: Assessment matrix showing which companies were assessed in each market**

		France	Germany	Italy	Poland	Romania	Spain	Total
Autogrill		Assessed	Assessed	Assessed				3
Buffalo Grill		Assessed						1
Burger King		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
Call a Pizza			Assessed					1
Dean & David			Assessed					1
Domino's		Assessed	Assessed		Assessed	Assessed	Assessed	5
Hans im Glück			Assessed					1
IKEA		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
KFC		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
L'Osteria		Assessed	Assessed					2
McDonald's		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
O'Tacos		Assessed						1
Pasibus					Assessed			1
PAUL		Assessed				Assessed		2
Peter Pane			Assessed					1
Pizza Hut		Assessed	Assessed		Assessed	Assessed	Assessed	5
Quick		Assessed						1
Salad Box						Assessed		1
Salad Story					Assessed			1
Spartan						Assessed		1
Starbucks		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
Subway		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	6
Vapiano		Assessed	Assessed		Assessed			3
Zahir Kebab					Assessed			1
5 to go						Assessed		1
<b>Total</b>		<b>15</b>	<b>15</b>	<b>7</b>	<b>12</b>	<b>12</b>	<b>8</b>	<b>69</b>







**Photo:** Broiler chicken with dirty feathers and feather loss sitting on the floor of a UK farm. Many conventional breeds are unable to stand or walk due to pain and injury caused by fast growth, leaving them sitting in their own waste which burns their skin. Credit: World Animal Protection / Tracks Investigations

## The Pecking Order 2023: Key findings

### 1. Tier Ranking and Overall Score

**Companies continue to make progress on broiler chicken welfare but are yet to demonstrate meaningful impact**

TPO 2023 showed that no company achieved an overall Tier 1 (Leading) or Tier 2 (Good) ranking. Four companies, or 6%, (Domino's Germany, KFC France, KFC Germany and Subway Germany) achieved overall Tier 3 status, indicating that these companies are making progress in their approach to broiler chicken welfare. The fourteen Tier 4 companies, accounting for 20%, indicate a reasonable proportion of assessed companies are beginning their journey to better manage broiler chicken welfare. However, the majority of companies fell into Tiers 5 (26%) and Tier 6 (48%), and therefore these companies are performing poorly or very poorly in their management and reporting of broiler chicken welfare.

Table 3 provides an overview of each companies' total overall score, as well as their Pillar 1 - Commitments & Targets and Pillar 2 - Performance Reporting scores, shown per tier and grade. The symbols behind each company show whether they have moved up or down tiers, or have remained in the same tier compared to 2022. The asterisk (\*) symbol indicates that a company has been newly assessed in this year's report.





**Table 3:** Table showing the Tier and Grade ranking for each assessment's Total Overall score, Commitments & Targets score, and Performance Reporting score.

	Total Overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
<b>Tier 1</b> Leading		Buffalo Grill France (▲ 5) Burger King France (▲ 4) Dean & David Germany* Domino's France (=) Domino's Germany (=) Hans im Glück Germany* IKEA Germany (=) IKEA Italy (=) IKEA Poland* IKEA Romania* IKEA Spain (=) KFC France (=) KFC Germany (=) L'Osteria Germany (=) PAUL France* PAUL Romania* Peter Pane Germany* Pizza Hut Germany (=) Pizza Hut Poland* Pizza Hut Romania* Pizza Hut Spain (=) Quick France (▲ 5) Subway France (=) Subway Germany (=) Subway Italy (=) Subway Poland* Subway Romania* Subway Spain (=) Vapiano France* Vapiano Germany (▲ 5) Vapiano Poland* <b>(31)</b>	
<b>Tier 2</b> Good		IKEA France* L'Osteria France* Pizza Hut France (▼ 1) <b>(3)</b>	
<b>Tier 3</b> Making progress	Domino's Germany (▲ 1) KFC Germany (▼ 1) KFC France (=) Subway Germany (▲ 1) <b>(4)</b>		

**Note:** Tier increase (▲), tier drop (▼), same tier (=) and new companies\*



	Total Overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
<b>Tier 4</b> Getting started	Burger King France (▲ 2) Dean & David Germany* Domino's France (=) Hans im Glück Germany* IKEA Poland* L'Osteria Germany (=) PAUL France* Peter Pane Germany* Subway France (▲ 1) Subway Italy (=) Subway Poland* Subway Romania* Subway Spain (=) Vapiano Germany (▲ 2) <b>(14)</b>		KFC Germany (=) <b>(1)</b>
<b>Tier 5</b> Poor	Buffalo Grill France (▲ 1) IKEA France* IKEA Germany (▼ 2) IKEA Italy (▼ 2) IKEA Romania* IKEA Spain (▼ 2) KFC Italy (=) KFC Spain (=) L'Osteria France* PAUL Romania* Pizza Hut France (=) Pizza Hut Germany (▼ 1) Pizza Hut Poland* Pizza Hut Romania* Pizza Hut Spain (▼ 1) Quick France (▲ 1) Vapiano France* Vapiano Poland* <b>(18)</b>		Burger King France (▲ 1) Domino's France (▲ 1) Domino's Germany (▲ 1) KFC France (=) KFC Italy (▼ 1) KFC Spain (▼ 1) <b>(6)</b>

**Note:** Tier increase (▲), tier drop (▼), same tier (=) and new companies\*



	Total Overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
<b>Tier 6</b> Very poor	Autogrill France (=) Autogrill Germany* Autogrill Italy* Burger King Germany (=) Burger King Italy (=) Burger King Poland* Burger King Romania* Burger King Spain (=) Call a Pizza Germany* Domino's Poland* Domino's Romania* Domino's Spain (=) KFC Poland* KFC Romania* McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland* McDonald's Romania* McDonald's Spain (=) O'Tacos France (=) Pasibus Poland* Salad Box Romania* Salad Story Poland* Spartan Romania* Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland* Starbucks Romania* Starbucks Spain (=) Zahir Kebab Poland* 5 to go Romania* <b>(33)</b>	Autogrill France (=) Autogrill Germany* Autogrill Italy* Burger King Germany (=) Burger King Italy (=) Burger King Poland* Burger King Romania* Burger King Spain (=) Call a Pizza Germany* Domino's Poland* Domino's Romania* Domino's Spain (=) KFC Italy (♥ 1) KFC Poland* KFC Romania* KFC Spain (♥ 1) McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland* McDonald's Romania* McDonald's Spain (=) O'Tacos France (=) Pasibus Poland* Salad Box Romania* Salad Story Poland* Spartan Romania* Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland* Starbucks Romania* Starbucks Spain (=) Zahir Kebab Poland* 5 to go Romania* <b>(35)</b>	Autogrill France (=) Autogrill Germany* Autogrill Italy* Buffalo Grill France (=) Burger King Germany (=) Burger King Italy (=) Burger King Poland* Burger King Romania* Burger King Spain (=) Call a Pizza Germany* Dean & David Germany* Domino's Poland* Domino's Romania* Domino's Spain (=) Hans im Glück Germany* IKEA France* IKEA Germany (♥ 1) IKEA Italy (♥ 1) IKEA Poland* IKEA Romania* IKEA Spain (♥ 1) KFC Poland* KFC Romania* L'Osteria France* L'Osteria Germany (=) McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland* McDonald's Romania* McDonald's Spain (=) O'Tacos France (=) Pasibus Poland* PAUL France* PAUL Romania* Peter Pane Germany* Pizza Hut France (=) Pizza Hut Germany (=) Pizza Hut Poland* Pizza Hut Romania* Pizza Hut Spain (=) Quick France (=) Salad Box Romania* Salad Story Poland* Spartan Romania* Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland* Starbucks Romania* Starbucks Spain (=) Subway France (=) Subway Germany (=) Subway Italy (=) Subway Poland* Subway Romania* Subway Spain (=) Vapiano France* Vapiano Germany (=) Vapiano Poland* Zahir Kebab Poland* 5 to go Romania* <b>(62)</b>

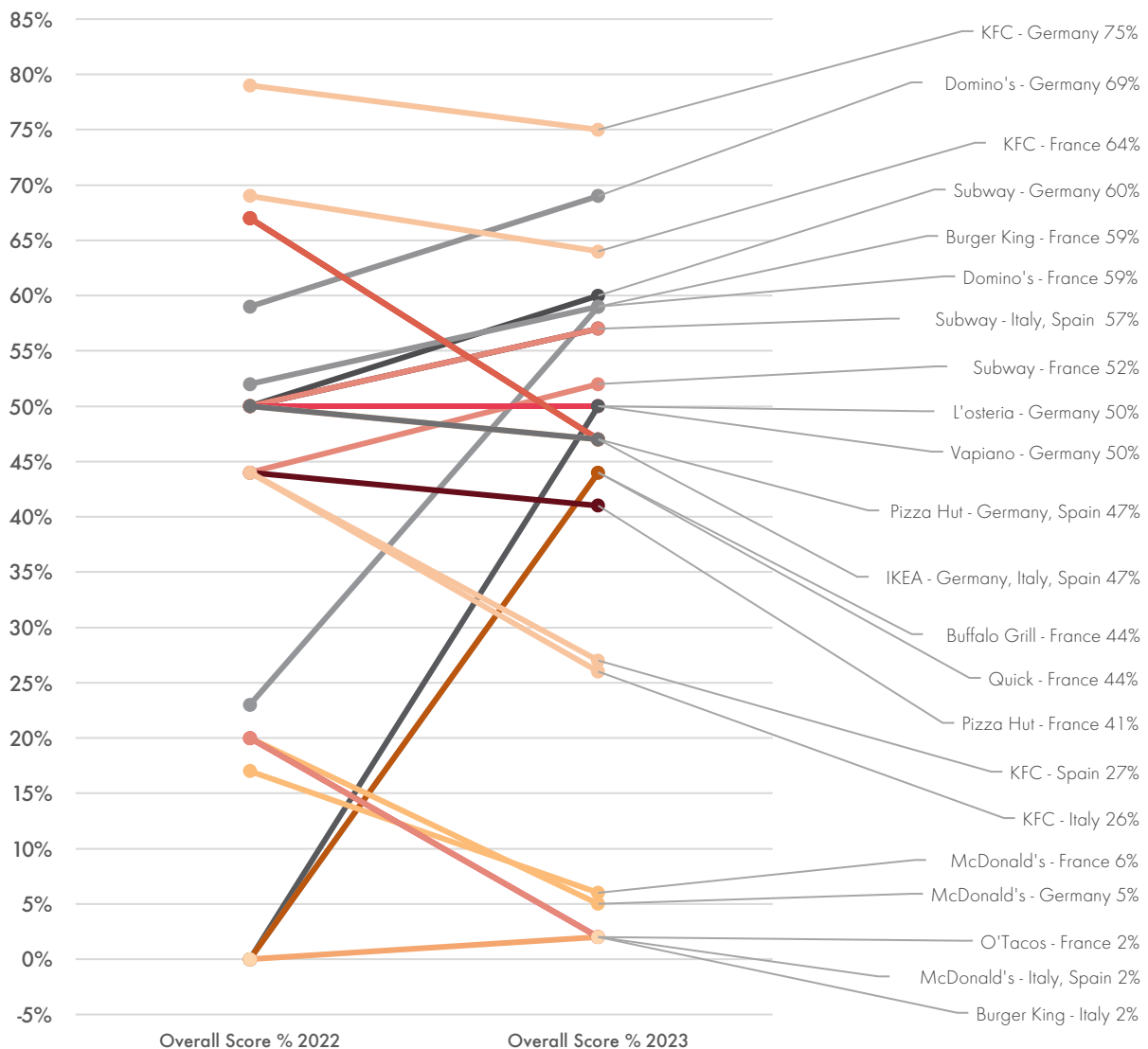
**Note:** Tier increase (▲), tier drop (▼), same tier (=) and new companies\*



Across all 69 companies from the six countries included in the assessments, the total overall average score was 27% (26% in 2022). In Pillar 1, the average score for all companies was 47% (41% in 2022). The average score for all companies for Pillar 2 was 5% (10% in 2022).

Of the 35 companies that were assessed in both 2022 and 2023, seven companies (20%) moved up one or two tiers in 2023 based on their total overall score, whereas six companies (17%) moved down one or two tiers. In Pillar 1, four companies moved up in the tier rankings, and three companies moved down. In Pillar 2, three companies moved up a tier and five companies moved down a tier. The described tier movements show the overall positive trend this year, driven largely by the improved performance in Pillar 1, thus indicating that more companies are committing to improving chicken welfare in their supply chains. The downwards trend in tier movement can largely be ascribed to the fact that some companies have not published any progress reporting that was available last year, and others were affected by the changes in the assessment approach (see *methodology* section).

**Figure 2: Timeline comparison of the average percentage scores of the 35 companies assessed in both 2022 and 2023**



**Note:** This graph includes 27 company assessments, excluding those that scored an average of 0% in both 2022 and 2023.





A highlight of 2023 is that Vapiano committed to the full ECC criteria, which is why for the three markets assessed, they are considered leading in the Commitment & Targets Pillar. However, since they made the commitment only this year, Vapiano has not been able to report on their performance on chicken welfare issues yet, resulting in them achieving a ranking in the lowest tier for the Performance Reporting Pillar. The same goes for other companies who have committed to the ECC in the past year.

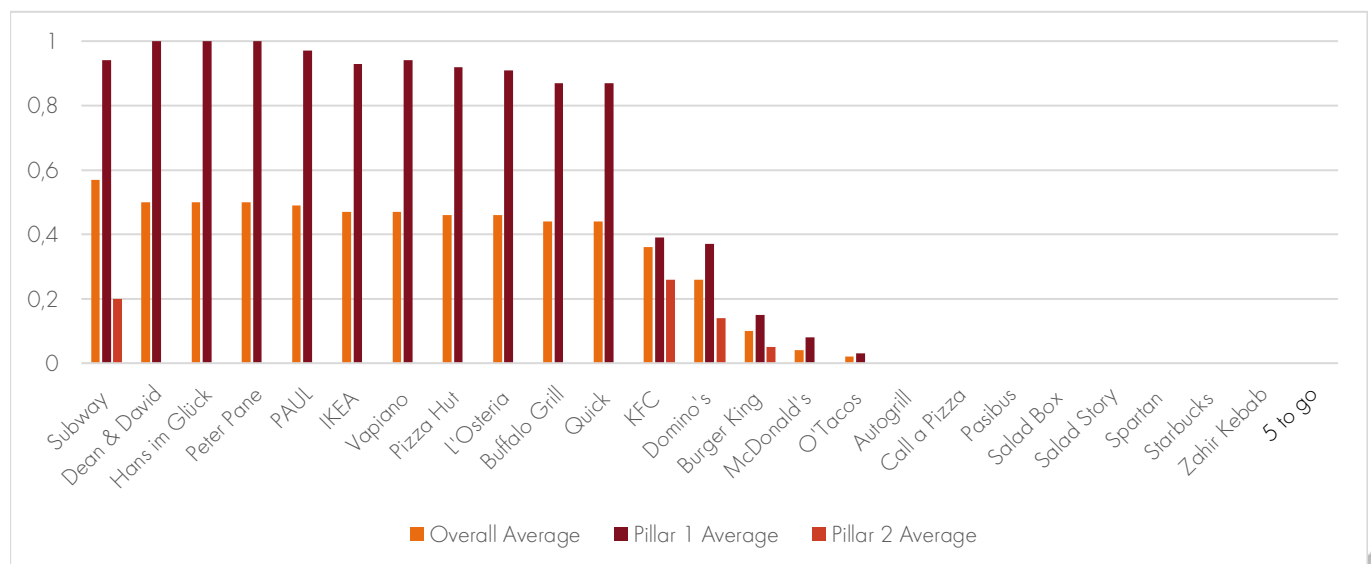
When looking at the data for each Pillar of the assessment separately, 34 companies (49%) achieved Tier 1 or Tier 2 status in Pillar 1, Commitments & Targets, demonstrating alignment with the ECC. Notably, IKEA (France, Germany, Spain, Italy, Poland, Romania), L'Osteria (France, Germany), PAUL (France, Romania), Pizza Hut (France, Germany, Spain, Poland, Romania), Subway (France, Germany, Spain, Italy, Poland, Romania) and Vapiano (France, Germany, Poland) have committed to the ECC in all markets they were assessed in. Buffalo Grill, Quick, Dean & David, Hans im Glück and Peter Pane were each assessed in a single market and have also published ECC commitments. On the contrary, 35 companies (51%) have not published broiler welfare commitments and were ranked in Tier 6.

In Pillar 2, focused on Performance Reporting, the majority of companies were found to be performing poorly. Indeed, no companies achieved a ranking in the top three tiers. Sixty-two companies (90%) were ranked in Tier 6, having been found to publish little or no performance reporting on broiler chicken welfare issues. One company (KFC in Germany) achieved Tier 4 status, indicating that the company is getting started on reporting progress on specific ECC-aligned broiler welfare issues.

KFC published a progress report providing updates on progress for each specific country. The reason only KFC Germany achieved Tier 4 status compared to the other KFC assessments is that there was more progress reported for Germany than for the other European countries assessed (KFC France, Spain and Italy, which achieved Tier 5). It should be noted that KFC Germany only made it into Tier 4 in Pillar 2 with a scoring percentage of 50%, which is just on the threshold for Tier 4 (50-59%). KFC Poland and Romania are not included in the KFC Western Europe supply chain and therefore score lower.

There is a significant gap between the scores in the Commitments & Targets Pillar and the Performance Reporting Pillar which suggests that while some companies have ECC-aligned policy commitments in place, there is limited evidence of implementation to date. The gap can to some extent be explained for companies who have made recent commitments as they are less likely to have started putting implementation and reporting measures in place. However, this does not apply to companies who have a longer-standing commitment, which can be expected to have made significantly more progress by now. Given the proximity of the ECC deadline, 2026, companies need to take concrete steps towards fulfilling their commitments if they are going to be achieved, and they must be transparent about this process.

**Figure 3: Average Overall and Pillar scores by company**





**Photo:** Lame bird with a splayed leg on a typical UK broiler chicken farm. Conventional breeds experience serious health and welfare issues due to being selectively bred for fast growth. Credit: World Animal Protection / Tracks Investigations

## 2. Pillar 1 – Commitments & Targets

### Companies are continuing to make commitments to address broiler chicken welfare by committing to the ECC

The 2023 data is influenced by the addition of new companies to the data set with, on average, fewer welfare commitments. Nonetheless, even with the newly-added companies included in the analysis, the findings show improvements in the proportion of companies with broiler welfare commitments. The average score for all companies for Pillar 1 was 47% (41% in 2022).

The first question in the Commitments & Targets Pillar assesses whether a company has any form of broiler welfare policy and if the policy is communicated in-country. Forty-five companies (65%) had published a broiler chicken welfare policy and 22 companies (49% of the 45 companies with a public policy; 32% of all assessments) have also communicated their policy on the in-country website.

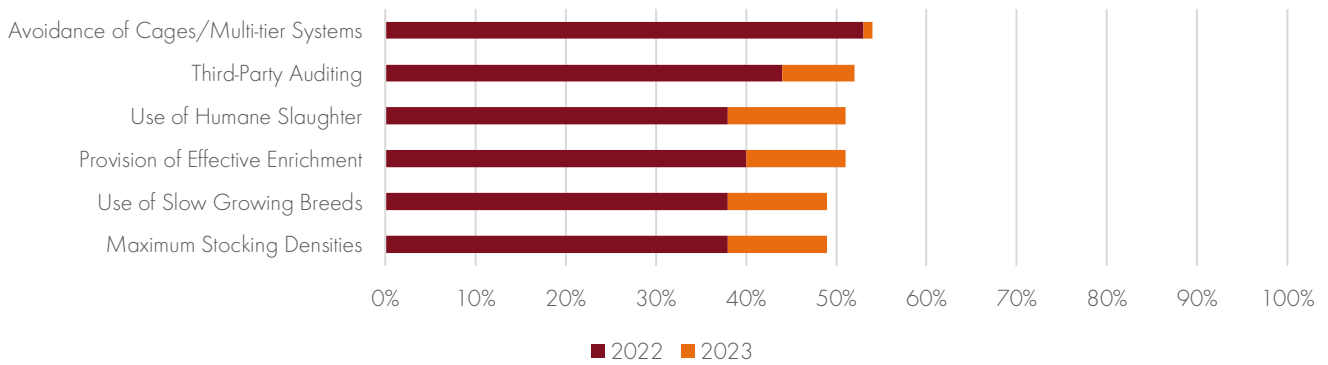
Looking solely at the 35 companies assessed in both 2022 and 2023, 19 companies (54%) have published a broiler chicken welfare policy, compared to 14 companies (40%) in 2022. Besides Vapiano previously discussed, Buffalo Grill France and Quick France have also committed to the ECC since the previous report, while Burger King Italy (through the Burger King franchise) and O'Tacos France have published a broiler chicken welfare policy, albeit not committed to the ECC. This demonstrates an overall positive trend for the companies for which we have comparable year-on-year data.

Although the TPO methodology assesses the individual elements of the ECC as can be seen in the analyses that follow, the ECC requirements should be seen as a complete package and not a pick-and-choose menu. Due to the complementary nature of the requirements, the full welfare benefits will only be seen if all aspects are fulfilled. We therefore urge companies to include all elements of the ECC to ensure broiler chicken welfare across their supply chains, and join over 600 companies, globally, who have an ECC policy in place.



Looking at all 69 assessments and the specific issues addressed by broiler welfare commitments, the most supported commitment was the avoidance of cages/multi-tier systems, with 54% of companies having this policy in place. The next most supported commitment was third-party auditing, with 52% of companies publishing commitments on this. The use of humane slaughter and the provision of enrichment are supported by 51% of companies. The remaining commitments, on maximum stocking densities and the use of slower growing breeds, are each supported by 49% of companies.

