

# The Pecking Order 2024



## Country Executive Summaries



HUMANE SOCIETY  
INTERNATIONAL  
EUROPE



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## The Pecking Order 2024: Czech Republic

The Pecking Order (TPO) is a ranking of restaurant chains based on their animal welfare standards for broiler chickens. Specifically, it focuses on the level of implementation of the European Chicken Commitment (ECC) and ranks companies according to their performance. The assessment was carried out in France, Germany, Italy, Poland, Romania, Spain, and for the first time this year, in the **Czech Republic**.



# Methodology

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TPO evaluates individual companies based on the ECC, a commitment of retailers, restaurants, food companies, and other institutions that sets minimum animal welfare standards for broiler chickens, according to the latest scientific findings. The main criteria include welfare-enhanced breeds, stocking density, environmental enrichment, lighting conditions in barns, slaughter methods, and third-party audits. The assessment is expressed both as a percentage (0-100%) and as a grade (1-6). The evaluation is based on publicly available information.

# Key findings

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- Czech companies significantly lag behind German and French companies.
- The average score of Czech restaurant chains is 19%.
- Low score is mainly due to the lack of commitments from companies such as Burger King, UGO, KFC, McDonald's, and Starbucks.
- However, there are signs of progress. The PAUL bakery chain achieved a score of 50%, thanks to a clear commitment and indications of an ongoing audit to ensure compliance.

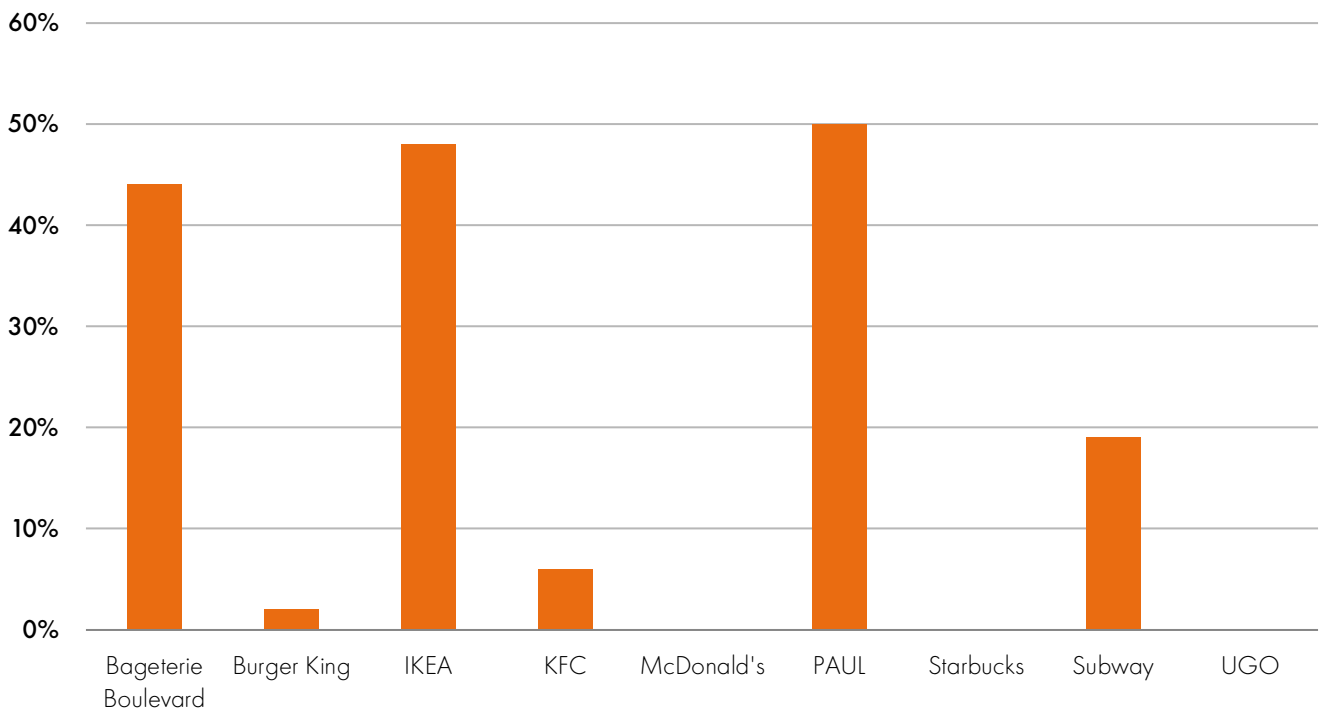


# Commentary



Selected Czech companies were evaluated for the first time in the TPO, which has been conducted repeatedly in other European countries for several years. While Czech companies are not at the bottom of the European rankings, it is clear that they are far behind countries like France and Germany. This contrast is even more pronounced when considering international branches of companies like KFC or Burger King, which perform much better in other countries. The results should serve as a call to action for Czech restaurants and fast food chains to adopt the ECC and implement it transparently. The ECC is a scientifically backed commitment aimed at addressing unethical practices in broiler chicken farming. By adopting the ECC, companies clearly declare their commitment to animal welfare and sustainability.

**Figure: Results for the Czech market**



## Scoring overview: the Czech Republic

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
	44%	5	Poor	87%	1	Leading	0%	6	Very Poor
	2%	6	Very Poor	3%	6	Very Poor	0%	6	Very Poor
	48%	5	Poor	95%	1	Leading	0%	6	Very Poor
	6%	6	Very Poor	11%	6	Very Poor	0%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	50%	4	Getting Started	82%	2	Good	17%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	19%	6	Very Poor	18%	6	Very Poor	20%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor



# Results of the Czech companies in detail

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## Bageterie Boulevard

Bageterie Boulevard achieved an overall score of 44%. The company has a clearly defined commitment to the ECC, making it the third-highest ranked entity in the evaluation. Although this score is higher than the Czech average, it is still rated as "poor". The company's score is significantly reduced by the absence of reports on fulfilling its commitment.

**Recommendation:** Supplement the ECC commitment with a plan for fulfillment by 2026 and share annual audit reports.

## Burger King

Burger King received the fourth-lowest score. The company has policies aligned with the ECC in the UK and France, but this commitment does not extend to the Czech Republic. As a result, Burger King received a very low score of only 2%.

**Recommendation:** Extend the ECC commitment to the Czech Republic.

## IKEA

IKEA has globally adopted the Better Chicken Commitment (another formal term for the ECC), making it the second-best rated company. However, the absence of reports on the fulfillment of this commitment in the Czech Republic significantly lowered the score, leading to a rating of "poor".

**Recommendation:** Publicly share information on ECC-related activities and fulfillment.

## KFC

KFC has adopted the ECC in Germany and France, but this commitment does not apply to the Czech Republic. Consequently, the company received a "very poor" rating and is one of the lowest-rated entities.

**Recommendation:** Adopt the ECC in the Czech Republic and regularly publish reports on its fulfillment.

## McDonald's

Although McDonald's has global commitments regarding broiler welfare, the Czech Republic is not included. As a result, the company received a "very poor" rating and was one of the lowest-rated entities.

**Recommendation:** Publish broiler welfare policies and regularly report on them in the Czech Republic.



## PAUL

The PAUL bakery chain achieved the highest score among all evaluated companies – 50%. PAUL is operated in the Czech Republic by Lagardère Travel Retail, which clearly communicates its commitment to the ECC, including reports on ongoing audits with chicken meat suppliers to meet goals. The description "At the beginning" is fitting here. PAUL is on track for better results once the announced audit is published.

**Recommendation:** *Publicly share the results of the audit on commitment fulfillment.*

## Starbucks

Like McDonald's and UGO, the international coffee chain Starbucks received a score of 0%. Starbucks has not committed to the ECC or any other broiler welfare policies.

**Recommendation:** *Adopt the European Chicken Commitment and report on its fulfillment.*

## Subway

Subway has adopted the ECC for the entire European market, but the commitment currently lacks a timeline for fulfillment. Subway does not communicate its commitment in the Czech Republic, nor does it report on its progress, which is why the company was rated at only 19%.

**Recommendation:** *Publish the ECC commitment, including the fulfillment timeline, on the Czech websites and regularly update progress reports.*

## UGO

UGO is one of the few companies with a score of 0%. This fast-food chain has not yet published any commitment to the ECC or any other broiler welfare improvement framework.

**Recommendation:** *Publish a commitment to the ECC and share reports on its fulfillment.*

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See pg. 8 for the Czech Republic Executive Summary in Czech.





## The Pecking Order 2024: České republika

The Pecking Order (TPO) je hodnocení řetězců restaurací z hlediska animal welfare kuřat chovaných na maso. Konkrétně se soustředí na úroveň implementace European Chicken Commitment (ECC) a sestavení žebříčku subjektů dle dosaženého hodnocení. Hodnocení probíhalo ve Francii, Německu, Itálii, Polsku, Rumunsku, Španělsku a tento rok poprvé i v **České republice**.





# Metodologie

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TPO vyhodnocuje jednotlivé subjekty dle ECC, což je závazek obchodních řetězců, restaurací, potravinářských společností a dalších institucí, který definuje minimální standardy animal welfare kuřat chovaných na maso dle aktuálních vědeckých poznatků. Hlavními kritérii jsou plemena se zvýšeným welfare, hustota osazení, obohacení prostředí, světelný režim v halách, způsob porážky a audit třetí strany. Hodnocení je vyjádřeno jednak procenty (0 - 100 %), jednak známkou (1 - 6). Hodnocení je prováděno na základě veřejně dostupných informací.

# Klíčová zjištění

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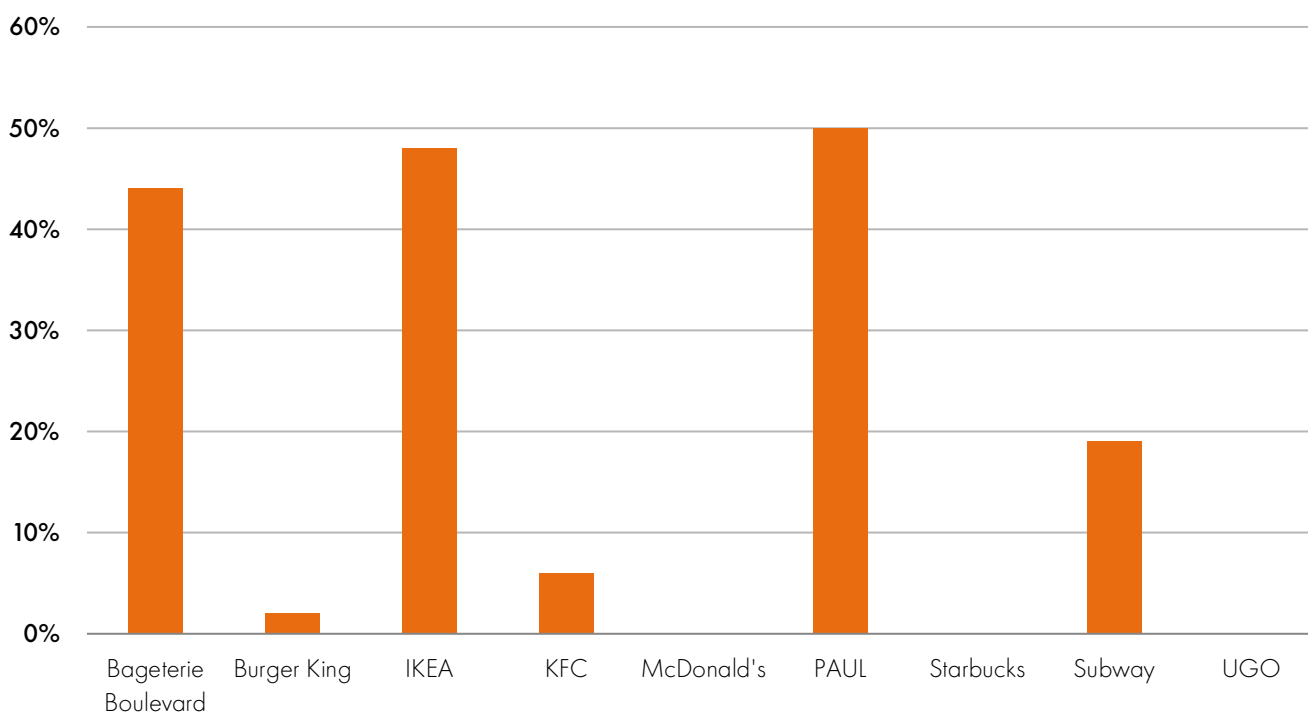
- České firmy výrazně zaostávají za německými a francouzskými.
- Průměrné hodnocení českých restauračních řetězců dosahuje 19 %.
- Nízké hodnocení je zapříčiněno především chybějícími závazky ze strany společností, jako je Burger King, UGO, KFC, McDonald's a Starbucks.
- Z druhé strany lze pozorovat i náznaky pokroku. Řetězec pekáren PAUL dosáhl 50 %, a to díky jasně deklarovanému závazku a náznaku probíhajícího auditu plnění.



## Komentář

Vybrané české společnosti byly poprvé hodnoceny v rámci TPO, které probíhá v jiných zemích Evropy opakovaně již několik let. Ačkoliv se v obecném pohledu na mapu Evropy firmy působící v ČR neumístily na poslední příčce, je na první pohled zjevné, že silně zaostávají za zeměmi, jako je např. Francie a Německo. V případě zahraničních poboček společností, jako je KFC či Burger King je tento kontrast o to větší, neboť v jiných zemích dosahují stejné subjekty mnohem vyššího hodnocení. Výsledky hodnocení by měly sloužit jako výzva pro tuzemské řetězce restaurací a rychlého občerstvení k přijetí ECC a jeho transparentní implementaci. ECC je vědecky podložený závazek, který cílí na řešení neetických praktik v chovech kuřat na maso. Přijetím ECC firmy jasně deklarují, že jim záleží na dobrých životních podmínkách zvířat a směřují k udržitelnosti.

Graf celkového hodnocení pro Českou republiku



## Tabulka celkového hodnocení pro Českou republiku

Společnost	Celkové hodnocení %	Známka celkového hodnocení	Známka celkového hodnocení slovně	Závazky a cíle %	Známka za závazky a cíle	Známka za závazky a cíle slovně	Zprávy o plnění %	Známka za zprávy o plnění	Známka za zprávy o plnění slovně
	44 %	5	Nízké	87 %	1	Vynikající	0 %	6	Velmi nízké
	2 %	6	Velmi nízké	3 %	6	Velmi nízké	0 %	6	Velmi nízké
	48 %	5	Nízké	95 %	1	Vynikající	0 %	6	Velmi nízké
	6 %	6	Velmi nízké	11 %	6	Velmi nízké	0 %	6	Velmi nízké
	0 %	6	Velmi nízké	0 %	6	Velmi nízké	0 %	6	Velmi nízké
	50 %	4	Na začátku	82 %	2	Dobré	17 %	6	Velmi nízké
	0 %	6	Velmi nízké	0 %	6	Velmi nízké	0 %	6	Velmi nízké
	19 %	6	Velmi nízké	18 %	6	Velmi nízké	20 %	6	Velmi nízké
	0 %	6	Velmi nízké	0 %	6	Velmi nízké	0 %	6	Velmi nízké



# Detailní hodnocení českých společností

## Bageterie Boulevard

Bageterie Boulevard dosáhla celkového hodnocení 44 %. Společnost má jasně definovaný závazek k ECC, což z ní dělá třetí nejlépe hodnocený subjekt v hodnocení. Ačkoliv se jedná o vyšší hodnocení, než je český průměr, stále se jedná o výsledek oznámkovaný jako „nízké“. Společnosti na kladném hodnocení výrazně ubírá absence zpráv o plnění závazku.

**Doporučení:** Závazek ECC doplnit o plán splnění do roku 2026 a sdílet každoroční audit.

## Burger King

Burger King dosáhl čtvrtého nejnižšího hodnocení. Společnost Burger King má ve Velké Británii a Francii stanovené zásady, které se týkají dobrých životních podmínek kuřat shodné s ECC. Závazek se však nevztahuje na Českou republiku. Z toho důvodu získal Burger velmi nízké hodnocení, pouhá 2 %.

**Doporučení:** Přijmout závazek ECC v České republice a následně zveřejňovat zprávy o jeho plnění.

## IKEA

IKEA celosvětově přijala závazek Better Chicken Commitment (pouze jiný název pro ECC), a je tak druhým nejlépe hodnoceným subjektem. Absence zpráv o plnění závazku v České republice však výrazně snížila hodnocení, a proto je společnost oznámkována slovy „nízké“.

