



The Pecking Order 2024



In association with:



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Cover photo: Chicks from a slower-growing breed. This slower growth rate avoids the health problems associated with the abnormally rapid growth of industrially farmed chickens. Credit: World Animal Protection



Foreword

Lifting the playing field

Roughly two kinds of people exist: those who see problems and those who see solutions. Both types are needed. The problem-focused individuals keep the solution-oriented ones in check, preventing them from running wild, while the solution-oriented individuals ensure we're not eternally stuck with problems. So far, so good. But things go wrong when problems are used as an excuse for maintaining the status quo, especially when solutions actually exist.

I believe this often happens in animal welfare. No one should deny or underestimate the difficulties of implementing higher animal welfare standards, but no one should have the audacity to pretend that such improvements are not feasible either. The standards of the European Chicken Commitment (ECC) are a perfect case in point. Many companies have already implemented these standards, and others are in the process of doing so. Still, there are too many companies that find or create excuses not to act, or to act without appropriate urgency.

The Pecking Order is the annual tool used to measure the commitments and progress of food service restaurants regarding meat chicken welfare. It identifies which companies deserve praise, which need encouragement, and which should be criticized. This initiative is a unique collaboration involving World Animal Protection, Albert Schweitzer Stiftung, Essere Animali, Humane Society International/Europe, L214, and Obranci Zvirat. It is also expanding its geographical scope: in 2024, the Czech Republic was added, and next year, The Pecking Order will also include Scandinavia.

But there is more. While a growing number of companies assessed for this report have a policy on broiler welfare (71%), have committed to the standards of the ECC (41%), and are reporting on implementation (25%), overall progress is still too slow. This highlights the urgency for companies to increase their efforts: time is running out to meet the commitments they made. In a very true sense, this edition of The Pecking Order is a wake-up call.

Lack of adequate progress also points to another important group of actors: EU policymakers. If the corporate sector as a whole is not willing to take its full responsibility, legislation is needed to help the laggards come on board and level the playing field. The outcome of the Strategic Dialogue on the Future of EU Agriculture, an initiative led by Ursula von der Leyen, holds this promise. It forcefully states the need for a revision of EU animal welfare legislation, while underlining that trade considerations should not act as impediments. The outcome of the Strategic Dialogue demonstrates that it is possible to bridge different perspectives and build a common vision.

Many farmers, companies, and NGOs are already working toward a better world for meat chickens. They must continue to do so with ever-increasing efforts. And they need to be supported by policymakers, raising the bar for all EU producers to meet the ECC and close the borders for non-compliant chicken meat.



Dirk Jan Verdonk
Director World Animal Protection Netherlands





Photo: Humanely raised chickens from a pilot organic farm. Credit: World Animal Protection / David Hogsholt

Executive summary

There are two ways to ensure broiler welfare in production. The first is through market-driven initiatives, where a portion of the broiler production must meet specific welfare standards to earn a label, or comply with minimum standards set by retailers, fast-food chains, or other similar sectors. The second is through welfare legislation, where all broiler production in a country or region must adhere to legally defined welfare standards.

In 2017, following the success of the Better Chicken Commitment in the U.S. in 2016, civil society in Europe introduced the European Chicken Commitment (ECC) as a market initiative. The ECC aims to encourage the European food industry to improve broiler welfare by implementing minimal requirements by 2026. The Pecking Order benchmark, established in 2019, evaluates the commitments of Europe's top international and local fast-food chains to address chicken welfare throughout their global supply chains and measures their progress in meeting these commitments.

The 2024 Pecking Order assessed 75 companies across seven countries: the Czech Republic, France, Germany, Italy, Poland, Romania and Spain. The average score for Commitment and Targets was 39%, while Performance Reporting lagged behind at just 7%. Of the 75 companies evaluated, 31 have either committed to the ECC or have fully aligned their broiler welfare policies with ECC standards. However, only 19 companies demonstrated any significant progress in performance reporting on broiler welfare. France and Germany achieved the highest average country scores, with 36% and 33%, respectively, while the other countries have scored significantly lower, with 19% for Czech Republic, 18% for Spain, Poland scored 17%, Italy 14%, and Romania 14%.



Figure 1. Summarized overview of The Pecking Order 2024 results.



Only a small percentage (15%) of the companies are in the early stages of addressing broiler welfare or are making limited progress. The remaining 85% are performing poorly in managing and reporting on broiler welfare in their supply chains.

Overall, the pace of progress is too slow to meet the upcoming commitment deadlines. Companies therefore need to accelerate the implementation of the ECC standards. The current trend also highlights the need for EU-level welfare legislation that aligns with ECC standards to drive more substantial improvements in broiler welfare.





The Pecking Order 2024: Project overview

Broiler chickens, which are chickens raised for their meat, are the most farmed land animals on the planet. Unfortunately, they are also among the most mistreated. To address this, we developed The Pecking Order (TPO) to improve their welfare worldwide. Companies that include 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, focusing on how both international and national fast-food brands, as well as food service companies, manage broiler chicken welfare within individual markets.

The methodology has also become more comprehensive, placing equal emphasis on both commitments and their implementation (performance reporting). In 2024, TPO was further refined with the addition of a new question in the Commitments & Targets pillar. This question evaluates whether companies have published a detailed roadmap outlining how they plan to meet the ECC standards by a set deadline¹. The goal is to encourage companies to publish specific progress milestones toward meeting these requirements within a defined timeframe.

Figure 2. Overview of all companies assessed in The Pecking Order 2024 benchmark².



¹ Please see the separate TPO 2024 Methodology document for more information on the methodology.

² Please see the Annex (pg. 21) for an overview of which companies have been assessed in which European countries.