**Figure 4: The proportion of assessments that address the specific ECC-related broiler welfare criteria compared between 2022 and 2023**

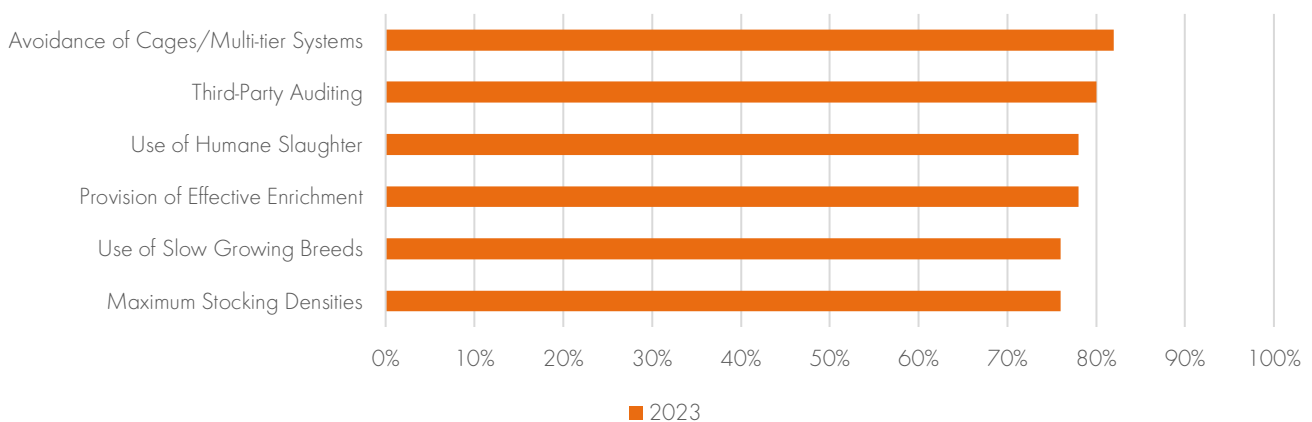


There is little difference in the proportion of companies committing to each of the specific welfare issues contained within the ECC. Further, the largely binary nature of the results achieved in Pillar 1, either Tier 1/Tier 2 or Tier 6 status, demonstrates that companies are largely committing to the ECC requirements in their entirety, across all relevant countries, and not to individual elements of the ECC.

Of all the companies assessed, 34 companies (49%) have committed to all elements of the ECC, while 11 companies (16%) have a commitment in place that does not include all elements of the ECC.

Zooming in on the 45 companies that have a broiler chicken welfare commitment (i.e., scored points on Q1.1), 82% have committed to the avoidance of cages/multi-tier systems. The third-party auditing commitment was supported by 80%, while the use of humane slaughter and the provision of enrichment are supported by 78% of companies. The remaining commitments, on maximum stocking densities and the use of slower growing breeds, are each supported by 76% of companies.

**Figure 5: The proportion of specific ECC-criteria addressed by the 45 companies that have a published broiler chicken welfare commitment**



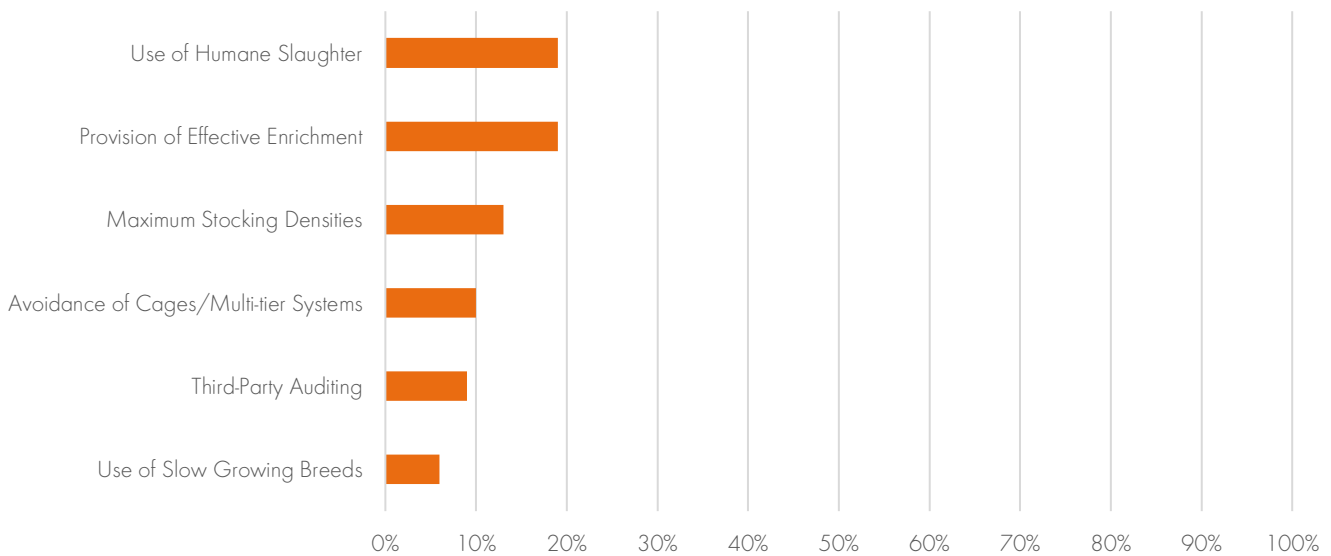
### 3. Pillar 2 – Performance Reporting

#### Welfare impact remains under-reported despite companies having broiler welfare commitments in place

Company reporting on progress against the specific welfare criteria in the ECC remains poor, with an average score for all companies for Pillar 2 of 5% (10% in 2022). The welfare issues most reported on, albeit by just 19% of all companies assessed, are the use of humane methods of slaughter and the provision of effective enrichment. Very low levels of performance reporting are shown for the other commitments; maximum stocking densities are reported by 13% of companies, avoidance of cages/multi-tier systems by 10% and third-party auditing by 9%. The use of slower growing breeds is the least reported-against commitment at 6% (see Figure 6).

As per the Pillar 1 findings, the 2023 data for Pillar 2 is influenced by the addition of new companies to the data set with, on average, lower levels of performance reporting. Looking solely at the 35 companies assessed in both 2022 and 2023, 11 companies (31%) have published performance reporting in 2023 compared to 14 companies (40%) in 2022. This demonstrates that even though companies have established broiler chicken welfare policies, there is still a lack of adequate reporting and transparency regarding the welfare impact of these policies on broiler chickens. Two companies received a reduced score for Pillar 2 as a result of a stricter assessment approach in 2023. They had been warned their evidence was unclear last year and failed to make the necessary changes to provide the greater clarity needed to continue to receive points.

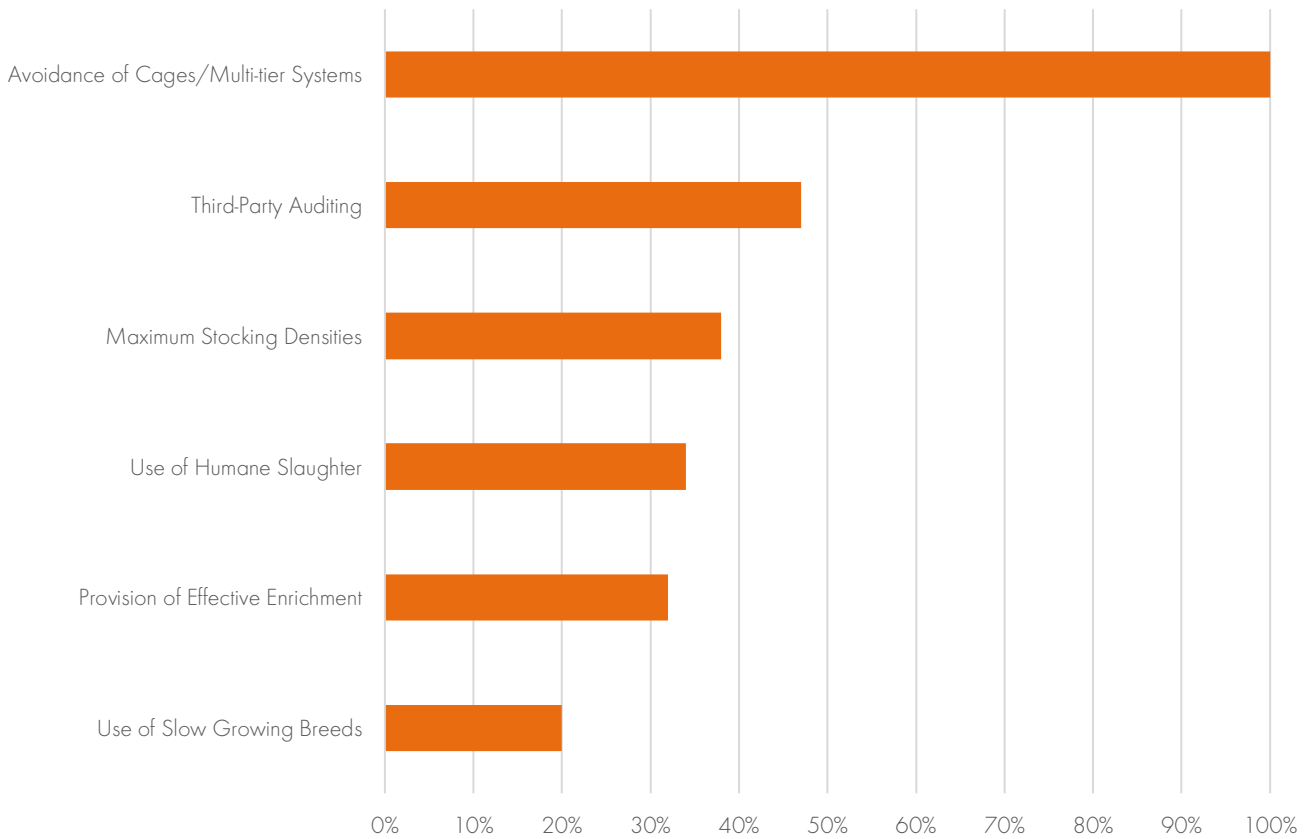
**Figure 6: The proportion of assessments with performance reporting on the specific ECC-related broiler welfare criteria**





Looking at the reported progress on the specific broiler welfare requirements of the ECC, the 10% of companies reporting on avoidance of cages/multi-tier systems state that 100% of their supply chains are compliant, compared to a 79% average compliance in 2022. Third-party auditing has the second-highest levels of compliance reported by companies, with companies reporting an average of 47% of the supply chain compliant (66% in 2022). The remaining requirements of the ECC, on maximum stocking densities, (38% of the supply chain reported to be compliant on average compared to 20% in 2022), the use of humane slaughter (34% compared to 71% in 2022), provision of effective enrichment (32% compared to 33% in 2022), and the use of slower growing breeds (20% and the same percentage reported in 2022), show mixed results in progress being made by the companies. Relatively low progress reported for most of the requirements shows that the pace of transition to ECC-compliant supply chains needs to accelerate for commitment deadlines to be achieved.

**Figure 7: The overall compliance reported of those assessments that report on each of the ECC-criteria**



## 4. Country Comparison

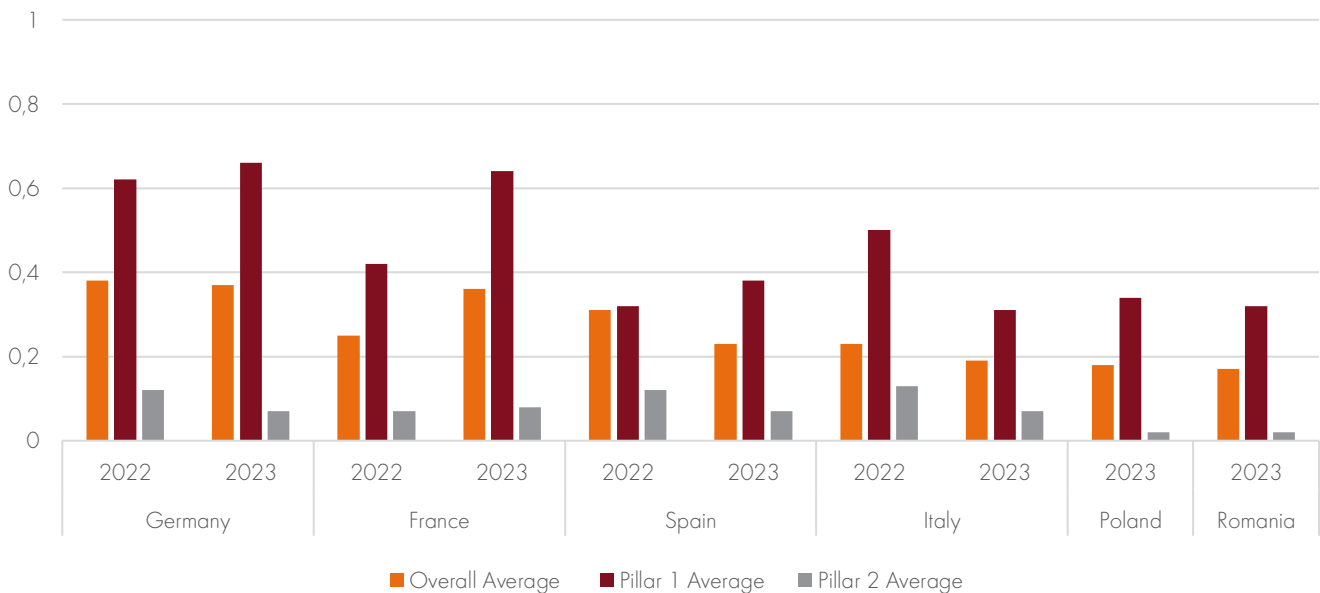
### Companies in Germany and France are outperforming those in other countries on their commitments and reporting on broiler chicken welfare

Comparing the average company scores achieved in each country indicates that companies in Germany were the highest-performing, with an overall average score of 37%, consisting of an average score of 66% for Commitments & Targets and 7% for Reporting Performance. Companies in France achieved the second-highest overall average score, at 36%, followed by Spain at 23%, Italy at 19%, Poland at 18% and Romania at 17% (see Figure 8).

The improvement in overall average scores for companies in France (from 25% in 2022 to 36% this year) has been largely driven by an improvement in scores in the Commitments & Targets Pillar, from 42% in 2022 to 64% in 2023. This shows companies in France are continuing to make broiler welfare commitments and are now, along with Germany, outperforming the other countries in the benchmark.

It should be noted that companies assessed in France are asked additional questions in Pillar 1 and Pillar 2 (Q1.8 and Q2.7) on the access to free range or the use of winter gardens<sup>6</sup>. Calculating the average scores for France without these additional questions included in the data, the overall average score for France is 42% (27% in 2022), with an average score for Pillar 1 of 74% (47% in 2022) and an average score for Pillar 2 of 9% (7% in 2022). This shows that, on a direct comparison basis, France is outperforming the other countries included in the benchmark.

**Figure 8: Yearly Comparison of Average Overall and Pillar scores by country<sup>7</sup>**



The improvement in scoring under the Commitments & Target Pillar for companies in France compared to lower scores for those same companies assessed in other markets shows misalignment of European franchises. Burger King France, Domino's France (and Germany) and KFC France (and Germany) are categorized Tier 1 under Pillar 1, while those same companies are categorized Tier 6 for the other markets they are assessed in for this report. Therefore, although companies show some commitment to better the welfare of broiler chickens in their supply chain, they have only applied this in selected markets.

6. PAUL France was the only company that scored on question 1.8 and no company scored on question 2.7.

7. The 2023 edition of the TPO report is the first instance that companies in Romania and Poland have been assessed, which is why there is no comparable data from 2022 for these countries.



Germany, Spain and Italy have shown slight reductions in the overall average scores achieved in 2023 compared to 2022 (minus 1%, 8% and 4% respectively). This is mainly due to the changes in the 2022 methodology where the maximum score for question 1.1 in the Commitments & Targets pillar has been reduced and companies are now additionally scored on in-country communication. Furthermore, the addition of 24 new companies in 2023 has also had an impact on the average scores achieved in these countries.

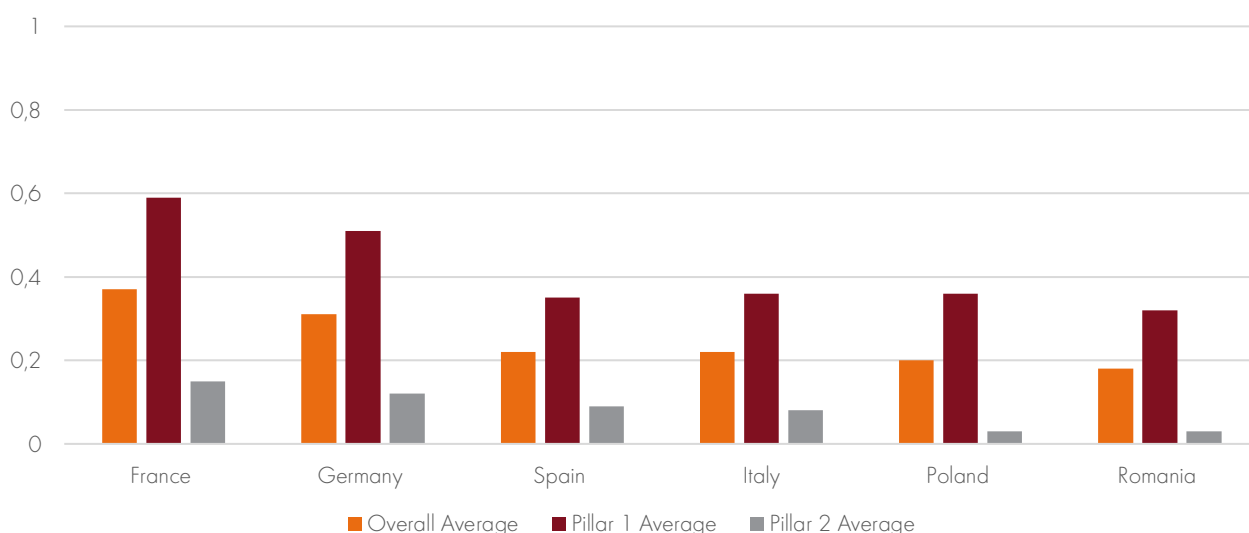
Eastern Europe, regrettably, seems to be falling behind on chicken welfare. Romania and Poland are newly assessed markets in this year's report, but their average scores are undoubtedly lower than the other markets assessed. It should be noted that companies assessed in Romania and Poland that are part of a larger European or international franchise were able to rake in some points, however, local companies received a score of 0.

The other reality is that the companies assessed in Romania and Poland, which are part of a larger European or international franchise, were not able to score equal points compared to the other markets they were assessed in. For example, looking at the total score, while KFC France and Germany are making some progress and achieved Tier 3, there is already a stark difference with the scores for KFC Italy and Spain which puts them in Tier 5, whereas KFC only scored 1 point for Romania and Poland, putting them in Tier 6. This shows that the low average country score is not solely because of local franchises, but that at the same time, some international companies are also doing little to nothing in some markets.

As the largest poultry producer in the European Union<sup>8</sup>, it is concerning to see how companies in Poland score compared to other markets in this benchmark. According to the European Commission, poultry meat consumption and production is expected to increase by around 4% between 2018 and 2030<sup>9</sup>. While Poland will most likely play a large role in supplying the increasing demand for poultry, the country is falling behind in making welfare improvements.

Given that the companies assessed in each market were not the same, an alternative comparison can be made by focusing solely on the six companies that were assessed across all markets (Burger King, KFC, IKEA, McDonald's, Starbucks and Subway). Figure 9 shows that France and Germany, with average overall scores of 37% and 31% for these six companies, continue to be in the lead. Spain and Italy had an overall average of 22%, Poland had an overall average score of 20%, and Romania had the lowest overall average score at 18%.

**Figure 9: Average Overall and Pillar scores by country (for companies assessed in all markets - Burger King, KFC, IKEA, McDonald's, Starbucks and Subway)**



8. Dutch Ministry of Agriculture, Nature, and Food Quality. <https://www.agroberichtenbuitenland.nl/actueel/nieuws/2023/06/01/poultry-in-poland>

9. European Commission Agricultural Outlook 2018-2030. [https://agriculture.ec.europa.eu/system/files/2021-01/medium-term-outlook-2018-report\\_en\\_0.pdf](https://agriculture.ec.europa.eu/system/files/2021-01/medium-term-outlook-2018-report_en_0.pdf)





## The Pecking Order 2023: France

TPO Europe 2023 conducted 69 assessments covering the markets of **France**, Germany, Italy, Poland, Romania and Spain. The following 15 companies have been assessed in the French market:





## Project overview

The Pecking Order assesses iconic fast-food brands and food service companies on their approach to managing and reporting on the welfare of chickens in their supply chains.

The Pecking Order began as an assessment of the commitments and reporting global fast-food brands were putting in place to address chicken welfare throughout their global supply chains. Since 2022, the methodology has adopted a more localised approach, focused on evaluating how international and national fast-food brands and food service companies are managing chicken welfare within individual markets.

## Methodology

The Pecking Order 2023 European Methodology document provides detailed information on the purpose of The Pecking Order benchmark, assessment criteria, approach and scoring system. It should be read in conjunction with this report, and can be requested from L214.

The criteria for The Pecking Order European methodology is based on the European Chicken Commitment (ECC), which has been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific elements of the ECC provide a clear and consistent set of improvements that focus on stocking density, breeds, enrichments, broiler cages, slaughter process and auditing. More information on the ECC can be found at <https://welfarecommitments.com/europeletter/>.

The Pecking Order has thirteen questions organised under two pillars<sup>10</sup>, with seven questions in the first pillar and six questions in the second. Each question focuses on a specific attribute of the ECC to improve chicken welfare. The pillars are reflected below:



### Pillar 1 – Commitments & Targets

questions focus on published time-bound commitments to improve chicken welfare.



### Pillar 2 – Performance Reporting

questions focus on reporting of progress against each of the elements of the ECC.

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<sup>10</sup> French companies are assessed on an additional question in each pillar. The questions concern the access to free range or the use of 'winter gardens'.



In 2023, the scoring approach has been changed for one question in the Commitments & Targets section of the assessment. Q1.1, which asks whether the company has published a policy covering broiler chicken welfare, has been amended to introduce a partial points option to differentiate between companies that communicate their published broiler welfare commitments in-country, and those companies for which there is no evidence of in-country communication.

Each company is given a score expressed as a percentage for each pillar. These results, with equal weighting, are added together to form an overall result. They are classified into 6 tiers, each tier corresponding to a level of commitment and/or publication of progress, as shown in the table below.

Tier	Grade	Percentage bands
6	Very poor	0-25
5	Poor	26-49
4	Getting started	50-59
3	Making progress	60-75
2	Good	76-85
1	Leading	86-100

## Scoring Overview: France

	Total overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
<b>Tier 1</b> Leading		Buffalo Grill, Burger King, Domino's, KFC, Paul, Quick, Subway, Vapiano	
<b>Tier 2</b> Good		Ikea, L'Osteria, Pizza Hut	
<b>Tier 3</b> Making progress	KFC		
<b>Tier 4</b> Getting started	Burger King, Domino's, Paul, Subway		
<b>Tier 5</b> Poor	Buffalo Grill, Ikea, L'Osteria, Pizza Hut, Quick, Vapiano		Burger King, Domino's, KFC
<b>Tier 6</b> Very poor	Autogrill, McDonald's, O'Tacos, Starbucks	Autogrill, McDonald's, O'Tacos, Starbucks	Autogrill, Buffalo Grill, Ikea, Paul, Quick, Subway, L'Osteria, McDonald's, O'Tacos, Pizza Hut, Starbucks, Vapiano



# Key findings: France

## The majority of companies assessed as part of the Pecking Order have made a commitment to tackle the worst chicken farming and slaughter practices...