**Doporučení:** Veřejně informovat o aktivitách týkající se plnění závazku ECC.

## KFC

Společnost KFC přijala závazek ECC v Německu a Francii, na Českou republiku se závazek však nevztahuje. Z tohoto důvodu získala společnost hodnocení „velmi nízké“ a stala se tak jedním z nejhůře hodnocených subjektů.

**Doporučení:** Přijmout závazek ECC v České republice a následně zveřejňovat zprávy o jeho plnění.

## McDonald's

Ačkoliv má společnost McDonald's celosvětové závazky týkající se dobrých životních podmínek kuřat chovaných na maso, Česká republika do nich není zahrnuta. Z tohoto důvodu získala společnost hodnocení „velmi nízké“ a stala se tak jedním z nejhůře hodnocených subjektů.

**Doporučení:** Přijmout závazek ECC v České republice a následně zveřejňovat zprávy o jeho plnění.



## PAUL

Řetězec pekáren PAUL dosáhl nejvyššího hodnocení ze všech hodnocených společností - 50 %. PAUL je v České republice provozován společností Lagardère Travel Retail, která svůj závazek k ECC jasně komunikuje, a to vč. zprávy o probíhajících auditech u dodavatelů kuřecího masa o plnění cílů. Slovní hodnocení „Na začátku“ je v tomto případě přílehlavé. PAUL je na dobré cestě k lepšímu výsledkům, jakmile bude zveřejněn avizovaný audit.

**Doporučení:** Veřejně komunikovat výsledky auditu o plnění závazku.

## Starbucks

Stejně jako McDonald's a UGO byl i mezinárodní řetězec kaváren Starbucks ohodnocen 0 %. Společnost Starbucks se nehlásí k ECC ani k žádným jiným zásadám zlepšující životní podmínky kuřat chovaných na maso.

**Doporučení:** Přijmout závazek ECC a následně zveřejňovat zpráv o jeho plnění.

## Subway

Společnost Subway přijala závazek ECC pro celý evropský trh, ten však aktuálně postrádá termín splnění. Subway v České republice závazek nekomunikuje a nepodává zprávy o jeho plnění, i proto byla společnost ohodnocena pouhými 19 %.

**Doporučení:** Zveřejnit závazek ECC včetně termínu splnění na českých webových stránkách a pravidelně informovat o jeho plnění.

## UGO

UGO je jedna z mála hodnocených společností s 0 %. Tento řetězec rychlého občerstvení dosud nezveřejnil závazek k ECC, ani k žádnému jinému konceptu zlepšení úrovně životních podmínek kuřat chovaných na maso.

**Doporučení:** Zveřejnit závazek k ECC a sdílet zprávy o jeho plnění.





## The Pecking Order 2024: France

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

The Pecking Order benchmark's aim is to drive disclosure amongst food service companies on their efforts to improve the welfare of broiler chickens across their operations and to demonstrate the progress being made. Based on the requirements of the European Chicken Commitment (ECC), The Pecking Order began as an annual assessment to understand how leading companies were implementing and reporting on their chicken welfare commitments across their international supply chains. Since 2022, the methodology has been revised to reflect a more localised approach, focused on evaluating how international and national fast-food brands and food service companies are managing and implementing their broiler chicken welfare commitments within selected individual markets.



# Methodology

The Pecking Order 2024 Methodology document provides detailed information on the aims of The Pecking Order benchmark, assessment criteria, approach and scoring system. It should be read in conjunction with this report.

The assessment criteria for The Pecking Order are based on the requirements of the ECC, which have been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific asks of the ECC provide a clear and consistent set of improvements that focus on stocking density, breeds, enrichment, broiler cages, slaughter process and auditing. More information on the ECC can be found [here](#).

The Pecking Order assessment criteria consist of questions organised under two pillars. Each question focuses on a specific requirement of the ECC.



## Pillar 1 – Commitments & Targets

questions assess published time-bound commitments to improve chicken welfare.



## Pillar 2 – Performance Reporting

questions assess reported progress against published commitments.

In 2024, a new question (Q1.8) has been included in the Commitments & Targets pillar, assessing companies on whether they have a published roadmap in place to achieve the requirements of the ECC. This question has been included to encourage companies to publish progress milestones towards achieving the ECC requirements within a specified timeframe.

Each company received a percentage score for each pillar. The pillar scores were also combined to create an overall score, with each pillar given equal weighting. Scores were 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



# Scoring Overview: France

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





## Key findings: France

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**By continuing to support the worst chicken farming and slaughter practices, McDonald's leads the trio of stubborns, while its competitors are committed.**

This year, of the 13 restaurant chains assessed in France under the Pecking Order, 10 are committed to meeting all the criteria of the [European Chicken Commitment](#) (ECC) by 2026.

Unfortunately, 3 companies are stuck in the past and did not publish any serious commitment to exclude the worst practices from their supply chain: Autogrill, Starbucks and McDonald's. As a leader in the fast food industry in France, McDonald's bears a heavy responsibility in perpetuating the extreme suffering imposed on millions of broiler chickens.

Fortunately, this regrettable position is now a minority in the sector, since all the other companies assessed, such as Burger King, Subway and Domino's, are committed to respecting the criteria of the ECC by 2026 at the latest.

### Half the companies involved publish their progress

Of the 10 companies involved, half have published an annual progress report: Burger King, Subway, Paul, Domino's and KFC. Most of the progress published is still insufficient in view of the approaching deadline. It is important that these companies make the necessary efforts to meet the ECC criteria within 2 years.

For their part, companies that have not published any reports must take the matter seriously by proving that they are making significant progress towards reducing the suffering of chickens.

### Corporate responsibility: moving from words to deeds

It is unacceptable that companies' commitments and actions still fall short of what's at stake when it comes to the conditions under which chickens are raised and slaughtered. Today, no one can ignore the extreme suffering endured by these animals.

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](#), 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).

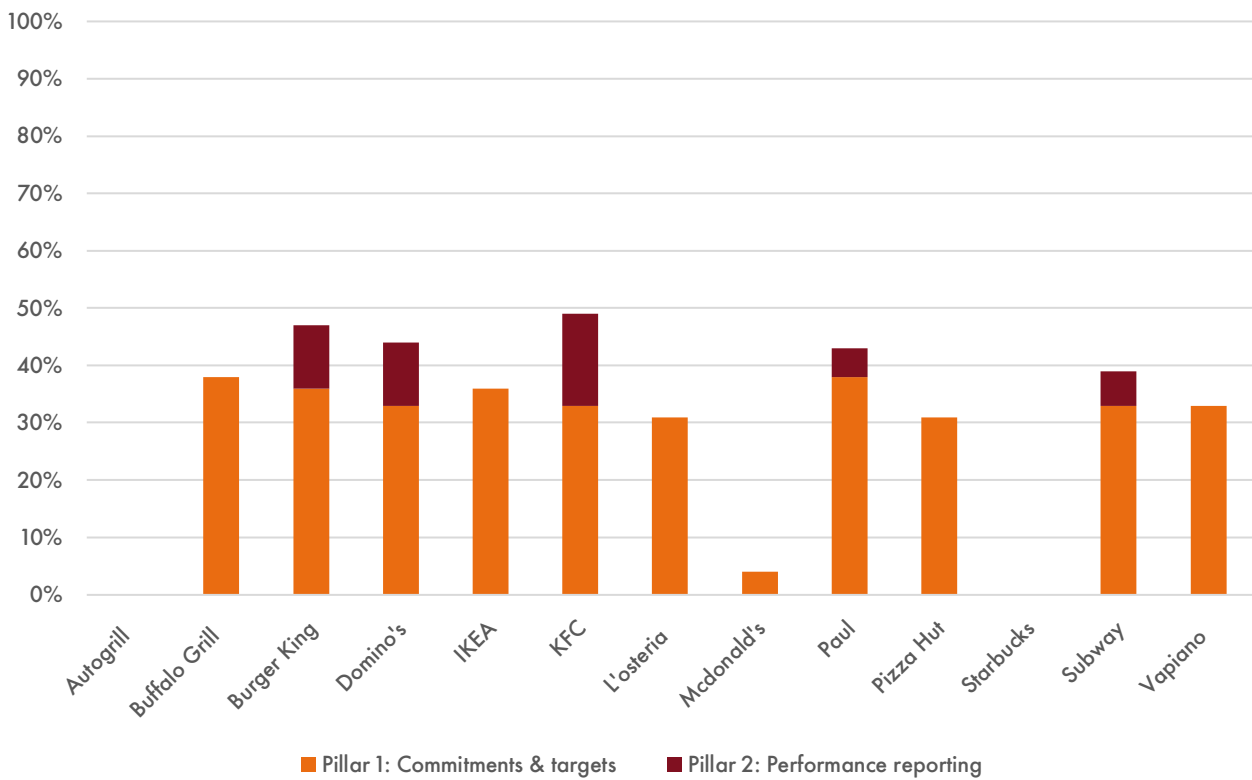


Furthermore, in 2022, a study by the [Welfare Footprint Project](#) showed that the selection of slower-growing breeds would reduce the time spent by chickens in disabling pain by 66% and the time spent in excruciating pain by 78%, compared to standard factory farms. With regard to slaughter, the same study indicates that replacing electrical waterbath stunning with controlled atmosphere killing using CO2 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 the ECC criteria - in particular McDonald's, whose responsibility is considerable as the leader in fast food - to take scientific expertise into consideration and commit themselves without delay.

We also request companies already committed to taking the issue seriously by publishing annual reports proving that significant progress is being made towards reducing the suffering of chickens, and to accelerate their transition to compliance with the ECC criteria.

**Figure: Results for the French market**



See pg. 19 for the France Executive Summary in French.





## Le Pecking Order 2024: France

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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.

L'objectif du Pecking Order est d'inciter les entreprises de restauration à communiquer leurs efforts pour réduire la souffrance des poulets "de chair" dans l'ensemble de leurs activités et de démontrer les progrès accomplis. Basé sur les exigences du European Chicken Commitment (ECC), 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 2024 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.

La méthodologie du Pecking Order 2024 est basée sur l'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 [ici](#). Le Pecking Order comporte seize questions organisées en deux sous-ensembles. Chacune des questions se focalise sur un critère spécifique de l'ECC.



## Pillar 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.



## Pillar 2 – Publication des avancées

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

En 2024, une nouvelle question (Q1.8) a été ajoutée dans la section *Engagements et objectifs*. Elle évalue si les entreprises disposent d'une feuille de route publiquement consultable pour atteindre aux les critères de l'ECC. Cette question vise à encourager les entreprises à publier les étapes de leur progression vers le respect des exigences de l'ECC dans un délai précis.

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	Pillar 1 Engagements et objectifs	Pillar 2 Publication des avancées
<b>Niveau 1</b> Raisonné			Buffalo Grill, Paul	
<b>Niveau 2</b> Encourageant			Burger King, Domino's, Ikea, KFC, Subway, Vapiano	
<b>Niveau 3</b> En progression		KFC	L'Osteria, Pizza Hut	
<b>Niveau 4</b> En retard		Burger King, Domino's, Paul		
<b>Niveau 5</b> Insatisfaisant		Buffalo Grill, Ikea, L'Osteria, Pizza Hut, Subway, Vapiano		Burger King, Domino's, KFC
<b>Niveau 6</b> Très insatisfaisant		Autogrill, McDonald's, Starbucks	Autogrill, McDonald's, Starbucks	Autogrill, Buffalo Grill, Ikea, Paul, Subway, L'Osteria, McDonald's, Pizza Hut, Starbucks, Vapiano



# Principales conclusions : France

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**En continuant de soutenir les pires méthodes d'élevage et d'abattage des poulets "de chair", McDonald's mène le trio des réfractaires alors que leurs concurrents sont engagés.**

Cette année, parmi les 13 entreprises de restauration implantées en France évaluées dans le cadre du *Pecking Order*, 10 sont engagées à respecter l'ensemble des critères du [European Chicken Commitment](#) (ECC) d'ici 2026.

3 entreprises campent malheureusement sur des positions passéistes et ne font état d'aucun engagement sérieux pour mettre fin aux pires méthodes d'élevage et d'abattage : Autogrill, Starbucks et McDonald's. En tant que leader de la restauration chaînée en France, McDonald's porte une lourde responsabilité dans la poursuite des souffrances extrêmes infligées chaque année à des millions de poulets "de chair".

Heureusement, ce positionnement regrettable est désormais minoritaire dans le secteur puisque l'ensemble des autres entreprises évaluées comme Burger King, Subway ou encore Domino's sont engagées à respecter les critères de l'ECC d'ici 2026 au plus tard.

## La moitié des entreprises engagées publient leur progrès

Sur les 10 entreprises engagées, la moitié d'entre elles ont publié un reporting annuel d'avancement : Burger King, Subway, Paul, Domino's et KFC. La plupart des progrès publiés sont encore insuffisants au regard de l'échéance approchante. Il est important que ces entreprises livrent les efforts nécessaires pour atteindre le respect des critères de l'ECC d'ici 2 ans.

De leur côté, les entreprises n'ayant pas publié de reporting doivent prendre le sujet au sérieux en prouvant que des progrès significatifs vers la réduction des souffrances des poulets sont réalisés.

## La responsabilité d'entreprise : passer des paroles aux actes

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](#), 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).

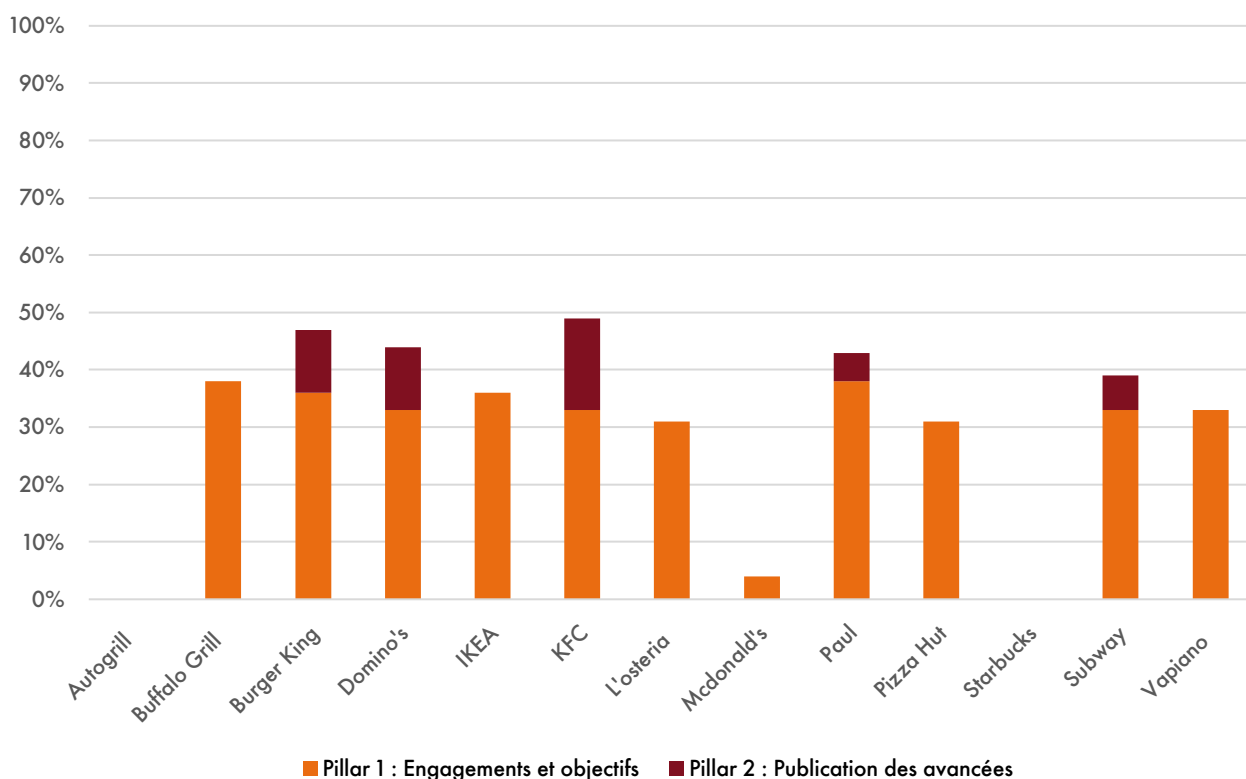


Par ailleurs, en 2022, une étude du [Welfare Footprint Project](#) démontre que l'adoption de races à croissance plus lente permettrait de réduire de 66 % le temps passé par les poulets à ressentir des douleurs continues invalidantes et de 78 % le temps passé en douleur intense insupportable, en comparaison 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 CO2 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 et à accélérer leur transition vers le respect des critères de l'ECC.