Photo: A chicken in a typical large-scale chicken farm that supplies broiler chickens to restaurants and to corporate supermarket chains for distribution. Chickens are constantly fed to increase their body weight until they reach market weight. Rapid weight gain often leads to chicks having weak legs and experiencing difficulty walking. Credit: Haig / World Animal Protection / We Animals Media

The Pecking Order 2024: Key findings

1. Tier Ranking and Overall Score

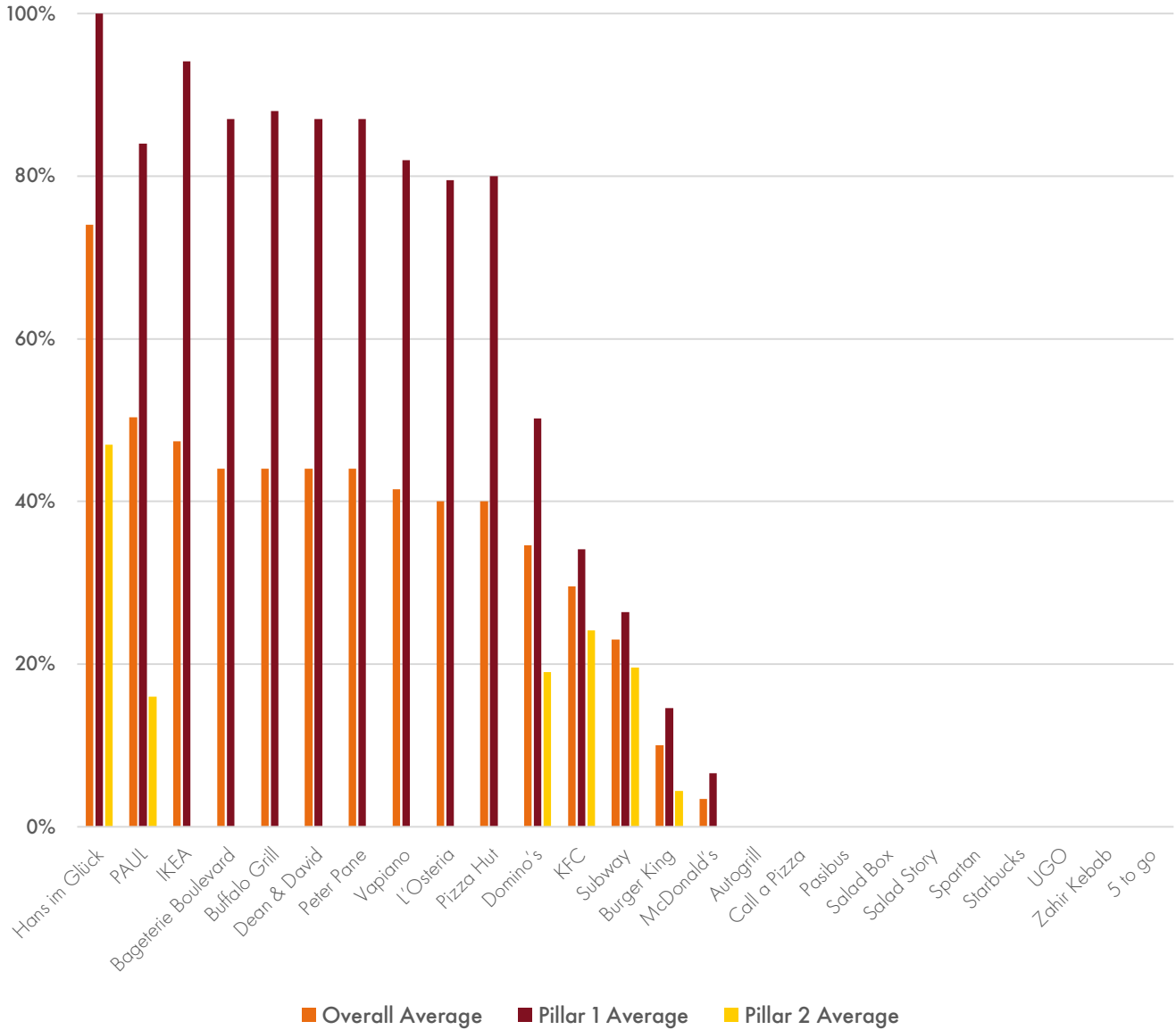
There is a concerning lack of progress, with overall scores remaining largely unchanged

In 2024, the overall average score across the 75 companies assessed is 23%, which is a combination of scores from Pillar 1 (Commitments & Targets) and Pillar 2 (Performance Reporting). This is a decrease from last year's average of 27%. The drop can be partly attributed to the addition of nine new companies assessed this year and a new question in Pillar 1, which assesses whether companies have published a roadmap to meet the ECC criteria (Q1.8). However, if we exclude the new companies and methodology changes, the overall average score for 2024 remained unchanged at 27%.

This lack of improvement highlights a troubling trend. Only 15% of the companies, or 11 in total, have scores indicating they are in the early stages of addressing broiler welfare or making limited progress. Unfortunately, 85% of fast-food and food service companies are performing poorly or very poorly in managing and reporting on broiler welfare in their supply chains.



Figure 3. Average Overall and Pillar scores by company, across all countries assessed³.



³ Please see the Annex (pg. 21) for an overview of which companies have been assessed in which European countries.



The good versus the bad

Several trends emerge from the results: some companies are making progress, others have stagnated, and some have either regressed or shown no focus on broiler welfare at all.



In 2024, Domino's committed to implement the ECC criteria in Poland by 2030 and is in the process of developing a roadmap. In Germany, the restaurant chain Hans im Glück has published a roadmap outlining their plan to fully implement the ECC criteria by 2026.

Despite some limited progress, the majority of companies are failing to make meaningful headway. For example, Pizza Hut committed in 2020 to meet or even exceed ECC standards in Europe by 2026, but four years later, there is no evidence they have made any progress toward improving the welfare of chickens in their supply chain.

Several companies, such as Bageterie Boulevard, Buffalo Grill, Dean & David, L'Osteria, Peter Pane, and Vapiano, like Pizza Hut, score well in the Commitment Pillar due to existing ECC commitments or broiler welfare policies, but score zero for Performance Reporting on implementation. These companies might be making progress, but without transparent reporting, there is no way to verify it. We strongly urge these companies to start reporting on broiler welfare, particularly regarding their implementation of the ECC welfare criteria.

Another company that should be in this group is IKEA, which has not published any progress reporting on implementing the ECC criteria in 2023 or 2024. Given that IKEA was making progress before, with reporting in 2022, this lack of recent reporting is concerning and raises questions about whether they are regressing on their commitment.



Even more troubling are cases where companies are actively backtracking. For instance, Subway removed the deadline from their ECC commitment for continental Europe (excluding France) in the past year. Previously, Subway was taking steps, earning some points for Performance Reporting on implementation, but by removing the deadline and providing no indication of a new one, Subway signals that improving broiler welfare is no longer a priority. Without a roadmap or new deadline, it is unclear whether Subway intends to improve chicken welfare in its supply chain at all.

Lastly, several companies scored absolute zero points across the entire assessment. These include Autogrill and Starbucks, which were assessed in multiple markets, and Call a Pizza, 5 to go, Pasibus, Salad Box, Salad Story, Spartan, UGO, and Zahir Kebab, assessed in single markets. These companies have no ECC commitment, no broiler welfare policy, and do not report on this issue, which suggests that these companies seemingly do not find chicken welfare a topic of interest, despite being in the business of purchasing and selling chicken products.



