



The pecking order 2021



Assessing how global fast-food brands are
responding to the chicken crisis

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Cover image: High welfare broiler chicken farm in Ontario, Canada. World Animal Protection



Foreword

It's an understatement to say that the world has changed profoundly since publishing the second version of 'The pecking order' in January 2020. In just 18 months, most of us have dealt with unparalleled changes in our personal and professional lives that have challenged us in new and unexpected ways.

COVID-19 and this period of adjustment have shone a spotlight on animals, their role in our food system and the close links between animal welfare and human welfare. Throughout the crisis an estimated 72 billion chickens continued to be farmed for their meat. This was mostly in intensive conditions that denied them space, light and natural behaviour, and forced growth so fast their legs could not support them.

While their suffering fed a planet in crisis, the food industry was forced to adjust to a tough operating environment. The issues faced included changing consumer demand, labour movement restrictions and material price fluctuations.

The pandemic has highlighted that there is more to feeding the world than short-term business gains.

To avoid the next global catastrophe and maintain a healthy economy, we need a strong and resilient food system. One which ensures that animals are ultimately raised in high-welfare farming systems. Such systems will safeguard us not only from antimicrobial resistance, which is already killing an estimated 700,000 people a year, but from environmental disaster too.

COVID-19 is still a focus in 2021, but our climate crisis gains attention as we move toward the 2021 UN sustainable food summit and the 26th UN Climate Change Conference of the Parties (COP26) later this year. Global leaders have a strong public mandate to build a more sustainable world. Civil society and business must continue to hold them to account. What's clear is that our current food and farming systems are broken.

They are failing people, animals and the natural world. Whether it's COVID-19, the climate crisis or another disaster-in-the-making that we haven't yet predicted, the way we produce food affects and is affected by almost everything else.

Everything is connected – and we must work together to make food systems more humane and sustainable.

'The pecking order 2021' is the third version of our scorecard and highlights important progress for chickens which we should celebrate. It's encouraging to see some companies – such as KFC in parts of Europe, and Nando's in the UK – take a stand to improve chicken welfare during this challenging year.

It's also exciting to see these companies, along with many others, innovate with meat-free options on their menus. The 'eat better meat, eat less meat' concept will be critical in years to come, as companies and consumers embrace sustainability.

However, 'The pecking order 2021' also shows a clear and unacceptable lack of action. This is particularly apparent in countries outside of North America and Europe. Global companies are not applying their policies globally. This must change. Global food business principles and the lives of the animals on which their companies depend should be valued consistently, wherever you are in the world.

The time is right to innovate to improve animal welfare. We can support you on your journey.

Please get in touch to discuss 'The pecking order 2021' results, or our work to build more humane and sustainable food systems.



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About 'The pecking order'

'The pecking order', now in its third year, was created to provide eight iconic fast-food brands' with a framework to measure and manage broiler chicken welfare performance worldwide (termed 'chicken' in this report). It also measures performances against peers and is the only tool of its kind available in the world.

The criteria underpinning 'The pecking order' methodology is based on the Better Chicken Commitment (BCC). This simple, robust set of improvements to chicken production was created by a group of the world's leading animal protection organisations and draws on the latest scientific evidence. BCC criteria includes the use of slower growing chickens and the provision of more space and better lighting.

Hundreds of companies have signed up to the commitment in North America, Europe and Australia. For more information on the technical detail of the BCC, please refer to table 29 on page 59.

Image: 19-day-old broiler (meat) chickens in an indoor, deep-litter system typical of independent farms in East Africa.
Georgina Goodwin/World Animal Protection

Companies in 'The pecking order' are awarded points across three main elements: corporate commitments, objectives and targets, and performance reporting. Each section has six questions and a total of 30 points can be awarded per section, with a total of 90 points across the assessment. Based on their score, companies can sit in one of the six grades given ranging from 'Very poor' to 'Leading'.

Transparency is crucial in managing chicken welfare. For this reason, only publicly available information is considered in 'The pecking order'.

To reflect the changing context in which companies operate, the scoring methodology is reviewed annually and refined as necessary. Any methodology changes are communicated in advance to featuring companies. Companies are also given the opportunity to review their assessments for feedback before publication.

I. More than eight companies are assessed through 'The pecking order'. A separate assessment is provided where the business is treated as a separate entity eg Domino's Pizza has multiple assessments as it's divided into different businesses, including Domino's PLC, Domino's Pizza Enterprises, etc.



The headlines

Leading the way in 2021 – European companies show genuine progression

KFC, out of all eight global brands assessed, is the clear leader of 'The pecking order 2021'. It is the only company in Tier 3 (Making progress) – still the same tier awarded in 2020 – but with a higher score. This is through alignment with the BCC and KFC reporting on its performance against the company's chicken welfare standards in Western Europe. These targets include stocking density, enriched environments, humane slaughter methods and third-party audits. KFC's work in Western Europe has positioned the company as the only one to achieve Tier 1 (Leading) positions in the local rankings of 'The pecking order 2021' for Denmark, Netherlands, Sweden and UK.

However, there is still significant room for improvement. Outside Western Europe, KFC is not aligned with the BCC.

The ranking of KFC contrasts sharply with Domino's, which is right at the bottom of 'The pecking order 2021' sitting alone in Tier 6 with a score of 'Very poor'. This company has consistently been in the bottom tiers since the first version of 'The pecking order' three years ago.

Three companies – Burger King, Nando's and Pizza Hut – have aligned with the BCC in the UK since the previous assessment. Consequently, they are starting to demonstrate a serious intention to improve chicken welfare in this market. As a result, two companies – Burger King and Pizza Hut – have moved up two tiers, and Nando's has moved up one tier. This is particularly encouraging to see as it will improve the lives of millions of chickens. We urge other companies featured in the UK – Starbucks, Subway, McDonald's and Domino's – to follow suit soon.

Despite moving up one tier, from 'Poor' to 'Getting started', McDonald's, unlike many of its competitors, is still unwilling to sign up to the BCC in any market globally. The company has some standards that align with the commitment. These include third-party auditing and humane slaughter; however much more needs to be done.

McDonald's has taken some other good steps to source products with good welfare in some markets such as organic milk, eggs from cage-free hens, and higher-welfare pork. We hope that McDonald's will align with its competitors in improving chicken welfare and ensure the chickens they use have a life worth living.

Missing welfare – companies not reporting performance

Most points gained by companies in 'The pecking order 2021' are through the commitments made and targets set. However, reporting on the proportion of chickens that currently meet their standards is limited. This means the companies are not reporting the progress made to improve the lives of chickens.

KFC picked up the most points for its performance reporting efforts in relevant European countries. Specifically: KFC receives 15 points for performance reporting; McDonald's 10 points; Nando's 6 points; Burger King 3 points, Subway and Domino's PLC 2 points each and Domino's Inc and Starbucks, zero.