This year, of the 15 restaurant chains assessed in France under the Pecking Order, 11 are committed to meeting all the criteria of the [European Chicken Commitment](#) (ECC) by 2026.

While some had already published their commitment when the 2022 edition was launched, others did so this year, thus taking responsibility. These include Burger King, Buffalo Grill, Quick, and even Vapiano that was added to the ranking for the first time this year.

Among the restaurant chains assessed for the second year in a row, Burger King and Buffalo Grill improved their scores (see Figure 11) thanks to the publication of strong ECC commitments in 2023.

In addition to the ECC, the bakery chain PAUL is still committed to ensuring that at least 20% of its chicken meat purchases in France come from farms where the animals have access to an outdoor area.

## ...while others are mired in stagnation

Out of the 15 companies assessed, four still refuse to commit to the ECC in 2023, even though these criteria are a bare minimum. These include Autogrill, O'Tacos, Starbucks, and McDonald's. While the lack of commitment from all of these actors is unacceptable, McDonald's refusal to commit is particularly concerning: indeed, given its position as a leader in the fast food industry in France, McDonald's bears a heavy responsibility in perpetuating the worst chicken farming and slaughter practices.

## Too few companies report publicly on progress

As last year, reporting on progress is unsatisfactory. While some companies, such as KFC, Burger King, Domino's, and Subway, shared some progress, others completely neglect this criterion, despite it being a requirement of the ECC. We remind these companies that they must abide by their commitments, which in this case means that they need to work actively to meet all ECC criteria by 2026 and publish detailed data on their yearly progress towards each of these criteria. Each year that passes without a progress report further damages the credibility of the companies that failed.



## Corporate responsibility: reality or mere communication?

It is unacceptable that the commitments and actions of companies still lag so far behind what is at stake when it comes to the conditions in which chickens are farmed and slaughtered. Today, no one can nor should ignore the extreme suffering that these animals endure.

As a reminder, no initiatives that fall below the ECC requirements can be considered sufficient for broilers according to scientific expertise. For example, in its report of 21st March 2000<sup>11</sup>, the EU Scientific Committee on Animal Health and Animal Welfare recommended a maximum density of 25 kg/m<sup>2</sup> and indicated that a density higher than 30 kg/m<sup>2</sup> (the maximum density tolerated by the ECC) would cause serious animal welfare problems (see paragraph 7.5.6 on pages 66-67 of the report).

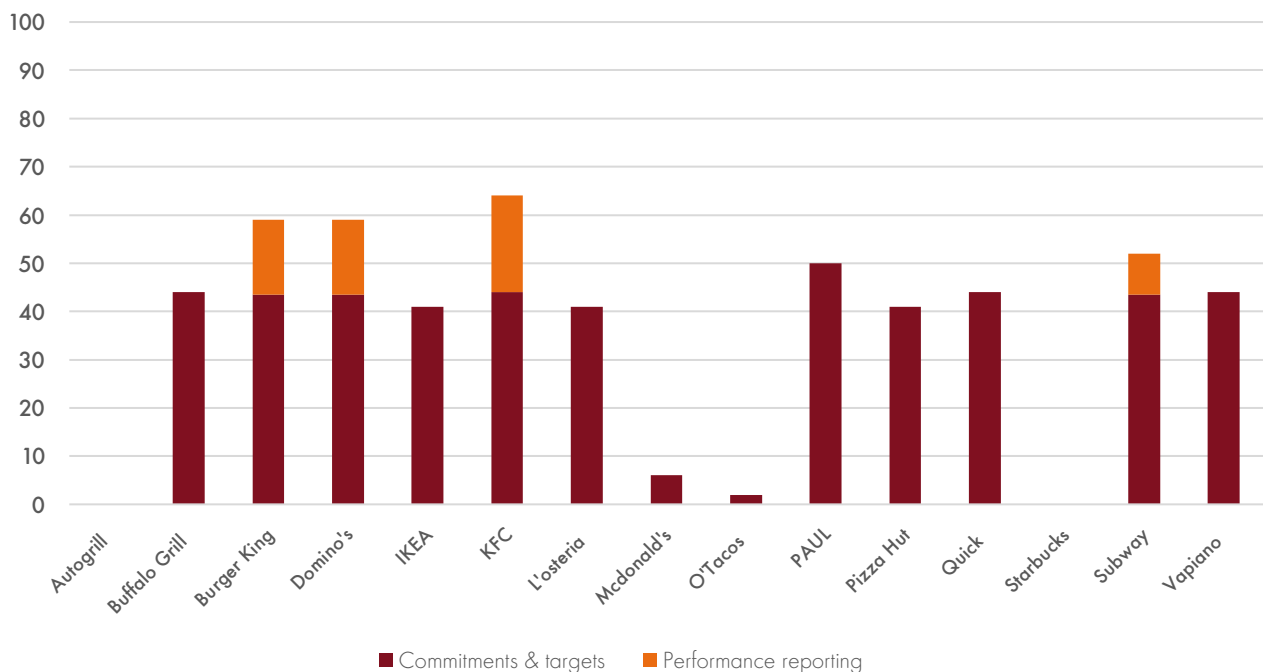
Furthermore, in 2022, a study by the *Welfare Footprint Project*<sup>12</sup> showed that the selection of slower-growing breeds would reduce the time spent by chickens in disabling pain by 66% and the time spent in excruciating pain by 78%, compared to standard factory farms. With regard to slaughter, the same study indicates that replacing electrical water bath stunning with controlled atmosphere killing using CO<sub>2</sub> would drastically reduce "severe" forms of pain and almost eliminate the possibility of any individual animal abuse in slaughterhouses.

We therefore urge all companies that are not yet committed to meeting all ECC criteria to take the existing scientific knowledge into account and commit to the ECC without delay, especially McDonald's whose responsibility as a leader in the fast-food industry is significant.

We also request companies that are already committed to take the issue seriously by publishing annual reports demonstrating substantial progress in reducing the suffering of chickens.

As an example not to be followed, the bakery chain PAUL made its commitment public three years ago, but at the time of current writing it has still not reported any progress. We remind PAUL as well as all other companies that the ECC is not a marketing tool, it is a key framework to drive meaningful changes in practices.

Figure: Results for the French market

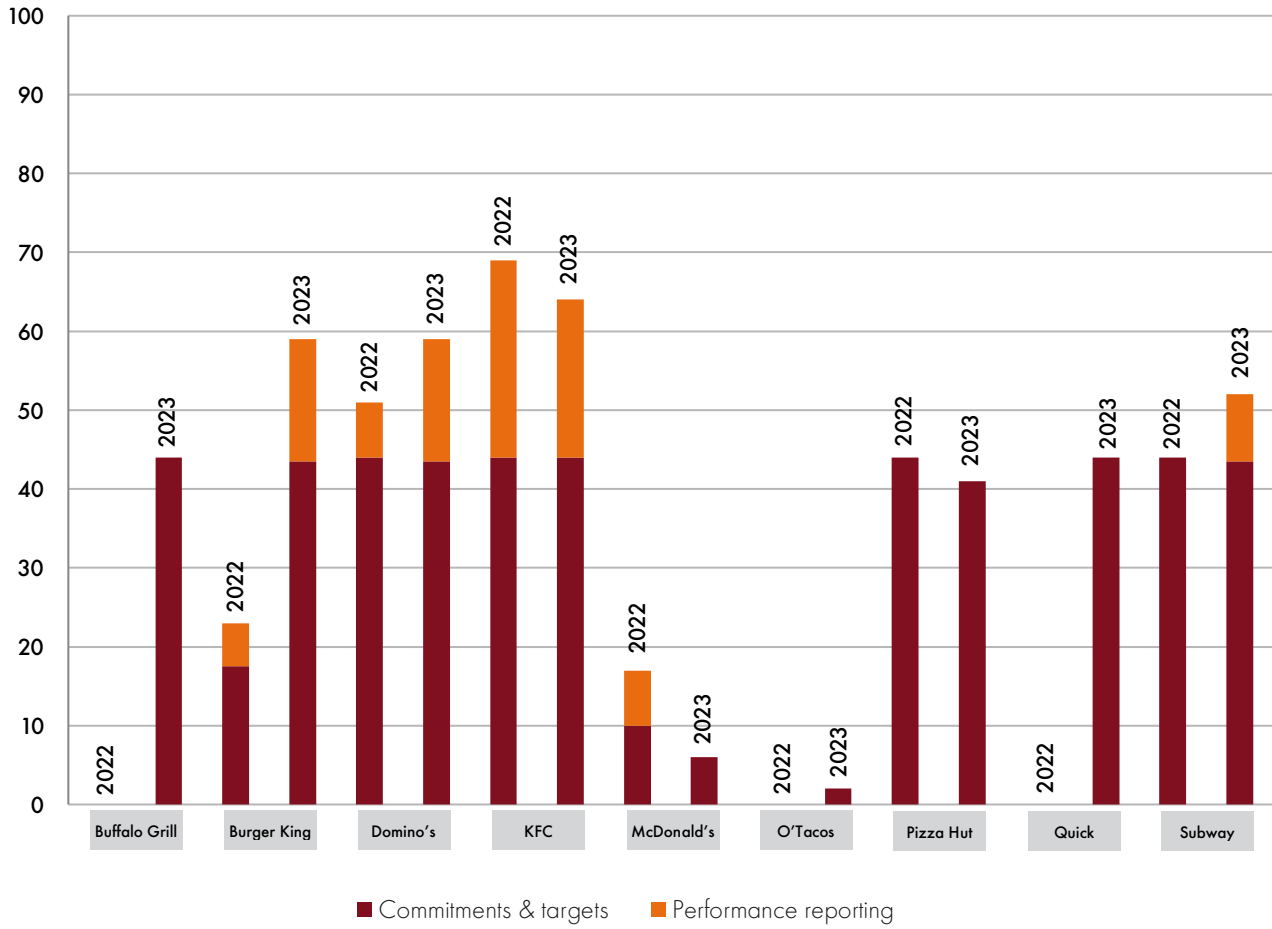


11. [https://food.ec.europa.eu/system/files/2020-12/sci-com\\_scah\\_out39\\_en.pdf](https://food.ec.europa.eu/system/files/2020-12/sci-com_scah_out39_en.pdf)

12. <https://welfarefootprint.org/research-projects/>



Figure: Yearly comparison of average scores







## The Pecking Order 2023: France

TPO Europe 2023 a réalisé 69 évaluations couvrant les marchés de l'Allemagne, **de la France**, de l'Espagne, de l'Italie et de la Croatie. Les 15 entreprises suivantes ont été évaluées sur le marché français :



# Le Projet

Le Pecking Order évalue les grandes enseignes de fast-food et de restauration au regard de leur considération du "bien-être" des poulets "de chair" dans leurs chaînes d'approvisionnement.

Le Pecking Order a débuté par l'évaluation des engagements et des publications de progrès que les chaînes mondiales de restauration rapide mettaient en place au sujet du "bien-être" des poulets "de chair" dans l'ensemble de leurs chaînes d'approvisionnement mondiales.

Depuis 2022, Le Pecking Order opte pour une approche plus localisée qui évalue les engagements et les reports de progrès des chaînes de restauration mondiales mais aussi nationales, en ce qui concerne la prise en compte du "bien-être" des poulets dans leurs achats.

## Méthodologie

Le document consacré à la méthodologie du Pecking Order 2023 fournit des informations plus détaillées sur l'objectif du classement, les critères d'évaluation et le système de notation. Nous conseillons de le lire de façon conjointe au présent rapport, il peut être demandé auprès de L214.

La méthodologie du Pecking Order 2023 est basée sur le European Chicken Commitment (ECC), dont les critères ont été établis conformément aux dernières connaissances scientifiques en matière de "bien-être animal" et sont soutenus par plusieurs organisations de protection animale à travers le monde. Les exigences de l'ECC constituent une politique minimale de référence qui vise à faire reculer les pires pratiques d'élevage et d'abattage des poulets "de chair". Elles portent par exemple sur la sélection des races et l'aménagement des bâtiments d'élevage. Vous trouverez plus d'informations sur l'ECC en cliquant sur ce lien :

<https://welfarecommitments.com/letters/europe/fr/>.

Le Pecking Order comporte treize questions organisées en deux sous-ensembles<sup>10</sup>. Le premier sous-ensemble est composé de sept questions et le second de six questions. Chacune d'entre elles se focalise sur un critère spécifique de l'ECC. Les sous-ensembles sont présentés ci-dessous :



### 1 – Engagements et objectifs

Les questions portent sur les engagements à échéance publiés, visant à bannir les pires pratiques d'élevage et d'abattage des poulets.



### 2 – Publication des avancées

Les questions portent sur la publication des progrès réalisés dans le cadre des engagements.

10. Les entreprises françaises ont également été évaluées, pour chaque sous-ensemble, sur une question additionnelle portant sur l'accès au plein air ou à un jardin d'hiver.



En 2023, la méthode de notation a été modifiée pour une question de la section Engagements et objectifs. La question Q1.1, qui demande si l'entreprise a publié une politique prenant en compte le "bien-être" des poulets de chair, a été modifiée pour introduire une option de notation partielle afin de différencier les entreprises qui communiquent précisément sur leurs engagements pris dans le pays en question, et celles qui ne le font pas.

Chaque entreprise se voit attribuer un résultat exprimé en pourcentage pour chacun des sous-ensembles. Ces résultats, bénéficiant d'une pondération égale, sont additionnés pour former un résultat global. Ils sont classés en 6 niveaux, chaque niveau correspondant à un échelon d'engagement et/ou de publication des progrès, comme indiqué dans le tableau ci-dessous.

Niveau	Echelons	Résultat en pourcentage
6	Très insatisfaisant	0-25
5	Insatisfaisant	26-49
4	En retard	50-59
3	En progression	60-75
2	Encourageant	76-85
1	Raisonnable	86-100

## Aperçu de la notation : France

	Classement global	1 - Engagements et objectifs	2 - Publication des avancées
<b>Niveau 1</b> Leading		Buffalo Grill, Burger King, Domino's, KFC, Paul, Quick, Subway, Vapiano	
<b>Niveau 2</b> Good		Ikea, L'Osteria, Pizza Hut	
<b>Niveau 3</b> Making progress	KFC		
<b>Niveau 4</b> Getting started	Burger King, Domino's, Paul, Subway		
<b>Niveau 5</b> Poor	Buffalo Grill, Ikea, L'Osteria, Pizza Hut, Quick, Vapiano		Burger King, Domino's, KFC
<b>Niveau 6</b> Very poor	Autogrill, McDonald's, O'Tacos, Starbucks	Autogrill, McDonald's, O'Tacos, Starbucks	Autogrill, Buffalo Grill, Ikea, Paul, Quick, Subway, L'Osteria, McDonald's, O'Tacos, Pizza Hut, Starbucks, Vapiano



# Principales conclusions : France

## La majorité des entreprises évaluées dans le cadre du Pecking Order s'engagent contre les pires pratiques d'élevage et d'abattage des poulets...

Cette année, parmi les 15 entreprises de restauration implantées en France évaluées dans le cadre du *Pecking Order*, 11 sont engagées à respecter l'ensemble des critères du [European Chicken Commitment](#) (ECC) d'ici 2026.

Alors que certaines avaient déjà publié leur engagement lors de l'édition 2022, d'autres l'ont fait cette année, prenant ainsi leurs responsabilités. C'est le cas de Burger King, de Buffalo Grill, de Quick ou encore de Vapiano, qui a été intégrée au classement pour la première fois cette année.

Parmi les chaînes de restauration évaluées pour la deuxième année consécutive, Burger King et Buffalo Grill ont vu leurs scores progresser (voir graphique n°2). Cette progression s'explique par la publication de leurs engagements en 2023.

De leur côté, les boulangeries Paul demeurent engagées, de façon additionnelle à l'ECC, à ce que 20 % au moins de leurs volumes de viande de poulets achetés en France proviennent d'élevages donnant accès à l'extérieur aux animaux.

## ...quand d'autres s'embourbent dans l'immobilisme

Sur les 15 entreprises évaluées, 4 s'entêtent encore, en 2023, à ne pas s'engager sur les critères minimum de l'ECC. C'est le cas d'Autogrill, d'O'Tacos, de Starbucks et de McDonald's. Si l'absence d'engagement de l'ensemble de ces acteurs est inacceptable, celle de McDonald's, leader de la restauration rapide, interroge particulièrement au regard du poids de l'enseigne et de la lourde responsabilité qui est la sienne dans la poursuite des pires pratiques d'élevage et d'abattage des poulets "de chair".

## Un nombre encore très insuffisant de publications de reportings d'avancement

Comme l'an dernier, les publications de progrès des entreprises laissent à désirer. Si certaines d'entre elles partagent au public quelques avancées, à l'image de KFC, Burger King, Domino's et Subway, les autres entreprises négligent ce critère pourtant requis par l'ECC. Nous rappelons à ces dernières qu'elles doivent tenir leurs engagements : travailler sérieusement à remplir les critères de l'ECC d'ici 2026 et en rendre compte annuellement par la publication de données précises sur leurs sites Internet. Chaque année passée sans publication d'un reporting d'avancement entache davantage la crédibilité des entreprises concernées.



## La responsabilité d'entreprise : réalité ou simple communication ?

Il n'est pas normal que les engagements et les actions des entreprises ne soient toujours pas à la hauteur des enjeux s'agissant des conditions d'élevage et d'abattage des poulets. Aujourd'hui, nul ne peut ignorer les souffrances extrêmes que subissent ces animaux.

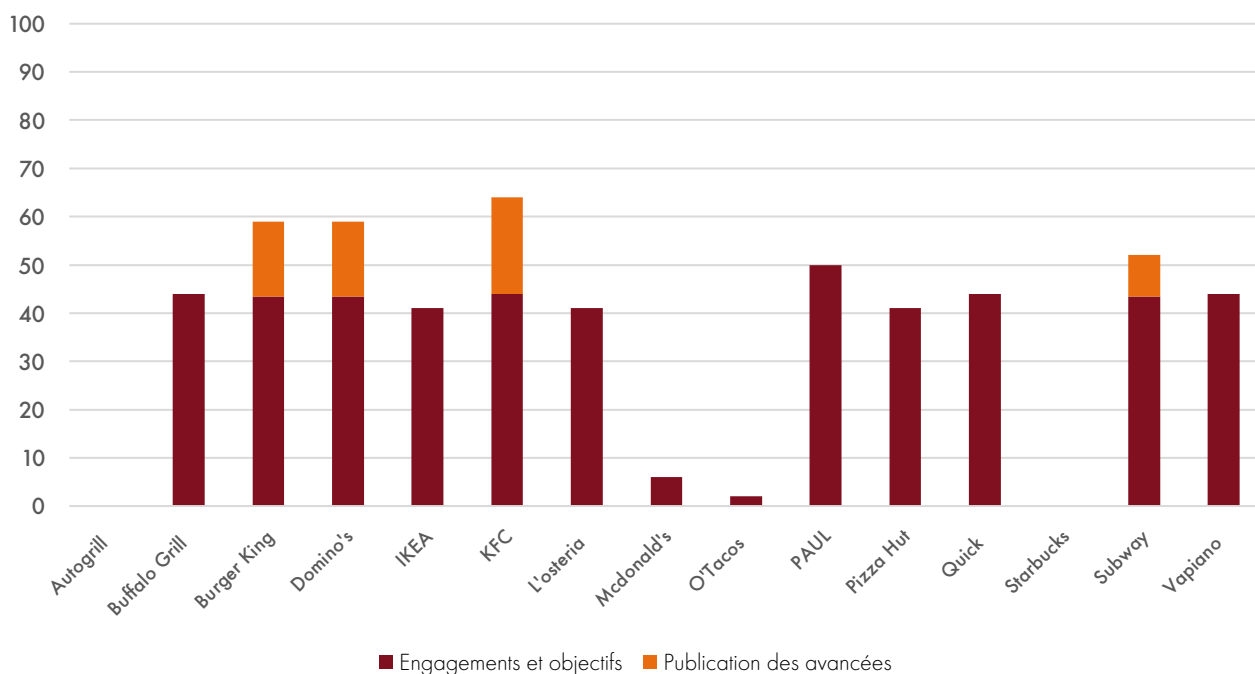
Pour mémoire, toutes les initiatives dont les exigences sont inférieures à celles de l'ECC ne peuvent être considérées comme suffisantes pour les poulets au regard de l'expertise scientifique. À titre d'exemple, dans son rapport du 21 mars 2000<sup>11</sup>, le comité scientifique de l'Union Européenne (*Scientific Committee on Animal Health and Animal Welfare*) préconise une densité maximale de 25 kg/m<sup>2</sup> et indique qu'une densité supérieure à 30kg/m<sup>2</sup> (densité maximale tolérée par l'ECC) engendre des problèmes graves de bien-être animal (voir paragraphe 7.5.6 aux pages 66-67 du rapport).

Par ailleurs, en 2022, une étude du *Welfare Footprint Project*<sup>12</sup> démontre que l'adoption de races à croissance plus lente permettrait de réduire de 66 % le temps passé par les poulets à ressentir des douleurs continues invalidantes et de 78 % le temps passé en douleur intense insupportable, en comparaison à ce qui est observé dans les élevages intensifs standards. Concernant l'abattage, la même étude indique que le remplacement de l'électronarcose par la mise à mort par atmosphère contrôlée utilisant du CO<sub>2</sub> permettrait de réduire drastiquement les formes de douleur "d'intensité aiguë" et d'éliminer pratiquement toute possibilité de maltraitance individuelle des animaux à l'abattoir.

Nous appelons donc l'ensemble des entreprises qui ne sont pas encore engagées à respecter les critères de l'ECC, en particulier McDonald's dont la responsabilité est considérable en tant que leader de la restauration rapide, à prendre en considération l'expertise scientifique et à s'engager sans délai.

Nous demandons également aux entreprises déjà engagées de prendre le sujet au sérieux en publiant chaque année un reporting prouvant que des progrès significatifs vers la réduction des souffrances des poulets sont réalisés. À titre d'exemple, l'enseigne Paul a rendu public son engagement il y a 3 ans mais, à l'heure où nous rédigeons ces lignes, n'a toujours pas publié le moindre progrès. Nous alertons cette enseigne, ainsi que les autres entreprises concernées, sur le fait que l'ECC n'est pas un outil de marketing mais bien un référentiel indispensable au changement des pratiques.