**Graphique: Résultats pour le marché français**





## The Pecking Order 2024: Germany

In this year's evaluation, German companies achieved the second-best score in the international comparison. With an overall score of 33%, they performed slightly worse than in 2023 (37%). As there was little progress, this is also due to adaptations to the methodology.

### Key insights

- Since the 2023 report, there have been no further ECC commitments among the companies assessed.
- Only four companies have already started to implement their goals.
- In the "commitments and targets" pillar, the companies achieve an average of 55%, while the "performance reporting" average is at only 10%.





# Results of the German companies at a glance

Hans im Glück, KFC and Domino's are the only three companies to reach tier 3 this year. They leave the other companies trailing behind at tier 5 and 6. What is particularly shocking is that even in the third year of the German report, three companies - Autogrill, Call a Pizza and Starbucks - have not positioned themselves in any way towards higher standards for broiler chickens, which is why they were unable to score a single point.



## Pillar 1 – Commitments and Targets

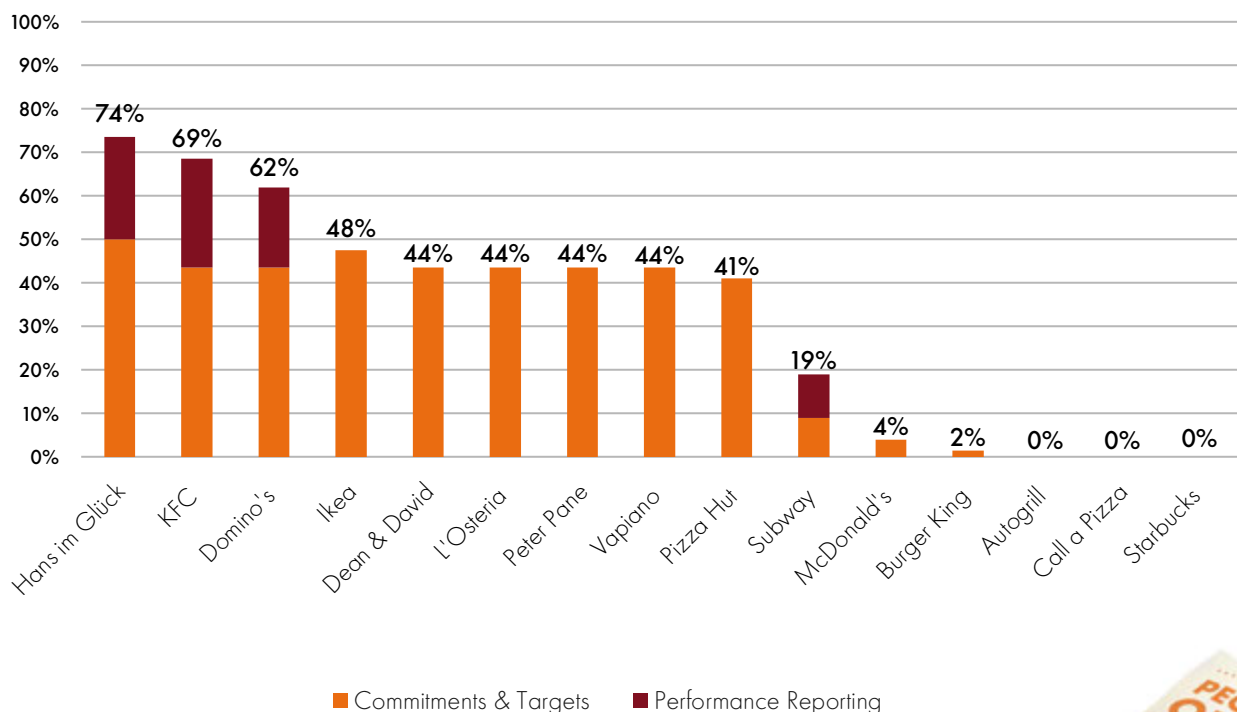
As Hans im Glück is the only company that has developed and published a roadmap for achieving its targets, it is the only company to achieve full points in the “commitments and targets” pillar this year. Six companies fall from 100% to 87% as they do not yet utilise this important tool. Subway drops even further and only achieves 18%, as the company has significantly weakened its commitment. Pizza Hut and McDonald's also deteriorate from 94% to 82% and 9% to 8% respectively. Meanwhile, Ikea (95% instead of 94%) and Burger King (3% instead of 0%) improves slightly, while Autogrill, Call a Pizza and Starbucks remain at 0%.



## Pillar 2 – Performance Reporting

Not even one third of German companies can show actual improvements in chicken farming. As in 2023, Domino's, KFC and Subway report that they at least partially fulfil the criteria of the ECC. Hans im Glück reports on progress for the first time and is the second-best company in this pillar with 47% behind KFC (50%). Hans im Glück's improved reporting slightly increases the “performance reporting” average to 10% (from 7% in 2023). After the evaluation period was completed, Hans im Glück publicly announced that the transition to ECC-compliant products has recently been completed in Germany and Austria. The figures clearly demonstrate that implementation for most companies is at a standstill.

Figure: Results for the German market



# Results of the German companies in detail

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## Hans im Glück

Hans im Glück has made remarkable progress since joining the ECC. With an implementation rate of 47%, they report reliably and have now also presented a roadmap for achieving the targets by 2026. Overall, they perform best with 74% at tier 3. By switching to husbandry concepts such as “Beter Leven Basic” and “Kip van Morgen”, Hans im Glück has made progress in all six implementation indicators of the report. After the end of the evaluation period, the company furthermore publicly announced that it is already fulfilling their commitment 100% in Germany and Austria. This makes them the first company in Germany that is 100 ECC compliant!

## KFC

KFC was one of the pioneers of the ECC and has led the ranking for the past two years. The company made an early commitment to animal welfare standards in Western Europe and has taken significant steps in implementing the ECC criteria. However, nothing fundamental has changed since last year. KFC cannot report any major progress and has not yet published a roadmap showing how it intends to achieve its target by 2026. Overall, KFC scores 69% in the overall assessment. In terms of implementation, KFC currently stands at 50%.

## Domino's

Domino's has joined the ECC in several European countries in 2020 and has made a solid start by improving stocking density, enrichment material, stunning and auditing. However, according to its latest progress report, Domino's has unfortunately not yet made any progress in switching to more robust breeds. The company has not reported on current developments this year either. Therefore, Domino's results remain unchanged and falls behind in the report as other companies make faster progress. Overall, Domino's achieves 62% and thus tier 3.

## Ikea

Although Ikea developed its own “Better Chicken Programme” in 2019 including some criteria not covered by the ECC (e.g. use of antibiotics), it is very unclear how these standards are being implemented: Ikea does not provide any information on the ECC or its own “Better Chicken Programme” in its current sustainability report. In our 2022 report, Ikea was still in third tier, but its lack of transparency led to a drop to tier 5 (48%).

## Dean & David

After Dean & David joined the German “Initiative Tierwohl” (ITW) at the beginning of 2020, the company committed to the ECC just a few months later. Since then, however, no detailed progress reports have been published to demonstrate concrete implementation. The only known information is that suppliers have been informed of the ECC requirements. With a score of just 44% and tier 5, the company leaves the impression that it remains at the commitment level rather than actually making progress.



## **L'Osteria**

L'Osteria joined the European Chicken Commitment in 2022 in its nine European markets and was able to position itself in the middle of the report for 2023. However, no progress reports have been published since then, although this is part of the voluntary ECC commitment. A roadmap is also still lacking. This results in a score of only 44% (tier 5) and raises the question of how important the issue of animal welfare for broiler chickens actually is for the company.

## **Peter Pane**

Peter Pane was a pioneer when they joined the ECC as the first German burger chain in 2019. Five years later, their level of implementation - measured by the lack of public reporting - is regrettably still at 0%. The company states on its website that it is working closely with a producer to develop an ECC-compliant product - the result of this collaboration is not transparently communicated to consumers though. Due to its full ECC commitment, Peter Pane achieves 44% through pillar 1 and therefore tier 5. We hope that the company will gain new motivation to keep up with its direct competitor Hans im Glück.

## **Vapiano**

After the company's long period of insolvency and reorganisation, Vapiano's Europe-wide commitment to the ECC 2023 was a strong step. Its first report on criteria implementation was due this year. However, no progress has yet been published, which means that Vapiano has not received any points for implementation. Vapiano's overall score is therefore 44% and tier 5.

## **Pizza Hut**

Pizza Hut joined the ECC Europe-wide in 2019 - just like KFC, another subsidiary of the American parent company YUM! Brands. The company has publicly pledged to take responsibility for improving the conditions in which chickens are kept in its supply chain. However, unlike KFC, Pizza Hut has not yet published a progress report or shared any other information on its transition. It is unclear whether the company is seriously implementing its commitment, especially as its ECC statement is conspicuously vague. Pizza Hut receives 44% for the available information and thus achieves tier 5.

## **Subway**

In 2021, following a campaign by several animal welfare organisations, Subway joined the ECC and committed to raising its broiler standards. By 2023, Subway had already made initial progress and was at around 20% implementation. However, this has not changed since. Additionally, since the 2022 report, Subway's German ECC commitment was deleted and the 2026 deadline has been removed from its international website. As a result, Subway has slipped to 19% (tier 6).



## McDonald's

McDonald's has decided against joining the ECC. The reason given was that it was testing its own broiler chicken programmes and eventually decided to raise a small part of its supply chain (30%) according to the standard of the German "Initiative Tierwohl" (ITW). However, the ITW standards are far below those of the ECC and are completely unsuitable as a new minimum standard: the stocking density, for example, is significantly higher and the use of breeds that cause extensive animal suffering is allowed. This leads to an assessment of 4% (tier 6).

## Burger King

Burger King Germany is also still refusing to join the ECC - even though the international branches took this step years ago in the USA, Canada and England. In France, Burger King has published its own standards, which match those of the ECC. In Germany, however, they remain at a standstill. As the parent company Restaurant Brands International (RBI) has a broiler policy, Burger King receives a few points. However, there is no information on the German website about higher standards for broilers. This puts Burger King at 2% and tier 6.

## Autogrill

Autogrill does not provide any information on husbandry conditions for broiler chickens in its supply chain. We have contacted the company several times to obtain information on how they fulfil their corporate responsibility - unfortunately, so far without success. We must therefore assume that Autogrill has no interest in raising their broiler chicken standards. Autogrill receives 0% (tier 6).

## Call a Pizza

No information can be found on Call a Pizza's website that proves that the company is interested in the conditions under which chickens are kept in its supply chains. There is no evidence that Call a Pizza purchases chicken from higher standards than the legal minimum or intends to do so in the future. The company therefore emerges from the report with zero points (tier 6).

## Starbucks

Starbucks also does not communicate any information about the husbandry standards of broiler chickens in its supply chain. We must assume that there is no improvement of the problematic legal minimum. Since chicken meat only makes up a small part of Starbucks' product range, it should be easy for the company to raise its standards. Unfortunately, the coffee chain is still not fulfilling its brand responsibility in Germany - even though the company has joined the ECC programmes in the USA, Canada and the UK. For the result in this survey, this means 0% - tier 6.

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See pg. 29 for the Germany Executive Summary in German.





## Masthuhn-Report 2024: Deutschland

In der diesjährigen Evaluation erreichen die deutschen Unternehmen im internationalen Vergleich die zweitbeste Wertung. Mit einer Gesamtbewertung von 33 % schneiden sie etwas schlechter ab als 2023 (37 %). Da es nur wenig Fortschritt gab, ist dies auch auf Anpassungen der Methodik zurückzuführen.

### Key insights

- Seit dem letzten Report gab es aus der Reihe der bewerteten Unternehmen keine weiteren Beitritte zur Masthuhn-Initiative.
- Nur vier Unternehmen haben angefangen, die selbstgesteckten Ziele in die Tat umzusetzen.
- Im Bereich Selbstverpflichtungen und Ziele erreichen die Unternehmen durchschnittlich 55 %, während es im Bereich Umsetzung und Berichterstattung lediglich 10 % sind.



# Ergebnisse der deutschen Unternehmen im Überblick

Hans im Glück, KFC und Domino's sind in diesem Jahr die einzigen drei Unternehmen, die Stufe 3 erreichen konnten. Sie lassen damit die anderen Unternehmen abgeschlagen auf Stufe 5 und 6 hinter sich. Besonders erschreckend: Auch im dritten Jahr der Erhebung haben sich drei Unternehmen – Autogrill, Call a Pizza und Starbucks – nicht zu höheren Standards für Masthühner positioniert, weswegen sie keinen einzigen Punkt erzielen konnten.



## Bereich 1: Selbstverpflichtung und Ziele

Hans im Glück erreicht in diesem Jahr im Bereich Selbstverpflichtung und Ziele die volle Punktzahl – es ist das einzige Unternehmen, das eine Roadmap zur Zielerreichung erarbeitet und veröffentlicht hat. Sechs Unternehmen fallen von 100 % auf 87 %, da sie dieses wichtige Instrument noch nicht nutzen. Subway lässt noch deutlicher nach und erreicht nur noch 18 %: Das Unternehmen hat seine Selbstverpflichtung deutlich abgeschwächt. Auch Pizza Hut und McDonald's verschlechtern sich von 94 % auf 82 % bzw. 9 % auf 8 %. Demgegenüber stehen die geringen Verbesserungen von Ikea (95 % statt 94 %) und Burger King (3 % statt 0 %) sowie der Stillstand bei 0 % von Autogrill, Call a Pizza und Starbucks.

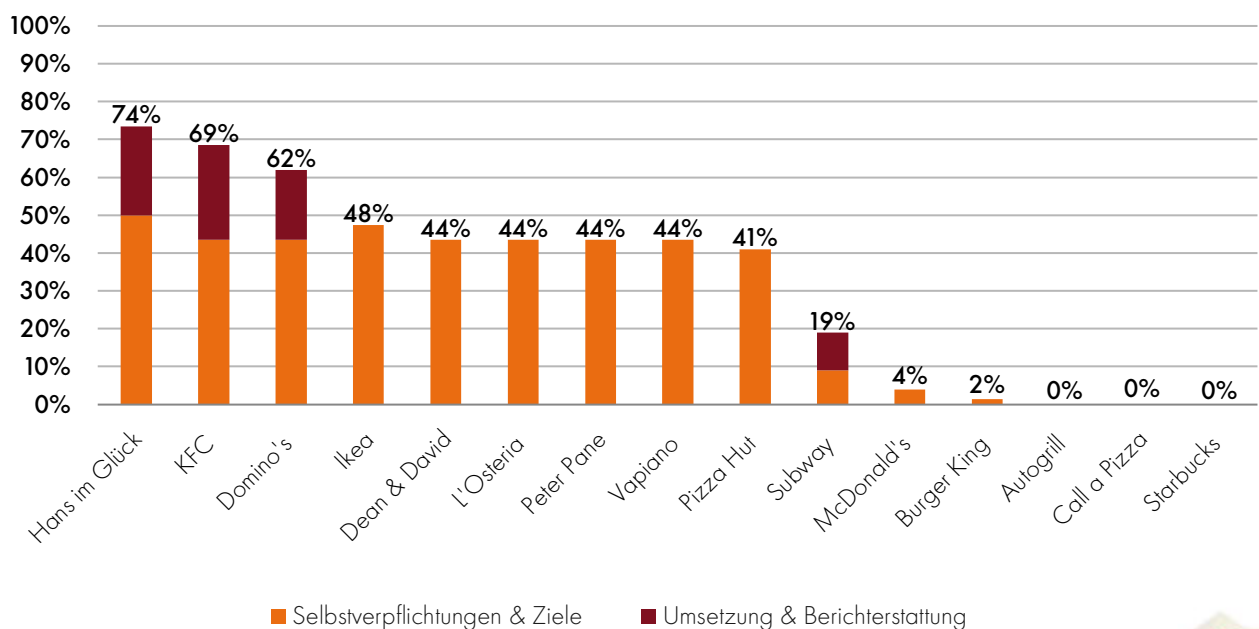


## Bereich 2: Umsetzung und Berichterstattung

Nicht einmal ein Drittel der untersuchten deutschen Unternehmen kann tatsächliche Verbesserungen in der Geflügelhaltung vorweisen. Wie auch 2023 berichten Domino's, KFC und Subway, dass sie die Kriterien der Masthuhn-Initiative (MHI) zumindest teilweise erfüllen. Hans im Glück berichtet zum ersten Mal über Fortschritte und schneidet in diesem Bereich mit 47 % als zweitbestes Unternehmen hinter KFC (50 %) ab. Das Reporting von Hans im Glück führt dazu, dass der Durchschnitt sich in diesem Bereich von 7 % auf 10 % verbessert.