Table 1 below highlights the points earned in 2019, 2020 and 2021 for the three scoring areas. Points for performance reporting have been consistently lower than corporate commitments, and objectives and targets over this three-year period.

Table 1 Scores (%) earned in 'The pecking order' in 2019, 2020 and 2021 by the companies that have been included from the start of the assessment – Burger King, Domino's Inc, Domino's PLC, KFC, McDonald's, Nando's, Pizza Hut, Starbucks and Subway.

	Corporate commitments	Objectives and targets	Performance reporting
2021	43%	39%	14%
2020	33%	28%	7%
2019	35%	31%	10%



Companies aligned with the BCC in North America – Burger King (USA and Canada) and Starbucks and Subway (USA) – have given little or no performance reporting data since ‘The pecking order’ launch.

All companies making farmed animal welfare commitments should provide clear and transparent data. This is key to highlight the opportunities and challenges of becoming corporates with more humane supply chains. Such reporting and data enable them to track their progress towards high-welfare chicken. It also sends a clear message of transparency to investors and customers of a company’s response to stakeholder concerns.

McDonald’s has increased its score for the information it provides in North America regarding the proportion of chickens humanely slaughtered using controlled atmospheric stunning. They report 20% in the USA and 100% in Canada. They also report the global proportion of chickens who are cage free at 100%. However, McDonald’s is not fully aligned with the BCC in any country.

Disappointing Domino’s scores the worst – ‘Very poor’

Domino’s stands out as the worst regarding chicken welfare in ‘The pecking order 2021’. It is the only brand to receive a ‘Very poor’ grade (Tier 6). This situation has not changed significantly since ‘The pecking order’ was first published. Its ranking highlights a consistent and worrying lack of interest in chicken welfare, and also in managing the risks and opportunities that come with it.

The exceptions within this multi-national are Domino’s Pizza Enterprises and Domino’s Pizza PLC. Domino’s Pizza Enterprises stands out for its commitment to the BCC in European markets including Denmark and Netherlands.

Domino’s Pizza Group PLC gains points for having an animal welfare policy applicable to all suppliers to its UK and Ireland restaurants. The policy includes a specific section on chicken welfare. This company also has committed to improving the provision of environmental enrichment in line with BCC standards.

Domino’s should step up for chickens, and indeed all farmed

animals, by developing comprehensive policies, time-bound objectives and robust reporting processes. Otherwise, its competitors will leave it far behind.

North America and Europe making more progress – why?

Beyond the ‘The pecking order 2021’ company assessments, most companies signed up to the BCC are in North America and Europe (see table 2 below).

Table 2 Number of chicken-focused corporate policies per country as of May 2021

Country	Number of companies
USA	174
UK	81
France	64
Germany	47
Canada	39
Sweden	31
Denmark	21
Netherlands	20
Belgium	19
Spain	14
Ireland	12
Norway	9
Australia	1
India	0
Brazil	0
Thailand	0
Indonesia	0
China	0
Kenya	0

Note: the commitments are aligned with the BCC, but they don’t necessarily apply to 100% of the chicken in the supply chains (source: Chicken Watch).



This could be due to several reasons.

- These markets have a stronger history of corporate progress on animal welfare.
- The public has a greater knowledge of the problems associated with industrial farming.
- The public has had more opportunities to express its discontent with industrial farming practices, for example through social media.
- Consumers are generally more willing and able to pay more for higher animal welfare. (Although improvements to animal welfare can be cost effective, and the consumer shouldn't always bear these costs).
- Civil society generally has more freedom to expose the unsustainable and/or inhumane actions (or inactions) of industry.

Regardless of these reasons, higher welfare chicken should not be exclusive to consumers in Europe and North America. Society at large increasingly expects companies to take animal welfare seriously and make it an integral part of their corporate social responsibilities, wherever their operations sit.

Companies can face operational, regulatory and reputational risks worldwide, so action in all markets is needed. We acknowledge the additional challenges that exist in some markets, but these are not insurmountable.

Image: Daniel Dash/Shutterstock



'The pecking order 2021' – results summary

Table 3 'The pecking order 2021' global results and comparison










Company	2021 score %	2021 grade	2021 tier	YoY tier change (2020 - 2021)	2020 tier	2019 tier
 KFC	59%	Making progress	3	-	3	5
 Pizza Hut	42%	Getting started	4	+2	6	5
 BURGER KING	41%	Getting started	4	+2	6	4
 Domino's Pizza Enterprises	40%	Getting started	4	n/a (not assessed in 2019 or 2020)		
 Nando's	38%	Getting started	4	+1	5	5
 McDonald's	37%	Getting started	4	+1	5	4
 SUBWAY	31%	Getting started	4	-	4	4
 Starbucks	28%	Getting started	4	-	4	4
 Domino's Pizza PLC	12%	Very poor	6	-	6	6
 Domino's Pizza Inc.	0%	Very poor	6	-	6	6
 Domino's Pizza Thailand	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		
 Domino's Pizza China	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		
 Domino's Pizza Brazil	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		
 Domino's Pizza India	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		
 Domino's Pizza Indonesia	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		
 Domino's Pizza Kenya	0%	Very poor	6	n/a (not assessed in 2019 or 2020)		



Table 4 'The pecking order 2021' global results and comparison by scoring area



















Company	Corporate commitments			Objectives and targets			Performance reporting		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
	67%	23%	30%	60%	70%	20%	0%	0%	20%
	67%	67%	30%	60%	60%	20%	50%	20%	20%
 Domino's Pizza Enterprises	60%	n/a	n/a	60%	n/a	n/a	0%	n/a	n/a
	57%	20%	60%	57%	10%	60%	10%	0%	0%
	47%	23%	23%	47%	20%	20%	20%	20%	20%
	43%	60%	60%	43%	60%	60%	7%	0%	0%
	43%	60%	60%	40%	60%	60%	0%	0%	0%
	40%	33%	33%	37%	30%	37%	33%	10%	17%
 Domino's Pizza PLC	23%	13%	17%	7%	7%	0%	7%	17%	10%
 Domino's Pizza Thailand	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza Kenya	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza Indonesia	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza India	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza China	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza Brazil	0%	n/a	n/a	0%	n/a	n/a	0%	n/a	n/a
 Domino's Pizza Inc.	0%	0%	0%	0%	0%	0%	0%	0%	0%



Table 5 ‘The pecking order 2021’ global results versus country results (% and tier)