### Graphique : Résultats pour le marché français



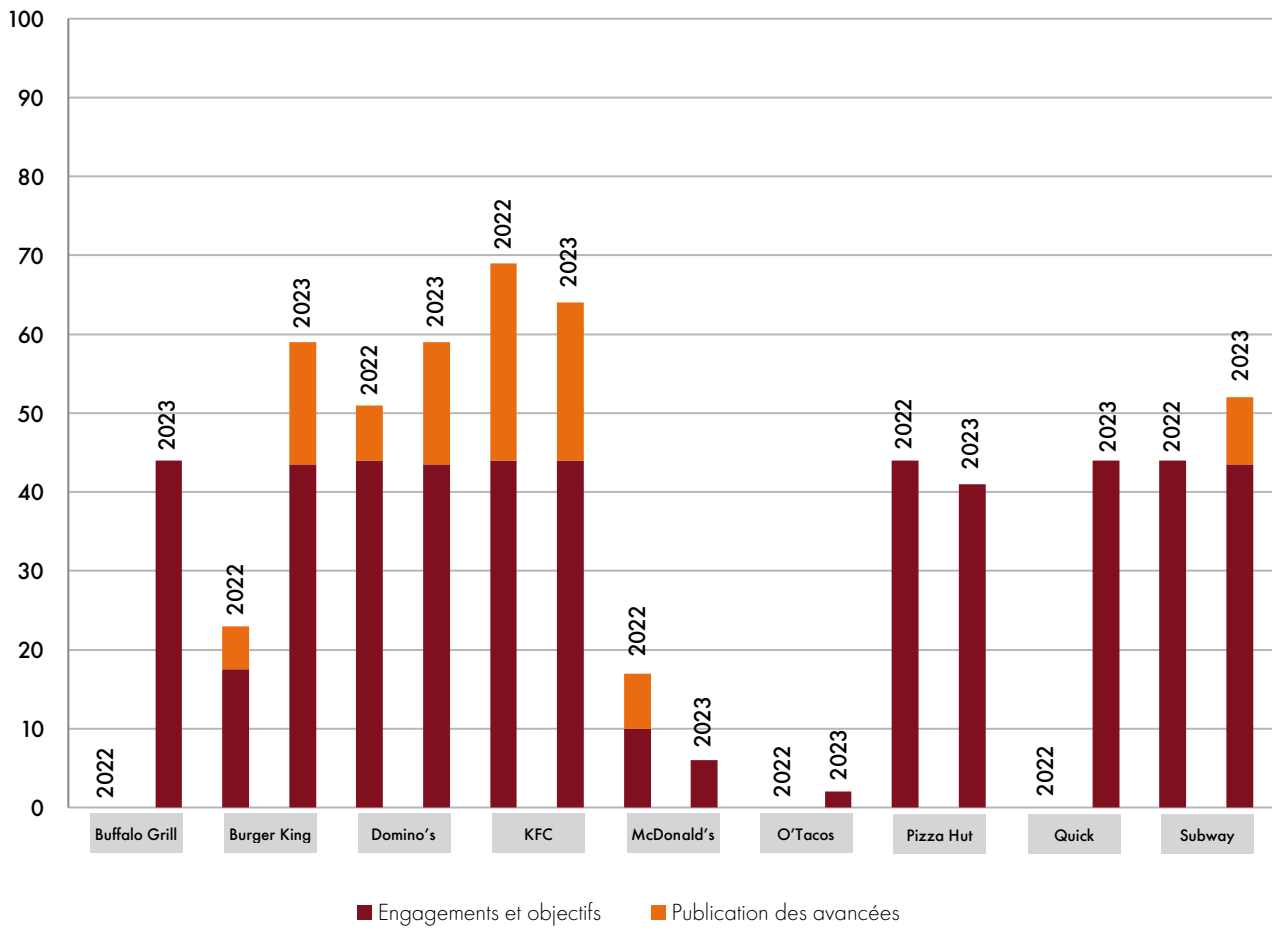
11. [https://food.ec.europa.eu/system/files/2020-12/sci-com\\_scah\\_out39\\_en.pdf](https://food.ec.europa.eu/system/files/2020-12/sci-com_scah_out39_en.pdf)

12. <https://welfarefootprint.org/research-projects/>





Graphique : Comparaison annuelle des résultats en pourcentage





## The Pecking Order 2023: Germany

With an average overall result of 37%, Germany's food service companies score highest in the Pecking Order Report.

The following 15 companies have been assessed in the German market:



## Key insights: Germany

- Only three companies have improved their performance since the 2022 report.
- Only one fifth of the companies assessed in Germany show visible efforts towards an actual improvement in the farming of chickens raised for meat.
- Too many companies operating in Germany are still dodging responsibility for their supply chains and dragging their feet when it comes to committing to the European Chicken Commitment (ECC).

German companies score an average of 66% on the »Commitments & Targets« pillar, and 7% on the »Performance Reporting« pillar. When comparing countries, they achieve the highest values, with an average overall score of 37%, and are ahead of companies in France (overall score: 36%) and Spain (23%). When considering only the six companies operating in all countries assessed (Burger King, KFC, IKEA, McDonald's, Starbucks and Subway), Germany (37%) again ranks higher than France (31%), where an additional requirement for free range is included in the assessment.

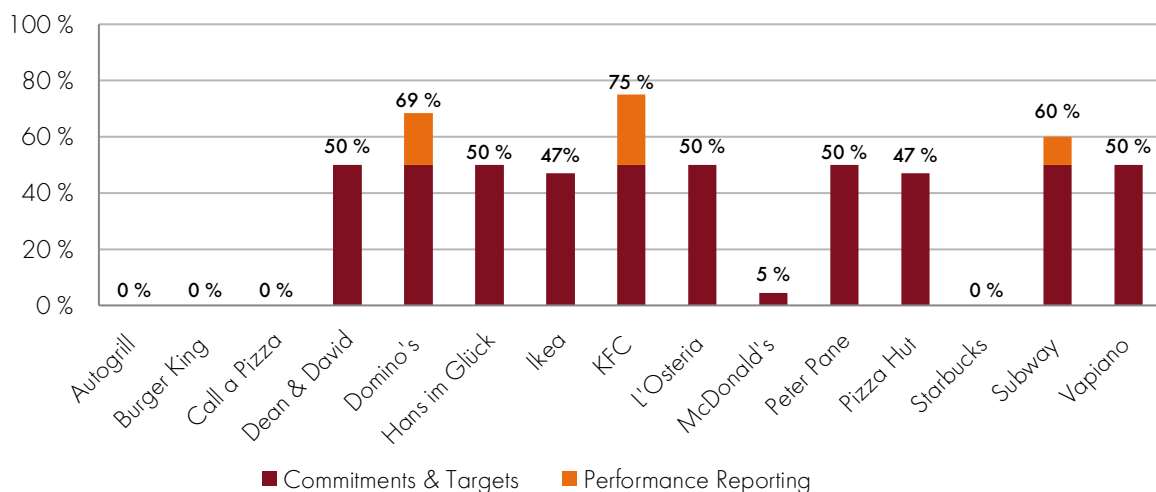
### Results of the German companies at a glance

In Germany, three companies received tier 3: KFC, Domino's and Subway. For KFC, this means a change for the worse compared with last year, while Domino's and Subway were able to move up by one tier. However, a standstill can be observed for the majority of companies: A lot of them scored only 50% of the points or less, and four of them even a flat 0% (Autogrill, Burger King, Call a Pizza and Starbucks).

Regarding the »Commitments & Targets« pillar, eight companies scored 100%: KFC, Domino's, Subway, Dean & David, Hans im Glück, L'Osteria, Peter Pane and Vapiano. These companies have pledged to implement all criteria of the ECC by 2026. IKEA and Pizza Hut have the same goal, but only score 94% as a result of insufficient public communication. At the other end of the scale is McDonald's, which scores a mere 5%, and the remaining companies assessed (Autogrill, Burger King, Call a Pizza and Starbucks), with 0%.

Regarding the »Performance Reporting« pillar, only three German companies scored at all. The best performer here is KFC, with a score of 50%.

Figure: Results for the German market



## Scoring overview: Germany

Company	Overall score %	Overall score tier	Overall score grade	Commitments & Targets %	Commitments & Targets tier	Commitments & Targets grade	Performance Reporting %	Performance Reporting tier	Performance Reporting grade
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor
	69%	3	Making progress	100%	1	Leading	37%	5	Poor
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	75%	3	Making progress	100%	1	Leading	50%	4	Getting started
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor
	5%	6	Very poor	9%	6	Very poor	0%	6	Very poor
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	60%	3	Making progress	100%	1	Leading	20%	6	Very poor
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor



## Results of the German companies in detail

### KFC

KFC scores highest in the ranking. However, the 75% it achieved in the overall ranking is only enough for tier 3, a step backwards compared with last year's ranking, when it still received tier 2 with 79%. The reduced score is due to a lower share of the supply chain complying with the ECC. KFC fully supports the ECC, but it is unfortunate that it now only scores 50% for »Performance Reporting«—which is 7 percentage points less than last year.

### Domino's

Domino's is closing in on KFC, with an overall score of 69%. The company takes the ECC seriously and acknowledges it as an integral part of its sustainability strategy. Domino's has pledged to fully adhere to the criteria of the ECC by 2026. In terms of implementation, Domino's has progressed from 17% to 37% since 2022. Overall, the company receives tier 3 (»Making Progress«), thereby moving up by one tier compared to last year.

### Subway

With an overall score of 60%, Subway reaches tier 3, thus also moving up by one tier. The company has made a full pledge to the ECC, but there is still considerable room for improvement in terms of implementation and reporting, with only 20% of the possible points. On a positive note, two years after joining the ECC, Subway has now submitted their first progress report.

### Dean & David

Dean & David is a newcomer in this year's ranking, receiving only tier 4 (»Getting Started«), with an overall score of 50%. Unfortunately, the full score in the »Commitments & Targets« pillar contrasts with 0% for »Progress Reporting«. The company had already become a member of the ECC in April 2020, but has since neglected to publish a detailed public report on their other progress.

### Hans im Glück

Hans im Glück presents the same as Dean & David: It also committed to the ECC back in 2020 and has yet to demonstrate any progress in the implementation of the criteria. Thus, with an overall score of 50%, Hans im Glück, also only reaches tier 4.





## L'Osteria

L'Osteria joined the ECC in 2022, but has not submitted a progress report yet. 100% on pillar 1 and 0% on pillar 2 result in an overall score of 50%. This is only enough for tier 4, meaning that the company was unable to improve its performance compared with the previous ranking.

## Peter Pane

Peter Pane also makes it to tier 4 only. Although the company is part of the ranking for the first time this year, it has already been a member of the ECC since 2019. However, Peter Pane only provides very vague information about its progress and thus cannot score in »Performance Reporting« at all.

## Vapiano

Vapiano has only recently joined the ECC and has not yet submitted a report, so its tier 4 ranking (at 50%) comes as no surprise.

## Pizza Hut

The series of tier 5 (»Poor«) companies is opened by Pizza Hut, with an overall score of 47%. This means that the company has fallen back by one tier. Since Pizza Hut does not publicly communicate its commitment to consumers in Germany, it does not receive the full score here. Although the company has already committed to the ECC in 2019, not a single progress report has been published. It therefore seems like Pizza Hut has so far not taken any concrete steps towards higher animal welfare standards and hence receives 0% in this part.

## IKEA

IKEA scores 47% in the overall rating, thereby falling back to tier 5. The company receives only 94% for its »Commitments & Targets« pillar because it does not make its commitment apparent to German-speaking customers on the relevant websites. IKEA does state that 55% of its chicken meat used worldwide meet some of the Commitment's criteria—but it is unclear which regions and which criteria this figure refers to, as IKEA does not establish supply chain transparency here.

## Autogrill

Autogrill—another newcomer to the ranking—enters at the lowest level, with an overall score of 0%.



## Burger King

Nothing has changed at Burger King: The overall score remains at 0%, just like last year. The company still does not specify any standards for chicken farming in Germany, whereas it has committed to implementing the criteria in other countries such as the US, Canada and the UK. In France, Burger King published a pledge last year that includes the same criteria as the ECC.

## Call a Pizza

Call a Pizza also appears to have zero interest in improved chicken farming. There are no published standards available. The company therefore also receives tier 6, with 0%.

## McDonald's

With an overall rating of 5%, McDonald's receives the lowest tier 6 (»Very Poor«). This score is derived from a value of 9% for »Commitments & Targets« and 0% for »Progress Reporting«. McDonald's has made rudimentary commitments to improve certain aspects of chicken farming. However, the criteria set by McDonalds fall short of those in the ECC, which, after all, are a set of minimal requirements, co-developed by veterinarians, to tackle the absolute worst problems in broiler welfare. In the previous ranking, McDonald's had still scored 17% on the reporting part: In 2022, the company had publicly stated that it would no longer be using cages—this statement can no longer be found.

## Starbucks

Starbucks also receives tier 6, with 0%. The company has not made a commitment to the ECC in Germany, lagging behind its own standards in the UK, the US and Canada.





## The Pecking Order 2023: Deutschland

Deutsche Systemgastronomen erreichen mit einer durchschnittlichen Gesamtbewertung von 37 % die höchsten Werte im **Masthuhn-Report**. Die folgenden 15 Unternehmen wurden auf dem deutschen Markt bewertet:



dean & david



# Key insights: Deutschland

- Seit dem Report 2022 haben sich nur drei Unternehmen verbessert.
- Nur ein Fünftel der in Deutschland untersuchten Unternehmen zeigt sichtbare Anstrengungen hin zu einer tatsächlichen Verbesserung der Masthuhn-Haltung.
- Zu viele in Deutschland aktive Unternehmen ziehen sich immer noch aus der Verantwortung für ihre Lieferketten und lassen mit dem Commitment zur Europäischen Masthuhn-Initiative (MHI) auf sich warten.

In Deutschland erreichen die Unternehmen im Masthuhn-Report im Schnitt 66 % im Bereich »Selbstverpflichtungen und Ziele« und 7 % im Bereich »Umsetzung und Berichterstattung«. Mit einer durchschnittlichen Gesamtbewertung von 37 % erzielen sie im Ländervergleich die höchsten Werte und liegen vor den Unternehmen in Frankreich (Gesamtergebnis: 36 %) und Spanien (23 %). Betrachtet man nur die sechs Unternehmen, die in allen untersuchten Ländern aktiv sind (Burger King, KFC, IKEA, McDonald's, Starbucks und Subway), liegen die Ergebnisse von Deutschland (37 %) ebenfalls vor Frankreich (31 %) - allerdings muss hier beachtet werden, dass dort eine zusätzliche Anforderung zum Freilauf mit in die Bewertung einfließt.

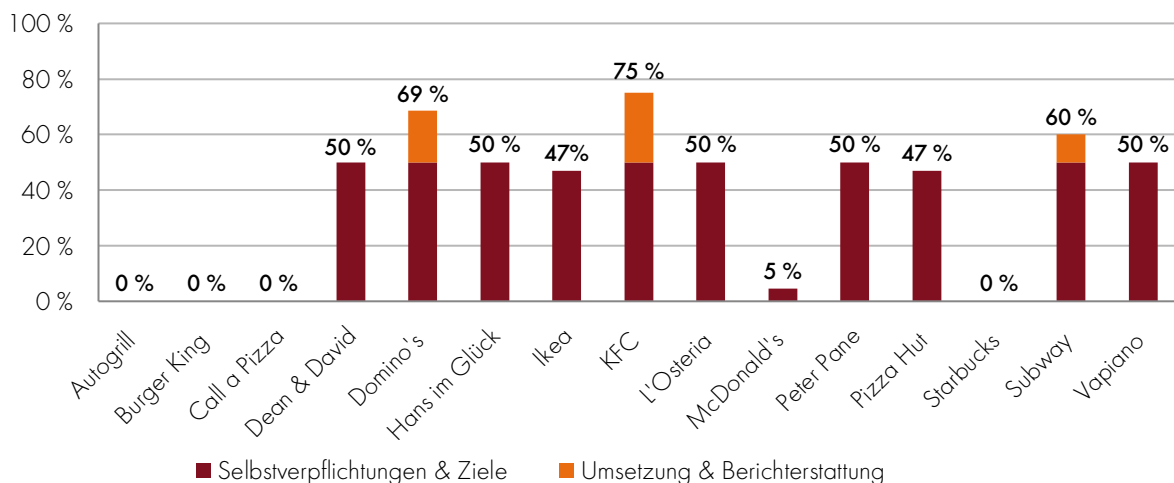
## Ergebnisse der deutschen Unternehmen im Überblick

In Deutschland landen drei Unternehmen auf Stufe 3: KFC, Domino's und Subway. Für KFC bedeutet das eine Verschlechterung im Vergleich zum Vorjahr, während Domino's und Subway eine Stufe aufsteigen konnten. Bei der Mehrheit der Unternehmen ist jedoch ein Stillstand zu beobachten: Viele Unternehmen erhielten nur 50 % der Punkte oder weniger, vier sogar 0 % (Autogrill, Burger King, Call a Pizza und Starbucks).

Im Bereich »Selbstverpflichtungen und Ziele« erreichen acht Unternehmen 100 %: KFC, Domino's, Subway, Dean & David, Hans im Glück, L'Osteria, Peter Pane und Vapiano. Diese Unternehmen haben es sich zur Aufgabe gemacht, alle Kriterien der MHI bis 2026 umzusetzen. IKEA und Pizza Hut haben zwar die gleiche Zielsetzung, kommen aber aufgrund von Mängeln in der Außenkommunikation nur auf 94 %. Am anderen Ende der Skala erhält McDonald's gerade einmal 9 % und die verbleibenden untersuchten Unternehmen (Autogrill, Burger King, Call a Pizza und Starbucks) 0 %.

Im Bereich »Umsetzung und Berichterstattung« können nur drei Unternehmen in Deutschland Punkte sammeln. Am besten schneidet hier KFC mit 50 % ab.

Figure: Ergebnisse für den deutschen Markt



## Ergebnisse im Überblick: Deutschland

Unternehmen	Gesamtwertung %	Gesamtwertung Stufe	Gesamtwertung Urteil	Selbstverpflichtungen & Ziele %	Selbstverpflichtungen & Ziele Stufe	Selbstverpflichtungen & Ziele Urteil	Umsetzung & Berichterstattung %	Umsetzung & Berichterstattung Stufe	Umsetzung & Berichterstattung Urteil
	0%	6	Sehr schlecht	0%	6	Sehr schlecht	0%	6	Sehr schlecht
	0%	6	Sehr schlecht	0%	6	Sehr schlecht	0%	6	Sehr schlecht
	0%	6	Sehr schlecht	0%	6	Sehr schlecht	0%	6	Sehr schlecht
	50%	4	Erste Schritte	100%	1	Führend	0%	6	Sehr schlecht
	69%	3	Verbesserungen	100%	1	Führend	37%	5	Schlecht
	50%	4	Erste Schritte	100%	1	Führend	0%	6	Sehr schlecht
	47%	5	Schlecht	94%	1	Führend	0%	6	Sehr schlecht
	75%	3	Verbesserungen	100%	1	Führend	50%	4	Erste Schritte
	50%	4	Erste Schritte	100%	1	Führend	0%	6	Sehr schlecht
	5%	6	Sehr schlecht	9%	6	Sehr schlecht	0%	6	Sehr schlecht
	50%	4	Erste Schritte	100%	1	Führend	0%	6	Sehr schlecht
	47%	5	Schlecht	94%	1	Führend	0%	6	Sehr schlecht
	0%	6	Sehr schlecht	0%	6	Sehr schlecht	0%	6	Sehr schlecht
	60%	3	Verbesserungen	100%	1	Führend	20%	6	Sehr schlecht
	50%	4	Erste Schritte	100%	1	Führend	0%	6	Sehr schlecht





## Ergebnisse der deutschen Unternehmen im Detail

### Kentucky Fried Chicken

KFC erreicht im Ranking die höchste Punktzahl. Die 75 % in der Gesamtwertung reichen jedoch nur für Stufe 3. Dieser Rückschritt im Vergleich zum letztjährigen Ranking, in dem KFC noch mit 79 % auf Stufe 2 gelandet ist, kommt durch einen geringeren MHI-Anteil der Lieferkette zustande. KFC unterstützt die MHI vollumfänglich. Es ist jedoch bedauerlich, dass KFC im Bereich »Umsetzung und Berichterstattung« nur noch 50 % erreicht – das sind 7 Prozentpunkte weniger als im letzten Jahr.

### Domino's

Domino's ist KFC mit einem Gesamtergebnis von 69 % dicht auf den Fersen. Das Unternehmen nimmt die MHI ernst und begreift sie als integralen Bestandteil seiner Nachhaltigkeitsstrategie. Domino's hat sich verpflichtet, die Kriterien der MHI bis 2026 vollständig umzusetzen. Bei der Umsetzung hat sich Domino's von 17 % auf 37 % verbessert. Insgesamt landet das Unternehmen auf Stufe 3 (»Sichtbare Verbesserungen«) und macht damit im Vergleich zum letzten Jahr eine Stufe gut.

### Subway

Subway landet mit einer Gesamtwertung von 60 % auf Stufe 3 und verbessert sich damit ebenfalls um eine Stufe. Das Unternehmen hat eine umfängliche Selbstverpflichtung zur MHI abgegeben, bei der Umsetzung und Berichterstattung gibt es mit erst 20 % der möglichen Punkte jedoch noch deutlich Luft nach oben. Positiv wirkt sich aus, dass Subway nun, zwei Jahre nach seinem Beitritt zur Initiative, erstmals einen Fortschrittsbericht vorgelegt hat.

### Dean & David

Dean & David ist dieses Jahr ein Neuzugang im Masthuhn-Ranking und belegt mit einem Gesamtergebnis von 50 % nur die Stufe 4 (»Erste Schritte«). Einem Wert von 100 % bei »Selbstverpflichtungen und Ziele« stehen 0 % bei der Umsetzung gegenüber. Das Unternehmen ist bereits seit April 2020 Mitglied der MHI, hinkt aber seitdem mit der Veröffentlichung eines detaillierten öffentlichen Reports über umgesetzte Maßnahmen oder sonstige Fortschritte hinterher.

### Hans im Glück

Bei Hans im Glück zeigt sich ein ähnliches Bild wie bei Dean & David: Das Unternehmen hat sich ebenfalls bereits im Jahr 2020 verpflichtet, die Kriterien der MHI umzusetzen, kann aber genauso wenig Fortschritte in der Umsetzung durch einen detaillierten Bericht vorweisen. Mit einem Gesamtergebnis von 50 % landet Hans im Glück daher ebenfalls nur auf Stufe 4.



## **L'Osteria**

L'Osteria ist seit 2022 bei der MHI dabei, hat aber noch keinen Bericht über die Umsetzung vorgelegt. 100 % im Bereich 1 und 0 % im Bereich 2 ergeben ein Gesamtergebnis von 50 %. Das reicht nur für Stufe 4. Damit konnte das Unternehmen im Vergleich zum letzten Ranking nicht verbessern.

## **Peter Pane**

Auch Peter Pane schafft es nur auf Stufe 4. Das Unternehmen ist zwar dieses Jahr zum ersten Mal im Ranking vertreten, aber bereits seit 2019 Mitglied der MHI. Peter Pane informiert allerdings nur sehr vage über die Fortschritte und kann damit im Bereich »Umsetzung und Berichterstattung« nicht punkten.