Interview with an expert

Ingrid de Jong - Senior Scientific Researcher at Wageningen Livestock Research, Netherlands.



❓ What are the characteristics of the most common chicken production systems in Europe?

The majority of European producers are still utilizing more intensive production systems with fast-growing chicken breeds. These systems are associated with all kinds of animal welfare issues – health problems, locomotion problems, managing the climate and litter in the barns, high stocking density, and no to little opportunity to perform natural behavior, either due to the high stocking density or physical ailments or limitations.

❓ How can we improve the welfare of these chickens?

There are two aspects, in my opinion, that are very important and need to be addressed first. One is lowering the stocking density. In Europe, the usual standard is between 38-39 kg chicken per square meter, in some cases even up to 42 kg/m². Research has shown that the lower the stocking density, and the more space the chickens have to perform natural behavior, the less risk they have of developing welfare problems.

The second aspect is the genetics, or growth rate, of the chickens. By letting the chickens grow slower to slaughter age, they can display their natural behavior for a longer period while growing at a more natural speed, and will therefore experience fewer physical problems.

Besides these two aspects, enrichments are also vital for chickens to perform natural behavior, and we should not forget the welfare of the parent stock of fast-growing broiler chickens either.

❓ Is the ECC an effective means to substantially improve the welfare of broiler chickens?

The components I mention in response to the previous question are criteria included in the ECC, and we know that, based on the ECC specified breeds, the ECC criteria improve the welfare of broilers. I therefore think that the ECC is certainly a step in the right direction. If you can persuade big companies to implement the welfare requirements of the ECC, and certainly if you can do that on a large scale at European level, then you will improve the welfare of a great many chickens.

❓ Implementing the ECC criteria seems like a relatively small step, however, we are not seeing too much improvement since the ECC was established in 2016. What is your opinion on this?

It is only natural that we prefer the system to change more rapidly, because it is going quite slowly. However, I also realize that there are completely different logistics involved when you switch to other breeds for example. On the other hand, it has been over 8 years since the ECC was created, and I think that is a timeframe in which you could implement some criteria, if not all.

I believe that we could learn from the Netherlands, where, under pressure from retail themselves, the sector was able to switch completely to Beter Leven chicken (which goes beyond the ECC). One reason why this was successful, is that all parties along the supply chain joined forces to bring about change, and that the will to change must come from both the production side all the way to retail.

❓ To encourage this change, do you think that harmonized higher standards set at European level by the European Commission could possibly make a difference?

Yes, I do think that it would make a difference. When standards are set, you create a level playing field within Europe that everyone seems to want so much. You will no longer have differences between countries, but everyone has to meet the same minimum standards. Each individual chain along the supply chain can still go a step further, and create even better welfare conditions, but then at least the minimum system requirements are guaranteed.



2. Pillar 1 - Commitments & Targets

More companies have communicated their policies to improve broiler chicken welfare

The 2024 scores for Pillar 1 have been affected by the addition of a new question (Q1.8), which asks whether companies have published a roadmap to meet ECC criteria, as well as the inclusion of new companies in the dataset. As a result, the average Pillar 1 score for all companies dropped to 39% in 2024, compared to 47% in 2023. Even when excluding the new question, the average score is 44%, which is still lower compared to last year.

Looking at individual company performance, Subway's significantly weaker broiler welfare commitment in six of the assessed markets had a notable impact on the overall average score for Pillar 1 in 2024.

Despite the decline in the overall average, there are positive signs of progress. The first question in the Commitments & Targets Pillar evaluates whether a company has a broiler welfare policy and if that policy is communicated in-country. Encouragingly, 53 companies (71%) have published some form of a broiler welfare policy, up from 45 companies (65%) in 2023.

When comparing only the 66 companies assessed in both 2023 and 2024, 47 companies (71%) have published a broiler welfare policy this year, an increase from 42 companies (64%) in 2023. The five companies contributing to this rise include Burger King for Germany, Spain, Poland, and Romania, as well as Domino's in Poland. This suggests a positive trend among companies for which we have comparable year-on-year data.

Communication is key

Some companies assessed operate as part of larger parent companies with branches across multiple countries. To ensure transparency and that the policy set by headquarters applies to all branches, we require companies to communicate their broiler welfare policies on local websites. This year, 23 companies (31%) published their policies on their local websites, a slight decrease from 32% in 2023. While this dip could be partly explained by the inclusion of more companies in the dataset, it also suggests that fewer of the 53 companies with broiler welfare policies are communicating them locally compared to last year.

The ECC is not a menu

While it's encouraging that 53 companies (71%) now have a broiler welfare policy in place, we do see that companies are selective in choosing the ECC criteria they want to address.

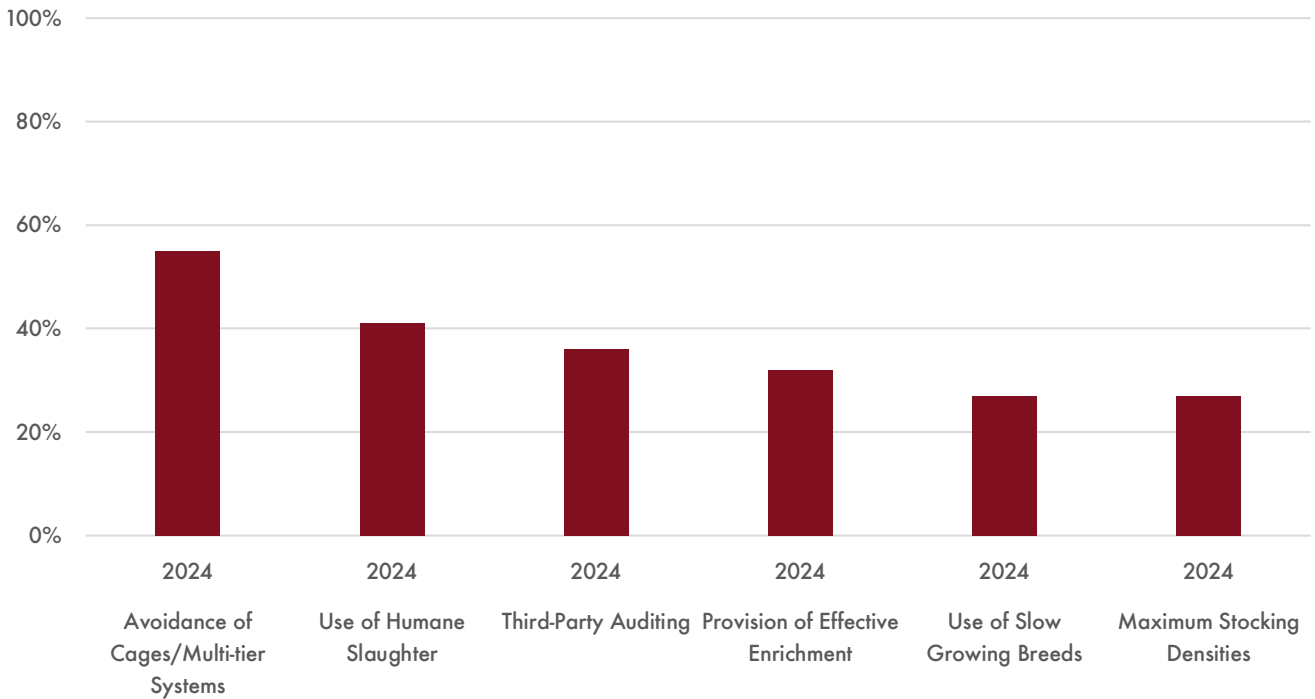
Of these 53 companies, 31 have either fully committed to the ECC or have policies fully aligned with its requirements. This represents 41% of companies in 2024, down from 49% in 2023. Notable examples include IKEA, L'Osteria, PAUL, Pizza Hut, and Vapiano, which have committed to the ECC in all markets where they were assessed. Additionally, Bageterie Boulevard, Buffalo Grill, Dean & David, Hans im Glück, and Peter Pane – each assessed in a single market – have also published commitments to meet ECC standards⁴.