		GLOBAL	AU	BR	CA	CN	DK	IN	ID	KE	NL	NZ	SE	TH	UK	US
	% Score	41%	10%	10%	54%	10%	10%	10%	0%	0%	10%	10%	10%	10%	70%	54%
	Tier	4	6	6	3	6	6	6	6	6	6	6	6	6	3	3
	% Score	-	0%	0%	0%	0%	67%	0%	0%	0%	67%	0%	0%	0%	17%	0%
	Tier	-	6	6	6	6	3	6	6	6	3	6	6	6	5	6
	% Score	59%	6%	6%	6%	0%	92%	6%	6%	6%	92%	6%	92%	6%	92%	6%
	Tier	3	6	6	6	6	1	6	6	6	1	6	1	6	1	6
	% Score	37%	38%	32%	43%	16%	16%	16%	16%	*	38%	16%	16%	16%	38%	43%
	Tier	4	4	4	3	5	5	5	5	*	4	5	5	5	4	3
	% Score	38%	34%	*	18%	*	*	0%	*	*	*	18%	*	*	78%	0%
	Tier	4	4	*	5	*	*	6	*	*	*	5	*	*	2	6
	% Score	42%	6%	6%	6%	6%	*	6%	6%	6%	*	6%	6%	6%	67%	6%
	Tier	4	6	6	6	6	*	6	6	6	*	6	6	6	3	6
	% Score	28%	6%	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	67%
	Tier	4	6	6	6	6	6	6	6	*	6	6	6	6	6	3
	% Score	31%	0%	18%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	67%
	Tier	4	6	5	6	6	6	6		6	6	6	6	6	6	3

Key

Tier 6 Very poor	Tier 5 Poor	Tier 4 Getting started	Tier 3 Making progress	Tier 2 Good	Tier 1 Leading
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II. Domino's is not treated in the same way as other companies in 'The pecking order' as its businesses are separate entities. For clarity, the following Domino's businesses have been assessed:

- Domino's Pizza Enterprises (Australia, New Zealand, Netherlands and Denmark)
- Domino's Pizza Inc. (US and Canada)
- Domino's Pizza Group PLC (Sweden and UK)
- Domino's Pizza Brazil
- Domino's Pizza China
- Domino's Pizza India
- Domino's Pizza Indonesia
- Domino's Pizza Kenya
- Domino's Pizza Thailand



Why companies should switch to higher welfare chicken

Six reasons for change

1. Preventing antibiotic overuse and protecting public health

Recent food safety scandals and zoonotic disease outbreaks are making consumers think about food systems and where their meat comes from. Research findings presented by Opinion Research Corporation International to the 2017 US Chicken Marketing Summit identified food safety as the issue causing consumers the most concern.¹ This was followed by disease, hormone use and antibiotic use.

There are legitimate reasons for these concerns. A total of 75% of new or emerging human infectious diseases reported in the past three decades are derived from animals.²

Antibiotic overuse in farming (and the associated rise of antibiotic-resistant superbugs) is rightly under significant scrutiny. Globally, three quarters of all antibiotics are used in farming. The use of antibiotics in feed or water to promote fast growth of farmed animals, or to prevent disease across entire groups, kept in intensive, high-stress, cruel conditions is widespread in most countries.

This poor treatment and the misuse of antibiotics facilitates the development of superbugs. These then spread via food, animals, animal feed, manure and the environment,³ posing major risks for people and public health. An estimated 700,000 people are dying annually from superbug infections that are resistant to antibiotics.

Higher welfare farming systems using slower growing chicken breeds reduce the need for antibiotics; significantly fewer are needed compared with conventional intensive systems. These higher welfare systems also have fewer antibiotic-resistant *E. coli* bacteria and pose a lower risk to the environment and people than antibiotic-free intensive systems.⁴ These factors appeal greatly to consumers and encourage them to buy high-welfare chicken.

However, it is important to recognise that antibiotic-free production is not the answer to improving chicken welfare. This is despite the marketing of 'raised without antibiotics', 'antibiotic-free' or 'no antibiotics ever' products in response to consumer

concern. Even when animals are kept in the highest welfare conditions, antibiotics should still be used to treat sick animals.

Going completely antibiotic-free does not lead to healthier animals; instead, it can create a host of serious animal welfare problems. These include skin burns, and eye and respiratory conditions.⁵ More than 500 American vets and producers familiar with antibiotic-free conventional production have expressed concern with these schemes and their negative effects on animal welfare.⁶

2. Increased competition from meat alternatives

Traditional animal proteins, including chicken, are facing competition from protein alternatives similar in taste and feel to meat. These alternative proteins are gaining consumer interest and market share.

A recent report from Boston Consulting Group and Blue Horizon Corporations suggests that 10% of all portions of meat, eggs, dairy and seafood consumed globally will be made from alternative proteins by 2035. By 2035, the worth of the alternative protein market is expected to reach at least US\$290bn.

Recent partnerships between alternative protein company Beyond Meat and PepsiCo, McDonald's and Yum! Brands highlight the strong interest in alternatives.

Cell-based - or cultured - meat is another area of burgeoning interest. The costs are still relatively high and there are no products available on a large scale, but lab-grown chicken nuggets and burgers are already on some restaurant menus in Singapore and Tel Aviv.

The interest in cell-based meat is predicted to grow; consequently, this product is almost certain to be part of many diets in the future. A recent report from consultants CE Delft indicated the multiple environmental benefits of cultured meat grown using renewable energy.



The range of consumer options, and increasing awareness of livestock production's effects on sustainable development, means food brands will need new ways of differentiating their products.

Animal welfare is a key distinguishing feature of sustainable and humane food production. Those companies with the most positive and humane stories to tell are most likely to reap the rewards of investment and consumer loyalty.

3. The changing investment climate

Climate change is widely accepted as financially relevant by the investor community, with expectations that companies need to develop business strategies that consider climate adaptation and mitigation. Meat and dairy production contribute greatly to climate change, with the Food and Agriculture Organization of the United Nations (FAO) estimating them to be responsible for 14.5% of global emissions.⁷ So, companies investing in factory farming are particularly vulnerable to financial loss as policy makers and investors address climate-related physical and transition risks.

Stronger policy responses against factory farming systems are expected as governments grapple with the Paris Agreement targets and shifting public attitudes. There is a strong reputational risk investing in systems that people increasingly consider unethical on animal welfare or environmental grounds.

Other sustainability risks associated with factory farming include biodiversity loss; antimicrobial resistance; zoonotic diseases; unhealthy dietary patterns, and human health problems related to air and water pollution from the farms. Additional issues involve corporate exploitation of employees negatively affecting their labour rights,⁸ social equity and food security.

Factory farming is clearly unsustainable. Attempts to position chicken as a sustainable meat, by comparing it with beef production are misguided. Although 1kg of chicken produces fewer greenhouse gas emissions than 1kg of beef, shifting to chicken production from beef or other animal protein production does not address factory farming risks. It can even exacerbate them.