Bedauerlicherweise zeigen die Zahlen der restlichen Unternehmen sehr deutlich, dass bei ihnen hinsichtlich der Umsetzung Stillstand herrscht.

## Ergebnisse für den deutschen Markt



# Ergebnisse der deutschen Unternehmen im Detail

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## Hans im Glück

Hans im Glück erreicht mit 74 % den höchsten Gesamtscore und damit Stufe 3. Seit dem Beitritt zur MHI 2020 zeigt das Unternehmen bemerkenswerte Fortschritte. Im Bereich »Umsetzung und Berichterstattung« konnte es sich seit letztem Jahr von 0 % auf 47 % steigern. Hans im Glück berichtet zuverlässig und hat eine Roadmap zur Erreichung der Ziele bis 2026 vorgelegt. Durch den Umstieg auf Haltungskonzepte wie »Beter Leven Basic« und »Kip van Morgen« konnten einige Kriterien zügig erfüllt werden. Nach Abschluss des Auswertungszeitraumes hat Hans im Glück öffentlich mitgeteilt, dass die Umstellung auf 100 % MHI-konformes Fleisch in Deutschland und Österreich bereits vollzogen ist.

## KFC

KFC war einer der Vorreiter bei der Masthuhn-Initiative und hat das Ranking während der vergangenen zwei Jahren angeführt. Das Unternehmen hat sich schon früh zu Tierschutzstandards in Westeuropa verpflichtet und ist wichtige erste Schritte in der Umsetzung gegangen. Seit letztem Jahr sehen wir allerdings eine Stagnation: Es gibt weder Umstellungsfortschritte noch eine öffentliche Roadmap. Insgesamt erreicht KFC 69 % in der Gesamtwertung und 50 % der möglichen Punkte bei der Umstellung – insbesondere im Bereich robuster Zuchtlinien und geringerer Besatzdichte ist hier noch viel Luft nach oben. Wir hoffen, dass KFC seinen vorherigen Drive wieder aufnimmt, um so seine selbstgesteckten Ziele auch tatsächlich zu erreichen und im Report nicht noch weiter zurückzufallen.

## Domino's

Domino's ist der MHI 2020 in mehreren europäischen Ländern beigetreten und konnte mit einem soliden Start in den Bereichen Besatzdichte, Ausschluss von Käfigen, Beschäftigungsmaterial, Betäubung und Auditing punkten. Gerade beim Thema Qualzucht hat Dominos laut seinem aktuellen letzten Fortschrittsbericht jedoch leider keine Fortschritte gemacht – allerdings hat das Unternehmen seit letztem Jahr auch nicht über aktuelle Entwicklungen berichtet. Domino's wird daher in der Umsetzung unverändert bewertet und rutscht im Report ab – andere Unternehmen ziehen mit ihren Fortschritten an dem Pizzalieferanten vorbei. Insgesamt erreicht Domino's 62 % und somit Stufe 3.

## Ikea

Ikea hat 2019 ein eigenes »Better Chicken Program« entwickelt, das den Kriterienkatalog der Masthuhn-Initiative teilweise sogar übertrifft (z. B. hinsichtlich Antibiotikaeinsatz) – trotzdem ist leider völlig unklar, wie es um die Umsetzung dieser Kriterien steht: Ikea liefert in seinem aktuellen Nachhaltigkeitsbericht weder Informationen zur MHI noch zum eigenen Programm. Vor zwei Jahren noch an zweiter Stelle unseres Reports, rutscht Ikea durch diese fehlende Transparenz mit 48 % nun weit nach hinten auf Stufe 5 ab.

## Dean & David

Dean & David hat sich Anfang 2020 der Initiative Tierwohl (ITW) und der Masthuhn-Initiative angeschlossen. Seitdem wurden jedoch keinerlei öffentliche Belege für die konkrete Umsetzung der Masthuhn-Initiative geliefert – das Unternehmen hat in den letzten vier Jahren lediglich kommuniziert, dass seine Lieferanten über die Anforderungen informiert wurden. Mit einer Gesamtwertung von lediglich 44 % und Stufe 5 hinterlässt das Unternehmen den Eindruck, dass es bislang eher bei unverbindlichen Zusagen bleibt, als tatsächlich Fortschritte zu erzielen.



## **L'Osteria**

L'Osteria ist der Masthuhn-Initiative 2022 in seinen neun europäischen Märkten beigetreten und konnte sich damit für 2023 noch knapp im Mittelfeld des Reports positionieren. Seitdem wurden allerdings keine Fortschrittsberichte veröffentlicht, obwohl dies Teil der Selbstverpflichtung zur MHI ist. Auch an einer Roadmap mangelt es bisher noch. Dies führt zu einer Bewertung von nur 44 % (Stufe 5) und lässt die Frage offen, wie wichtig das Thema Tierschutz für Masthühner für das Unternehmen tatsächlich ist.

## **Peter Pane**

Als erste deutsche Burgerkette in der Masthuhn-Initiative war Peter Pane 2019 ein Vorreiter. Fünf Jahre später liegt der Umsetzungsgrad, gemessen an der (fehlenden) öffentlichen Berichterstattung, bedauernswerterweise noch immer bei 0 %. Das Unternehmen gibt auf seiner Webseite an, eng mit einem Großproduzenten zu arbeiten, um ein MHI-konformes Produkt zu entwickeln – Resultat dieser Zusammenarbeit: für VerbraucherInnen nicht einsehbar. Aufgrund des vollumfänglichen Commitments erreicht Peter Pane 44 % und somit Stufe 5. Wir hoffen, dass das Unternehmen neue Motivation schöpft, um mit der direkten Konkurrenz Hans im Glück mithalten zu können.

## **Vapiano**

Nach dem langen Insolvenzverfahren und der Neuaufstellung des Unternehmens war Vapianos europaweiter Beitritt zur MHI 2023 ein starker Schritt. In diesem Jahr hätte der erste Bericht über die Fortschritte in der Umsetzung der Kriterien erscheinen müssen. Bisher fehlt dieser allerdings, sodass Vapiano keinerlei Punkte bei der Umsetzung erzielt. Somit liegt auch Vapiano insgesamt bei 44 % und Stufe 5.

## **Pizza Hut**

Pizza Hut ist der MHI 2019 europaweit beigetreten – genau wie KFC, eine weitere Tochterfirma des amerikanischen Mutterkonzerns YUM! Brands. Damit hat das Unternehmen öffentlich zugesagt, Verantwortung für bessere Haltungsbedingungen der Masthühner in seiner Lieferkette zu übernehmen. Im Gegensatz zu KFC hat Pizza Hut bisher jedoch weder einen Fortschrittsbericht veröffentlicht, noch anderweitig Informationen zur Umstellung geteilt. Es ist fraglich, ob das Unternehmen seine Selbstverpflichtung ernsthaft umsetzt, zumal das Beitrittsstatement auffallend unkonkret formuliert ist. Für die vorliegenden Informationen erhält Pizza Hut 44 % und erreicht somit Stufe 5.

## **Subway**

Subway hat sich 2021, nach einer Kampagne von mehreren Tierschutz-Organisationen, der MHI angeschlossen und sich verpflichtet, seine Haltungsstandards für Masthühner anzuheben. 2023 hatte Subway auch schon erste Fortschritte vorzuweisen und stand bei der Umsetzung bei rund 20 %. Dabei ist es allerdings geblieben – und neben den fehlenden Fortschritten ist seit dem letzten Report sogar die Beitrittserklärung von Subways deutscher Webseite verschwunden und aus dem internationalen Commitment wurde die Deadline 2026 gestrichen. Dadurch rutscht Subway auf 19 % und damit auf die letzte Stufe ab.





## McDonald's

McDonald's hat sich gegen einen Anschluss an die MHI entschieden. Begründet wurde dies mit dem Test eigener Aufzuchtprogramme für Masthühner. Ein kleiner Teil der Lieferkette (30 %) soll nun auf die Initiative Tierwohl (ITW) umgestellt werden – diese liegt jedoch weit unter den Kriterien der Masthuhn-Initiative und ist als neuer Mindeststandard ungeeignet. So ist beispielsweise die Besatzdichte deutlich höher und es werden weiterhin Qualzuchten eingesetzt. Insgesamt reicht es in der Bewertung lediglich für 4 % (Stufe 6).

## Burger King

Auch Burger King Deutschland demonstriert Stillstand und weigert sich nach wie vor, die MHI umzusetzen – dies enttäuscht insbesondere, da es für die USA, Kanada und England seit Jahren Commitments gibt. In Frankreich hat Burger King zudem eigene Richtlinien veröffentlicht, die denen der Masthuhn-Initiative entsprechen. Für eine »Broiler Policy« des Mutterkonzerns Restaurant Brands International (RBI) gibt es einige wenige Punkte. Auf der deutschen Webseite sind allerdings nach wie vor keine Informationen zu Haltungsstandards für Masthühner zu finden. Burger King liegt damit bei 2 % und Stufe 6.

## Autogrill

Autogrill macht keine Angaben zu den Haltungsbedingungen für Masthühner in seiner Lieferkette. Dies führt zu einem Ergebnis von 0 % und somit Stufe 6. Wir haben das Unternehmen mehrfach erfolglos kontaktiert, um zu prüfen, wie es seiner unternehmerischen Verantwortung nachkommt. Wir müssen daher davon ausgehen, dass Autogrill kein Interesse daran hat, die Standards in der Geflügelmast anzuheben.

## Call a Pizza

Auf der Website von Call a Pizza finden sich keine Informationen darüber, dass das Unternehmen an den Haltungsbedingungen der Masthühner in seinen Lieferketten interessiert ist. Es gibt keine öffentlichen Anhaltspunkte dafür, dass Call a Pizza Hühnerfleisch aus höheren Standards als dem gesetzlichen Minimum einkauft oder beabsichtigt, dies in Zukunft zu tun. Das Unternehmen geht daher mit null Punkten (Stufe 6) aus dem Report hervor.

## Starbucks

Auch Starbucks kommuniziert keine Informationen über die Haltungsstandards von Masthühnern in seinen Produkten. Es muss also davon ausgegangen werden, dass diese die problematischen gesetzlichen Mindeststandards nicht übersteigen. Hühnerfleisch macht nur einen kleinen Teil des Sortiments der Kaffeekeite aus – da sollte es für das Unternehmen ein Leichtes sein, die Standards anzuheben. Es kommt seiner Markenverantwortung in Deutschland leider weiterhin nicht nach – und das, obwohl der Konzern in den USA, Kanada und auch Großbritannien den dortigen Initiativen beigetreten ist. Für das Ergebnis in dieser Erhebung bedeutet das: 0 % und Stufe 6.





## The Pecking Order 2024: Italy

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For the sixth consecutive year, The Pecking Order (TPO) examined the publicly available communication of major fast-food and restaurants chains to assess how they address and manage the welfare of broiler chickens in their supply chains.

For the 2024 report, 75 companies have been assessed in Czech Republic, France, Germany, **Italy**, Poland, Romania and Spain. As far as Italy is concerned, seven brands were evaluated:



## Key results: Italy

- Italy tail-end in Europe**

While companies in France and Germany continue to make progress, Italy ranks last of all the countries analysed, even lower than Poland and the Czech Republic.

- Many communications but few real commitments for chickens**

Despite the fact that many companies communicate on the importance of animal welfare in their supply chains, only one of the seven companies analysed in Italy has published a commitment to phase out all the main chicken welfare issues from their supply chains.

- KFC Italy still lagging behind**

KFC Italy remains far behind the sector leaders and its counterparts in France and Germany. Despite some progress in communication, its commitments remain at the lowest level, signalling a lack of transparency and meaningful improvement targets.

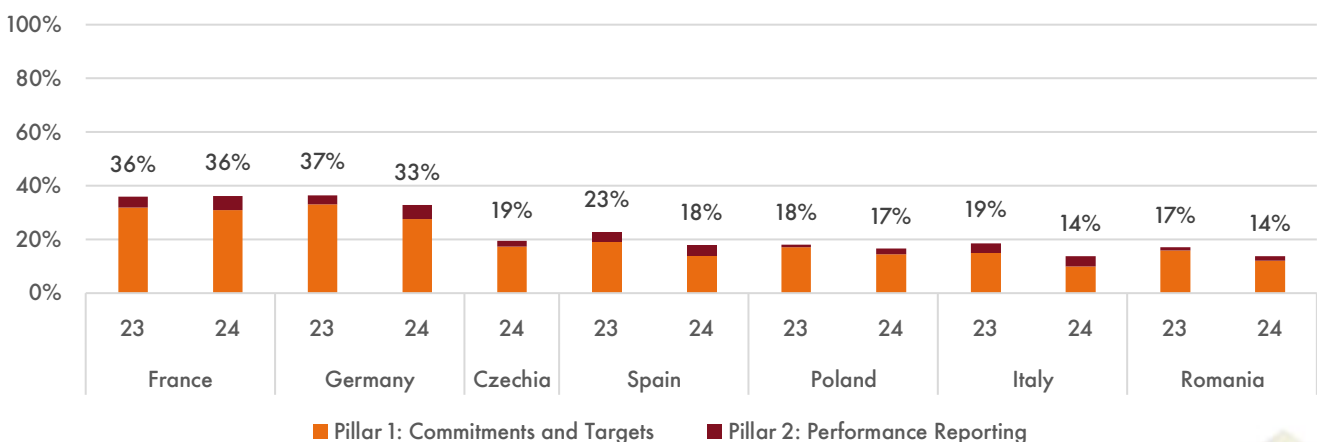
### Comparison across countries: Italy tail-end in Europe

As was the case last year, TPO 2024 analysis confirms that companies operating in Germany and France take the welfare of broiler chicken much more into account than the other countries, including Italy. What is new this year is that Italy worsens so much in the evaluation that it comes last among all 7 countries analysed.

While France continues to outperform the other countries included in the benchmark, the overall average scores of Germany, Spain, Poland, Italy and Romania decreased, mainly due to the addition of a new question in the first pillar and the evaluation of a brand, whose score deteriorated sharply due to the disappearance of its ECC policy in all countries except France.

Looking in detail at the average scores across the different countries, French companies perform the best, with an overall average score of 36% (36% in 2023). German companies were the second best performers, with an overall average score of 33% (37% in 2023), followed by the Czech Republic with 19%, Spain with 18% (23% in 2023), Poland with 17% (18% in 2023), Italy with 14% (19% in 2023) and Romania with 14% (17% in 2023) (Figure 1).

**Figure 1: Comparison of the 2023 and 2024 data of the overall average score by country**



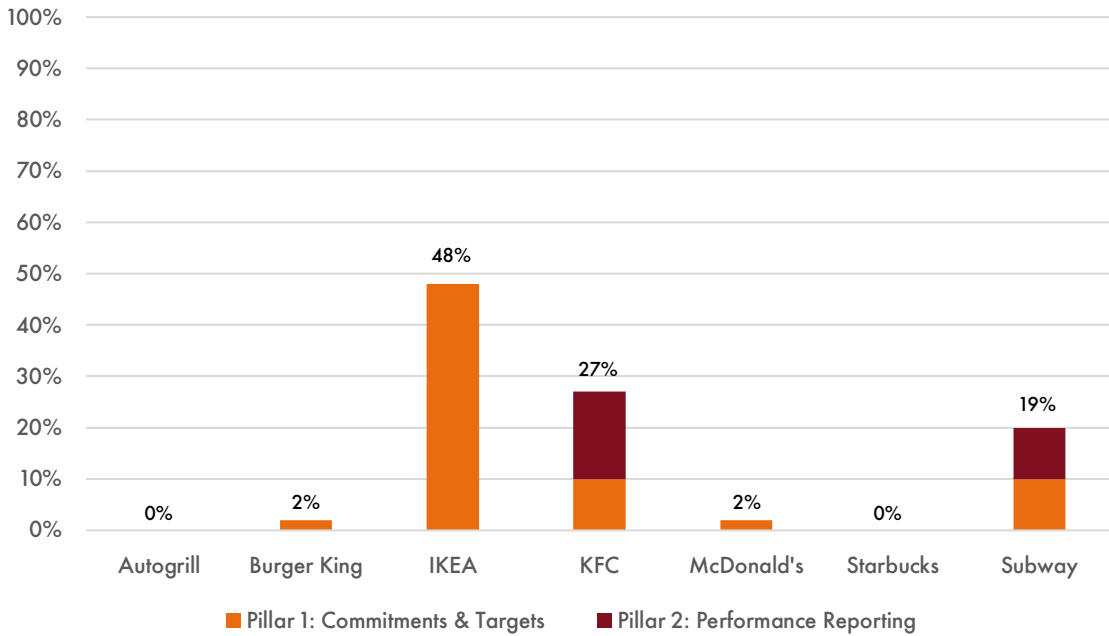
### The inertia of the Italian restaurant sector continues








While at European level the number of companies that have published a chicken welfare policy increases (71% in 2024 vs 65% in 2023), in Italy among the seven companies assessed, only IKEA has published a commitment aligned to the ECC.