⁴ Please see the Annex (pg. 21) for an overview of which companies have been assessed in which European countries.



However, the remaining 22 companies have adopted broiler welfare policies that include only some of the ECC criteria. Figure 4 illustrates the proportion of ECC criteria included in these partial policies. The most commonly addressed criteria, included by just over half of these companies, is the avoidance of cages and multi-tier systems. The other ECC criteria appear in only 20-40% of these partial policies.

Figure 4. Proportion of the 22 companies with a broiler chicken welfare policy (but not fully aligned with the ECC), that include the specific ECC requirements, for 2024.



It's essential to recognize that the ECC requirements function as a complete package, not a pick-and-choose menu. The full welfare benefits can only be realized when all aspects are implemented together, as the requirements are complementary. We encourage these companies with partially aligned policies to address and include all ECC welfare criteria.

Roadmap

An increasingly important accountability mechanism is the use of a roadmap. As previously mentioned, a roadmap outlines how a company plans to meet the ECC requirements within a set timeframe. By establishing clear milestones and timelines that are made publicly available, companies provide a transparent structure for third parties to track their progress while demonstrating their commitment to achieving ECC standards.

Of the 75 companies assessed, 10 (13%) have published a roadmap detailing how they plan to meet specific ECC criteria by a defined deadline. These companies include Buffalo Grill in France, Burger King in France, Hans im Glück in Germany, and IKEA across all markets assessed. With this new benchmark question, we hope to see steady improvements of implementation in the coming years as more companies develop and implement roadmaps to guide their progress.



3. Pillar 2 - Performance Reporting

Companies are increasing their reporting on broiler chicken welfare but from a very low baseline

When it comes to reporting on performance and implementation, most companies continue to perform poorly. In 2024, 66 companies (88%) were ranked at the bottom of Pillar 2 for providing little to no performance reporting on broiler chicken welfare (90% in 2023)⁵.

KFC Germany stands out as the only company to achieve Tier 4 status, indicating that they have started reporting on specific ECC-aligned broiler welfare issues. However, KFC Germany’s score and Tier status remained unchanged from last year, indicating no significant expansion or improvement in the scope of their reporting.

Out of the 75 companies assessed in the benchmark, only 19 (25%) provided some performance impact data on broiler chicken welfare within their supply chains, an increase from 19% in 2023.

Figure 5. Number of assessments who report on the specific ECC requirements.

Avoidance of Cages / Multi-tier Systems	12 / 75	Use of Humane Slaughter	16 / 75
Third-Party Auditing	7 / 75	Provision of Effective Enrichment	15 / 75
Maximum Stocking Density	11 / 75	Use of Slow Growing Breeds	5 / 75

Notably, reporting on selected ECC criteria is not limited to companies who have an ECC commitment or policies fully aligned with the ECC. Among the 31 companies that have a commitment or fully-aligned policy, only 11 provided any form of performance reporting on broiler welfare. The remaining eight companies that reported on performance are those with policies that are only partially aligned with the ECC.

Comparing the 66 companies assessed in both 2023 and 2024, the number of companies publishing some performance data rose from 13 (20%) in 2023 to 17 (26%) in 2024. While this reflects a small improvement, it still highlights that only a limited number of companies are actively monitoring their commitments on key broiler welfare issues.

⁵ Please see the Annex (pg. 22) for an overview of the Tier and Grade ranking for each assessment’s total overall score, commitments & targets score, and performance reporting score.