Image: Sixty billion meat chickens are raised for global consumption each year. World Animal Protection

For example, more intensive poultry farms could lead to increased disease and antibiotic use, superbug emergence, and biodiversity loss through feed production for fast-growing chicken breeds.

Furthermore, the global economy fundamentally relies on healthy people. So, the significant harm posed to public health by factory farming operations is material to the financial sector.

Financial institutions are key in bringing about the necessary transformative shift towards food system sustainability. We can expect financial institutions to increasingly refuse to invest in companies involved in mass deforestation, to clear land for soy used as animal feed in factory farms. And we should anticipate an investment climate where financial institutions recognise and address the need for a protein transition where the remaining farmed animals enjoy high welfare.

4. Protecting the land and biodiversity

Intensive animal production has a disproportionately large impact on forests and biodiversity. This is largely because cattle ranching and farm animal feed production drives land-use change, deforestation, and loss of habitat for wild animals.⁹



In the Brazilian Amazon, deforestation levels are at a record high since 2008.¹⁰ In the Cerrado – a biome in Brazil that is considered to be the most biodiverse savanna in the world – has also seen an increase in its deforestation levels (13.2% in 2020 vs 2019).¹¹ Nearly 30% of deforestation in the Cerrado is attributed to soy production.¹²

Companies with zero deforestation commitments agreed to decouple their supply chains from deforestation linked to soy and other commodities by 2020. The New York Declaration on Forests – with signatories including McDonald’s, Cargill and Barclays – committed to achieve this. Half way through 2021, however, we are a long way from meeting this goal that expired a year ago.

Replacing the animal protein in people’s diets with plant protein would reduce the land used for food by 3.1 billion hectares¹³ – that’s more than three times the size of the USA.

Image: Deforestation levels in the Brazilian Amazon are at a record high since 2008. PARALAXIS/Shutterstock

5. Protecting the world from pandemics

There is a clear link between industrial farming and the emergence of the most dangerous, virulent strains of disease.

Experts from the World Health Organization have warned that intensive farming practices increase the risk of zoonotic diseases – those that spread from animals to humans. A 2013 report from the FAO stated that ‘livestock health is the weakest link in our global health chain’.¹⁴ Intensive production – factory farming – provides ideal conditions for new disease variants to emerge and spread rapidly.¹⁵ High levels of animal stress, common when animals are kept in poor conditions, increases ‘pathogen shedding’ – the expulsion of bacteria and viruses.¹⁶

The trading and transporting of live animals also increase their stress. This means that strains of diseases such as avian or swine flu, previously isolated from each other, have more opportunities to mutate into more virulent strains.^{17 18} Furthermore, when animals





Image: The World Health Organization has warned that intensive farming practices increase the risk of zoonotic diseases. KOOKLE/Shutterstock

of the same breeds – all pigs or all poultry for example – are kept at high stocking densities, this increases the risk of virulent and mass disease transmission among them.^{19 20 21}

As factory farming has expanded globally, so too have the risks. There is evidence that exporting the factory farming model to Asia led to an unprecedented explosion of viruses infecting birds and people in the 1990s.²² A 2018 study showed that out of 39 incidences of H5 and H7 avian flu spreading to people, 37 originated in factory farms.²³ These events are how new strains of viruses emerge, and so present a significant danger to human and animal health.

Assumptions that intensive poultry production has higher levels of biosecurity than smallholder operations in preventing introduction and release of pathogens are misplaced. Thai government data regarding the 2004 avian flu outbreak indicate that the odds of H5N1 outbreaks were significantly higher in large-scale commercial poultry operations than in backyard flocks.²⁴

6. More chicken breeds now align with the Better Chicken Commitment

Companies frequently give the limited number of slower growing chicken breeds with high production and welfare outcomes as reasons for not adopting the BCC.

Fast growing breeds experience:

- impaired walking due to the stress imposed by fast weight gain on the chickens' immature bones

- altered walking patterns due to large breast muscles
- problems related to the high metabolic demands of fast growth, including ascites, heart failure and sudden death
- a higher predisposition to footpad lesions and infections
- muscle development problems like white striping and wooden breast
- lower activity levels.

The adoption of breeds with demonstrated higher welfare outcomes is perhaps the most critical step for improving the overall welfare of meat chickens on farms. Progress in both research and business highlights the possible success of using slower growing breeds.

Results of a University of Guelph study will be used to create a list of approved breeds under Global Animal Partnership's^{III} welfare certification scheme and the BCC.

In addition, genetics companies and certification bodies are accelerating their work on approving breeds and increasing their market availability. In the first quarter of 2021, two new breeds, the Hubbard Redbro (for indoor systems only) and the Hubbard JACY57, have been approved for use in compliance with the BCC.

Companies have welcomed the addition of these new breeds, as they present a more cost-effective option for improving welfare. With this progress, companies no longer have excuses to hold off on breed transition. Given the timeframes of contracts and expected increase in market demand, the time is right to act on this. Companies that do nothing are at much higher risk of being left behind, unable to meet the rapidly changing preferences of their customers for higher welfare chicken.

III. Global Animal Partnership (GAP) is a non-profit animal welfare certification organisation. Its board of directors includes animal welfare scientists, farmers, retailers and animal advocates. Initiated by US-based retailer Whole Foods in 2008, it works with a five-step certification scheme, ranging from very basic requirements (step 1: no cages and overcrowding) to elaborate requirements that are fully animal centred (step 5+). To date, it has developed five-step schemes for chickens (broilers and laying hens), pigs, turkeys, sheep, bison and beef cattle.



Corporate performance – company focus

The following tables provide a breakdown of 'The pecking order 2021' data by company, both globally and across the 14 markets included in the assessment. The scores out of 30 for each of the three question areas – corporate commitments, objectives and targets and performance reporting – are provided, along with the total score out of 90, tier and grade.

We also give a statement for each market, detailing how any points have been awarded and what we expect of underperforming companies.