Compared to last year, Subway's commitment has disappeared, thus causing the company to drop from tier 4 to 6. Indeed, in all countries except France, Subway has updated its chicken welfare policy removing the deadline for the implementation of its criteria, effectively invalidating the company's commitment. The other five companies assessed (Autogrill, Burger King, KFC, McDonald's and Starbucks) show no change from last year and continue to have no public commitment, not even on the most important criteria such as stocking density reduction and transition to slower growing breeds.

The fact that most Italian companies have failed to make significant progress or improve their scores since 2023 highlights the widespread sector inertia, with the result that Italian companies consistently rank in the lower tiers with poor or very poor scores.

Figure 2: Overall score by company in 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
	48%	5	Poor	95%	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
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very poor
	19%	6	Very Poor	18%	6	Very Poor	20%	6	Very poor

### KFC Italy continues to lag behind

It is particularly interesting to focus more closely on KFC performance across the different countries, as it emblematically reflects the trends discussed so far. Indeed, while KFC France and Germany continue to make progress, demonstrating a leading position in those markets, in Italy the brand remains far away from this trend.

Not only does KFC Italy show no improvement from 2023, but the low score in the commitment pillar (21%) also indicates that it has not yet planned any target to fully align with the ECC. There is also a discrepancy between published commitments and reporting on actual progress, with the score recorded in pillar 2 (33%) being slightly higher than in pillar 1. While KFC Italy shows some progress in communication, its commitments and targets remain at the lowest levels, signalling a lack of transparency or concrete actions planned for the coming years.

See pg. 38 for the Italy Executive Summary in Italian.





## The Pecking Order 2024: Italia

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Per il sesto anno consecutivo, The Pecking Order (TPO) ha esaminato le comunicazioni pubbliche delle principali catene di fast-food e ristoranti per valutare come affrontano e gestiscono le condizioni di vita dei polli allevati nelle loro filiere. Nel 2024, l'inserimento della Repubblica Ceca ha ampliato ulteriormente il numero di Paesi europei analizzati, fornendo una panoramica ancora più dettagliata e completa. I criteri di valutazione di TPO rispecchiano le richieste dello European Chicken Commitment (ECC), che prendono in considerazione le priorità principali in tema di benessere dei polli: densità di allevamento, razze, arricchimenti ambientali, metodi di stordimento e audit di un ente terzo.

Per il report 2024 sono state valutate 75 aziende, operanti in Francia, Germania, **Italia**, Polonia, Repubblica Ceca, Romania e Spagna. Nel nostro Paese, sono state sette quelle valutate:



SUBWAY



Per stimolare sia la pubblicazione di impegni aziendali che la loro implementazione, la valutazione delle aziende è organizzata su due sezioni:



### Sezione 1 – Impegni e obiettivi

Valuta la presenza di una politica aziendale pubblica che sia allineata ai criteri dell'ECC e comprenda obiettivi temporali precisi. Nel 2024, è stata inserita una nuova domanda che analizza se le aziende hanno pubblicato una tabella di marcia per raggiungere i loro impegni, in modo da incoraggiare la pianificazione progressiva dei criteri dell'ECC.



### Sezione 2 – Comunicazione dei progressi

Valuta i progressi già effettivamente fatti dalle aziende in relazione a ciascuno dei criteri dell'ECC: eliminazione di gabbie/sistemi multipiano, presenza di arricchimenti ambientali, uso di razze a crescita più lenta, riduzione delle densità, stordimento efficace e verifiche di un ente terzo.

Facendo la media dei punteggi ottenuti in ciascuna sezione, le aziende ricevono una valutazione complessiva e vengono classificate su sei livelli a seconda della fase di miglioramento in cui si trovano:

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

- **Italia fanalino di coda in Europa**

Mentre le aziende che operano in Francia e Germania continuano a fare passi avanti, l'Italia si posiziona all'ultimo posto tra tutti i Paesi analizzati, anche più in basso di Polonia e Repubblica Ceca.

- **Molte comunicazioni ma pochi impegni concreti per i polli**

Nonostante molte aziende comunichino l'importanza del benessere animale nelle loro filiere, solo una delle sette aziende analizzate in Italia ha pubblicato un impegno a eliminare dalle proprie filiere le problematiche principali di benessere dei polli.

- **KFC ancora in ritardo**

KFC Italia rimane ben lontana dai leader di settore e dalle sue controparti in Francia e Germania. Nonostante qualche progresso nella comunicazione, i suoi impegni rimangono ai livelli più bassi, segnalando mancanza di trasparenza e di obiettivi di miglioramento significativi.

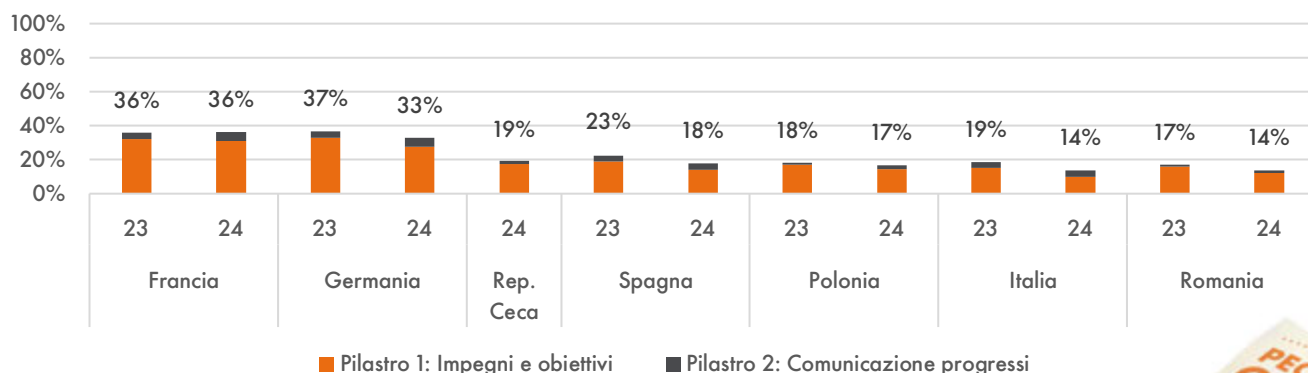
### Il confronto con gli altri Paesi analizzati: Italia fanalino di coda

Come già l'anno scorso, l'analisi di TPO 2024 conferma che le aziende operanti in Germania e Francia prendono molto più in considerazione il benessere dei polli di quanto fatto negli altri Paesi, Italia compresa. La novità di quest'anno è che l'Italia peggiora così tanto nella valutazione da arrivare a occupare l'ultima posizione tra tutti i 7 Paesi analizzati.

In un confronto diretto, la Francia continua a superare gli altri Paesi inclusi nel benchmark. A differenza della Francia, i punteggi medi complessivi di Germania, Spagna, Polonia, Italia e Romania si sono ridotti, principalmente a causa dell'aggiunta di una domanda nuova nel primo pilastro e della valutazione di un marchio, il cui punteggio è fortemente peggiorato per la scomparsa della politica allineata all'ECC in tutti i Paesi eccetto che la Francia.

Andando a guardare nel dettaglio i punteggi medi registrati dalle aziende nei diversi Paesi, si osserva che le aziende francesi hanno ottenuto le prestazioni più elevate, con un punteggio medio complessivo del 36% (36% nel 2023). Le aziende tedesche sono state le seconde più performanti, con un punteggio medio complessivo del 33% (37% nel 2023), seguite dalla Repubblica Ceca con il 19%, dalla Spagna con il 18% (23% nel 2023), dall'Italia con il 14% (19% nel 2023) e dalla Romania con il 14% (17% nel 2023) (Figura 1).

**Figura 1: Confronto tra i dati 2023 e 2024 del punteggio medio complessivo suddiviso per sezione nei diversi Paesi**





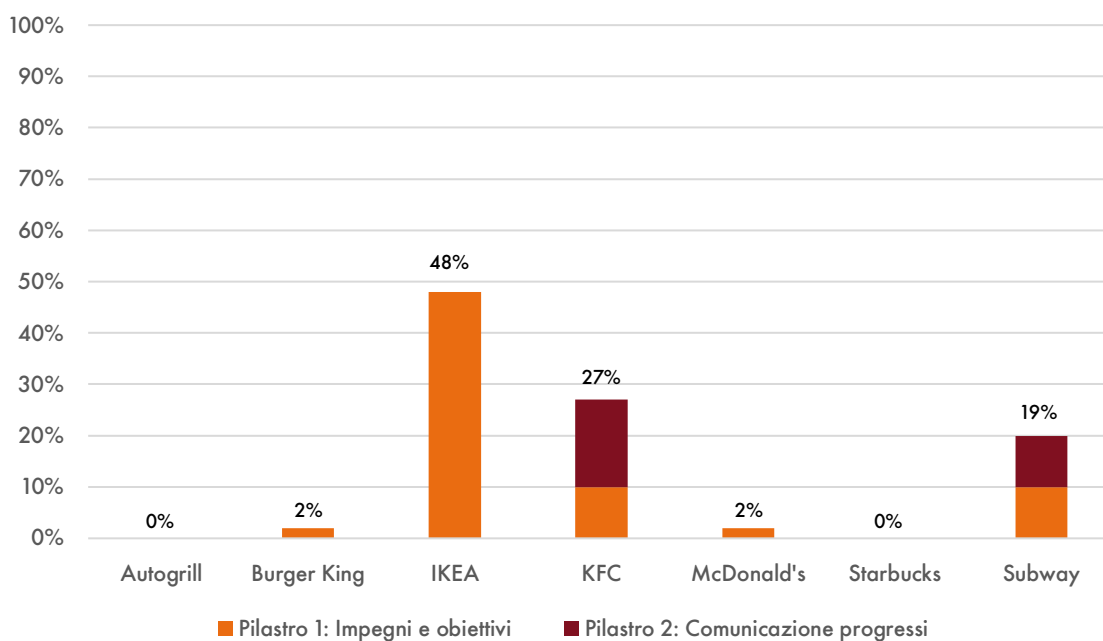
## Continua l'inerzia della ristorazione italiana








Mentre a livello europeo sale il numero di aziende che ha pubblicato una politica sui polli (71% nel 2024 vs 65% nel 2023), in Italia delle sette aziende analizzate, solo IKEA ha pubblicato un impegno a eliminare tutte le problematiche principali di benessere per questi animali.

Rispetto all'anno scorso, scompare infatti l'impegno di Subway, che per questo scende dal livello 4 al 6. In tutti i Paesi eccetto che in Francia, Subway ha infatti aggiornato la propria politica lasciando elencati i criteri da rispettare per l'ECC ma eliminando la data di implementazione, invalidando di fatto l'impegno dell'azienda. Le altre cinque aziende analizzate (Autogrill, Burger King, KFC, McDonald's e Starbucks) non fanno registrare cambiamenti rispetto all'anno scorso e continuano a non avere nessun impegno pubblico, neanche sui criteri più importanti come la riduzione delle densità e la transizione a razze a più lenta crescita.

Il fatto che la maggior parte delle aziende italiane non sia riuscita a fare progressi significativi o a migliorare i propri punteggi rispetto al 2023 evidenzia un'inerzia diffusa con il risultato che le aziende italiane si collocano sempre nei livelli più bassi della classificazione con punteggi scarsi o molto scarsi.

**Figura 2: Punteggi complessivi registrati in Italia dalle singole aziende**



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
	48%	5	Scarso	95%	1	In testa al cambiamento	0%	6	Molto scarso
	27%	5	Scarso	21%	6	Molto scarso	33%	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
	19%	6	Molto scarso	18%	6	Molto scarso	20%	6	Molto scarso

### Continua il ritardo di KFC Italia

È particolarmente interessante soffermarsi sull'andamento di KFC nei diversi Paesi, già che rispecchia in maniera emblematica gli andamenti discussi finora. Mentre in Francia e in Germania KFC continua infatti a fare progressi dimostrando una posizione di leadership in quei mercati, in Italia rimane ben lontana da questo trend.

Non solo KFC Italia non mostra nessun miglioramento rispetto al 2023, ma il basso punteggio registrato nel pilastro sugli impegni (21%) indica anche che non ha ancora pianificato obiettivi futuri per allinearsi agli standard dell'ECC. Si nota, inoltre, una certa discrepanza tra impegni dichiarati e comunicazione dei progressi effettivi, già che il punteggio registrato nel pilastro 2 è leggermente superiore all'1 (33%). Mentre KFC mostra di aver fatto qualche progresso nella comunicazione, i suoi impegni e obiettivi rimangono ai livelli più bassi, segnalando una mancanza di trasparenza o di azioni concrete in programma per i prossimi anni.





## The Pecking Order 2024: Poland

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The *Pecking Order (TPO)* provides a comprehensive overview of the fast-food industry's performance in broiler chicken welfare by analyzing leading chains operating in the European Union on their progress toward meeting the science-based criteria of the [European Chicken Commitment \(ECC\)](#). In 2024 it evaluated seven European markets, including Poland.

The report highlights weaknesses and areas of progress, offering clear insights into the path forward. It underscores the fast-food sector's important role in enhancing chicken welfare within Poland's broiler chicken industry.

The 2024 report assessed 75 companies covering the markets of Czechia, France, Germany, Italy, **Poland**, Romania and Spain. The following companies were evaluated in Poland's fast-food industry:



# Key findings: Poland

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- **International disparities:** In 2024, *The Pecking Order* assessed fast-food companies across Czechia, France, Germany, Italy, Poland, Romania and Spain. While there are some signs of progress compared to 2023, Polish chains consistently were one of the lowest scorers in both years, signaling a significant need for improvement.
- **The state of the industry:** In 2024, Domino's Pizza Poland joined the ECC, showing that there is momentum toward higher broiler welfare standards across the industry. While more than one-third of Polish companies have made such commitments, most have yet to prioritize chicken welfare. Polish fast-food chains are falling behind industry trends and the science on animal welfare. There is an urgent need for these companies to align with the ECC criteria, which address key welfare issues in broiler chicken production. Furthermore, those chains with commitments have not published information on their progress, leaving consumers to assume little to no action is being taken.
- **International vs. national chains:** International chains in Poland often rely on parent company policies, showing some progress globally but lagging locally. The local offices are either unaware or unwilling to engage on the company's chicken welfare commitments. National chains lag further, because they do not have any chicken welfare policies. It is crucial for fast-food chains to ensure their animal welfare commitments are visible and actionable within Poland.

## Results of Poland's fast-food industry

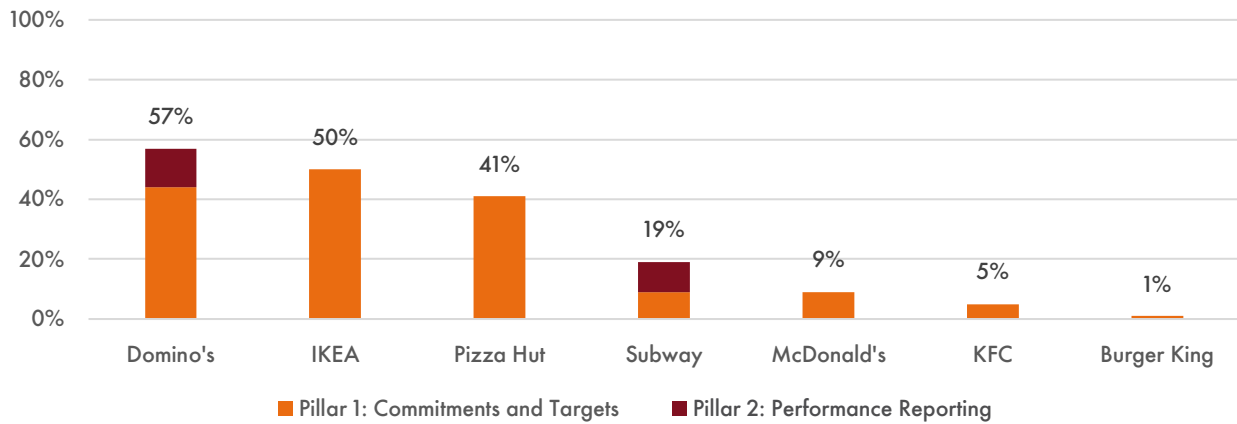
In Poland, 11 fast-food companies were assessed on their publicly available chicken welfare policies and practices. Domino's, IKEA and Pizza Hut lead, with strong targets but low scores in progress reporting, followed by Subway, McDonald's and KFC. Burger King, Pasibus, Salad Story, Starbucks and Zahir Kebab received very low scores.