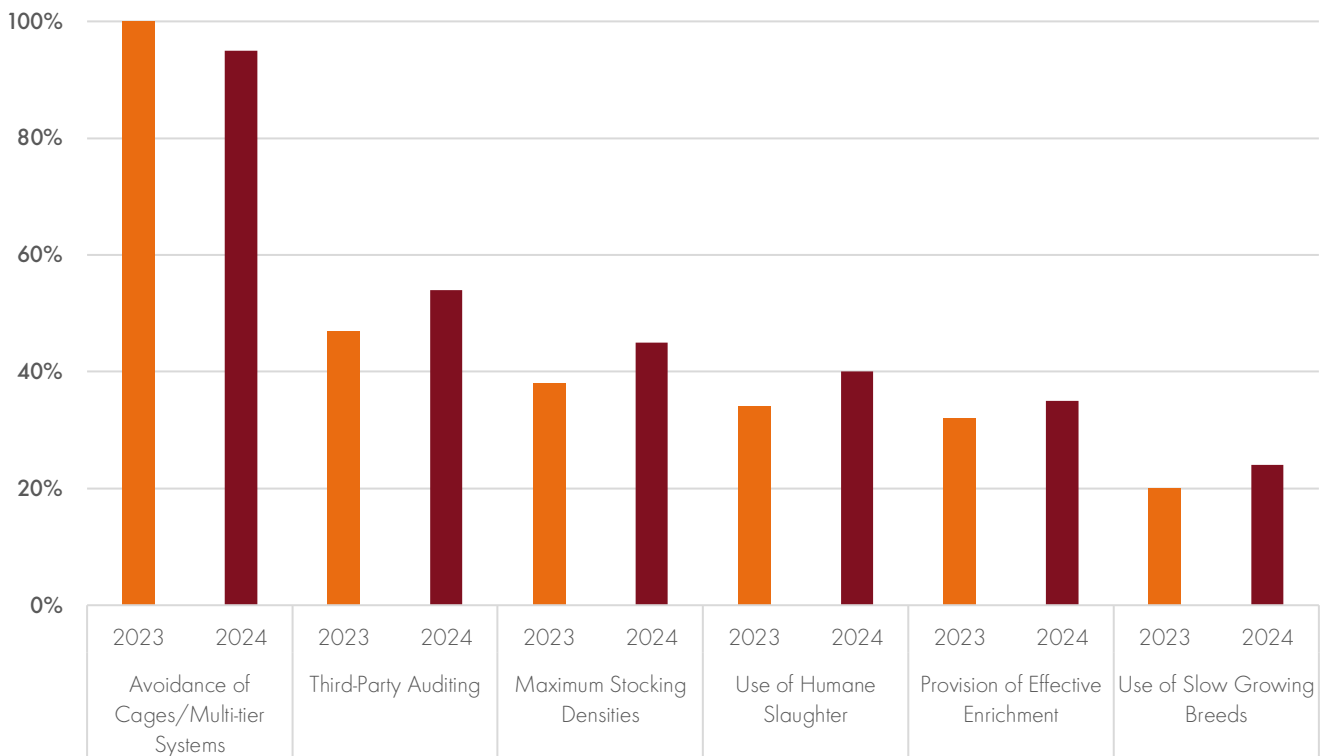


Compliance

Reporting on specific broiler welfare issues addressed by the ECC also shows improvement in implementation. For example, companies reporting progress on third-party auditing indicate that, on average, 54% of their supply chain is now compliant – an increase from 47% in 2023. Reporting on maximum stocking densities reveals an average compliance rate of 45% with ECC standards, up from 38% last year. Similarly, compliance with the use of humane slaughter methods rose to 40%, compared to 34% in 2023.

However, as shown in Figure 6, there is one area where overall compliance has declined: the avoidance of cages and multi-tier systems. In 2023, fewer companies reported on this issue, but those that did indicated 100% compliance. This year, more companies reported on this issue, with one company reporting partial compliance at 40%, while the rest maintained full compliance. As a result, the overall average compliance slightly decreased to 95%.

Figure 6. The overall average compliance reported of those assessments that report on the specific ECC requirements.



These trends suggest that companies working to implement ECC requirements are indeed making progress. However, the pace remains too slow, particularly with the 2026 deadline looming. As of June 2024, 378 companies across Europe have committed to the ECC. While the restaurant sector has the highest number of commitments, other sectors – such as foodservice and retail – are making faster strides. According to the ECC Progress Report from the Open Wing Alliance, retailers that have transitioned to 100% ECC-compliant chicken are seeing significant above-average market growth. Similarly, a Norwegian producer, Norsk Kylling, reports better yields and higher profits after shifting exclusively to ECC-compliant broilers, showing that early adopters are benefiting from their transition⁶.

⁶ <https://openwingalliance.org/ecc-progress-report-2024>



Case study:

Poultry Producer in Germany

Context: FairMast is part of Plukon GmbH's product range. The husbandry requirements comply with all ECC criteria, meaning that only robust breeds are used and broilers have more space (25kg live weight per square metre) as well as perches and enrichment material. In some aspects, the FairMast requirements go beyond those of the ECC. For example, FairMast poultry are required to have a covered outdoor area and a high proportion of grain in their feed.

Mr. Schulz has been producing poultry since 2007 and has been implementing the FairMast criteria since 2019.

According to Mr. Schulz, chickens that are kept according to the ECC criteria are generally fitter, healthier, and much less susceptible to stressful situations such as heat, which makes working with these animals much easier and more relaxed.

His farm received a Ceres Award from the Agrar-heute newspaper as 'Poultry Farmer of the Year 2020'. This title has now opened many doors for him to present this form of husbandry to the wider community, and his farm has been a demonstration farm in the state of Brandenburg for the last 4 years.

What is, according to Mr. Schulz, needed in order to drive forward the reorganization of animal husbandry towards higher welfare standards in Germany? His answer is clear: 'Farmers such as me urgently need more political support in obtaining permits for conversions and new buildings and, at the same time, appropriate competitiveness and the same standards for imported goods.'

He adds: "In conjunction, chicken meat sellers should draw more and clearer attention to the use of poultry from the ECC, so that customers are more aware that the chicken they consume was produced with a higher standard of animal welfare."

Despite these promising developments, a significant gap remains between the scores in the Commitments & Targets Pillar and the Performance Reporting Pillar. While many companies have made partial or full commitments to the ECC, there is still a glaring shortfall in reporting on actual implementation. This raises concerns about the rate of progress being made, and the willingness of companies to improve the lives of broiler chickens in their supply chain. Without detailed performance reporting or a clear roadmap towards the target date, companies' commitments risk appearing superficial. The lack of transparency underscores the need for companies to demonstrate real accountability in enhancing broiler chicken welfare.

The reporting gap can also be seen as ironic, since on January 5th 2023, the European Union Corporate Sustainability Reporting Directive (EU CSRD) came into force, which actually requires corporates to report on issues like animal welfare.





Photo: 'Windstreek' is a high welfare chicken farm located in the Netherlands which ensures chickens have a good and valued life. The farm has natural ventilation, enough space for the chicks and chickens to roam around, a motherboard for young chicks under which they are heated, they are given good feed, and the farm uses slow growing breeds. Credit: Valerie Kuypers / World Animal Protection

4. Country Comparison

Companies in France and Germany continue to outperform those in other countries in their commitments and reporting on broiler chicken welfare

Europe is the third-largest poultry producer globally, with 75% of total European production concentrated in France, Germany, Italy, the Netherlands, Poland, Spain, and the UK⁷. Historically, the importance of animal welfare, especially for farmed species, has been more prominent in Western Europe, with initiatives to develop minimum welfare standards for animal species most commonly farmed in Europe going back more than 50 years. Broiler welfare was a latecomer to this movement⁸, however, those countries that already had national legislation with specific rules regarding broilers, seem to be ahead of the curve.