## **Vapiano**

Vapiano ist der MHI erst vor Kurzem beigetreten und hat noch keinen Bericht vorgelegt, daher ist eine Platzierung auf Stufe 4 (mit 50 %) nicht überraschend.

## **Pizza Hut**

Die Stufe 5 (»Schlecht«) wird von Pizza Hut mit einem Gesamtergebnis von 47 % eröffnet. Damit hat sich das Unternehmen um eine Stufe verschlechtert. Da Pizza Hut seine Selbstverpflichtung in Deutschland nicht öffentlich an die VerbraucherInnen kommuniziert, gibt es hier nicht die volle Punktzahl. Obwohl das Unternehmen sich schon im Jahr 2019 zur MHI verpflichtet hat, liegt noch kein einziger Bericht über den Fortschritt der Umsetzung vor. Offenbar hat Pizza Hut also noch keine konkreten Schritte zu höheren Tierschutzstandards unternommen und bekommt deshalb in diesem Bereich 0 %.

## **IKEA**

IKEA erreicht in der Gesamtwertung 47 % und rutscht damit auf Stufe 5 ab. Das Unternehmen bekommt für seine »Selbstverpflichtungen und Ziele« lediglich 94 %, denn es macht sein Commitment nicht für die deutschsprachigen Kunden auf den relevanten Webseiten erkennbar. IKEA gibt zwar an, dass 55 % seines weltweit genutzten Hühnerfleischs einigen den Kriterien der Initiative entsprechen – jedoch ist unklar, auf welche Regionen und welche Kriterien sich diese Zahl bezieht, da IKEA hier keine Lieferkettentransparenz herstellt.

## **Autogrill**

Autogrill – ein weiterer Neuzugang im Masthuhn-Ranking – steigt mit einer Gesamtwertung von 0 % auf der schlechtesten Stufe ein.



## Burger King

Bei Burger King hat sich nichts geändert: Die Gesamtwertung bleibt wie im letzten Jahr bei 0 %. Das Unternehmen gibt in Deutschland keinerlei Standards für die Hühnerhaltung vor, während es sich in anderen Ländern wie den USA, Kanada und Großbritannien zur Umsetzung der Kriterien verpflichtet hat. In Frankreich hat Burger King im letzten Jahr eine Selbstverpflichtung veröffentlicht, die dieselben Kriterien wie die MHI beinhaltet.

## Call a Pizza

Auch bei Call a Pizza scheint es kein Interesse an einer verbesserten Hühnerhaltung zu geben. Es gibt keine veröffentlichten Standards. Das Unternehmen landet daher mit 0 % ebenfalls auf Stufe 6.

## McDonald's

Mit einer Gesamtwertung von 5 % landet McDonald's auf der letzten Stufe 6 (»Sehr schlecht«). Die Wertung ergibt sich aus einem Wert von 9 % für die Selbstverpflichtungen und Ziele und 0 % für die Umsetzung. McDonald's hat zwar rudimentäre Verpflichtungen zur verbesserten Haltung von Masthühnern abgegeben, allerdings stehen diese bei Weitem nicht in Einklang mit den Anforderungen der MHI, die unter anderem von Veterinären entwickelte Mindestanforderungen darstellen. Im letzten Ranking hatte McDonald's hier noch 17 % erreicht: 2022 hatte das Unternehmen öffentlich angegeben, keine Käfige mehr zu nutzen – diese Angabe ist heute nicht mehr auffindbar.

## Starbucks

Auch Starbucks steht mit 0 % auf Stufe 6. Das Unternehmen hat in Deutschland keine Verpflichtung zur MHI abgegeben und hinkt damit den eigenen Standards in Großbritannien, den USA und Kanada hinterher.





## The Pecking Order 2023: Italy

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2023, it has expanded the range of European countries where companies are assessed in order to provide a better Europe-wide overview of companies' commitments and progress.

TPO represents a crucial tool for providing an objective assessment of companies based on specific criteria. The criteria for TPO assessment are based on the European Chicken Commitment (ECC), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2023 conducted 69 assessments covering the markets of France, Germany, **Italy**, Poland, Romania and Spain. The following companies have been assessed in the Italian market:



In order to encourage public commitments as well as their impact on farm, TPO’s company evaluation is organized under two pillars:



### Pillar 1 – Commitments & Targets

This score reflects whether a company has any form of broiler welfare policy as well as the scope and completeness of a company’s time-bound commitment to the ECC criteria. Assessments were made on whether the company has published a commitment to: avoid cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.



### Pillar 2 – Performance Reporting

This score reflects the extent to which a company is reporting progress against each of the elements of the ECC. Assessments were made on the company’s performance on each specific ECC criteria: avoidance of cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.

These two pillars combine, with equal weighting, for an overall percentage score, which is translated into overall tiers and grades to give an indication of where companies sit in their journey.

Tier	Grade	Percentage bands
6	Very poor	0-25
5	Poor	26-49
4	Getting started	50-59
3	Making progress	60-75
2	Good	76-85
1	Leading	86-100



## Key results: Italy

- **Italy lags behind France, Germany and Spain**

Among the countries analysed, companies in France and Germany score on average almost twice as high as in Italy, which is lagging behind both in terms of public commitments and progress made.

- **Still few commitments to improve broiler chicken welfare**

Only two of the seven companies assessed in Italy have published a commitment to eliminate the most pressing welfare issues for broilers from their supply chains.

- **Nearly half of Italian companies drops in rating**

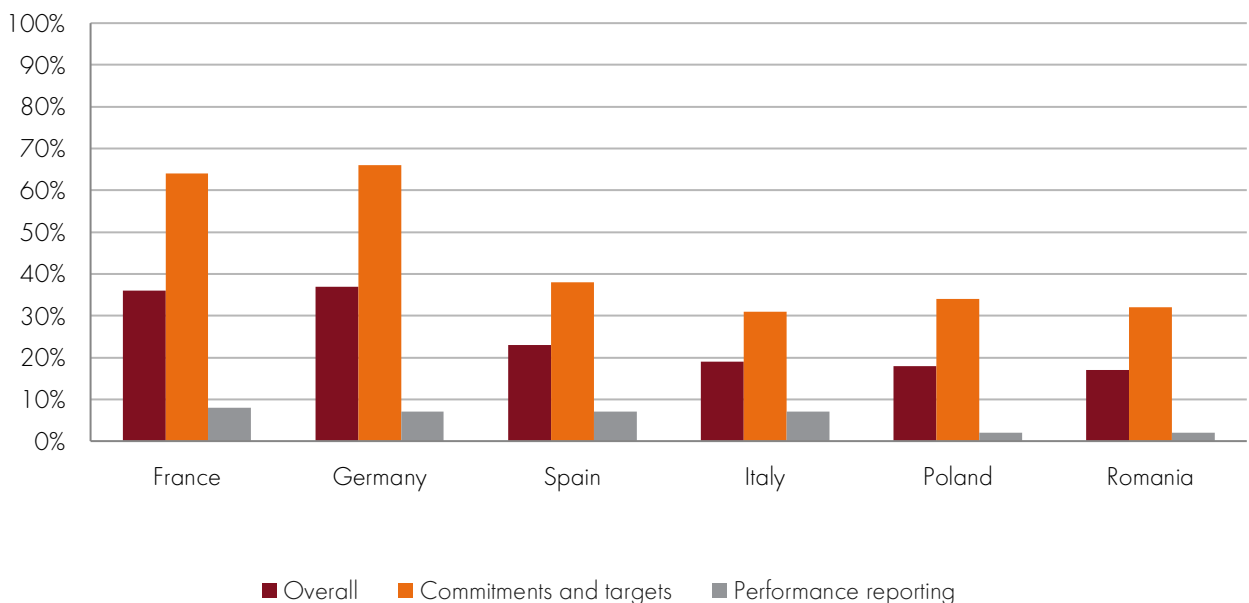
None of the companies assessed in Italy improves in the score compared to TPO 2022 and as many as three score lower than last year.

### Italy's comparison with the other countries

A data that stands out in TPO 2023 is that companies operating in Germany and France take the welfare of broiler chickens much more into account than the other countries analysed. Indeed, their performance differs significantly when it comes to both public commitments and progress reporting.

The average overall score of companies in Germany and France is respectively 37% and 36%, followed by Spain with 23%, Italy with 19%, Poland at 18% and Romania with 17%. The percentage of companies that have published a commitment aligned to the ECC also varies significantly with 73% of companies in France, 67% in Germany, 37% in Spain and only 29% in Italy. As it is happening with retailers, the Italian food service sector also lags behind other European countries in addressing critical welfare issues for broilers.

Comparison of 2023 average Overall and Pillar scores by country

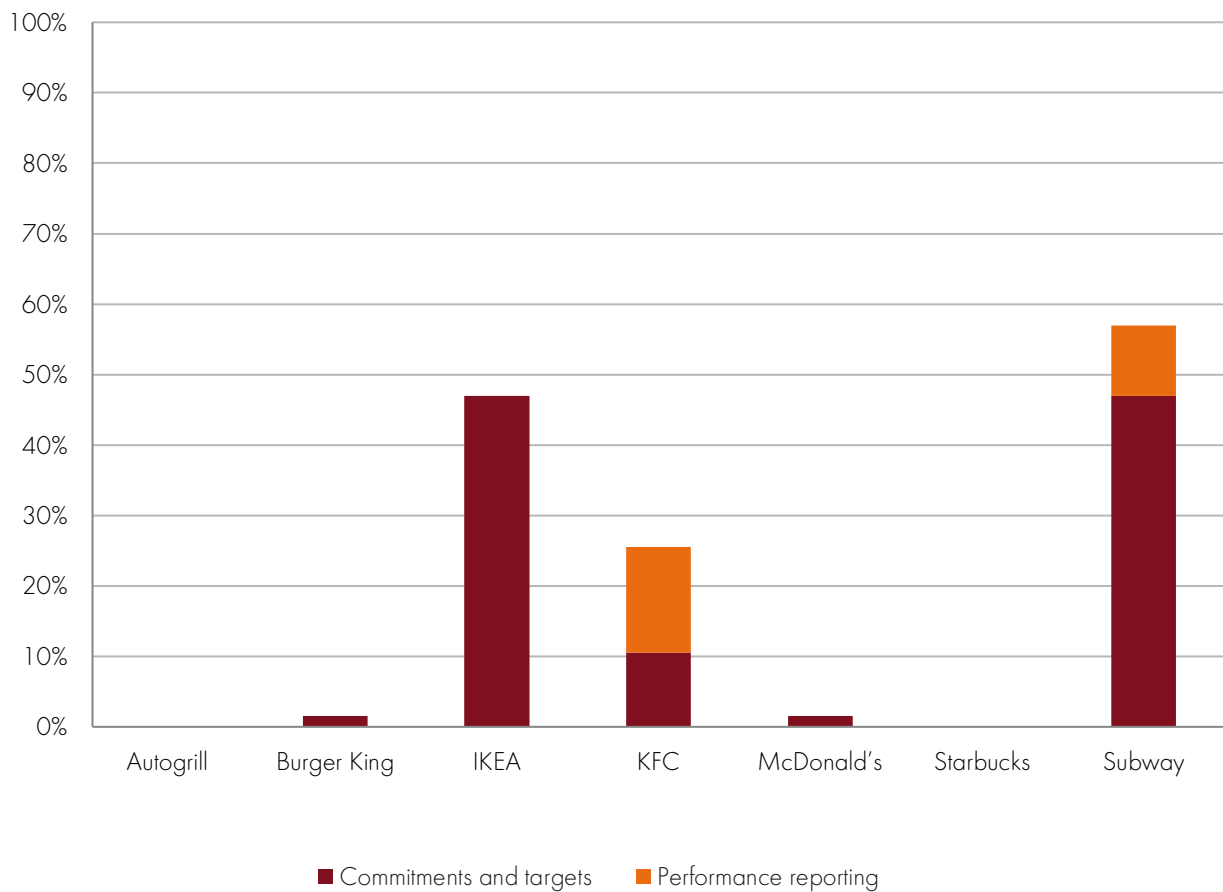


## Broiler welfare still remains at the margins of company policies

Of the seven companies assessed in Italy, only two (IKEA and Subway) have published a commitment to eliminate all major broiler welfare issues from their supply chains. The other five (Autogrill, Burger King, KFC, McDonald's and Starbucks) have made no public commitments so far, not even on the most crucial criteria such as reducing stocking densities and transitioning to breeds with better welfare outcomes.








Furthermore, looking at how companies in Italy report on progress, the scenario gets even worse, as all seven either have no reporting or progress is too limited to be meaningful. This results in Italian companies placing in the lower tiers of the benchmark with poor or very poor scores.

Overall score by companies in Italy





## Scoring overview: Italy

Company	Overall score %	Overall score tier	Overall score grade	Commitments & Targets %	Commitments & Targets tier	Commitments & Targets grade	Performance Reporting %	Performance Reporting tier	Performance Reporting grade
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very poor
	2%	6	Very Poor	3%	6	Very Poor	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	26%	5	Poor	21%	6	Very Poor	30%	5	Poor
	2%	6	Very Poor	3%	6	Very Poor	0%	6	Very poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very poor
	57%	4	Getting Started	94%	1	Leading	20%	6	Very poor

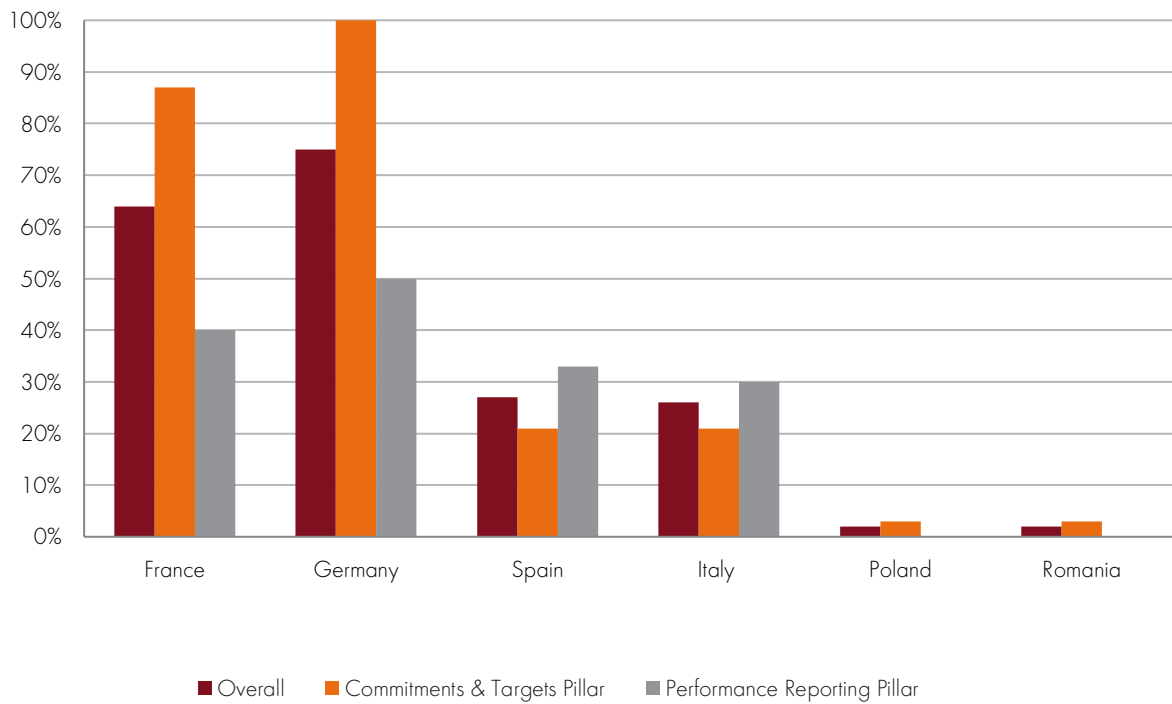


## Almost half of the companies score lower than 2022

Three of the seven companies assessed (IKEA, KFC and McDonald's) significantly worsened their overall score compared to TPO 2022. McDonald's reduced score (20% in 2022 vs. 2% in 2023) is mainly due to the disappearance of the public commitment to phase out cages and multitier systems from their supply chains, while IKEA's (67% in 2022 vs. 47% in 2023) and KFC's (44% in 2022 vs. 26% in 2023) are related to a step backwards in their progress reporting.

KFC Italy case is particularly emblematic, not only because it shows a real regression in the progress made compared to TPO 2022, but also because of the strong dishomogeneity of the policies and practices implemented in different countries. KFC has committed to meet the ECC in France and Germany, while this commitment is completely missing in Spain, Poland, Romania and Italy. In addition to this, in TPO 2023 KFC Italy has taken a strong step backwards on some important criteria: for instance, the percentage of broilers effectively stunned in gas systems has decreased from 57.85% to 25.03% and the percentage of broilers reared at stocking densities lower than 30 kg/m<sup>2</sup> has dropped to 0.

KFC Overall and per pillar scores by countries





## The Pecking Order 2023: Italia

Dal 2019, The Pecking Order (TPO) analizza le comunicazioni delle più importanti aziende di fast-food e ristorazione per valutare come affrontano il benessere dei polli allevati nelle loro filiere. Nel 2023, TPO ha ampliato il numero di Paesi europei analizzati, in modo da fornire una panoramica migliore e più dettagliata.

TPO è uno strumento cruciale per fornire una valutazione obiettiva delle aziende basata su criteri precisi. I criteri di valutazione, infatti, si basano sulla richiesta dello European Chicken Commitment (ECC), sviluppata per stare al passo con le più recenti ricerche scientifiche e affrontare i problemi più urgenti per il benessere dei polli.

Per la stesura del report 2023 sono state valutate 69 aziende, operanti in Francia, Germania, **Italia**, Polonia, Romania e Spagna. Per quanto riguarda il mercato italiano, sette sono state quelle analizzate:



Allo scopo di incoraggiare non solo la pubblicazione di impegni, ma anche l'implementazione delle buone pratiche in allevamento, la valutazione delle aziende è organizzata su due pilastri:



### Pilastro 1 – Impegni e obiettivi

Valuta se l'azienda ha una politica pubblica sul benessere dei polli, il suo ambito di applicazione e la completezza degli impegni presi rispetto ai criteri dell'ECC. Si analizza se sono stati pubblicati obiettivi temporali precisi in merito a: eliminazione di gabbie/sistemi multipiano, presenza di arricchimenti ambientali, uso di razze a crescita più lenta, limitazione delle densità, stordimento efficace e verifiche di un ente terzo.



### Pilastro 2 – Comunicazione dei progressi

Valuta la misura in cui un'azienda sta effettivamente implementando gli standard migliorativi dell'ECC. Si analizza se e come sono comunicati i progressi fatti in relazione a ciascuno dei criteri: eliminazione di gabbie/sistemi multipiano, presenza di arricchimenti ambientali, uso di razze a crescita più lenta, limitazione delle densità, stordimento efficace e verifiche di un ente terzo.

Facendo la media delle valutazioni ottenute in ciascun pilastro, alle aziende viene assegnato un punteggio complessivo, sulla base del quale vengono poi classificate in diversi livelli che descrivono la fase del percorso di miglioramento in cui si trova ciascuna azienda:

Livello	Valutazione	Punteggi percentuali
6	Molto scarso	0-25
5	Scarso	26-49
4	Miglioramento iniziato	50-59
3	Progressi in corso	60-75
2	Buoni progressi	76-85
1	In testa al cambiamento	86-100



## Risultati principali: Italia

- **L'Italia rimane indietro rispetto a Francia, Germania e Spagna**

Tra i Paesi analizzati, le aziende che operano in Francia e Germania raggiungono in media quasi il doppio del punteggio registrato in Italia, distaccandosi sia per quanto riguarda la pubblicazione di impegni sia per i progressi avviati.

- **Ancora pochi impegni a garantire un migliore benessere animale ai polli**

Solo due delle sette aziende analizzate in Italia hanno pubblicato un impegno a eliminare dalle proprie filiere le problematiche principali di benessere dei polli.

- **Quasi la metà delle aziende italiane scende nella valutazione**

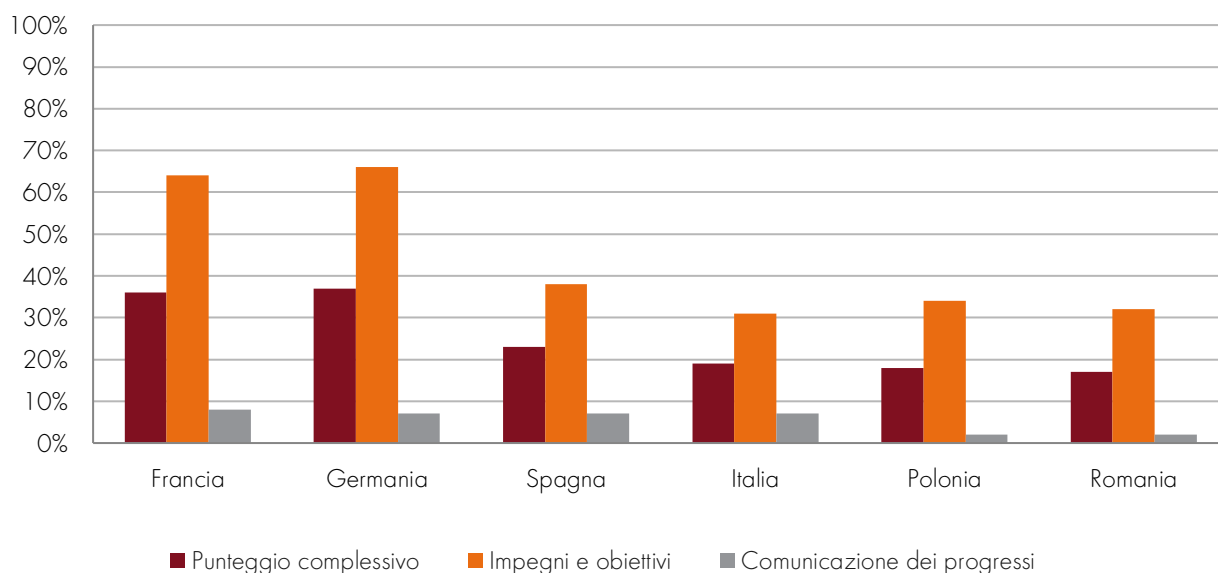
Nessuna delle aziende analizzate in Italia migliora nella valutazione rispetto a TPO 2022 e ben tre registrano punteggi più bassi rispetto all'anno passato.

### L'Italia a confronto con gli altri Paesi analizzati

Un dato che emerge in maniera chiara da TPO 2023 è che le aziende operanti in Germania e Francia prendono molto più in considerazione il benessere dei polli di quanto fatto negli altri Paesi analizzati. Le loro performance, infatti, si distaccano nettamente sia per quanto riguarda la pubblicazione di impegni che la comunicazione dei progressi fatti.