Positive developments in Poland's industry signalling ongoing efforts to improve chicken welfare:

- In 2024, Domino's Pizza Poland published an animal welfare policy on its website, committing to ensuring that by 2030, 100% of the chicken meat used in its menus will meet ECC criteria. The company also began reporting its progress on chicken welfare.
- Domino's, IKEA, Pizza Hut and Subway have published ECC commitments, though Subway removed its deadline. While this represents progress, Domino's and IKEA are categorized as "Getting started", while all other brands show "Poor" or "Very poor" performance in broiler welfare practices.
- In 2024, IKEA became the first assessed company to score for a published road map. This represents a significant step forward to achieving the company's broiler welfare commitment.
- Seven companies score above zero, with Domino's and Burger King joining in 2024.
- In 2023, Subway was the only company reporting progress on its higher welfare commitments; this year, Domino's joined as the second.



**Figure:** Industry brand overview based on assessed fast-food companies that made progress



**Industry brands with a 0% score**

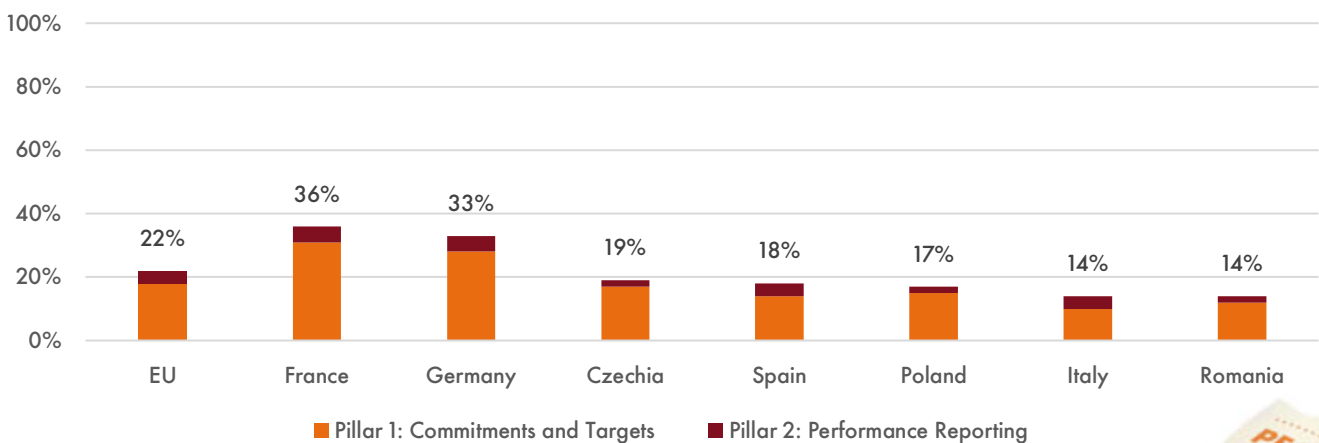


**Results on country level**

In 2024, 75 fast-food chains were assessed across seven European markets, including Poland. The average industry score in the EU is 22%, placing most of the industry brands in the "Very Poor" category.

Scores among EU countries show significant variation. France and Germany lead, reflecting stronger commitments to higher chicken welfare, though still categorized as "Poor." Czechia, assessed for the first time in 2024, follows, with Spain and Poland slightly behind, indicating a need for improvement in welfare practices and reporting. Italy and Romania scored the lowest, underscoring a significant need for progress. Except for France and Germany, the other five countries remain in the "Very Poor" category.

**Figure:** Overview of the country results based on the fast-food industry scores in that country



## Ways forward for Poland

As a key player in Europe's broiler chicken market, Poland's fast-food industry has the opportunity and responsibility to improve welfare standards. Supporting higher welfare practices can reduce the suffering of billions of chickens and align with consumer expectations for a more humane food system, reflected on fast-food menus.

- **Commitments and road maps:** Fast-food companies without a chicken welfare commitment should begin developing policies aligned with ECC criteria. Those with existing commitments should create clear road maps to achieve their goals. Without visible plans, consumers are left to assume poor welfare practices.
- **Collaboration between companies and producers:** Fast-food chains and chicken producers must collaborate to meet ECC standards. Producers need dedicated buyers to justify investments in higher welfare, while fast-food chains rely on these producers for a steady supply of higher welfare chicken. This partnership is key to building a supply chain that meets ECC standards and responds to consumer preferences for higher welfare products.
- **Legislative action:** Polish lawmakers play an important role in supporting the industry's transition to higher broiler welfare practices by developing and enforcing legislation that aligns with ECC standards and current animal welfare science. Policymaking is essential to drive industrywide change, ensuring Poland remains competitive while meeting consumer expectations.

Humane Society International/Europe helps companies improve animal welfare within their supply chains, benefiting animals and preparing businesses for shifting consumer demands and legislation. HSI also provides lawmakers expertise on farm animal welfare policy. Go to [hsi.org](https://hsi.org) to learn more or join us.

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See pg. 47 for the Poland Executive Summary in Polish.





## The Pecking Order 2024: Polska

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*The Pecking Order (TPO)* dostarcza kompleksowego przeglądu wyników branży fast food w zakresie dobrostanu brojlerów, analizując postępy czołowych sieci działających w Unii Europejskiej w spełnianiu kryteriów [European Chicken Commitment](#) (ECC). W 2024 roku oceniono siedem rynków europejskich, w tym Polskę.

Raport podkreśla słabe strony i obszary do poprawy, przedstawiając rozwiązania. Podkreśla ważną rolę sektora fast food w poprawie dobrostanu brojlerów w Polsce.

W raporcie z 2024 roku oceniono 75 firm działających na rynkach Czech, Francji, Niemiec, Włoch, **Polski**, Rumunii i Hiszpanii. Ocenie w polskiej branży fast food poddano następujące firmy:





# Kluczowe Wnioski: Polska

- **Międzynarodowe różnice:** W 2024 roku „The Pecking Order” poddał analizie sieci fast food w Czechach, Francji, Niemczech, Włoszech, Polsce, Rumunii i Hiszpanii. Choć widać pewne oznaki postępu w porównaniu z 2023 rokiem, sieci działające w Polsce konsekwentnie plasowały się na ostatnich pozycjach w rankingach z obu lat, co wskazuje na potrzebę znaczącej poprawy.
- **Stan branży:** W 2024 roku Domino’s Pizza Polska dołączyła do ECC, co pokazuje, że w branży pojawia się tendencja do podnoszenia standardów dobrostanu brojlerów. Mimo że ponad jedna trzecia firm działających w Polsce złożyła takie zobowiązania, większość z nich nie traktuje priorytetowo dobrostanu kurcząt. Sieci fast food z polskiego rynku pozostają w tyle za trendami w branży i naukowymi standardami dotyczącymi dobrostanu zwierząt. Istnieje pilna potrzeba, aby te firmy dostosowały się do kryteriów ECC, które dotyczą kluczowych kwestii związanych z dobrostanem brojlerów. Ponadto firmy, które złożyły zobowiązania, nie opublikowały informacji o postępach, pozostawiając konsumentów w przekonaniu, że nie podjęto żadnych działań.
- **Międzynarodowe vs. krajowe sieci:** Międzynarodowe sieci w Polsce często polegają na politykach firm macierzystych, które wykazują pewne postępy na szczeblu globalnym, ale lokalnie pozostają w tyle za swoimi centralami. Lokalne biura albo nie są świadome, albo nie chcą zaangażować się w zobowiązania firmy dotyczące dobrostanu kurcząt. Krajowe sieci są jeszcze bardziej w tyle, ponieważ nie mają polityk dotyczących dobrostanu kurcząt. Kluczowe jest, aby sieci fast food zapewniły, że ich zobowiązania dotyczące dobrostanu zwierząt byłyby widoczne również w Polsce.

## Wyniki branży fast food w Polsce

W Polsce oceniono 11 firm z branży fast food pod kątem dostępnych publicznie polityk i praktyk dotyczących dobrostanu kurczaków. Domino’s, IKEA i Pizza Hut przewodzą z zadeklarowanymi celami, ale niskimi wynikami w raportowaniu postępów w ich realizacji. Za nimi plasują się Subway, McDonald’s i KFC. Burger King, Pasibus, Salad Story, Starbucks i Zahir Kebab uzyskały bardzo niskie oceny.

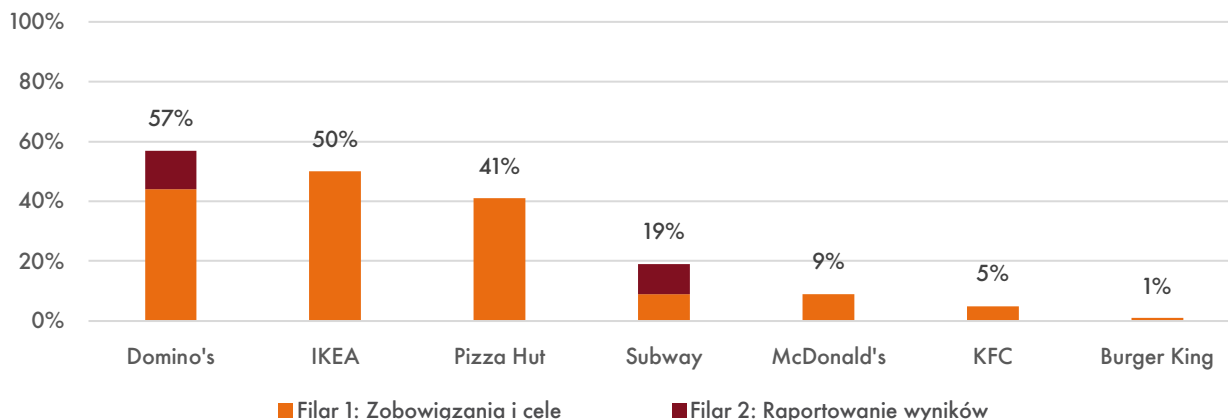
Pozytywne zmiany w branży fast food obecnej w Polsce, które wskazują na wdrażanie działań na rzecz poprawy dobrostanu kurcząt:

- W 2024 roku Domino’s Pizza Polska opublikowała politykę dotyczącą dobrostanu zwierząt na swojej stronie internetowej, zobowiązując się do tego, że do 2030 roku 100% mięsa z kurcząt używanego w jej punktach gastronomicznych będzie spełniać kryteria ECC. Firma rozpoczęła także raportowanie postępów w zakresie dobrostanu kurcząt.
- Domino’s, IKEA, Pizza Hut i Subway opublikowały zobowiązania ECC, choć Subway usunął termin ich realizacji. Choć jest to postęp, Domino’s i IKEA są zaliczane do kategorii „Początkujący”, podczas gdy wszystkie inne marki wykazują „Słabe” lub „Bardzo słabe” wyniki w praktykach dotyczących dobrostanu brojlerów.
- W 2024 roku IKEA jako pierwsza oceniana firma opublikowała strategię przejścia („mapę drogową”). Jest to znaczący krok naprzód w realizacji zobowiązania firmy w zakresie dobrostanu brojlerów.
- Siedem firm uzyskało wyniki powyżej zera, z Domino’s i Burger King, które dołączyły w 2024 roku.
- W 2023 roku Subway była jedyną firmą raportującą postępy w realizacji zobowiązań dotyczących wyższego dobrostanu; w tym roku dołączyła do niej Domino’s.





**Wykres: Zestawienie marek branży fast food uwzględniające firmy, które poczyniły postępy**



**Marki z wynikiem 0%**



SaladStory  
(100% fresh)



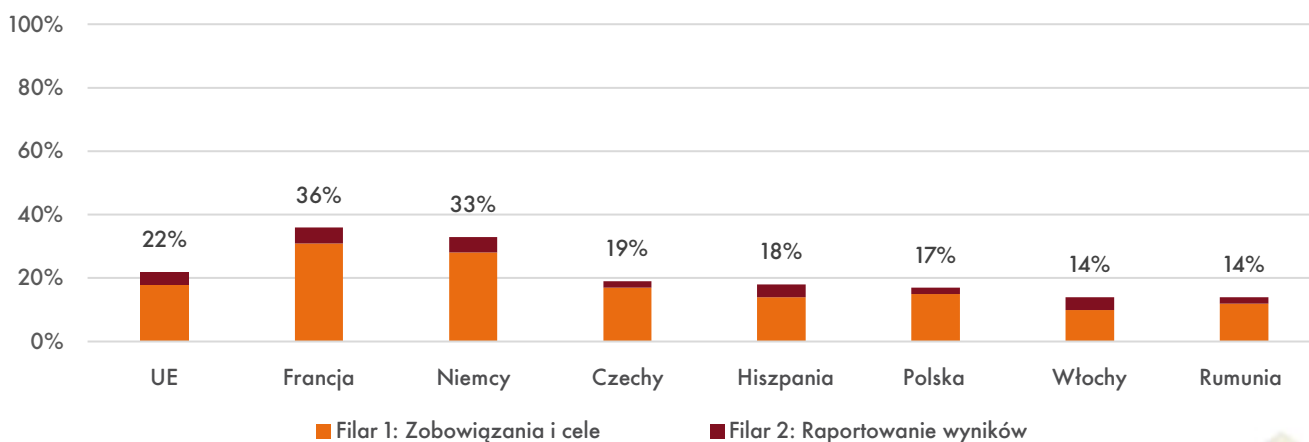
ZAHIR  
KEBAB

**Wyniki na poziomie krajów**

W 2024 roku oceniono 75 firm fast food w siedmiu europejskich rynkach, w tym w Polsce. Średnia ocena branży w UE wynosi 22%, co plasuje większość marek branżowych w kategorii „Bardzo słabe”.

Wyniki w krajach UE wykazują znaczną różnicę. Francja i Niemcy przewiodzą z silniejszymi zobowiązaniami do wyższego dobrostanu kurczaków, choć wciąż znajdują się w kategorii „Słabe”. Czechy, ocenione po raz pierwszy w 2024 roku, zajmują trzecie miejsce, z Hiszpanią i Polską nieco za nimi, co wskazuje na potrzebę poprawy praktyk i raportowania w zakresie dobrostanu. Włochy i Rumunia uzyskały najniższe wyniki, co podkreśla potrzebę znacznych postępów. Z wyjątkiem Francji i Niemiec pozostałe pięć krajów pozostaje w kategorii „Bardzo słabe”.

**Wykres: Przegląd wyników krajowych na podstawie oceny branży fast food w danym kraju**



## Kierunki rozwoju dla Polski

Jako kluczowy gracz na europejskim rynku brojlerów, polska branża fast food ma szansę i obowiązek poprawić standardy dobrostanu. Wspieranie praktyk o wyższym dobrostanie może zmniejszyć cierpienie miliardów kurcząt i dostosować się do oczekiwań konsumentów dotyczących bardziej humanitarnego systemu żywnościowego, odzwierciedlonego w menu fast foodów.

- **Zobowiązania i strategię przejścia:** Firmy fast food, które nie mają zobowiązań dotyczących dobrostanu kurcząt, powinny rozpocząć opracowywanie polityk zgodnych z kryteriami ECC. Te, które mają już zobowiązania, powinny opracować jasne strategię przejścia (*roadmaps*) do osiągnięcia swoich celów. Bez widocznych planów konsumenci mogą zakładać, że praktyki dobrostanowe są słabe.
- **Współpraca między firmami a producentami:** Sieci fast food i hodowcy brojlerów muszą współpracować, aby spełniać standardy ECC. Producenci potrzebują zainteresowanych kupców, aby uzasadnić inwestycje w większy dobrostan, podczas gdy sieci fast food polegają na tych producentach w zakresie stałej dostawy kurczaków o wyższym dobrostanie. To partnerstwo jest kluczowe dla budowy łańcucha dostaw spełniającego standardy ECC i odpowiadającego na preferencje konsumentów.
- **Działania legislacyjne:** Polscy ustawodawcy odgrywają kluczową rolę we wspieraniu przemysłu w przechodzeniu na wyższe standardy dobrostanu kurcząt rzeźnych poprzez opracowywanie i egzekwowanie przepisów zgodnych z kryteriami ECC i aktualną wiedzą naukową na temat dobrostanu zwierząt. Polityka prawna jest niezbędna do wprowadzenia zmian na poziomie całej branży, co pozwoli Polsce pozostać konkurencyjną oraz spełniać oczekiwania konsumentów.