⁷ https://www.eurogroupforanimals.org/files/eurogroupforanimals/2021-12/2020_11_19_eurogroup_for_animals_broiler_report.pdf

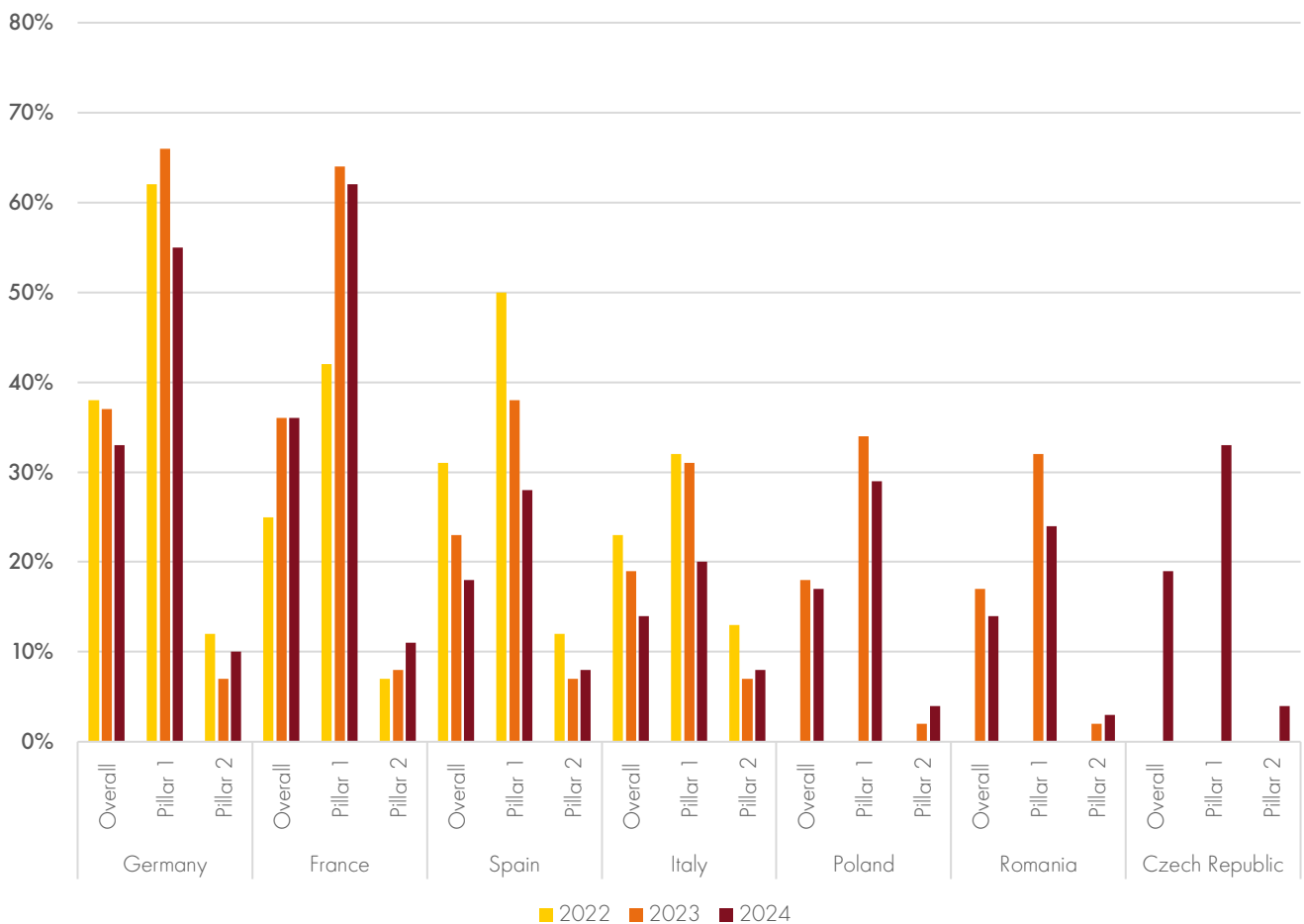
⁸ <https://edepot.wur.nl/568300>



Analyzing the average company scores across seven countries, France leads with an overall average score of 36% (the same as in 2023). Germany follows with a score of 33% (down slightly from 37% in 2023). The Czech Republic came in third, with an average score of 19%, followed by Spain at 18% (23% in 2023). Poland averaged 17% (18% in 2023), Italy at 14% (down from 19% in 2023), and Romania also at 14% (down from 17% in 2023). The drop in country scores can primarily be attributed to the addition of a new question in the 2024 methodology, and due to Subway scoring lower in six countries assessed, because of their weakened broiler welfare commitment.

French companies were asked additional questions in Pillar 1 and Pillar 2 (Q1.9 and Q2.7)⁹. To facilitate a direct comparison across countries, we also calculated the average score for France without these additional questions. On this basis, France’s overall average score was 45%, up from 42% in 2023.

Figure 7. Graph showing the comparison of Average Overall and Pillar scores by country from 2022-2024¹⁰.



⁹ Please see the separate TPO 2024 Methodology document for more information on these questions.

¹⁰ The 2024 edition of the TPO report is the first instance that companies in Czech Republic have been assessed, which is why there is no comparable data from 2022 and 2023 for this country. Similarly, 2023 was the first year Romania and Poland were included, which is why there is no comparable data from 2022 for these countries.



The Big Six

An alternative comparison was made by focusing only on the six companies assessed in all seven markets: Burger King, KFC, IKEA, McDonald's, Starbucks, and Subway. Figure 8 shows that even among these companies, France is the clear leader, with an overall average score of 36% (slightly down from 37% in 2023). Germany remains the second-best performing country with an average score of 24% (down from 31% in 2023). The remaining countries scored lower: Spain at 17% (22% in 2023), Italy at 16% (22% in 2023), Poland at 14% (20% in 2023), Romania at 13% (18% in 2023), and the Czech Republic at 13%. Here too, the drop in scores is due to the additional question in Pillar 1 and the decreased scores for Subway in all markets except for France.

Figure 8. Average Overall and Pillar scores by country
(for companies assessed in all markets – Burger King, KFC, IKEA, McDonald's, Starbucks and Subway).