Il punteggio medio complessivo registrato dalle aziende in Germania e Francia è, rispettivamente, 37% e 36%, seguono la Spagna con il 23%, l'Italia con il 19%, Polonia con il 18% e Romania con il 17%. Anche la percentuale di aziende che hanno pubblicato un impegno a rispettare i criteri dell'ECC varia significativamente: 73% in Francia, 67% in Germania, 37% in Spagna e solo 29% in Italia. Come sta accadendo nella grande distribuzione, quindi, anche nel settore della ristorazione l'Italia resta indietro rispetto agli altri Paesi europei nell'affrontare le criticità di allevamento dei polli.

### Confronto del punteggio medio complessivo e per ciascun pilastro nei diversi Paesi

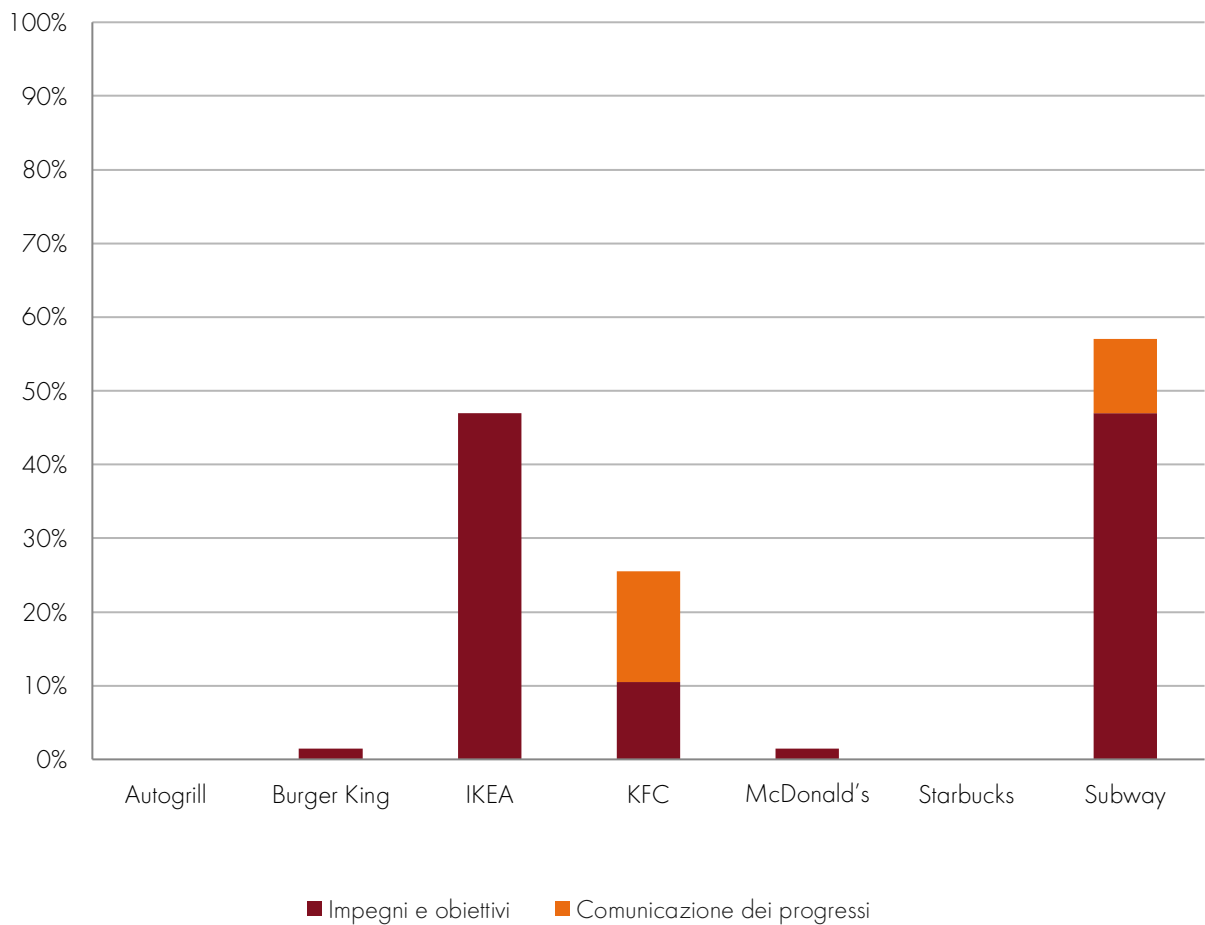


## Il benessere dei polli rimane ancora ai margini delle politiche aziendali




Delle sette aziende analizzate per l'Italia, solo due (IKEA e Subway) hanno pubblicato un impegno a eliminare tutte le problematiche principali di benessere dei polli. Le altre cinque (Autogrill, Burger King, KFC, McDonald's e Starbucks) non hanno invece assunto nessun impegno pubblico, neanche sui criteri più importanti come la riduzione delle densità e la transizione a razze con migliori indicatori di benessere animale.

Guardando a come le aziende in Italia comunicano i progressi fatti finora, lo scenario peggiora ulteriormente, già che tutte sette o non hanno comunicazioni a proposito o i progressi sono troppo limitati per risultare significativi. Il risultato è che le aziende italiane si collocano nei livelli più bassi della classificazione con punteggi scarsi o molto scarsi.

Punteggi complessivi registrati in Italia dalle singole aziende



## Panoramica dei punteggi: Italia

Azienda	Punteggio complessivo	Livello complessivo	Valutazione complessiva	Impegni & Obiettivi %	Impegni & Obiettivi Livello	Impegni & Obiettivi Valutazione	Comunicazione progressi %	Comunicazione progressi Livello	Comunicazione progressi Valutazione
	0%	6	Molto scarso	0%	6	Molto scarso	0%	6	Molto scarso
	2%	6	Molto scarso	3%	6	Molto scarso	0%	6	Molto scarso
	47%	5	Scarso	94%	1	In testa al cambiamento	0%	6	Molto scarso
	26%	5	Scarso	21%	6	Molto scarso	30%	5	Scarso
	2%	6	Molto scarso	3%	6	Molto scarso	0%	6	Molto scarso
	0%	6	Molto scarso	0%	6	Molto scarso	0%	6	Molto scarso
	57%	4	Miglioramento iniziato	94%	1	In testa al cambiamento	20%	6	Molto scarso



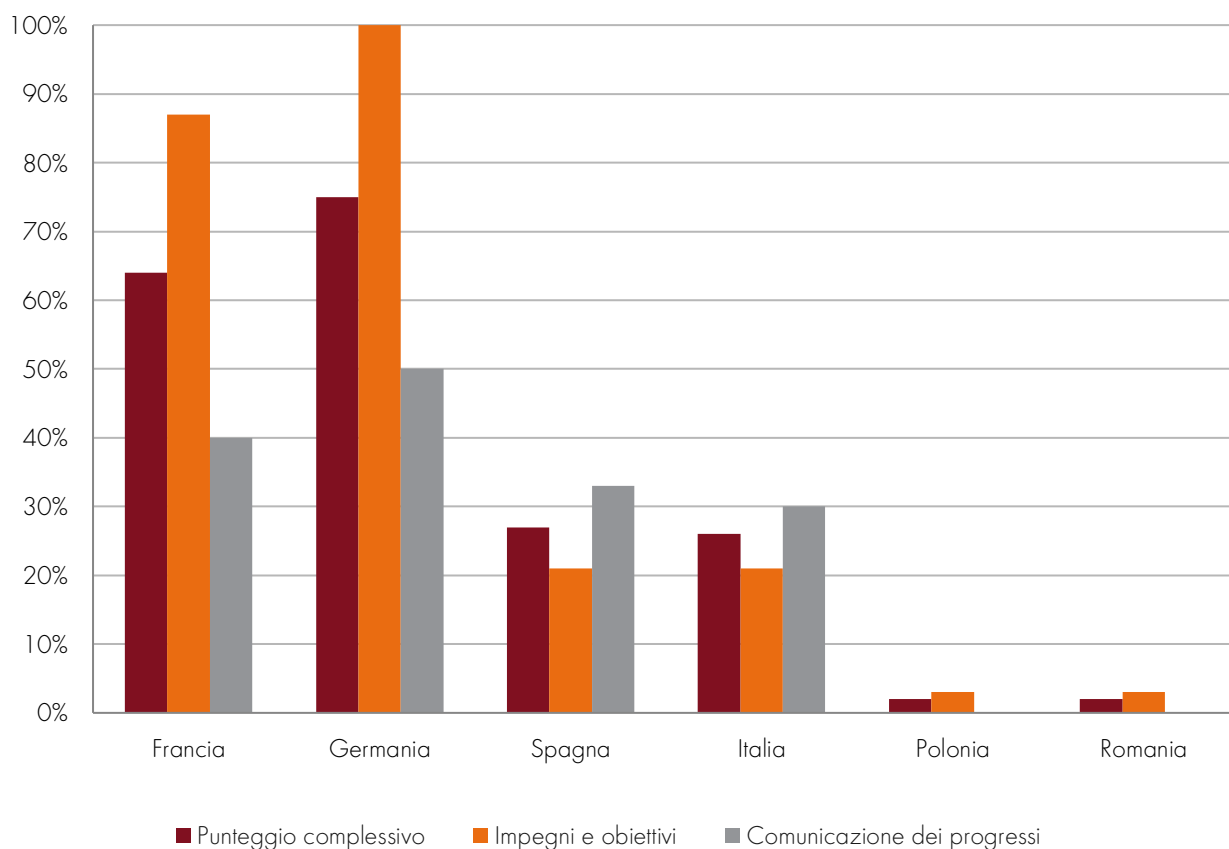


## Quasi metà delle aziende ottiene un punteggio più basso che nel 2022

Tre delle sette aziende analizzate (IKEA, KFC e McDonald's) peggiorano significativamente il proprio punteggio complessivo rispetto al TPO 2022. Nel caso di McDonald's (20% nel 2022 vs 2% nel 2023) la riduzione è dovuta prevalentemente alla scomparsa dell'impegno pubblico a eliminare gabbie e sistemi multipiano dalle loro filiere, mentre la valutazione negativa di IKEA (67% nel 2022 vs 47% nel 2023) e KFC (44% nel 2022 vs 26% nel 2023) è legata a un passo indietro nella comunicazione dei progressi fatti.

Risulta particolarmente emblematico il caso di KFC Italia, non solo perché mostra una effettiva regressione dei progressi fatti rispetto a TPO 2022, ma anche per la forte disomogeneità tra le politiche e le pratiche attuate nei diversi Paesi. KFC si è infatti impegnato a rispettare l'ECC in Francia e Germania, mentre manca completamente questo tipo di impegno in Spagna, Polonia, Romania e, ovviamente, Italia. Per quanto riguarda in particolare KFC Italia, inoltre, tra TPO 2022 e TPO 2023 si osserva un forte passo indietro su alcuni parametri importanti: ad esempio, la percentuale di polli storditi in maniera efficace in sistemi a gas diminuisce dal 57,85% al 25,03% e scende a 0 la percentuale di polli allevati con densità inferiori a 30 kg/m<sup>2</sup>.

**Punteggi complessivi e per pilastro di KFC nei diversi Paesi analizzati**





## The Pecking Order 2023: Poland

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2023 it evaluated six European markets, marking the inclusion of Poland as one of the most important players in Europe's broiler chicken industry. This report provides an overview of the Polish fast-food industry's status and offers potential avenues for improvement.

The criteria for TPO are based on the [European Chicken Commitment](#) (ECC), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2023 conducted 69 assessments covering the markets of France, Germany, Italy, **Poland**, Romania and Spain. The following companies have been assessed in the Polish market:



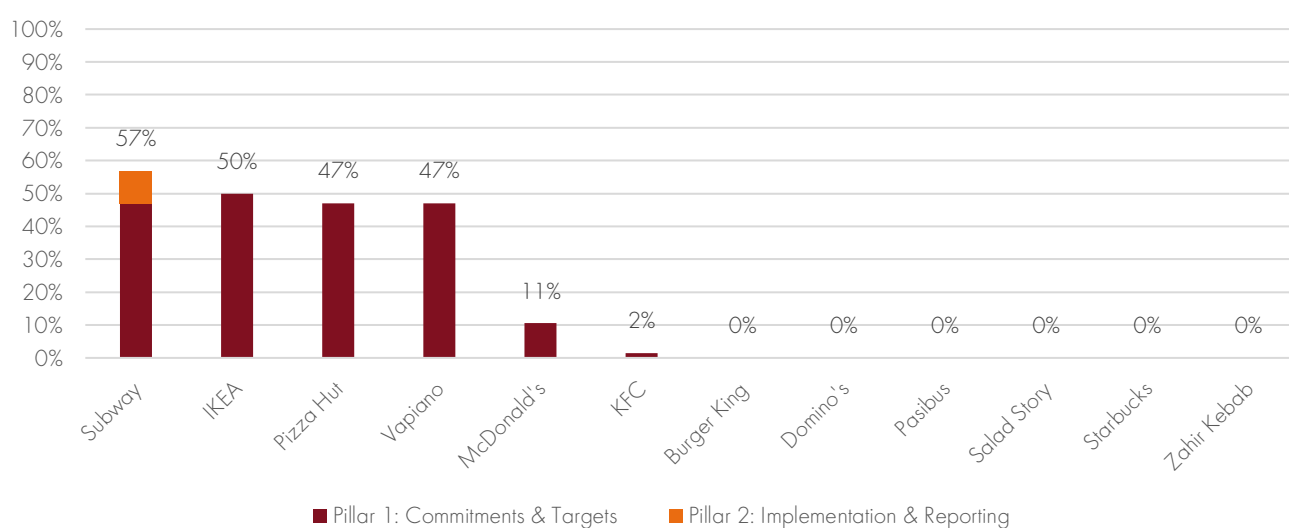
## Key findings: Poland

- Chicken welfare management across countries varies. The German and French fast-food companies have the highest average overall scores of the assessed countries, demonstrating more commitments and implementation. Polish chains have some of the lowest scores, indicating that there is substantial progress needed within the country's fast-food industry concerning chicken welfare.
- Although certain leading fast-food chains in Poland have published commitments to improve animal welfare for chickens in the meat industry, most companies have not yet prioritized chicken welfare in their corporate policies. This stresses the urgency for more consistent and comprehensive action across the industry to address chicken welfare.
- Fast-food chains in Poland struggle to effectively implement their commitments and provide transparent reporting on their progress. To move forward, companies need to create road maps on how they will fulfil their commitments by 2026 or start working on chicken welfare if they have not yet published a commitment.
- International fast-food chains in Poland rely heavily on their parent companies' chicken welfare policies and ECC commitments, as these policies are often missing from the Polish websites. Parent companies should ensure their Polish franchises meet ECC standards by 2026 and provide updates on local websites. National fast-food chains have not introduced these welfare policies, missing out on the parent company's commitment.

### Results of companies operating in Poland at a glance

In Poland, 12 international and national fast-food companies have been assessed on their performance in terms of broiler chicken welfare. Some companies have published commitments, while most of the chains still must get started. Subway and IKEA lead with scores of 57% and 50%, respectively, while Pizza Hut and Vapiano follow with scores of 47%. Notably, McDonald's, KFC, Burger King, Domino's, Pasibus, Salad Story, Starbucks and Zahir Kebab received very low scores of 11%, 2% or 0%. Subway is the only chain that received a non-zero score in performance reporting.

Figure: Results for the Polish market



## Scoring overview: Poland

Company	Overall score %	Overall score tier	Overall score grade	Commitments & Targets %	Commitments & Targets tier	Commitments & Targets grade	Performance Reporting %	Performance Reporting tier	Performance Reporting grade
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	50%	4	Getting started	100%	1	Leading	0%	6	Very poor
	2%	6	Very poor	3%	6	Very poor	0%	6	Very poor
	11%	6	Very poor	21%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	57%	4	Getting started	94%	1	Leading	20%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor



## Results of companies operating in Poland in detail

### Subway

Subway is an American fast-food chain. Subway Poland scores highest in the Polish ranking.

Subway Group has specified time-bound commitments for Poland up to 2026 in accordance with the ECC. Subway UK provides performance reporting for its European supply. Consequently, Subway Poland scored 57%, featuring a 94% score in the commitment pillar and a 20% score for performance reporting. To improve the scoring, Subway Poland needs to state its commitment to the ECC on its own website and start reporting on its progress.

### IKEA

IKEA is a Swedish/Dutch company. The chain has the second highest score in the Polish ranking.

IKEA pledged to the Better Chicken Commitment for North America and Europe. IKEA Poland received an overall score of 50%, excelling in the commitment pillar with a 100% score for publishing chicken welfare standards on its Polish website. However, it received a 0% score for reporting progress quantitatively. Of note, IKEA Poland is only one of two assessed companies that communicates about chicken welfare on the Polish company website. It can enhance its rating by providing comprehensive information on its implementation progress via its website in Polish.

### Pizza Hut and Vapiano

Pizza Hut and Vapiano are an American and a German company, respectively. These chains have the third highest scores in the Polish ranking.

The parent companies of the two chains have committed to the ECC or the Better Chicken Commitment and included in their commitment the chains in Poland. This has resulted in an overall score of 47%, demonstrating strong commitment by achieving a 94% rating for disclosing their chicken welfare standards on their international website. Nonetheless, both received a 0% score for performance reporting. The chains can enhance ratings by providing comprehensive information on chicken welfare via the websites in Polish.

### McDonald's and KFC

McDonald's and KFC are American fast-food chains. Both chains scored minimal points in the Polish ranking.

Both parent companies have a global animal welfare policy that includes chicken welfare but does not align with the ECC. McDonald's Poland scored 11%, and KFC Poland had only a 2% overall score. Of note, McDonald's Poland is only one of two assessed companies that communicates about chicken welfare on the Polish company website. To enhance standing, KFC Poland and McDonald's Poland need to commit to the ECC criteria and publish these commitments for greater transparency.



## Burger King, Domino's and Starbucks

Burger King, Domino's and Starbucks are American fast-food chains. Among the international chains, these restaurants have the lowest score in the Polish ranking.

All three chains in Poland scored 0%. To enhance the standing, the chains need to commit to the ECC criteria and publish these commitments for greater transparency. They can take lessons from their counterparts or competitors globally.

## Pasibus, Salad Story and Zahir Kebab

The Polish fast-food companies Pasibus, Salad Story and Zahir Kebab have the lowest score in the Polish ranking, together with the international chains Burger King, Domino's and Starbucks.

All three national chains have a 0% score. Pasibus and Zahir Kebab have not published any information related to animal welfare generally or chicken welfare specifically. Fortunately, Salad Story has demonstrated its awareness of animal welfare by committing to achieving 100% cage-free eggs in Poland by the end of 2025.<sup>13</sup> However, it did not publish a broiler chicken policy. To enhance their positions, the chains must publish an animal welfare policy that encompasses chickens and aligns with the ECC and start progress reporting.

# Recommendations: Poland

1. Embrace the ECC and publicly commit to improving chicken welfare in your supply chain.
2. Implement ECC standards in your chicken sourcing and production practices.
3. Transparently communicate your commitment and progress to your customers on local websites.

Humane Society International/Europe supports companies to improve animal welfare in their supply chains. This not only helps the animals used by the companies, but also makes the businesses future-proof by preparing for consumer demands and future legislation.

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13. Chicken Watch. 2018. <https://chickenwatch.org/cage-free>. Accessed September 26, 2023.





## The Pecking Order 2023: Polska

Od 2019 r. *The Pecking Order* (TPO) ocenia kultowe marki fast food i firmy świadczące usługi gastronomiczne pod kątem dobrostanu kurcząt brojlerów w ich łańcuchach dostaw. W 2023 r. dokonano oceny sześciu rynków europejskich, potwierdzając włączenie Polski do grona najważniejszych graczy w europejskiej branży kurcząt brojlerów. Niniejszy raport zawiera przegląd statusu polskiej branży fast food i przedstawia możliwości poprawy

Kryteria TPO opierają się na [Europejskiej inicjatywie dla kurczaków](#) (ECC), opracowanej zgodnie z najnowszymi osiągnięciami nauki w zakresie dobrostanu w celu rozwiązania najpilniejszych problemów związanych z dobrotanem kurcząt brojlerów.

TPO Europe 2023 przeprowadziło 69 ocen obejmujących rynki Francji, Niemiec, Włoch, **Polski**, Rumunii i Hiszpanii. Na polskim rynku ocenie poddano następujące firmy:





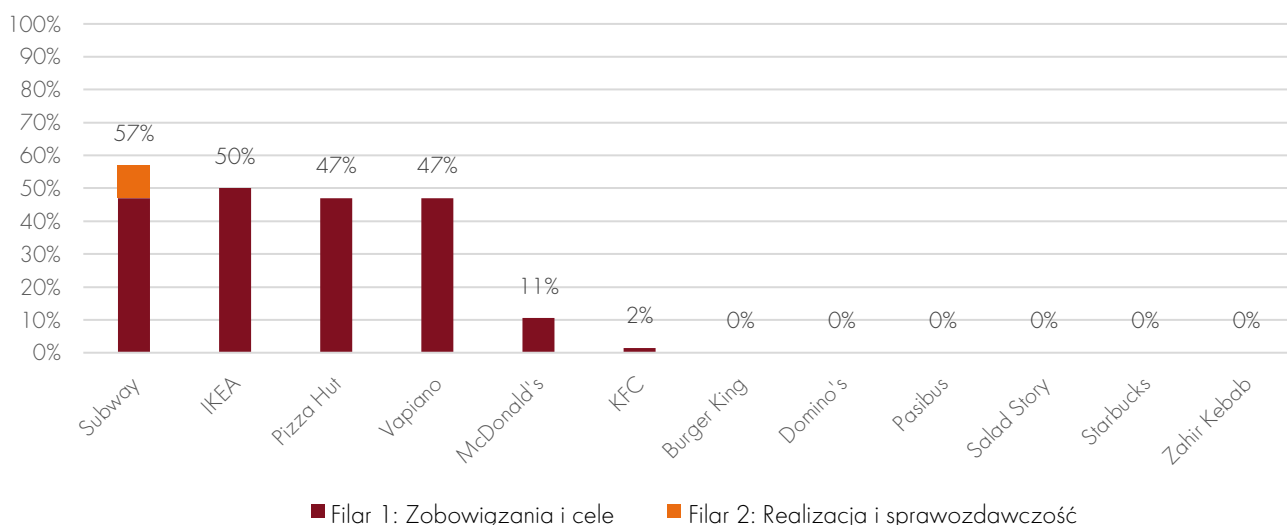
## Kluczowe wnioski: Polska

- Zarządzanie dobrostanem kurczaków w poszczególnych krajach jest zróżnicowane. Niemieckie i francuskie firmy fast food mają najwyższe średnie wyniki ogólne spośród ocenianych krajów, wykazując większe zaangażowanie i realizację. Jedne z najniższych wyników osiągają polskie sieci, co wskazuje, że w krajowej branży fast food jest potrzebny znaczny postęp w zakresie dobrostanu kurczaków.
- Mimo że pewne wiodące sieci fast food w Polsce opublikowały zobowiązania do poprawy dobrostanu zwierząt w przemyśle mięsnym, większość z nich nie przyznała jeszcze priorytetu dobrostanowi kurcząt w polityce korporacyjnej. Podkreśla to pilną potrzebę podjęcia bardziej spójnych i kompleksowych działań w całej branży w celu poprawy dobrostanu kurcząt.
- Sieci fast food w Polsce mają trudności z efektywną realizacją swoich zobowiązań i zapewnieniem przejrzystego raportowania swoich postępów. Aby poprawić tę sytuację, firmy muszą stworzyć plany działania dotyczące tego, w jaki sposób wypełnią zobowiązania do 2026 r. lub rozpocząć pracę nad dobrostanem kurcząt, jeśli jeszcze nie opublikowały zobowiązania.
- Międzynarodowe sieci fast food w Polsce w dużym stopniu opierają się na polityce dobrostanu kurczaków i zobowiązaniach ECC swoich spółek-matek, ponieważ polityki tej często brakuje na polskich stronach internetowych. Spółki-matki powinny zapewnić, że ich polskie franczyzy spełnią standardy ECC do 2026 roku i udostępniać aktualizacje na lokalnych stronach internetowych. Krajowe sieci fast food nie wprowadziły tej polityki dobrostanu, nie dotrzymując zobowiązań spółki-matki.