Table 6 'The pecking order 2021' global and local scores and commentary for Burger King


Geographic focus	Corporate commitments (out of 30)			Objectives and targets (out of 30)		Performance reporting (out of 30)		Total (out of 90)	Tier	Grade	 Commentary
	Corporate commitments (out of 30)			Objectives and targets (out of 30)		Performance reporting (out of 30)					
	Corporate commitments (out of 30)			Objectives and targets (out of 30)		Performance reporting (out of 30)					
	Corporate commitments (out of 30)			Objectives and targets (out of 30)		Performance reporting (out of 30)					
	Corporate commitments (out of 30)			Objectives and targets (out of 30)		Performance reporting (out of 30)					
Global	17	17	3	37	4	Getting started	<p>The overall score has significantly increased since the previous assessment for 'The pecking order 2020'. An overall score of 37 out of 90 means that Burger King is ranked in Tier 4, which we consider 'Getting started'. This is an improvement on 2020 when the company was ranked in Tier 6.</p> <p>Under a directive from the parent company's (Restaurant Brands International/RBI) global animal welfare policy, Burger King has chicken welfare commitments for the USA and Canada. These address key welfare issues by aligning with Global Animal Partnership standards. These include stocking densities; chickens bred for measurably improved welfare outcomes; provision of meaningful enrichment and the use of humane slaughter processes. Burger King UK has made commitments in line with the 2026 European Chicken Commitment, specifically on stocking density, chickens bred for measurably improved welfare outcomes, environmental enrichment, use of humane slaughter systems and the use of third-party auditing.</p> <p>We encourage Burger King to make its chicken welfare commitments in the USA and Canada explicit, and to extend these commitments to other geographies. We also encourage Burger King to begin reporting on its progress to meet the time bound commitments it has set for the UK, USA and Canada.</p> <p>RBI has a global animal welfare auditing statement that requires global poultry raw material suppliers to submit annual third-party audits that include animal welfare standards. However, the animal welfare standards in countries other than the USA and Canada are unclear.</p>				
AU	3	3	3	9	6	Very poor	<p>The country is covered by the global animal welfare policy. However, this does not make relevant commitments to chicken welfare in Australia. We encourage Hungry Jack's (Burger King operates in Australia under this name) to introduce commitments in line with the BCC.</p>				
BR	3	3	3	9	6	Very poor	<p>The country is covered by the global animal welfare policy; however, this does not make relevant commitments to chicken welfare in Brazil. We encourage Burger King Brazil to introduce commitments in line with the BCC.</p>				



Table 6 'The pecking order 2021' global and local scores and commentary for Burger King

CA	23	23	3	49	3	Making progress	Burger King Canada's chicken welfare commitment addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment and use of humane slaughter processes. These all align with Global Animal Partnership Standards. We encourage Burger King Canada to make its commitments explicit, particularly on which slower growth chicken breeds they will use and to start reporting on progress against these commitments.
CN	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy. However, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King China to introduce commitments in line with the BCC.
DK	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy. However, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King Denmark to introduce commitments in line with the BCC.
IN	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy. However, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King India to introduce commitments in line with the BCC.
ID	0	0	0	0	0	Very poor	It is not clear if the country is covered by Burger King's global animal welfare policy or by RBI's animal welfare third-party auditing statement. The country is not included in Burger King's listed international operations and does not provide any additional chicken welfare commitments. We encourage Burger King Indonesia to introduce commitments in line with the BCC.
KE	0	0	0	0	0	Very poor	It is not clear if the country is covered by Burger King's global animal welfare policy or by RBI's animal welfare third-party auditing statement. The country is not included in Burger King's listed international operations and does not provide any additional chicken welfare commitments. We encourage Burger King Kenya to introduce commitments in line with the BCC.
NL	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King Netherlands to introduce commitments in line with the BCC.
NZ	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website does make an animal welfare statement; however, it does not provide detail on chicken welfare commitments. We encourage Burger King New Zealand to introduce commitments in line with the BCC.
SE	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King Sweden to introduce commitments in line with the BCC.
TL	3	3	3	9	6	Very poor	The country is covered by Burger King's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Burger King Thailand to introduce commitments in line with the BCC.
UK	30	30	3	63	3	Making progress	Burger King UK's animal welfare policy includes chicken welfare. The company has also committed to the BCC by 2026. Its policy includes criteria on stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment, use of humane slaughter processes and third-party auditing. We encourage Burger King United Kingdom to begin reporting on its progress to meet those targets.
US	23	23	3	49	3	Making progress	Burger King USA has a chicken welfare commitment that addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment and use of humane slaughter processes. Commitments on these welfare issues are stated as in alignment with Global Animal Partnership Standards. We encourage Burger King USA to make its commitments explicit, particularly on which slower growth chicken breeds they will use and to start reporting on progress against these commitments.



Table 7 'The pecking order 2021' global and local scores and commentary for Domino's Pizza

Geographic focus	Corporate commitments (out of 30)				Performance reporting (out of 30)		Tier	Grade	Commentary
	Objectives and targets (out of 30)				Total (out of 90)				
								 IV.	
AU	0	0	0	0	6	Very poor	Domino's Pizza Enterprises	The company mentions in its corporate social responsibility report that it avoids using animals that have not been treated humanely. However, the company does not mention a clear set of standards. We encourage Domino's Pizza Enterprises Australia to align with the BCC standards.	
BR	0	0	0	0	6	Very poor	Domino's Pizza Brazil	No information was available for points to be awarded.	
CA	0	0	0	0	6	Very poor	Domino's Pizza Inc.	Domino's Canada does not appear to have a chicken welfare policy, or any commitments related to the BCC. We encourage the company to introduce commitments in line with the BCC.	
CN	0	0	0	0	6	Very poor	Domino's Pizza China	No information was available for points to be awarded.	
DK	30	30	0	60	3	Making progress	Domino's Pizza Enterprises	Denmark is one of the European countries included in the company's commitment aligned with the BCC. We encourage Domino's Pizza Enterprises Denmark to make available on the Danish website a list of detailed standards the company has committed to.	
IN	0	0	0	0	6	Very poor	Domino's Pizza India	No information was available for points to be awarded.	
ID	0	0	0	0	6	Very poor	Domino's Pizza Indonesia	No information was available for points to be awarded.	
KE	0	0	0	0	6	Very poor	Domino's Pizza Kenya	No information was available for points to be awarded.	
NL	30	30	0	60	3	Making progress	Domino's Pizza Enterprises	The Netherlands is one of the European countries included in the company's commitment aligned with the BCC. The Netherlands website provides a link to the European Chicken Commitment letter. We encourage the company to include all of the standards of the commitment on their own website.	
NZ	0	0	0	0	6	Very poor	Domino's Pizza Enterprises	There is no mention of animal welfare for the New Zealand activities of Domino's Pizza Enterprises. We encourage Domino's Pizza Enterprises New Zealand to align with the BCC standards.	
SE	0	0	0	0	6	Very poor	Domino's Pizza Group PLC	We were unable to find information on chicken welfare for DPG Sweden. Suppliers to DPG Sweden are not required to meet the standards set out in the DPG animal welfare policy. There does not appear to be further relevant information on the country website. We encourage DPG Sweden to introduce time-bound commitments aligned with the BCC.	