Humane Society International/Europe wspiera firmy w poprawie dobrostanu zwierząt w ich łańcuchach dostaw, co przynosi korzyści zwierzętom i przygotowuje firmy na zmieniające się wymagania konsumentów i regulacje prawne. HSI oferuje również wsparcie ekspertów w zakresie polityki dobrostanu zwierząt hodowlanych dla ustawodawców. Odwiedź [hsi.org](https://hsi.org), aby dowiedzieć się więcej i skontaktować się z nami.





## The Pecking Order 2024: Romania

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The Pecking Order (TPO) provides a comprehensive overview of the fast-food industry's performance in broiler chicken welfare by analyzing leading chains operating in the European Union on their progress toward meeting the science-based criteria of the [European Chicken Commitment](#) (ECC). In 2024 it evaluated seven European markets, including Romania.

The report highlights weaknesses and areas of progress, offering clear insights into the path forward. It underscores the fast-food sector's important role in enhancing chicken welfare within Romania's broiler chicken industry.

The 2024 report assessed 75 companies covering the markets of Czechia, France, Germany, Italy, Poland, **Romania** and Spain. The following companies were evaluated in Romania's fast-food industry:



# Key findings: Romania

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- **International disparities:** In 2024, *The Pecking Order* assessed fast-food companies across Czechia, France, Germany, Italy, Poland, Romania and Spain. While there are some signs of progress compared to 2023, Romanian chains consistently scored the lowest in both years, signaling a significant need for improvement.
- **The state of the industry:** While one-third of Romanian companies have committed to higher broiler welfare standards, most have yet to prioritize chicken welfare. Romanian fast-food chains are falling behind industry trends and the science on animal welfare. There is an urgent need for these companies to align with the ECC criteria, which address key welfare issues in broiler chicken production. Furthermore, those chains with commitments have not published information on their progress, leaving consumers to assume little to no action is being taken.
- **International vs. national chains:** International chains in Romania often rely on parent company policies, showing some progress globally but lagging locally. The local offices are either unaware or unwilling to engage on the company's chicken welfare commitments. National chains lag further, because they do not have any chicken welfare policies. It is crucial for fast-food chains to ensure their animal welfare commitments are visible and actionable within Romania.

## Results of Romania's fast-food industry

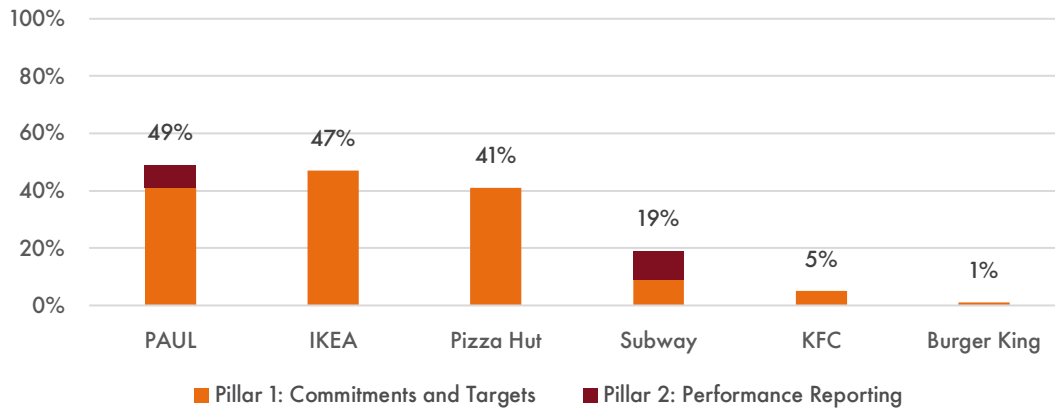
In Romania, 12 fast-food companies were assessed on their publicly available chicken welfare policies and practices. PAUL, IKEA and Pizza Hut lead, with strong targets but low scores in progress reporting, followed by Subway and KFC. 5 to go, Burger King, Domino's, McDonald's, Salad Box, Spartan and Starbucks received very low scores.

Positive developments in Romania's industry signalling ongoing efforts to improve chicken welfare:

- IKEA, PAUL, Pizza Hut and Subway have published ECC commitments, though Subway removed its deadline. While this represents progress, all assessed brands still show "Poor" or "Very poor" performance in broiler welfare practices.
- In 2024, IKEA became the first assessed company to score for a published road map. This represents a significant step forward to achieving the company's broiler welfare commitment.
- Six companies score above zero, with Burger King joining in 2024.
- In 2023, Subway was the only company reporting progress on its higher welfare commitments; this year, PAUL joined as the second.



**Figure:** Industry brand overview based on assessed fast-food companies that made progress



**Industry brands with a 0% score**

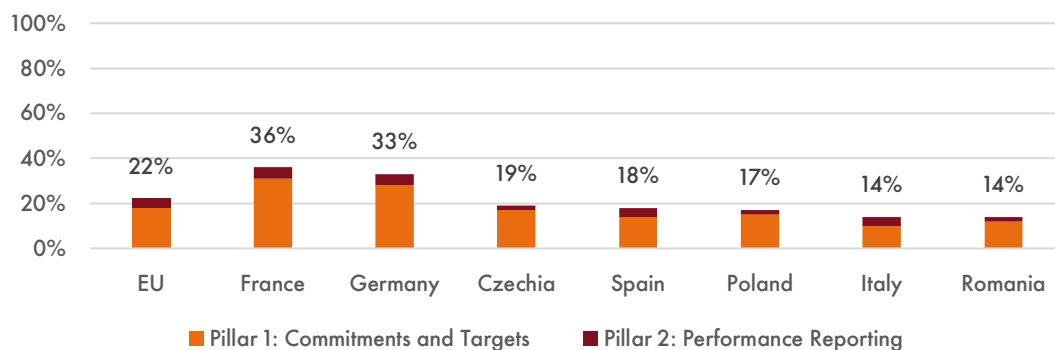


**Results on country level**

In 2024, 75 fast-food chains were assessed across seven European markets, including Romania. The average industry score in the EU is 22%, placing most of the industry brands in the "Very Poor" category.

Scores among EU countries show significant variation. France and Germany lead, reflecting stronger commitments to higher chicken welfare, though still categorized as "Poor." Czechia, assessed for the first time in 2024, follows, with Spain and Poland slightly behind, indicating a need for improvement in welfare practices and reporting. Italy and Romania scored the lowest, underscoring a significant need for progress. Except for France and Germany, the other five countries remain in the "Very Poor" category.

**Figure:** Overview of the country results based on the fast-food industry scores in that country



## Ways forward for Romania

As a key player in Europe's broiler chicken market, Romania's fast-food industry has the opportunity and responsibility to improve welfare standards. Supporting higher welfare practices can reduce the suffering of billions of chickens and align with consumer expectations for a more humane food system, reflected on fast-food menus.

- **Commitments and road maps:** Fast-food companies without a chicken welfare commitment should begin developing policies aligned with ECC criteria. Those with existing commitments should create clear road maps to achieve their goals. Without visible plans, consumers are left to assume poor welfare practices.
- **Collaboration between companies and producers:** Fast-food chains and chicken producers must collaborate to meet ECC standards. Producers need dedicated buyers to justify investments in higher welfare, while fast-food chains rely on these producers for a steady supply of higher welfare chicken. This partnership is key to building a supply chain that meets ECC standards and responds to consumer preferences for higher welfare products.
- **Legislative action:** Romanian lawmakers play an important role in supporting the industry's transition to higher broiler welfare practices by developing and enforcing legislation that aligns with ECC standards and current animal welfare science. Policymaking is essential to drive industrywide change, ensuring Romania remains competitive while meeting consumer expectations.

Humane Society International/Europe (HSI) helps companies improve animal welfare within their supply chains, benefiting animals and preparing businesses for shifting consumer demands and legislation. HSI also provides lawmakers expertise on farm animal welfare policy. Go to [hsi.org](https://hsi.org) to learn more or join us.

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See pg. 55 for the Romania Executive Summary in Romanian.





## The Pecking Order 2024: România

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*The Pecking Order* (TPO) este un raport care oferă o imagine de ansamblu asupra performanței industriei fast-food în ceea ce privește bunăstarea puilor de carne. Raportul analizează principalele lanțuri care operează în Uniunea Europeană din perspectiva progresului lor în îndeplinirea criteriilor cu bază științifică, ale [Angajamentului European Pentru Pui](#) (*European Chicken Commitment*). În 2024, în cadrul TPO au fost evaluate șapte piețe europene, inclusiv România.

Raportul evidențiază punctele slabe dar și progresele, oferind o perspectivă clară asupra drumului de urmat. Raportul subliniază rolul important al sectorului fast-food în îmbunătățirea bunăstării puilor de carne, în cadrul mai larg al industriei puilor de carne din România.

Raportul 2024 a evaluat 75 de companii din Cehia, Franța, Germania, Italia, Polonia, **România** și Spania. În România au fost incluse următoarele companii din industria fast-food:



# Concluzii: România

- **Disparități internaționale:** În 2024, *The Pecking Order* a evaluat companiile de fast-food din Cehia, Franța, Germania, Italia, Polonia, România și Spania. Deși există unele semne de progres în comparație cu 2023, lanțurile românești au obținut în mod constant cel mai mic punctaj în ambii ani, semnalând o nevoie semnificativă de îmbunătățire.
- **Starea industriei:** În timp ce o treime dintre companiile românești s-au angajat să respecte standarde mai ridicate de bunăstare a puilor de carne, majoritatea nu au acordat încă prioritate bunăstării puilor. Lanțurile românești de fast-food rămân în urma tendințelor industriei și a științei privind bunăstarea animalelor. Există o nevoie urgentă ca aceste companii să se alinieze la criteriile Angajamentului European pentru Pui, care abordează aspecte-cheie privind bunăstarea în producția de pui broiler. În plus, lanțurile care și-au asumat angajamente nu au publicat informații cu privire la progresele lor, lăsând consumatorii să presupună că se iau puține măsuri sau chiar deloc.
- **Lanțuri internaționale vs. lanțuri naționale:** Lanțurile internaționale din România se bazează adesea pe politicile societății-mamă, înregistrând unele progrese la nivel global, dar rămânând în urmă la nivel local. Birourile locale fie nu sunt conștiente, fie nu doresc să se implice în angajamentele companiei privind bunăstarea puilor. Lanțurile naționale rămân de asemenea în urmă, deoarece nu au nicio politică privind bunăstarea puilor. Este esențial ca lanțurile fast-food să se asigure că angajamentele lor privind bunăstarea animalelor sunt vizibile și aplicabile în România.

## Rezultate ale industriei fast-food din România

În România, 12 companii de fast-food au fost evaluate în funcție de politicile și practicile lor publice privind bunăstarea puilor. PAUL, IKEA și Pizza Hut conduc, cu obiective solide, dar scoruri scăzute în raportarea progreselor, urmate de Subway și KFC. 5 to go, Burger King, Domino's, McDonald's, Salad Box, Spartan și Starbucks au primit scoruri foarte scăzute.

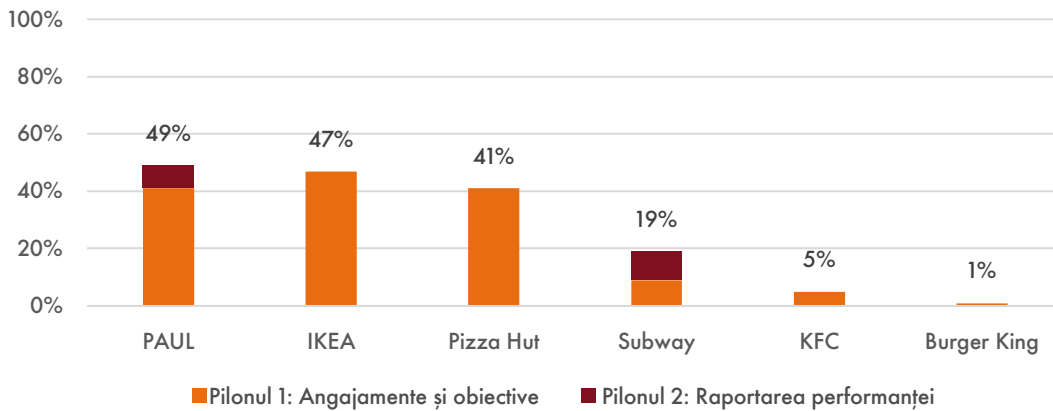
Evoluții pozitive în industria din România, care semnalează eforturile continue de îmbunătățire a bunăstării puilor:

- IKEA, PAUL, Pizza Hut și Subway au publicat angajamente ECC, chiar dacă Subway și-a retras termenul limită de implementare. Deși putem vorbi despre progres, toate mărcile evaluate încă prezintă performanțe „slabe” sau „foarte slabe” în ceea ce privește practicile de bunăstare a puilor de carne.
- În 2024, IKEA a devenit prima companie evaluată care a obținut puncte pentru publicarea unui plan de acțiune. Acest lucru reprezintă un mare pas înainte, către îndeplinirea angajamentului companiei privind bunăstarea puilor de carne.
- Șase companii au obținut scoruri peste zero, Burger King alăturându-se acestora în 2024.
- În 2023, Subway a fost singura companie care a raportat progrese în ceea ce privește angajamentele sale privind dedicarea sa pentru măsuri de bunăstare animală; în acest an, PAUL s-a alăturat ca a doua companie.





**Imagine:** Prezentare generală a mărcilor din industrie pe baza companiilor de fast-food evaluate care au făcut progrese



**Branduri din industrie cu scor 0%**



SALAD B°X

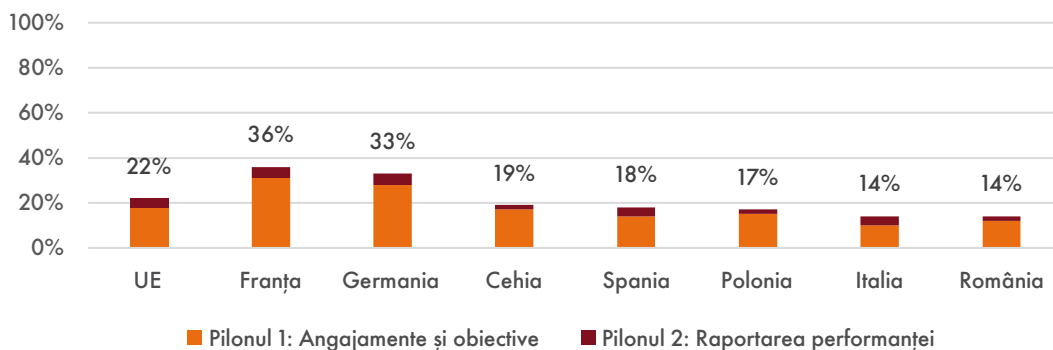


**Rezultate la nivel de țară**

În 2024, 75 de lanțuri fast-food au fost evaluate în șapte piețe europene, inclusiv în România. Scorul mediu al industriei în UE este de 22%, plasând majoritatea mărcilor din industrie în categoria „foarte slab”.

Scorurile țărilor UE prezintă variații semnificative. Franța și Germania conduc detașat, reflectând un angajament mai puternic pentru creșterea bunăstării puilor, deși sunt încă clasificate în categoria „slab”. Urmează Cehia, evaluată pentru prima dată în 2024, iar Spania și Polonia sunt ușor în urmă, indicând o nevoie de îmbunătățire a practicilor de bunăstare și a raportării. Italia și România au obținut cele mai mici scoruri, subliniind o nevoie semnificativă de progres. Cu excepția Franței și a Germaniei, celelalte cinci țări rămân în categoria „foarte slab”.

**Imagine:** Prezentare generală a rezultatelor pe țări pe baza scorurilor industriei fast-food din țara respectivă



## Direcții viitoare pentru România

În calitate de jucător-cheie pe piața europeană a puilor crescuți pentru carne, industria fast-food din România are oportunitatea și responsabilitatea de a îmbunătăți standardele de bunăstare. Sprijinirea unor practici de bunăstare mai ridicate poate reduce suferința a miliarde de pui și se aliniază așteptărilor consumatorilor pentru un sistem alimentar mai uman, concept care se reflectă în meniurile fast-food-urilor.