### Wyniki firm działających w polsce w skrócie

12 międzynarodowych i krajowych firm z branży fast food w Polsce zostało poddanych ocenie pod kątem dobrostanu kurczaków brojlerów. Niektóre firmy opublikowały zobowiązania, podczas gdy większość sieci musi jeszcze podjąć pierwsze kroki. Liderami są Subway i IKEA z wynikami odpowiednio 57% i 50%, za nimi plasują się Pizza Hut i Vapiano z wynikami 47%. W szczególności McDonald's, KFC, Burger King, Domino's, Pasibus, Salad Story, Starbucks i Zahir Kebab otrzymały bardzo niskie wyniki na poziomie 11%, 2% lub 0%. Subway jest jedyną siecią, która otrzymała wynik różny od zera w raportowaniu wyników.

### Postać: Wyniki dla rynku polskiego



## Przegląd punktowania: Polska

Firma	Ogólny wynik%	Poziom wyniku ogólnego	Stopień wyniku ogólnego	Zaangażowanie i cele%	Zaangażowanie i poziom celów	Ocena zobowiązań i celów	Raportowanie wyników %	Poziom raportowania wyników	Ocena raportowania wyników
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby
	50%	4	Początkujący	100%	1	Lider	0%	6	Bardzo słaby
	2%	6	Bardzo słaby	3%	6	Bardzo słaby	0%	6	Bardzo słaby
	11%	6	Bardzo słaby	21%	6	Bardzo słaby	0%	6	Bardzo słaby
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby
	47%	5	Słaby	94%	1	Lider	0%	6	Bardzo słaby
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby
	57%	4	Początkujący	94%	1	Lider	20%	6	Bardzo słaby
	47%	5	Słaby	94%	1	Lider	0%	6	Bardzo słaby
	0%	6	Bardzo słaby	0%	6	Bardzo słaby	0%	6	Bardzo słaby



## Szczegółowe wyniki firm działających w Polsce

### Subway

Subway to amerykańska sieć fast food. Subway Polska zajmuje najwyższe miejsce w polskim rankingu.

Grupa Subway określiła zobowiązania dla Polski, które mają zostać zrealizowane do 2026 roku zgodnie z ECC. Subway UK prowadzi sprawozdawczość w zakresie wyników dla swoich europejskich dostawców. W rezultacie Subway Polska uzyskał 57%, w tym 94% w filarze zobowiązań i 20% za raportowanie wyników. Aby poprawić wynik, Subway Polska musi wykazać swoje zaangażowanie w ECC na własnej stronie internetowej i rozpocząć raportowanie swoich postępów.

### IKEA

IKEA jest przedsiębiorstwem szwedzko-holenderskim. Sieć ma drugi najwyższy wynik w polskim rankingu.

IKEA przystąpiła do programu Better Chicken Commitment dla Ameryki Północnej i Europy. IKEA Polska uzyskała ogólny wynik na poziomie 50%, wyróżniając się w filarze zaangażowania ze 100% wynikiem za publikowanie standardów w zakresie dobrostanu kurczaków na polskiej stronie internetowej. Otrzymała jednak 0% punktów za sprawozdawczość jakościową na temat postępów. Warto zauważyć, że IKEA Polska jest tylko jedną z dwóch ocenianych firm, które informują o dobrostanie kurczaków na swojej stronie internetowej. Może poprawić ocenę, przekazując wyczerpujące informacje na temat postępów we wdrażaniu standardów na stronie internetowej w języku polskim.

### Pizza Hut and Vapiano

Pizza Hut i Vapiano to odpowiednio sieć amerykańska i niemiecka. Sieci te zajmują trzecie miejsce w polskim rankingu.

Spółki-matki obu sieci zobowiązały się do realizacji programu ECC lub Better Chicken Commitment i włączyły w to sieci w Polsce. Przełożyło się to na ogólny wynik 47%, co świadczy o silnym zaangażowaniu przy wyniku 94% za ujawnienie standardów dobrostanu kurczaków na międzynarodowej stronie internetowej. Niemniej jednak obie otrzymały wynik 0% za raportowanie wyników. Sieci mogą podnieść oceny poprzez udostępnianie kompleksowych informacji na temat dobrostanu kurczaków za pośrednictwem stron internetowych w języku polskim.

### McDonald's and KFC

McDonald's i KFC to amerykańskie sieci fast food. Obie sieci zdobyły minimum punktów w polskim rankingu.

Obie spółki-matki mają globalną politykę w zakresie dobrostanu zwierząt, która obejmuje dobrostan kurczaków, ale nie jest zgodna z ECC. McDonald's Polska uzyskał 11%, a KFC Polska - zaledwie 2%. Warto zauważyć, że McDonald's Polska jest tylko jedną z dwóch spośród wszystkich ocenianych firm, które podają informacje na temat dobrostanu kurczaków na polskiej stronie internetowej. Aby poprawić swoją pozycję, KFC Polska i McDonald's Polska muszą zobowiązać się do przestrzegania kryteriów ECC i opublikować te zobowiązania w celu zagwarantowania większej przejrzystości.



## Burger King, Domino's i Starbucks

Burger King, Domino's i Starbucks to amerykańskie sieci fast food. Restauracje te mają najniższą notę w polskim rankingu wśród międzynarodowych sieci.

Wszystkie trzy sieci w Polsce uzyskały wynik 0%. Aby poprawić swoją pozycję, sieci muszą zobowiązać się do przestrzegania kryteriów ECC i opublikować te zobowiązania w celu zagwarantowania większej przejrzystości. Mogą brać przykład od swoich odpowiedników lub konkurentów na całym świecie.

## Pasibus, Salad Story i Zahir Kebab

Najniżej w polskim rankingu plasują się polskie firmy fast food Pasibus, Salad Story i Zahir Kebab, obok międzynarodowych sieci Burger King, Domino's i Starbucks.

Wszystkie trzy sieci krajowe mają wynik 0%. Pasibus i Zahir Kebab nie opublikowały żadnych informacji związanych z dobrostanem zwierząt w ogóle lub konkretnie dobrostanem kurcząt. Na szczęście firma Salad Story pokazała, że bierze pod uwagę dobrostan zwierząt, zobowiązując się, że do końca 2025 roku w Polsce 100% wykorzystywanych przez nią jaj pochodzić będzie z chowu bezklatkowego.<sup>13</sup> Nie opublikowała jednak polityki dotyczącej kurczaków brojlerów. Aby wzmocnić swoją pozycję, sieci muszą opublikować politykę dobrostanu zwierząt obejmującą kurczaki i zgodną z ECC oraz rozpocząć raportowanie postępów.

## Zalecenia: Polska

1. Przystąpienie do inicjatywy ECC i publiczne zobowiązanie się do poprawy dobrostanu kurcząt w swoim łańcuchu dostaw.
2. Wdrożenie standardów ECC w praktykach pozyskiwania i produkcji kurcząt.
3. Przejrzyste informowanie klientów o przyjętych zobowiązaniach i postępach w ich realizacji na lokalnych stronach internetowych.

Humane Society International/Europe udziela firmom wsparcia w działaniach na rzecz poprawy dobrostanu zwierząt w ich łańcuchach dostaw. W ten sposób nie tylko pomaga zwierzętom wykorzystywanym przez firmy, ale także przygotowuje firmy na przyszłe wymagania konsumentów i planowane przepisy.

13. Chicken Watch. 2018. <https://chickenwatch.org/cage-free>. Dostęp: 26 września 2023.





## The Pecking Order 2023: Romania

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2023 it evaluated six European markets, marking the inclusion of Romania for the first time. This report provides an overview of the Romanian fast-food industry's status and offers potential avenues for improvement.

The criteria for TPO are based on the [European Chicken Commitment](#) (ECC), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2023 conducted 69 assessments covering the markets of France, Germany, Italy, Poland, **Romania** and Spain. The following companies have been assessed in the Romanian market:



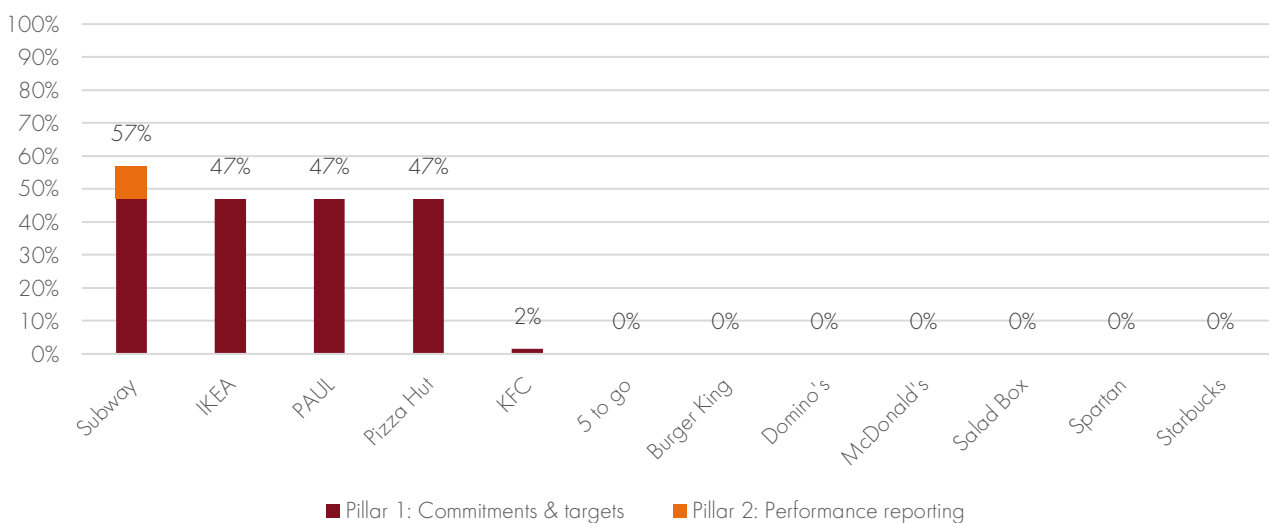
## Key findings: Romania

- Chicken welfare management across countries varies. The German and French fast-food companies have the highest average overall scores of the assessed countries, demonstrating more commitments and implementation. Romanian chains have the lowest scores, indicating that there is substantial progress needed within the country's fast-food industry concerning chicken welfare.
- Although certain leading fast-food chains in Romania have published commitments to improve animal welfare for chickens in the meat industry, most companies have not yet prioritized chicken welfare in their corporate policies. This stresses the urgency for more consistent and comprehensive action across the industry to address chicken welfare.
- Fast-food chains in Romania struggle to effectively implement their commitments and provide transparent reporting on their progress. To move forward, companies need to create road maps on how they will fulfil their commitments by 2026 or start working on chicken welfare if they have not yet published a commitment.
- International fast-food chains in Romania rely heavily on their parent companies' chicken welfare policies and ECC commitments, as these policies are often missing from the Romanian websites. Parent companies should ensure their Romanian franchises meet ECC standards by 2026 and provide updates on local websites. National fast-food chains have not introduced these welfare policies, missing out on the parent company's commitment.













### Results of companies operating in Romania at a glance

In Romania, 12 international and national fast-food companies have been assessed on their performance in terms of broiler chicken welfare. Some companies have published commitments, while most of the chains still must get started. Subway leads with a score of 57%, while IKEA, PAUL and Pizza Hut follow with scores of 47%. Notably, KFC, 5 to go, Burger King, Domino's, McDonald's, Salad Box, Spartan and Starbucks received very low scores of 2% or 0%. Subway is the only chain that received a non-zero score in performance reporting.

Figure: Results for the Romanian market



## Scoring overview: Romania

Company	Overall score %	Overall score tier	Overall score grade	Commitments & Targets %	Commitments & Targets tier	Commitments & Targets grade	Performance Reporting %	Performance Reporting tier	Performance Reporting grade
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	2%	6	Very poor	3%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	47%	5	Poor	94%	1	Leading	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
	57%	4	Getting started	94%	1	Leading	20%	6	Very poor





## Results of companies operating in Romania in detail

### Subway

Subway is an American fast-food chain. Subway Romania scores highest in the Romanian ranking.

Subway Group has specified time-bound commitments for Romania up to 2026 in accordance with the ECC. Subway UK provides performance reporting for its European supply. Consequently, Subway Romania scored 57%, featuring a 94% score in the commitment pillar and a 20% score for performance reporting. To improve the scoring, Subway Romania needs to state its commitment to the ECC on its own website and start reporting on its progress.

### IKEA, PAUL and Pizza Hut

IKEA, PAUL and Pizza Hut are a Swedish/Dutch company, a French bakery and an American chain, respectively. These chains have the second highest scores in the Romanian ranking.

The parent companies of the three chains have committed to the ECC or the Better Chicken Commitment and included in their commitment the chains in Romania. This has resulted in an overall score of 47%, demonstrating strong commitment by achieving a 94% rating for disclosing their chicken welfare standards on their international website. Nonetheless, all three received a 0% score for performance reporting. Of note, IKEA Romania is the only assessed international company that communicates about animal welfare on the Romanian company website. The chains can enhance ratings by providing comprehensive information on chicken welfare via the websites in Romanian instead of referencing global resources.

### KFC

KFC is an American fast-food chain and holds the second-largest presence among fast-food chains in Romania.

Parent company Yum! has a global animal welfare policy that includes chicken welfare, so KFC Romania received a 2% overall score. The policy has no concrete standards and is not aligned to any ECC criteria. KFC Romania can ask support from its peers in other European countries that committed to the ECC.

### Burger King, Domino's, McDonald's and Starbucks

Burger King, Domino's, McDonald's and Starbucks are American fast-food chains. McDonald's is market leader in Romania. Among the international chains, these restaurants have the lowest score in the Romanian ranking.

All four chains in Romania scored 0%. To enhance standing, the chains need to commit to the ECC criteria and publish these commitments for greater transparency. They can take lessons from their counterparts or competitors globally.



## 5 to go, Salad Box and Spartan

The Romanian fast-food companies 5 to go, Salad Box and Spartan have the lowest score in the Romanian ranking, together with the international chains Burger King, Domino's, McDonald's and Starbucks.

All three national chains have a 0% score. 5 to go and Spartan have not published any information related to animal welfare generally or chicken welfare specifically. Fortunately, Salad Box has demonstrated its awareness of animal welfare by committing to achieving 100% cage-free eggs in Romania by the end of 2025.<sup>14</sup> However, it did not publish a broiler chicken policy. To enhance their positions, the chains must publish an animal welfare policy that encompasses chickens and aligns with the ECC and start progress reporting.

## Recommendations: Romania

1. Embrace the ECC and publicly commit to improving chicken welfare in your supply chain.
2. Implement ECC standards in your chicken sourcing and production practices.
3. Transparently communicate your commitment and progress to your customers on local websites.

Humane Society International/Europe supports companies to improve animal welfare in their supply chains. This not only helps the animals used by the companies, but also makes the businesses future-proof by preparing for consumer demands and future legislation.

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14. Chicken Watch. 2018. <https://chickenwatch.org/cage-free>. Accessed September 26, 2023.





## The Pecking Order 2023: România

*The Pecking Order* (TPO) evaluează încă din anul 2019 branduri emblematice din sectorul fast-food și servicii alimentare referitor la bunăstarea puilor de carne (broiler) în cadrul lanțurilor de aprovizionare. În 2023 au fost evaluate șase piețe europene, incluzând pentru prima dată și România. Raportul oferă o prezentare generală a situației din industria fast-food din România și propune, de asemenea, noi oportunități pentru îmbunătățire.

Criteriile TPO se bazează pe [Angajamentul European pentru Pui](#) (ECC), care a fost elaborat în conformitate cu cele mai recente rezultate științifice în materie de bunăstare, respectiv pentru soluționarea nevoilor cele mai presante identificate în cazul puilor de carne (broiler).

TPO Europe 2023 a efectuat o analiză care a implicat 69 de evaluări acoperind piețele din Franța, Germania, Italia, Polonia, **România** și Spania. Următoarele companii au fost evaluate pe piața din România:



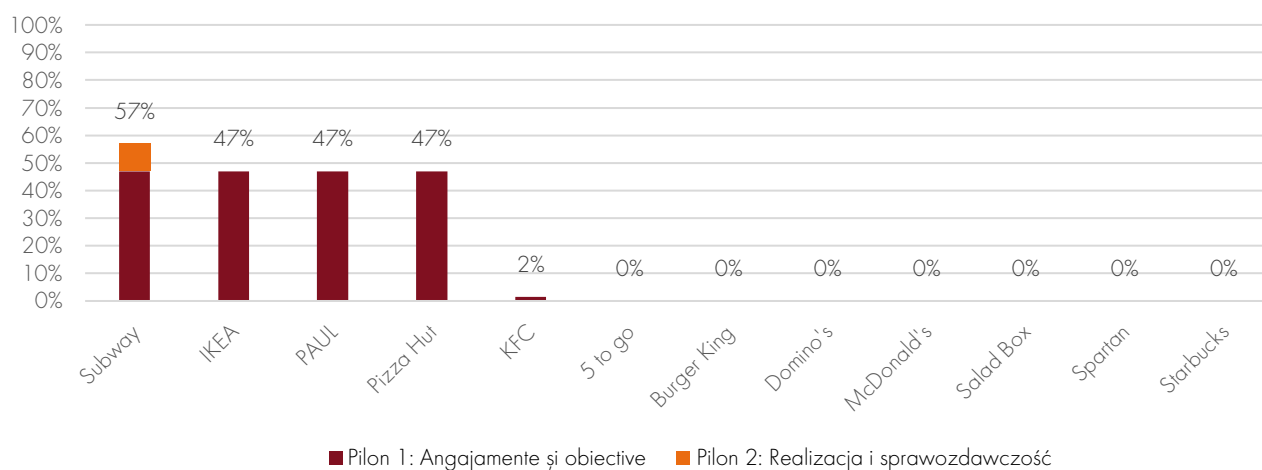
## Principalele constatări: România

- Managementul bunăstării puilor diferă de la țară la țară. Companiile din Germania și Franța cu activitate în sectorul fast-food au obținut cele mai bune scoruri medii generale dintre toate țările evaluate, demonstrând mai multe angajamente asumate și o implementare mai bună a măsurilor. Lanțurile românești au afișat cele mai scăzute scoruri, ceea ce indică faptul că este în continuare necesar să se aducă îmbunătățiri semnificative la nivel de țară în industria fast-food cu privire la bunăstarea puilor.
- Deși anumite lanțuri fruntașe în sectorul fast-food din România au publicat angajamente în vederea îmbunătățirii aspectelor legate de bunăstarea animalelor, și anume cu privire la puii destinați industriei cărnii, majoritatea acestora nu a prioritizat încă aspectele legate de bunăstarea puilor în cadrul propriilor politici corporative. Este subliniată astfel nevoia urgentă de a iniția acțiuni mai consistente și mai cuprinzătoare în întreaga industrie în vederea soluționării principalelor probleme legate de bunăstarea puilor.
- Lanțurile de fast-food din România depun eforturi în sensul implementării efective a angajamentelor și raportării în mod transparent a progreselor înregistrate. Pentru a putea să înregistreze progrese în acest domeniu, companiile trebuie să conștientizeze importanța necesității de a furniza până în anul 2026 rapoarte detaliate privind modul în care reușesc să își îndeplinească angajamentele, sau să își concentreze în mod eficient eforturile pentru a asigura bunăstarea puilor, în cazul în care nu au publicat încă niciun angajament în acest sens.
- Lanțurile internaționale de fast-food din România se bazează foarte mult pe politicile adoptate de companiile-mamă în materie de bunăstare a puilor, respectiv pe angajamentele luate în conformitate cu prevederile ECC, în special din moment ce aceste politici adesea lipsesc de pe site-urile de internet locale, respectiv din România. Societățile-mamă au obligația de a se asigura că francizele din România respectă standardele impuse prin Angajamentul ECC și asta până în anul 2026, respectiv că acestea comunică public pe site-urile de internet locale orice progrese înregistrate în acest sens. Lanțurile fast-food naționale nu au introdus aceste politici privind bunăstarea animalelor, nerespectând angajamentul luat de compania-mamă.












### Companii românești - rezultate pe scurt

În România au fost evaluate 12 companii internaționale și naționale cu privire la performanțele lor în ceea ce privește bunăstarea puilor de carne (broiler). Unele companii au publicat angajamente în acest sens, în timp ce majoritatea lanțurilor sunt în continuare în fază incipientă. Subway conduce cu un scor de 57%, iar IKEA, PAUL și Pizza Hut urmează în clasament cu un scor procentual de 47%. În special KFC, 5 to go, Burger King, Domino's, McDonald's, Salad Box, Spartan și Starbucks au obținut scoruri foarte mici, de 2% sau 0%. Subway este singurul lanț de acest gen care a obținut un scor non-zero la raportarea evoluției celor asumate.