Table 7 'The pecking order 2021' global and local scores and commentary for Domino's Pizza

TL	0	0	0	0	6	Very poor	<p>Domino's Pizza Thailand</p> <p>No information was available for points to be awarded.</p>
UK	11	2	2	15	5	Poor	<p>Domino's Pizza Group PLC</p> <p>The DPG animal welfare policy, applicable to all UK and Ireland suppliers, includes chicken welfare commitments. However, apart from committing to provide environmental enrichment, these are not aligned with the BCC. DPG UK is committed to cage-free chicken meat and reports on chicken stocking densities in its supply chain. We encourage DPG UK to develop its existing chicken welfare commitments to align with the BCC standards. We also urge them to include a commitment on selecting chickens bred for better welfare outcomes</p>
US	0	0	0	0	6	Very poor	<p>Domino's Pizza Inc.</p> <p>Domino's USA does not appear to have a chicken welfare policy, or any commitments related to the BCC. We encourage the company to introduce commitments in line with the BCC.</p>

IV. 'The pecking order' results are gathered via independent assessment by Chronos Sustainability. Given the complex business structure of Domino's, however, World Animal Protection gathered the data for all Domino's companies other than Domino's Pizza PLC and Domino's Pizza Inc. For all other brands in 'The pecking order 2021' data gathering was carried out by Chronos Sustainability.

Image: 'Windstreek' is a high welfare chicken farm in the Netherlands. It has been built with the welfare of chickens in mind, to ensure they have a good and valued life.
Valerie Kuypers/World Animal Protection



Table 8 'The pecking order 2021' global and local scores and commentary for KFC


Geographic focus	Corporate commitments (out of 30)				Total (out of 90)	Tier	Grade	Commentary
	Objectives and targets (out of 30)			Performance reporting (out of 30)				
	Performance reporting (out of 30)		Objectives and targets (out of 30)					
	Total (out of 90)							
	Performance reporting (out of 30)							
								
Global	20	18	15	53	3	Making progress	<p>The overall score has improved since the previous assessment for 'The pecking order 2020'. An overall score of 53 out of 90 means that KFC is ranked in Tier 3, which we consider 'Making progress'. This is the same as 2020 when the company was ranked in Tier 3.</p> <p>KFC globally is subject to Yum! Brands' global animal welfare policy and the complementary KFC Global Chicken Welfare Guidelines. These specifically cover chicken welfare. However, it is not aligned with the BCC. KFC's global ranking score is driven by several KFC Western Europe countries publicly committing to the BCC and reporting on their progress in implementing those commitments by 2026. These countries are KFC UK and Ireland, Germany, Denmark, Netherlands, Belgium and Sweden. (KFC also signed up to the BCC in France after the assessment period for 'The pecking order 2021').</p> <p>We encourage KFC to make time-bound commitments aligned with the BCC in its other geographic areas.</p>	
AU	5	0	0	5	6	Very poor	KFC Australia is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.	
BR	5	0	0	5	6	Very poor	KFC Brazil is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.	
CA	5	0	0	5	6	Very poor	KFC Canada is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.	
CN	3	3	3	9	6	Very poor	KFC China operates independently to Yum! Brands and is not covered by the Yum! Brands global animal welfare policy. We note the company's 2019 Sustainability Report states an animal welfare policy has been introduced; we encourage Yum China to publish that policy. We encourage the company to introduce commitments aligned with the BCC.	
DK	30	30	23	83	1	Leading	KFC Denmark has published 2026 commitments aligned with the BCC on its country website. The 'Annual progress report on chicken welfare' (prepared for KFC Western Europe) provides reporting against areas of the BCC for KFC Western Europe as a whole. We encourage KFC Denmark to produce its own annual progress report as undertaken by KFC UK and Ireland.	
IN	5	0	0	5	6	Very poor	KFC India is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.	
ID	5	0	0	5	6	Very poor	KFC Indonesia is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.	

Table 8 'The pecking order 2021' global and local scores and commentary for KFC

KE	5	0	0	5	6	Very poor	KFC Kenya is covered by the Yum! Brands global animal welfare policy, which explicitly covers chicken welfare. This is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.
NL	30	30	23	83	1	Leading	KFC Netherlands has published 2026 commitments aligned with the BCC on its country website. 'The annual progress report on chicken welfare' (prepared for KFC Western Europe) provides reporting against areas of the BCC for KFC Western Europe as a whole. We encourage KFC Netherlands to produce its own annual progress report as undertaken by KFC UK and Ireland.
NZ	5	0	0	5	6	Very poor	KFC New Zealand is covered by the Yum! Brands global animal welfare policy, which explicitly covers chicken welfare. This is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.
SE	30	30	23	83	1	Leading	KFC Sweden has 2026 commitments aligned with the BCC; we note these are not published on its country website animal welfare page. 'The annual progress report on chicken welfare (prepared for KFC Western Europe) provides reporting against areas of the BCC for KFC Western Europe as a whole. We encourage KFC Sweden to produce its own annual progress report as undertaken by KFC UK and Ireland.
TL	5	0	0	5	6	Very poor	KFC Thailand is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.
UK	30	30	23	83	1	Leading	KFC UK and Ireland has published 2026 commitments aligned with the BCC on its country website. It has an annual progress report on chicken welfare covering UK and Ireland that provides reporting against each of the areas of the BCC. We note that KFC UK and Ireland leads KFC Western Europe's chicken welfare standards.
US	5	0	0	5	6	Very poor	KFC USA is covered by the Yum! Brands global animal welfare policy. This explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.



Table 9 ‘The pecking order 2021’ global and local scores and commentary for McDonald’s


Geographic focus	Corporate commitments (out of 30)				Total (out of 90)	Tier	Grade	 Commentary		
	Objectives and targets (out of 30)			Performance reporting (out of 30)						
	Global	12	11						10	
										33
Global	12	11	10	33	4	Getting started	<p>The overall score has improved since the previous assessment for ‘The pecking order 2020’. An overall score of 33 out of 90 means that McDonald’s is ranked in Tier 4, which we consider ‘Getting started’. This is an improvement from 2020 when the company was ranked in Tier 5.</p> <p>McDonald’s has global animal welfare guidelines led by the corporate head office that cover chickens. It has also made specific commitments, that will be fully implemented by 2024, covering 70% of its supply chain. The commitment to use controlled atmospheric stunning is aligned with the BCC. All commitments will be subject to third-party auditing. McDonald’s further commitments on measuring welfare outcomes and providing enrichments are positive welfare improvements, but do not appear to be aligned with the BCC.</p> <p>We encourage McDonald’s to report its progress on delivering its 2024 commitments.</p>			
AU	16	13	5	34	4	Getting started	The country is covered by the McDonald’s global animal welfare guidelines and the 2024 chicken welfare commitments. We encourage McDonald’s Australia to introduce the full commitments of the BCC.			
BR	11	8	10	29	4	Getting started	The country is covered by the McDonald’s global animal welfare guidelines. It also makes commitments on cage-free chickens and third-party auditing on its country website. We encourage McDonald’s Brazil to introduce the full commitments of the BCC.			
CA	16	13	10	39	3	Making progress	The country is covered by the McDonald’s global animal welfare guidelines and the 2024 chicken welfare commitments. Additionally, 100% of Canadian suppliers use humane slaughter practices. We encourage McDonald’s Canada to introduce the full commitments of the BCC.			
CN	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s China to introduce the full commitments of the BCC.			
DK	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s Denmark to introduce the full commitments of the BCC.			
IN	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s India to introduce the full commitments of the BCC.			
ID	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s Indonesia to introduce the full commitments of the BCC.			
NL	16	13	5	34	4	Getting started	The country is covered by the McDonald’s global animal welfare guidelines and has a commitment to source chickens reared in housing with environmental enrichments. It is also covered by the 2024 chicken welfare commitments. We encourage McDonald’s Netherlands to introduce the full commitments of the BCC.			
NZ	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s New Zealand to introduce the full commitments of the BCC.			
SE	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s Sweden to introduce the full commitments of the BCC.			