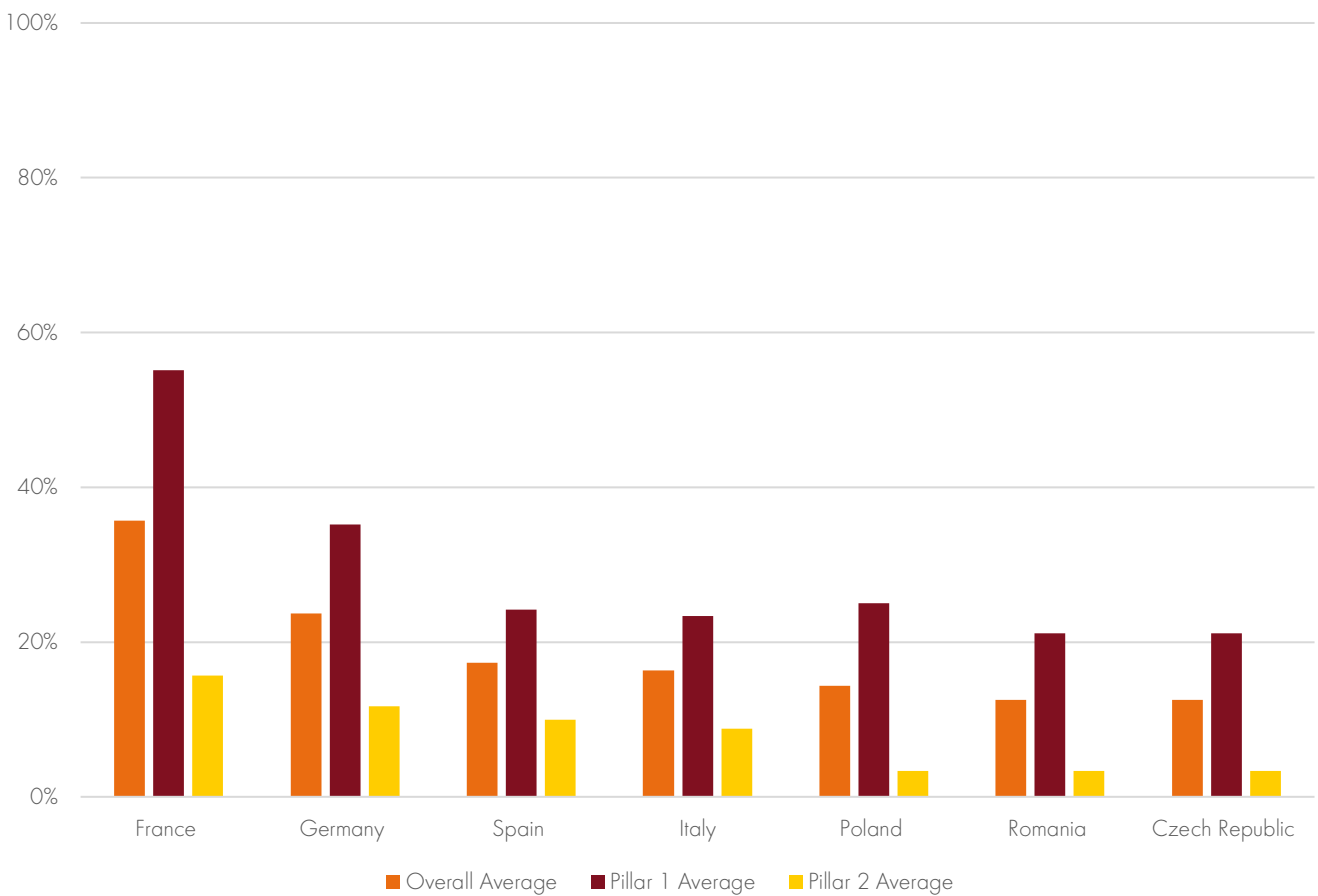




Photo: Fast growing Hubbard Flex chickens in the UK. Credit: World Animal Protection

Conclusion

This report underscores a troubling gap between companies' commitments to improve broiler chicken welfare and the actual implementation of those commitments. While more companies are adopting policies aligned with the ECC, the lack of significant progress in implementation is concerning. The overall average score for all assessed companies decreased from 27% in 2023 to 23% in 2024, with only 15% (11 companies) demonstrating meaningful improvements in broiler welfare. Thirty-one companies have made commitments to improve broiler welfare, of which only a third provide evidence of (partial) implementation. Only 19 companies (25%) reported any performance data on broiler welfare, showing minimal progress from the previous year. This lack of transparency hinders stakeholders' ability to understand companies' progress toward ECC-aligned goals.

As the 2026 deadline for ECC compliance approaches, companies must recognize the urgency of increasing their pace of progress. The restaurant sector leads in ECC commitments, but implementation rates remain inadequate. Notably, retailers transitioning to 100% ECC-compliant chicken have experienced significant market growth, indicating that adhering to higher welfare standards can yield economic benefits. This should motivate companies across sectors to accelerate their efforts.

Moreover, incorporating welfare standards into European legislation is crucial. While individual company commitments are a step in the right direction, they must be supported by robust legal frameworks that establish minimum welfare requirements for broiler chickens. Such legislation would provide a baseline for all companies, ensuring that welfare standards are upheld across the industry. By creating an environment where higher welfare standards are mandated, we can foster a more ethical and sustainable broiler sector.

Companies must move beyond hollow commitments and demonstrate genuine progress through active implementation of and transparent reporting on the ECC requirements. With the 2026 deadline approaching, the onus is on these companies to prove their commitment to improving broiler welfare. Significant progress can only be achieved through sustained effort, accountability, and transparency, ensuring that commitments translate into real benefits for the billions of broiler chickens in global supply chains.





Photo: Chickens in a large-scale intensive broiler farm in the UK. Credit: World Animal Protection / Tracks Investigations

Annex

1. Assessment matrix of companies assessed in each market

In 2024, The Pecking Order assessed 25 food service companies across seven European markets: the Czech Republic, France, Germany, Italy, Poland, Romania, and Spain. In total, 75 company assessments were conducted. This report refers to the number of "companies" rather than "assessments", to align with previous editions of TPO. Since companies were assessed in multiple markets, the term "10 companies" could include multiple assessments of the same company in different markets. Table 1 below shows the markets in which each company was assessed.



Table 1: Assessment matrix showing which companies were assessed in each market.