- **Angajamente și planuri de acțiune:** Companiile de fast-food care nu și-au asumat un angajament privind bunăstarea puilor ar trebui să înceapă să elaboreze politici aliniate la criteriile ECC. Cele care și-au luat angajamentul ar trebui să creeze planuri de acțiune clare pentru a-și atinge obiectivele. În lipsa unor planuri vizibile, consumatorii sunt lăsați să presupună că practicile de bunăstare sunt deficitare.
- **Colaborarea între companii și producători:** Lanțurile de fast-food și producătorii de pui trebuie să colaboreze pentru a îndeplini standardele ECC. Producătorii au nevoie de cumpărători dedicați pentru a justifica investițiile în creșterea bunăstării, în timp ce lanțurile de fast-food se bazează pe acești producători pentru o aprovizionare constantă cu pui din sisteme cu bunăstare animală superioară. Acest parteneriat este esențial pentru construirea unui lanț de aprovizionare care să respecte standardele ECC și să răspundă preferințelor consumatorilor pentru produse cu un nivel mai ridicat de bunăstare animală.
- **Legislație:** Legiuitorii români joacă un rol important în sprijinirea tranziției industriei către practici de bunăstare superioară a puilor de carne prin elaborarea și aplicarea unei legislații care să se alinieze standardelor ECC și științei actuale privind bunăstarea animalelor. Elaborarea de politici este esențială pentru a impulsiona schimbarea la nivelul întregii industrii, asigurându-se că România rămâne competitivă și îndeplinește în același timp așteptările consumatorilor.

Humane Society International/Europe (HSI) ajută companiile să crească nivelul de bunăstare a animalelor în cadrul lanțurilor lor de aprovizionare. Acest lucru este în beneficiul animalelor și pregătește companiile pentru evoluția cerințelor consumatorilor și a legislației. HSI oferă, de asemenea, expertiză legislatorilor în materie de politici privind bunăstarea animalelor de fermă. Accesați [hsi.org](https://www.hsi.org) pentru a afla mai multe.





## The Pecking Order 2024: Spain

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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) (<https://welfarecommitments.com/letters/europe/>), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2024 conducted a total of 75 assessments covering the markets of Czech Republic, France, Germany, Italy, Poland, Romania and **Spain**. The following companies have been assessed in the Spanish market:











## Key findings: Spain

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- In general, companies in Spain are performing very poorly. All the 8 companies assessed for Spain have an overall score that puts them at the bottom of the ranking, and there has been little improvement compared to 2023.
  - **IKEA** and **Pizza Hut** are the two that have slightly higher overall scores, primarily because they were able to score points in the Commitments & Targets pillar – 95% for IKEA, putting them in the category of Leading, and 82% for Pizza Hut, earning them a grade indicating relative Good progress. Unfortunately, these companies still lack proper reporting of progress against each of the elements of the ECC, and a score of 0% for their Performance Reporting is bringing down their overall scores.
  - Last year, **Subway** was the only one that was showing some solid progress, however, since they have removed the deadline for their commitment, their score has dropped dramatically – a fall in the Commitment pillar score from 97% in 2023 to 18% in 2024 results in an a drop of overall score from 57% (Getting Started) to 19% (Very Poor)
  - Although **KFC** was able to increase their score for Performance Reporting (from 33% in 2023 to 40% in 2024), this was not yet enough to move up a grade. With an overall score of 31%, they remain in the grade Poor.
  - The remaining companies, **Burger King, Domino's, McDonald's** and **Starbucks**, score either little to no points at all, falling far behind the rest, just like last year.
- Half of the companies assessed in Spain seem committed to improve the welfare of their broiler chickens, but there is no to little evidence yet of actual steps being taking.
  - *Pillar 1 - Commitments & Targets.* There is a huge contrast between companies, with two having scores putting them in the top two grades (Leading: **IKEA**, and Good: **Pizza Hut**) while the other companies have scores putting them in the bottom grade (Very Poor: **Burger King, Domino's, KFC, McDonald's, Starbucks** and **Subway**).
  - *Pillar 2 - Performance Reporting.* With 7 out of 8 companies having grades putting them in the lowest grade (6 companies score 0%, with only **Subway** scoring a meager 20%), and the remaining company only scoring one grade higher (Poor: **KFC**), it shows companies in Spain are not committed to report on broiler chicken welfare.
- Compared to the 2022 and 2023 assessments, there seem to be no improvements. On the contrary, there seems to be a downward moving trend for Spain.
  - Compared to 2022, two companies moved down grades (**IKEA** and **Pizza Hut**) in 2023, and have remained in the those same grades for 2024.
  - While **Subway** did not improve, they were able to stay in the same grade for 2023 as they were in 2022. However, now, they have moved down two grades in 2024 (from Getting Started to Very Poor).
  - Five companies have shown no progress at all over the past two years (**Burger King, Dominos, KFC, McDonald's** and **Starbucks**).



## 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
	2%	6	Very Poor	3%	6	Very Poor	0%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	48%	5	Poor	95%	1	Leading	0%	6	Very Poor
	31%	5	Poor	21%	6	Very Poor	40%	5	Poor
	4%	6	Very Poor	8%	6	Very Poor	0%	6	Very Poor
	41%	5	Poor	82%	2	Good	0%	6	Very Poor
	0%	6	Very Poor	0%	6	Very Poor	0%	6	Very Poor
	19%	6	Very Poor	18%	6	Very Poor	20%	6	Very Poor



## Results by company

### Dominos and Starbucks

Of the fast-food brands assessed in Spain, 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).

### Burger King

Burger King was awarded some points for having a policy that explicitly covers broiler chicken welfare, however, there is no evidence of in-country communication. The policy is published by Burger King Spain's parent company, Restaurant Brands International, but does not refer to any of the ECC criteria.

### IKEA

IKEA has committed to the ECC to improve their broiler chicken welfare, which is to be fully implemented by 2025, and has published a roadmap detailing how this will be achieved. The only thing of note is that IKEA has not communicated their commitment to the ECC in-country, which is why IKEA Spain scores 95% for Pillar 1 (Tier 1 - Leading) instead of getting a full 100% score. In addition, since IKEA's reporting on (quantitative) progress is limited and not specified by market, IKEA Spain scores an overall score of 48% (Tier 5 - Poor).

### KFC

KFC Spain, as part of KFC Western Europe, 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, to continue to use humane slaughter methods, 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, or have set time-bound commitments for the ones they have included, they only received 21% for the Commitments & Targets Pillar (Tier 6 - Very Poor). On the other hand, KFC Spain provides performance reporting on some of the ECC criteria, but not all, and thus KFC Spain only scores 40% 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, however this commitment is not yet communicated in-country, nor do they have a roadmap in place, and therefore has a score of 82% in the Commitments & Targets Pillar (Tier 2 - Good). Unfortunately, there is no reporting on progress available, yet, which means they score 0% in the Performance Reporting Pillar (Tier 6 - Very Poor).

## Subway

This year, Subway has removed the deadline from their ECC commitment. The commitment they set in 2021 includes all ECC criteria and specifies that it applies to the European market, but it does no longer include time-bound commitment, it is not yet communicated in-country, and Subway does not have a roadmap, which is why for 2024 Subway Spain dropped to a score of 18%% for Pillar 1 (Tier 6 - Very Poor). Progress Reporting also does not include all elements of the ECC, resulting in a 20% score for Pillar 2 (Tier 6 - Very Poor).

## Recommendations: Spain

- For **Domino's** and **Starbucks** to commit to the ECC and publish a broiler chicken welfare policy that explicitly states the criteria as per the ECC.
- We recommend that **Burger King** and **McDonald's** incorporate the specific ECC welfare criteria in their existing broiler welfare policies, and to communicate their policies in-country.
- For those companies that have an ECC commitment in place, to publish a roadmap, and for **IKEA**, **Pizza Hut** and **Subway** specifically, to make sure this is communicated in-country in Spain and accessible to the public, and for **KFC**, to include deadlines of implementation.
- While a commitment to the ECC or broiler welfare policy indicates a first step, companies (**IKEA**, **KFC**, **Pizza Hut**, **Subway**, **Burger King** and **McDonald's**) do need to show they are actually improving broiler chicken welfare by report on the progress they are making to implement the ECC criteria across their supply chain.
- We strongly encourage **Subway** to reinstate a deadline to achieve the ECC requirements.

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See pg. 64 for the Spain Executive Summary in Spanish.





## The Pecking Order 2024: España

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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 sobre el Pollo / *European Chicken Commitment* (ECC) (<https://welfarecommitments.com/letters/europe/>), 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 2024 ha realizado un total de 75 evaluaciones que abarcan los mercados de República Checa, Francia, Alemania, Italia, Polonia, Rumanía y **España**. Las siguientes empresas han sido evaluadas en el mercado español:













## Principales resultados: España

- En general, el rendimiento de las empresas en España es muy bajo. Las 8 empresas evaluadas para España tienen una puntuación global que las sitúa en la parte baja de la clasificación, y ha habido pocas mejoras en comparación con 2023.
  - **IKEA** y **Pizza Hut** son las dos que tienen puntuaciones globales ligeramente más altas, principalmente porque fueron capaces de obtener puntos en el pilar de Compromisos y Objetivos - 95% para IKEA, situándolas en la categoría de Líderes, y 82% para Pizza Hut, obteniendo una calificación que indica un progreso relativamente Bueno. Desgraciadamente, estas empresas siguen sin informar adecuadamente de sus avances en cada uno de los elementos del ECC, y la puntuación del 0% en sus informes de resultados está reduciendo sus puntuaciones globales.
  - El año pasado, **Subway** era la única que mostraba un progreso sólido, sin embargo, desde que eliminaron la fecha límite para su compromiso, su puntuación ha caído drásticamente: Una caída en la puntuación del pilar de compromiso del 97% en 2023 al 18% en 2024 se traduce en una caída de la puntuación general del 57% (Comenzando) al 19% (Muy Deficiente).
  - Aunque **KFC** consiguió aumentar su puntuación en informes de rendimiento (del 33% en 2023 al 40% en 2024), esto no fue suficiente para subir de grado. Con una puntuación global del 31%, permanecen en el grado Pobre.
  - El resto de empresas, **Burger King**, **Domino's**, **McDonald's** y **Starbucks**, obtienen muy pocos o ningún punto, quedando muy por detrás del resto, al igual que el año pasado.
- La mitad de las empresas evaluadas en España parecen comprometidas a mejorar el bienestar de sus pollos de engorde, pero aún no hay pruebas de que se estén tomando medidas reales.
  - *Pilar 1 - Compromisos y Objetivos.* Hay un gran contraste entre las empresas, ya que dos tienen puntuaciones que las sitúan en los dos primeros puestos (Líder: **IKEA**, y Bueno: **Pizza Hut**), mientras que las demás tienen puntuaciones que las sitúan en los últimos puestos (Muy Deficiente: **Burger King**, **Domino's**, **KFC**, **McDonald's**, **Starbucks** y **Subway**).
  - *Pilar 2 - Informes de Resultados.* Con 7 de 8 empresas con puntuaciones que las sitúan en el grado más bajo (6 empresas puntúan 0%, y sólo **Subway** puntúa un escaso 20%), y la empresa restante sólo puntúa un grado más alto (Deficiente: **KFC**), muestra que las empresas en España no están comprometidas con informar sobre el bienestar de los pollos de engorde.
- En comparación con las evaluaciones de 2022 y 2023, no parece haber mejoras. Al contrario, parece haber una tendencia a la baja para España.
  - En comparación con 2022, dos empresas bajaron de categoría (**IKEA** y **Pizza Hut**) en 2023, y se han mantenido en las mismas categorías para 2024.
  - Aunque **Subway** no mejoró, logró mantenerse en 2023 en el mismo grado que en 2022. Sin embargo, ahora han bajado dos grados en 2024 (de Comenzando a Muy Deficiente).
  - Cinco empresas no han mostrado ningún progreso en los últimos dos años (**Burger King**, **Domino's**, **KFC**, **McDonald's** y **Starbucks**).



## Resumen de puntuación: España

Compañía	Puntuación global %	Nivel de puntuación global	Calificación global de la puntuación	Compromisos y objetivos %	Nivel de compromisos y objetivos	Calificación de los compromisos y objetivos	Informes de desempeño	Nivel de informes de desempeño	Calificación de los informes de desempeño
	2%	6	Muy Deficiente	3%	6	Muy Deficiente	0%	6	Muy Deficiente
	0%	6	Muy Deficiente	0%	6	Muy Deficiente	0%	6	Muy Deficiente
	48%	5	Deficiente	95%	1	Líder	0%	6	Muy Deficiente
	31%	5	Deficiente	21%	6	Muy Deficiente	40%	5	Deficiente
	4%	6	Muy Deficiente	8%	6	Muy Deficiente	0%	6	Muy Deficiente
	41%	5	Deficiente	82%	2	Bueno	0%	6	Muy Deficiente
	0%	6	Muy Deficiente	0%	6	Muy Deficiente	0%	6	Muy Deficiente
	19%	6	Muy Deficiente	18%	6	Muy Deficiente	20%	6	Muy Deficiente



## Resultados por compañía

### Dominos y Starbucks

De las marcas de comida rápida evaluadas en España, Domino's y Starbucks no han publicado una política que cubra el bienestar de los pollos de engorde y no se han comprometido públicamente con el ECC, ni han elaborado ningún informe. Con una puntuación global 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).

### Burger King

A Burger King se le concedieron algunos puntos por tener una política que cubre explícitamente el bienestar de los pollos de engorde, sin embargo, no hay pruebas de comunicación en el país. La política está publicada por la empresa matriz de Burger King España, Restaurant Brands International, pero no hace referencia a ninguno de los criterios de la ECC.

### IKEA

IKEA se ha comprometido con el ECC a mejorar el bienestar de sus pollos de engorde, que deberá estar totalmente implementado en 2025, y ha publicado una hoja de ruta en la que se detalla cómo conseguirlo. Lo único destacable es que IKEA no ha comunicado su compromiso con el ECC en el país, razón por la cual IKEA España obtiene una puntuación del 95% en el Pilar 1 (Nivel 1 - Líder) en lugar de obtener una puntuación total del 100%. Además, dado que los informes de IKEA sobre el progreso (cuantitativo) son limitados y no se especifican por mercados, IKEA España obtiene una puntuación global del 48% (Nivel 5 - Deficiente).

### KFC

KFC España, como parte de KFC Europa Occidental, tiene una política que cubre explícitamente el bienestar de los pollos de engorde en la que se comprometen a no utilizar jaulas de engorde ni sistemas de varios niveles, a seguir utilizando métodos de sacrificio no crueles 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 demás criterios del ECC, ni ha establecido compromisos con plazos concretos para los que sí ha incluido, sólo ha recibido un 21% en el pilar Compromisos y Objetivos (Nivel 6 - Muy Deficiente). Por otra parte, KFC España presenta informes de resultados sobre algunos de los criterios del ECC, pero no sobre todos, por lo que sólo obtiene un 40% en el Pilar 2 Informes de resultados (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 e incluyen 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 global 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 a cumplir los criterios del ECC, pero este compromiso aún no se ha comunicado en el país ni se ha establecido una hoja de ruta, por lo que obtiene una puntuación del 82% en el pilar Compromisos y Objetivos (Nivel 2 - Bueno). Lamentablemente, aún no se dispone de informes sobre los progresos realizados, lo que significa que la puntuación es del 0% en el pilar de informes de resultados (nivel 6: Muy Deficiente).

## Subway

Este año, Subway ha eliminado la fecha límite de su compromiso ECC. El compromiso que establecieron en 2021 incluye todos los criterios del ECC y especifica que se aplica al mercado europeo, pero ya no incluye un compromiso con fecha límite, todavía no se ha comunicado en el país y Subway no tiene una hoja de ruta, por lo que para 2024 Subway España ha bajado a una puntuación del 18% para el Pilar 1 (Nivel 6 - Muy Deficiente). El Informe de Progreso tampoco incluye todos los elementos del ECC, lo que resulta en una puntuación del 20% para el Pilar 2 (Nivel 6 - Muy Deficiente).

## Recomendaciones: España

- Que **Domino's** y **Starbucks** se comprometan con el ECC y publiquen una política de bienestar de los pollos de engorde que establezca explícitamente los criterios según el ECC.
- Recomendamos que **Burger King** y **McDonald's** incorporen los criterios específicos de bienestar de la ECC en sus políticas de bienestar de pollos de engorde existentes, y que comuniquen sus políticas en el país.
- En el caso de las empresas que ya se han comprometido con el ECC, que publiquen una hoja de ruta, y en el caso concreto de **IKEA, Pizza Hut** y **Subway**, que se aseguren de que se comunique en España y sea accesible al público, y en el caso de **KFC**, que incluyan plazos de aplicación.
- Aunque un compromiso con el ECC o la política de bienestar de los pollos de engorde indica un primer paso, las empresas (**IKEA, KFC, Pizza Hut, Subway, Burger King** y **McDonald's**) necesitan demostrar que realmente están mejorando el bienestar de los pollos de engorde informando sobre los progresos que están haciendo para aplicar los criterios del ECC en toda su cadena de suministro.
- Animamos encarecidamente a **Subway** a restablecer un plazo para cumplir los requisitos del ECC.



'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)

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