Table 9 ‘The pecking order 2021’ global and local scores and commentary for McDonald’s

TL	6	3	5	14	5	Poor	The country is covered by the McDonald’s global animal welfare guidelines. We encourage McDonald’s Thailand to introduce the full commitments of the BCC.
UK	16	13	5	34	4	Getting started	The country is covered by the McDonald’s global animal welfare guidelines and the 2024 chicken welfare commitments. We encourage McDonald’s UK to introduce the full commitments of the BCC.
US	16	13	10	39	3	Making progress	The country is covered by the McDonald’s global animal welfare guidelines and the 2024 chicken welfare commitments. Additionally, 20% of USA suppliers use humane slaughter practices. We encourage McDonald’s USA to introduce the full commitments of the BCC.

Image: A typical chicken factory farm.
 roibu/iStock.com



Table 10 'The pecking order 2021' global and local scores and commentary for Nando's


Geographic focus	Corporate commitments (out of 30)				Objectives and targets (out of 30)		Performance reporting (out of 30)		Total (out of 90)	Tier	Grade	Commentary														
	Global	14	14	6	34	4	Getting started																			
													AU	11	10	10	31	4	Getting started							
																				CA	6	5	5	16	5	Poor
NZ	6	5	5	16	5	Poor																				
							UK	30	30	10	70	2	Good													
US	0	0	0	0	6	Very poor																				
																										
<p>The overall score has significantly improved since the previous assessment for 'The pecking order 2020'. An overall score of 34 out of 90 means that Nando's is ranked in Tier 4, which we consider 'Getting started'. This is an improvement on 2020 when the company was ranked in Tier 5.</p> <p>Nando's does not publish a global corporate commitment to chicken welfare; welfare standards appear to be defined and reported at the country level. Nando's global ranking has improved due to Nando's UK making commitments for 2026 aligned with the BCC. Several Nando's countries (Australia, Canada, and New Zealand) make statements on chicken welfare related to cage free.</p> <p>We encourage Nando's to develop time-bound global commitments on higher welfare issues. These should be in line with standards set out in the BCC for all geographies in which it operates. We also encourage Nando's UK to begin reporting on its progress to meet the BCC.</p> <p>Australia has a dedicated website section where it discusses that all suppliers of chicken are certified to the 'RSPCA approved farming scheme'. We encourage Nando's Australia to clarify the welfare benefits for chickens produced under the scheme. We also encourage the company to make time-bound commitments aligned with the BCC.</p> <p>Nando's Canada discusses the avoidance of battery chicken in the FAQ section of its website, but does not appear to make further commitments related to chicken welfare. We encourage the company to make time-bound commitments aligned with the BCC.</p> <p>Nando's India does not appear to provide any information related to chicken welfare. We encourage the company to make time-bound commitments aligned with the BCC.</p> <p>Nando's New Zealand commits to only sourcing free-range chicken in the FAQ section of its website, but does not appear to make further commitments related to chicken welfare. We encourage the company to make time-bound commitments aligned with the BCC.</p> <p>Nando's UK has a dedicated chicken welfare section of its website where current welfare commitments on environmental enrichment, antibiotics and Red Tractor assurance are disclosed. In May 2020 it signed the BCC to fully implement higher standards of welfare for chickens in its supply chain by 2026. We encourage Nando's UK to begin reporting on its progress to meet the 2026 commitments.</p> <p>Nando's USA does not appear to provide any information related to chicken welfare. We encourage the company to make time-bound commitments aligned with the BCC.</p>																										

Table 11 'The pecking order 2021' global and local scores and commentary for Pizza Hut

Geographic focus	Corporate commitments (out of 30)						Commentary
	Objectives and targets (out of 30)						
	Performance reporting (out of 30)						
	Total (out of 90)						
	Tier	Grade					
Global	20	18	0	38	4	Getting started	<p>The overall score has significantly improved since the previous assessment for 'The pecking order 2020'. An overall score of 38 out of 90 means that Pizza Hut is ranked in Tier 4, which we consider 'Getting started'. This is an improvement on 2020 when the company was ranked in Tier 6.</p> <p>Pizza Hut is subject to Yum! Brands global animal welfare policy that specifically covers chicken welfare, however, it is not aligned with the BCC. The reason for Pizza Hut's improved score is Pizza Hut UK and Europe's commitment to making 2026 chicken welfare improvements fully aligned with the BCC. Pizza Hut should list the countries covered by the Pizza Hut UK and Europe commitment.</p> <p>We encourage Pizza Hut to begin reporting on Pizza Hut UK and Europe's progress on meeting its 2026 chicken welfare commitments. We also encourage the company to make time-bound commitments aligned with the BCC in the other geographic areas in which it operates.</p>
AU	5	0	0	5	6	Very poor	<p>Pizza Hut Australia is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>
BR	5	0	0	5	6	Very poor	<p>Pizza Hut Brazil is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>
CA	5	0	0	5	6	Very poor	<p>Pizza Hut Canada is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>
CN	0	0	0	0	6	Very poor	<p>Pizza Hut China operates independently to Yum! Brands and is not covered by the Yum! Brands global animal welfare policy. We note the company's 2019 sustainability report states an animal welfare policy has been introduced and we encourage Yum China to publish that policy. We encourage the company to introduce commitments aligned with the BCC.</p>
IN	5	0	0	5	6	Very poor	<p>Pizza Hut India is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>
ID	5	0	0	5	6	Very poor	<p>Pizza Hut Indonesia is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>
KE	5	0	0	5	6	Very poor	<p>Pizza Hut Kenya is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.</p>