		Czech Republic	France	Germany	Italy	Poland	Romania	Spain	Total
Autogrill			Assessed	Assessed	Assessed				3
Bageterie Boulevard		Assessed							1
Buffalo Grill			Assessed						1
Burger King		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	7
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	Assessed	7
KFC		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	7
L'Osteria			Assessed	Assessed					2
McDonald's		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	7
Pasibus						Assessed			1
PAUL		Assessed	Assessed				Assessed		3
Peter Pane				Assessed					1
Pizza Hut			Assessed	Assessed		Assessed	Assessed	Assessed	5
Salad Box							Assessed		1
Salad Story						Assessed			1
Spartan							Assessed		1
Starbucks		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	7
Subway		Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	7
UGO		Assessed							1
Vapiano			Assessed	Assessed					2
Zahir Kebab						Assessed			1
5 to go							Assessed		1
Total		9	13	15	7	11	12	8	75



2. Companies tier for Overall and Pillar scores

Table 2 provides an overview of each company's 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 2023. The asterisk (*) symbol indicates that a company has been newly assessed in this year's report.

Table 2: 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
Tier 1 Leading		Bageterie Boulevard Czech Republic (*) Buffalo Grill France (=) Dean & David Germany (=) Domino's Germany (=) Domino's Poland (▲ 5) Hans im Glück Germany (=) IKEA Czech Republic (*) IKEA Germany (=) IKEA Italy (=) IKEA Poland (=) IKEA Romania (=) IKEA Spain (=) KFC Germany (=) L'Osteria Germany (=) PAUL France (=) Peter Pane Germany (=) Vapiano Germany (=) (17)	
Tier 2 Good		Burger King France (▼ 1) Domino's France (▼ 1) IKEA France (=) KFC France (▼ 1) Pizza Hut Germany (▼ 1) Pizza Hut Poland (▼ 1) Pizza Hut Romania (▼ 1) Pizza Hut Spain (▼ 1) PAUL Czech Republic (*) PAUL Romania (▼ 1) Subway France (▼ 1) Vapiano France (▼ 1) (12)	
Tier 3 Making progress	Domino's Germany (=) Hans im Glück Germany (▲ 1) KFC France (=) KFC Germany (=) (4)	L'Osteria France (▼ 1) Pizza Hut France (▼ 1) (2)	

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



	Total Overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
Tier 4 Getting started	Burger King France (=) Domino's France (=) Domino's Poland (▲ 2) IKEA Poland (=) PAUL Czech Republic (*) PAUL France (=) PAUL Romania (▲ 1) (7)		KFC Germany (=) (1)
Tier 5 Poor	Bageterie Boulevard Czech Republic (*) Buffalo Grill France (=) Dean & David Germany (▼ 1) IKEA Czech Republic (*) IKEA France (=) IKEA Germany (=) IKEA Italy (=) IKEA Romania (=) IKEA Spain (=) KFC Italy (=) KFC Spain (=) L'Osteria France (=) L'Osteria Germany (▼ 1) Peter Pane Germany (▼ 1) Pizza Hut France (=) Pizza Hut Germany (=) Pizza Hut Poland (=) Pizza Hut Romania (=) Pizza Hut Spain (=) Subway France (▼ 1) Vapiano France (=) Vapiano Germany (▼ 1) (22)		Burger King France (=) Domino's France (=) Domino's Germany (=) Domino's Poland (▲ 1) Hans im Glück Germany (▲ 1) KFC France (=) KFC Italy (=) KFC Spain (=) (8)
Tier 6 Very poor	Autogrill Germany (=) Autogrill Italy (=) Burger King Czech Republic (*) Burger King Germany (=) Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Spain (=) Call a Pizza Germany (=) Domino's Romania (=) Domino's Spain (=) KFC Czech Republic (*) KFC Poland (=) KFC Romania (=) <i>(Continues in the next page)</i>	Autogrill France (=) Autogrill Germany (=) Autogrill Italy (=) Burger King Czech Republic (*) Burger King Germany (=) Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Spain (=) Call a Pizza Germany (=) Domino's Romania (=) Domino's Spain (=) KFC Czech Republic (*) KFC Italy (=) <i>(Continues in the next page)</i>	Autogrill France (=) Autogrill Germany (=) Autogrill Italy (=) Bageterie Boulevard Czech Republic (*) Buffalo Grill France (=) Burger King Czech Republic (*) Burger King Germany (=) Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Spain (=) Call a Pizza Germany (=) Dean & David Germany (=) Domino's Romania (=) <i>(Continues in the next page)</i>

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



	Total Overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
Tier 6 (cont.) Very poor	Autogrill France (=) McDonald's Czech Republic (*) McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Spain (=) Pasibus Poland (=) Salad Box Romania (=) Salad Story Poland (=) Spartan Romania (=) Starbucks Czech Republic (*) Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Spain (=) Subway Czech Republic (*) Subway Germany (▼ 3) Subway Italy (▼ 2) Subway Poland (▼ 2) Subway Romania (▼ 2) Subway Spain (▼ 2) UGO Czech Republic (*) Zahir Kebab Poland (=) 5 to go Romania (=) (42)	KFC Poland (=) KFC Romania (=) KFC Spain (=) McDonald's Czech Republic (*) McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Spain (=) Pasibus Poland (=) Salad Box Romania (=) Salad Story Poland (=) Spartan Romania (=) Starbucks Czech Republic (*) Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Spain (=) Subway Czech Republic (*) Subway Germany (▼ 5) Subway Italy (▼ 5) Subway Poland (▼ 5) Subway Romania (▼ 5) Subway Spain (▼ 5) UGO Czech Republic (*) Zahir Kebab Poland (=) 5 to go Romania (=) (44)	Domino's Spain (=) IKEA Czech Republic (*) IKEA France (=) IKEA Germany (=) IKEA Italy (=) IKEA Poland (=) IKEA Romania (=) IKEA Spain (=) KFC Czech Republic (*) KFC Poland (=) KFC Romania (=) L'Osteria France (=) L'Osteria Germany (=) McDonald's Czech Republic (*) McDonald's France (=) McDonald's Germany (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Spain (=) Pasibus Poland (=) PAUL Czech Republic (*) PAUL France (=) PAUL Romania (=) Peter Pane Germany (=) Pizza Hut France (=) Pizza Hut Germany (=) Pizza Hut Poland (=) Pizza Hut Romania (=) Pizza Hut Spain (=) Salad Box Romania (=) Salad Story Poland (=) Spartan Romania (=) Starbucks Czech Republic (*) Starbucks France (=) Starbucks Germany (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Spain (=) Subway Czech Republic (*) Subway France (=) Subway Germany (=) Subway Italy (=) Subway Poland (=) Subway Romania (=) Subway Spain (=) UGO Czech Republic (*) Vapiano France (=) Vapiano Germany (=) Zahir Kebab Poland (=) 5 to go Romania (=) (66)

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




'Chronos Sustainability was contracted by World Animal Protection to provide guidance on the development of The Pecking Order 2024 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

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