Figura: Rezultatele pentru piața din România



## Punctaje - Prezentare generală: România

Companie	Scor general%	Nivel - Scor general	Notă - Scor general	Nivel - Angajamente & Obiective %	Notă - Angajamente & Obiective %	Angajamente & Obiective %	Raportare evoluție %	Nivel - Raportare evoluție	Notă - Raportare evoluție
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	47%	5	Slab	94%	1	Poziție fruntașă	0%	6	Foarte slab
	2%	6	Foarte slab	3%	6	Foarte slab	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	47%	5	Slab	94%	1	Poziție fruntașă	0%	6	Foarte slab
	47%	5	Slab	94%	1	Poziție fruntașă	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	0%	6	Foarte slab	0%	6	Foarte slab	0%	6	Foarte slab
	57%	4	Stadiu inițial	94%	1	Poziție fruntașă	20%	6	Foarte slab



## Companii Românești - Rezultate detaliate

### Subway

Subway este un lanț american de restaurante de tip fast-food. Subway România a obținut cel mai bun scor în clasamentul din România.

Subway Group a specificat angajamentele în cazul României în conformitate cu Angajamentul ECC, cu termen de punere în aplicare până în 2026. Subway UK furnizează rapoarte privind evoluția celor asumate pentru propria aprovizionare la nivel european. Prin urmare, Subway România a înregistrat un scor de 57%, figurând cu un scor de 94% în Pilonul privind angajamentele și cu unul de 20% în Pilonul referitor la implementare și raportare. În vederea îmbunătățirii acestui punctaj, Subway România trebuie să își asume pe pagina proprie de internet angajamentul de a respecta prevederile din Angajamentul ECC și să înceapă raportarea cu privire la progresele înregistrate.

### IKEA, PAUL și Pizza Hut

IKEA, PAUL și Pizza Hut reprezintă o companie suedezo-olandeză, o brutărie franceză, respectiv un lanț american. Aceste lanțuri înregistrează al doilea cel mai mare scor în clasamentul din România.

Companiile-mamă ale celor trei lanțuri și-au exprimat angajamentul față de ECC sau față de Angajamentul pentru Pui (*Better Chicken Commitment*) și au inclus în angajamentul asumat și lanțurile din România. Aceasta a condus la un scor general de 47%, demonstrând astfel un angajament serios, rezultat din atingerea unui rating de 94% pentru comunicarea pe site-ul web internațional a standardelor proprii în domeniul bunăstării puilor. Cu toate acestea, cele trei au obținut un scor procentual de 0% la raportarea evoluției celor asumate. Este de remarcat însă faptul că IKEA România este singura companie internațională evaluată care comunică referitor la bunăstarea animalelor pe site-ul companiei - versiunea pentru România. Lanțurile își pot îmbunătăți rating-urile prin furnizarea de informații complete cu privire la bunăstarea puilor prin intermediul site-urilor web din România, în loc să facă referire la resurse globale.

### KFC

KFC este un lanț american de restaurante de tip fast-food ce deține a doua cea mai mare prezență pe piață în rândurile lanțurilor fast-food din România.

Compania-mamă, Yum!, are definite politici globale privind bunăstarea animalelor care includ și aspecte legate de bunăstarea puilor, în consecință KFC România a obținut 2% ca scor general. Politicile nu includ însă standarde concrete și nu sunt aliniată la niciunul dintre criteriile Angajamentului ECC. KFC România poate să solicite ajutor din partea omologilor săi din alte țări europene care s-au angajat să respecte Angajamentul ECC.



## Burger King, Domino's, McDonald's și Starbucks

Burger King, Domino's, McDonald's și Starbucks sunt lanțuri americane de restaurante fast-food. McDonald's este lider de piață în România. Dintre lanțurile internaționale, aceste restaurante au obținut cel mai scăzut scor în clasamentul din România.

În România, toate cele patru lanțuri figurează cu un scor de 0%. Pentru a-și consolida prestigiul, lanțurile trebuie să se angajeze în mod clar în favoarea criteriilor incluse în Angajamentul ECC, respectiv să comunice publicului aceste angajamente pentru o mai mare transparență în activitatea acestora, având posibilitatea de a învăța din experiența dobândită de omologii lor sau de la concurența internațională în acest sector.

## 5 to go, Salad Box și Spartan

Companiile din România cu activitate în sectorul fast-food, respectiv 5 to go, Salad Box și Spartan au obținut cele mai slabe scoruri în clasamentul din România, alături de lanțurile internaționale Burger King, Domino's, McDonald's și Starbucks.

Toate cele trei lanțuri naționale au înregistrat un scor de 0%. 5 to go și Spartan nu au publicat informații cu privire la bunăstarea animalelor în general, sau referitor la bunăstarea puilor, în particular. Din fericire, Salad Box a demonstrat că a conștientizat aspectele legate de bunăstarea animalelor prin angajamentul de a achiziționa și utiliza în România doar ouă provenite 100% de la păsări crescute în sistem la sol, fără baterii (cage-free) până la finalul lui 2025. Cu toate acestea, compania nu a publicat nicio politică referitoare la bunăstarea puilor de carne (broiler). Pentru a-și întări și consolida poziția, aceste lanțuri trebuie să publice politicile privind bunăstarea animalelor, care să cuprindă aspectele referitoare la pui și să se alinieze cu Angajamentul ECC, inclusiv să înceapă raportarea cu privire la progresele înregistrate.

## Recomandări: România

1. Însușiți-vă Angajamentul ECC și angajați-vă în mod public în favoarea îmbunătățirii aspectelor legate de bunăstarea puilor folosiți în cadrul propriului lanț de aprovizionare.
2. Implementați standardele impuse prin Angajamentul ECC în propriile practici de aprovizionare cu pui și în practicile de producție.
3. Comunicați clienților dumneavoastră în mod transparent, pe site-urile web locale, întregul angajament luat și progresele înregistrate în acest sens.

Humane Society International/Europe acordă sprijin companiilor pentru ca acestea să îmbunătățească aspecte legate de bunăstarea animalelor în lanțurile de aprovizionare. Acest lucru este benefic nu doar în cazul animalelor folosite pentru carne de către companii, ci este, de asemenea, esențial pentru firme, pregătindu-le pentru noile cerințe ale consumatorilor și pentru legislația viitoare.

14. Chicken Watch. 2018. <https://chickenwatch.org/cage-free>. Data accesării 26 septembrie 2023.





## The Pecking Order 2022: Spain

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on their approach to managing and reporting on the welfare of broiler chickens in their supply chains since 2019.

The criteria for TPO are based on the [European Chicken Commitment](#) (ECC), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2023 conducted a total of 69 assessments covering the markets of France, Germany, Italy, Poland, Romania and **Spain**. The following companies have been assessed in the Spanish market:





TPO’s company evaluation is organized under two pillars:



### Pillar 1 – Commitments & Targets

This score reflects whether a company has any form of broiler welfare policy as well as the scope and completeness of a company’s commitment to the specific criteria outlined in the ECC. Compared to 2022, the 2023 assessment differentiates between companies that communicate their published broiler welfare commitments in-country, and those companies for which there is no evidence of in-country communication.



### Pillar 2 – Performance Reporting

This score reflects the extent to which a company has implemented its commitments in relation to the ECC criteria. Assessments were made on the company’s performance on specific broiler welfare commitments: avoidance of cages/multi-tier systems, third-party auditing, effective enrichment, use of breeds that demonstrate higher welfare outcomes, maximum stocking densities, humane slaughter.

Each company receives a pillar percentage score for each of the two pillars, which when combined, with equal weighting, gives an overall percentage score. Scores are also translated into Tiers and Grades as shown in the table below.

Tier	Grade	Percentage bands
6	Very poor	0-25
5	Poor	26-49
4	Getting started	50-59
3	Making progress	60-75
2	Good	76-85
1	Leading	86-100











## Key findings: Spain

- Of the 8 companies assessed for Spain, **Subway** has the highest overall average score of 57% (Tier 4 - Getting Started) and is the only company showing some solid progress through their reporting. **Pizza Hut** and **IKEA** are slightly behind with a score of 47% (Tier 5 - Poor), only falling short by 3% to be categorized a tier higher. These three companies succeed in setting commitments and targets to improve chicken welfare but still lack proper reporting of progress against each of the elements of the ECC. **KFC** is also in Tier 5, with a lower score of 27%. The other companies, **Burger King, Domino's, McDonald's and Starbucks**, score either little to no points at all, falling far behind the rest.
- Companies in Spain seem committed to improve the welfare of their broiler chickens, but there is no evidence yet of actual steps being taken.
  - *Pillar 1 - Commitments & Targets.* There is a huge contrast between companies, with three having scores putting them in the top Tier 1 (Leading: **IKEA, Pizza Hut and Subway**) while the other companies have scores putting them in the bottom Tier 6 (Very Poor: **Burger King, Domino's, KFC, McDonald's and Starbucks**).
  - *Pillar 2 - Performance Reporting.* While 4 out of the 5 companies with some welfare policy in place received scores putting them in the lowest Tier (Very poor: **IKEA, McDonald's, Pizza Hut, and Subway**) and the remaining company only scoring one Tier higher (Poor: **KFC**), it shows companies in Spain are not reporting on any progress against published commitments.
- Compared to the 2022 assessment, 2023 sees no improvements in the overall score, on the contrary:
  - Two companies moved down tiers (**IKEA and Pizza Hut**).
  - Six companies show no progress (**Burger King, Domino's, KFC, McDonald's, Starbucks and Subway**).



## Scoring overview: Spain

Company	Overall score %	Overall score tier	Overall score grade	Commitments & Targets %	Commitments & Targets tier	Commitments & Targets grade	Performance Reporting %	Performance Reporting tier	Performance Reporting grade
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	47%	5	Poor	94%	1	Leading	0%	6	Very Poor
	27%	5	Poor	21%	6	Very Poor	33%	5	Poor
	2%	6	Very Poor	3%	6	Very Poor	0%	6	Very Poor
	47%	5	Poor	94%	1	Leading	0%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	57%	4	Getting Started	94%	1	Leading	20%	6	Very Poor



## Results by company

### Burger King, Domino's and Starbucks

Of the fast-food brands assessed in Spain, Burger King, Domino's and Starbucks have not published a policy covering broiler chicken welfare and have not publicly committed to the ECC, nor do they have any reporting in place. With an overall score of 0%, these companies are yet to show any intention of improving the welfare of broiler chickens in their supply chain, and are therefore ranked at the bottom, in Tier 6 (Very Poor).

### IKEA

IKEA has committed to the ECC to improve their broiler chicken welfare, which is to be fully implemented by 2025. However, IKEA has not communicated their commitment to the ECC in-country, which is why IKEA Spain scores 94% for Pillar 1 (Tier 1 - Leading). However, since IKEA's reporting on (quantitative) progress is limited and not specified by market, IKEA Spain scores an overall score of 47% (Tier 5 - Poor).

### KFC

KFC Spain has a policy that explicitly covers broiler chicken welfare, in which they state they are committed to not use broiler cages or multi-tier systems and comply with their broiler welfare standards via annual third-party auditing. However, since their policy does not include any of the other ECC criteria, they received 21% for the Commitments & Targets Pillar (Tier 6 - Very Poor).

KFC Spain provides performance reporting on some of the ECC criteria, but not all, and thus KFC Spain only scores 33% for Pillar 2 Performance Reporting (Tier 5 - Poor).

### McDonald's

McDonald's has set global commitments on broiler chicken welfare and made specific commitments to be fully implemented by 2024 that cover 70% of its supply chain and explicitly include its Spanish operations. However, these commitments are not in line with the ECC requirements, nor is it communicated on the McDonald's Spain website. Furthermore, reporting on progress is limited. This results in very low scores for both pillars and an overall score of 2% (Tier 6 - Very Poor).



## Pizza Hut

Pizza Hut Spain, noting that they are a subsidiary of Yum! Brands Inc., has committed to the ECC criteria and therefore has a high score of 94% in the Commitments & Targets Pillar (Tier 1 - Leading). Unfortunately, there is no reporting on progress available, yet, which means they score 0% in the Performance Reporting Pillar (Tier 6 - Very Poor).

## Subway

Subway has specified time-bound commitments set for 2026 in accordance with the ECC. The commitment includes all ECC criteria and specifies that it applies to the European market, but it is not yet communicated in-country, which is why Subway Spain scores 94% for Pillar 1 (Tier 1 - Leading). Progress Reporting does not include all elements of the ECC, resulting in a 20% score for Pillar 2 (Tier 6 - Very Poor).

## Recommendations: Spain

- We recommend that **Burger King, Domino's, McDonald's** and **Starbucks** commit to the ECC and publish a broiler chicken welfare policy that explicitly states the criteria as per the ECC.
- For those companies that have a commitment in place, such as **IKEA, KFC, Pizza Hut** and **Subway**, to make sure this is communicated in-country in Spain and other markets and accessible to the public.
- While a commitment to the ECC indicates a first step, companies need to report on the progress they are making to implement the ECC criteria across their supply chain.





## The Pecking Order 2022: España

El Ranking de Bienestar de Pollos, conocido en inglés como *The Pecking Order (TPO)*, ha estado evaluando marcas icónicas de comida rápida y empresas de servicios alimentarios sobre su enfoque para gestionar e informar sobre el bienestar de los pollos de engorde en sus cadenas de suministro desde 2019.

Los criterios de TPO se basan en el Compromiso Europeo del Pollo / [European Chicken Commitment \(ECC\)](#), desarrollado en línea con el conocimiento actual en materia de bienestar animal y así abordar los problemas de bienestar más urgentes de los pollos de engorde.

El TPO Europa 2023 ha realizado un total de 69 evaluaciones que abarcan los mercados de Francia, Alemania, Italia, Polonia, Rumanía y **España**. Las siguientes empresas han sido evaluadas en el mercado español:



La evaluación de las empresas siguiendo el TPO se organiza en torno a dos pilares:



### Pilar 1 – Compromisos y objetivos

Esta puntuación refleja si una empresa tiene algún tipo de política de bienestar de los pollos de engorde, así como el alcance y la exhaustividad del compromiso de una empresa con los criterios específicos descritos en el ECC. En comparación con 2022, la evaluación de 2023 diferencia entre las empresas que comunican sus compromisos publicados sobre el bienestar de los pollos de engorde en el país, y aquellas empresas para las que no hay pruebas de comunicación en el país de estudio.



### Pilar 2 – Informes de desempeño

Esta puntuación refleja el grado de cumplimiento de los compromisos de la empresa en relación a los criterios de la ECC. Se ha evaluado el desempeño de la empresa en relación a los compromisos específicos de bienestar de los pollos de engorde: evitar jaulas/sistemas de varios niveles, auditoría por parte de terceros, enriquecimiento efectivo, uso de razas que crecimiento lento, densidades de población máximas, sacrificio no cruel.

Cada empresa recibe una puntuación porcentual para cada uno de los dos pilares, que al combinarse, con igual ponderación, da una puntuación porcentual media. Las puntuaciones también se traducen en niveles y calificaciones, como se muestra en la tabla siguiente.

Nivel	Rango porcentual	Calificación
6	Muy deficiente	0-25
5	Deficiente	26-49
4	Empezando	50-59
3	Avanzando	60-75
2	Buena	76-85
1	Liderando	86-100











## Principales resultados: España

- De las 8 empresas evaluadas en España, **Subway** tiene la puntuación media más alta, un 57% (Empezando) y es la única que muestra un progreso más sólido a través de sus informes. **Pizza Hut** e **IKEA** están ligeramente por detrás con una puntuación del 47% (Nivel 5 - Deficiente), y sólo les falta un 3% para ser clasificadas en un nivel superior. Estas tres compañías han establecido con éxito compromisos y objetivos para mejorar el bienestar de los pollos, pero siguen sin informar adecuadamente de su progreso y desempeño en la ejecución de cada uno de los elementos del ECC. **KFC** también se encuentra en el Nivel 5, con una puntuación inferior del 27%. Las demás empresas, **Burger King**, **Domino's**, **McDonald's** y **Starbucks**, obtienen muy poca o ninguna puntuación, quedando muy por detrás del resto.
- Las empresas españolas parecen comprometidas a mejorar el bienestar de sus pollos de engorde, pero aún no hay constancia de que se estén tomando medidas reales.
  - Pilar 1 - Compromisos y objetivos. Hay un gran contraste entre las empresas ya que tres tienen puntuaciones que las sitúan en el Nivel 1 superior (liderando: **IKEA**, **Pizza Hut** y **Subway**), mientras que las demás tienen puntuaciones que las sitúan en el nivel 6 inferior (Muy deficiente: **Burger King**, **Domino's**, **KFC**, **McDonald's** y **Starbucks**).
  - Pilar 2 - Informes de desempeño. 4 de las 5 empresas con alguna política de bienestar en vigor recibieron puntuaciones que las sitúan en el nivel más bajo (Muy deficiente: **IKEA**, **McDonald's**, **Pizza Hut** y **Subway**), y la empresa restante sólo obtuvo una puntuación un nivel más elevado (Deficiente: **KFC**), esto demuestra que las empresas en España no están informando sobre ningún progreso respecto a los compromisos publicados.
- En comparación con la evaluación de 2022, en 2023 no se observan mejoras en la puntuación media, más bien lo contrario:
  - Dos compañías descendieron dos niveles (**IKEA** y **Pizza Hut**).
  - Seis compañías no muestran ningún progreso (**Burger King**, **Domino's**, **KFC**, **McDonald's**, **Starbucks** y **Subway**).





## Resumen de puntuación: España

Compañía	Puntuación media %	Nivel de puntuación media	Calificación media de la puntuación	Compromisos y objetivos %	Nivel de compromisos y objetivos	Calificación de los compromisos y objetivos	Informes de desempeños	Nivel de informes de desempeños	Calificación de los informes de desempeños
	0%	6	Muy deficiente	0%	6	Muy deficiente	0%	6	Muy deficiente
	0%	6	Muy deficiente	0%	6	Muy deficiente	0%	6	Muy deficiente
	47%	5	Deficiente	94%	1	Liderando	0%	6	Muy deficiente
	27%	5	Deficiente	21%	6	Muy deficiente	33%	5	Deficiente
	2%	6	Muy deficiente	3%	6	Muy deficiente	0%	6	Muy deficiente
	47%	5	Deficiente	94%	1	Liderando	0%	6	Muy deficiente
	0%	6	Muy deficiente	0%	6	Muy deficiente	0%	6	Muy deficiente
	57%	4	Empezando	94%	1	Liderando	20%	6	Muy deficiente



## Resultados por compañía

### Burger King, Domino's y Starbucks

De las marcas de comida rápida evaluadas en España, Burger King, Domino's y Starbucks no han publicado ninguna política que cubra el bienestar de los pollos de engorde, no se han comprometido públicamente con el ECC ni tampoco han elaborado ningún informe de desempeño. Con una puntuación media del 0%, estas empresas aún no han mostrado ninguna intención de mejorar el bienestar de los pollos de engorde en su cadena de suministro, y por lo tanto se clasifican en la parte inferior, en el Nivel 6 (Muy deficiente).

### IKEA

IKEA se ha comprometido con el ECC a mejorar el bienestar de sus pollos de engorde, que deberá estar totalmente implantado en 2025. Sin embargo, IKEA no ha comunicado su compromiso con el ECC en el país, por lo que IKEA España obtiene una puntuación del 94% en el Pilar 1 (Nivel 1 - Líder). Dado que los informes de IKEA sobre el progreso (cuantitativo) son limitados y no se especifican por mercado, IKEA España obtiene una puntuación media del 47% (Nivel 5 - Deficiente).

### KFC

KFC España tiene una política que cubre explícitamente el bienestar de los pollos de engorde, en la cual se comprometen a no utilizar jaulas de engorde ni sistemas de varios niveles y a cumplir sus normas de bienestar de los pollos de engorde mediante auditorías anuales realizadas por terceros. Sin embargo, dado que su política no incluye ninguno de los otros criterios del ECC, han obtenido un 21% en el pilar Compromisos y objetivos (Nivel 6 - Muy deficiente).

KFC España proporciona informes de desempeño sobre algunos de los criterios del ECC, pero no sobre todos, por lo que KFC España sólo obtiene un 33% en el Pilar 2 Informes de desempeño (Nivel 5 - Deficiente).

### McDonald's

McDonald's ha establecido compromisos globales sobre el bienestar de los pollos de engorde y ha asumido compromisos específicos que se aplicarán plenamente en 2024 y que cubren el 70% de su cadena de suministro, incluyendo explícitamente sus operaciones españolas. Sin embargo, estos compromisos no se ajustan a los requisitos del ECC, ni se comunica en la página web de McDonald's España. Además, la información sobre los progresos es limitada. El resultado es una puntuación muy baja en ambos pilares y una puntuación media del 2% (Nivel 6 - Muy deficiente).



## Pizza Hut

Pizza Hut España, teniendo en cuenta que es una filial de Yum! Brands Inc., se ha comprometido con los criterios del ECC y por lo tanto, tiene una puntuación alta del 94% en el pilar Compromisos y objetivos (Nivel 1 - Líder). Lamentablemente, aún no dispone de informes sobre el progreso realizados, por lo que su puntuación en el pilar de informes de resultados es del 0% (Nivel 6 - Muy deficiente).

## Subway

Subway ha especificado compromisos con un plazo establecido para 2026 de conformidad con el ECC. El compromiso incluye todos los criterios del ECC y especifica que se aplica al mercado europeo, pero aún no se ha comunicado en el país, por lo que Subway España obtiene una puntuación del 94% para el Pilar 1 (Nivel 1 - Líder). El informe de progreso no incluye todos los elementos del ECC, lo que da como resultado una puntuación del 20% para el Pilar 2 (Nivel 6 - Muy deficiente).

# Recomendaciones: España

- Recomendamos que **Burger King, Domino's, McDonald's** y **Starbucks** se comprometan con la ECC y publiquen una política de bienestar de los pollos de engorde que establezca explícitamente los criterios según la ECC.
- Para aquellas empresas que tienen un compromiso establecido, como **IKEA, KFC, Pizza Hut** y **Subway**, asegurarse de que se comunica en España y en otros mercados y que es accesible al público.
- Aunque un compromiso con la ECC indica un primer paso, las empresas deben informar sobre los progresos que están realizando para aplicar los criterios de la ECC en toda su cadena de suministro.



*'Chronos Sustainability was contracted by World Animal Protection to provide guidance on the development of The Pecking Order 2023 methodology and act as an independent assessor in the data gathering process. Chronos Sustainability has not been involved in the drafting of this report'.*

Chronos Sustainability was established in 2017 with the objective of delivering transformative, systemic change in the social and environmental performance of key industry sectors through expert analysis of complex systems and effective multi-stakeholder partnerships. Chronos works extensively with international organisations on a range of sustainability related issues, developing tools and strategies to enable them to deliver impact at scale. For more information visit [www.chronossustainability.com](http://www.chronossustainability.com)

## World Animal Protection

5th Floor  
222 Grays Inn Road  
London WC1X 8HB  
UK

 +44 (0)20 7239 0500

 [info@worldanimalprotection.org](mailto:info@worldanimalprotection.org)

 W: [worldanimalprotection.org](http://worldanimalprotection.org)

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