Table 11 ‘The pecking order 2021’ global and local scores and commentary for Pizza Hut

NZ	5	0	0	5	6	Very poor	Pizza Hut New Zealand is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.
SE	5	0	0	5	6	Very poor	Pizza Hut Sweden is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. We encourage the company to introduce commitments aligned with the BCC. We also encourage Pizza Hut Sweden to clarify if it is covered by the Pizza Hut UK and Europe sourcing code of practice that has made commitments for 2026 aligned to the BCC. Sweden does not link to the code or appear to provide any further information related to chicken welfare on its country website.
TL	5	0	0	5	6	Very poor	Pizza Hut Thailand is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.
UK	30	30	0	60	3	Making progress	Pizza Hut UK through the Pizza Hut UK and Europe sourcing code of practice has made commitments for 2026 aligned to the BCC. We encourage Pizza Hut UK to begin reporting on its progress to meeting the commitments for 2026.
US	5	0	0	5	6	Very poor	Pizza Hut USA is covered by the Yum! Brands global animal welfare policy that explicitly covers chicken welfare, but is not aligned with the BCC. The company does not appear to provide any further information on its country website. We encourage the company to introduce commitments aligned with the BCC.

Image: Lipatova Maryna/Shutterstock



Table 12 'The pecking order 2021' global and local scores and commentary for Starbucks


Geographic focus	Corporate commitments (out of 30)				Total (out of 90)	Tier	Grade	 Commentary
	Objectives and targets (out of 30)							
	Performance reporting (out of 30)							
Global	13	12	0	25	4	Getting started	<p>The overall score has remained the same since the previous assessment for 'The pecking order 2020'. An overall score of 25 out of 90 means that the company is ranked in Tier 4, which we consider Getting started. This is the same as 2020 when the company was also ranked in Tier 4.</p> <p>Starbucks has a chicken welfare commitment for the USA. The commitment addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment, use of humane slaughter processes and third-party auditing. It does this by aligning with Global Animal Partnership standards. We encourage Starbucks to make its chicken welfare commitments explicit, and to extend these commitments to other geographies. We note the Canadian commitments that mirrored those made by the USA appear to have been removed. We also encourage Starbucks to begin reporting on its progress to meet the time-bound commitments it has set for the USA.</p>	
AU	5	0	0	5	6	Very poor	<p>The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website states that '100% RSPCA Approved' chicken is used in its sandwich products, however it does not disclose specifics on the animal welfare requirements of 'RSPCA Approved'. We encourage Starbucks Australia to introduce commitments in line with the BCC and to elaborate on the animal welfare standards it meets through the use of 'RSPCA Approved' chicken.</p>	
BR	0	0	0	0	6	Very poor	<p>We acknowledge that Starbucks Brazil operates under a full licensing agreement with SouthRock LLP, and that the country is covered by Starbucks's global animal welfare policy. However, we have not found evidence of country specific commitments to chicken welfare. We encourage Starbucks Brazil to introduce commitments in line with the BCC.</p>	
CA	0	0	0	0	6	Very poor	<p>The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website does not provide any additional chicken welfare commitments. We note Starbucks Canada was previously included in the USA chicken commitments in line with the BCC. We encourage Starbucks Canada to adopt these commitments again.</p>	
CN	0	0	0	0	6	Very poor	<p>The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website does not provide any additional chicken welfare commitments. We encourage Starbucks China to introduce commitments in line with the BCC.</p>	
DK	0	0	0	0	6	Very poor	<p>The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website does not provide any additional chicken welfare commitments. We encourage Starbucks Denmark to introduce commitments in line with the BCC.</p>	
IN	0	0	0	0	6	Very poor	<p>The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website publishes an animal welfare statement. However, it is text extracted from the global policy and there are no additional chicken welfare commitments applicable to India. We encourage Starbucks India to introduce commitments in line with the BCC.</p>	

Table 12 'The pecking order 2021' global and local scores and commentary for Starbucks

ID	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Starbucks Indonesia to introduce commitments in line with the BCC.
NL	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country website publishes an animal welfare statement; but this is text extracted from the global policy and there are no additional chicken welfare commitments applicable in the Netherlands. We encourage Starbucks Netherlands to introduce commitments in line with the BCC.
NZ	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Starbucks New Zealand to introduce commitments in line with the BCC.
SE	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Starbucks Sweden to introduce commitments in line with the BCC.
TL	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Starbucks Thailand to introduce commitments in line with the BCC.
UK	0	0	0	0	6	Very poor	The country is covered by Starbucks's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Starbucks United Kingdom to introduce commitments in line with the BCC.
US	30	30	0	60	3	Making progress	Starbucks USA has a chicken welfare commitment that addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment, use of humane slaughter processes and third-party auditing. It does this by aligning with Global Animal Partnership Standards. We encourage Starbucks USA to make its commitments explicit and start reporting on progress against these commitments.



Table 13 ‘The pecking order 2021’ global and local scores and commentary for Subway


Geographic focus	Corporate commitments (out of 30)				Objectives and targets (out of 30)		Performance reporting (out of 30)		Tier	Grade	Commentary
	Objectives and targets (out of 30)				Performance reporting (out of 30)		Total (out of 90)				
	Performance reporting (out of 30)				Total (out of 90)		Total (out of 90)				
	Total (out of 90)				Total (out of 90)		Total (out of 90)				
	Total (out of 90)				Total (out of 90)		Total (out of 90)				
											
Global	13	13	2	28	4	Getting started				<p>The overall score has declined since the previous assessment for ‘The pecking order 2020’. An overall score of 28 out of 90 means that Subway is ranked in Tier 4, which we consider ‘Getting started’. This is the same as 2020 when the company was ranked in Tier 4.</p> <p>Subway has a global animal welfare policy that refers to chickens, but does not make any specific commitments. Subway has a chicken welfare commitment for the USA. This addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment, use of humane slaughter processes and third-party auditing. Its commitments on these welfare issues align with Global Animal Partnership Standards. The last assessment found Subway Canada had the same commitment as the USA, but the Canadian commitment is no longer published.</p> <p>We encourage Subway to make commitments in line with the BCC in the other geographic locations it operates. We also encourage Subway to begin reporting progress made on the commitments it has made in the USA.</p>	
AU	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway Australia to introduce commitments in line with BCC.</p>	
BR	6	5	5	16	5	Poor				<p>Subway Brazil is committed to cage-free chickens and reports that all chicken in its restaurants is cage free. The country does not provide any additional chicken welfare commitments. We encourage Subway Brazil to introduce commitments in line with BCC.</p>	
CA	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We note Subway Canada’s last assessment had chicken welfare commitments that aligned with the BCC, but these are no longer published. We encourage Subway Canada to clarify if they remain committed.</p>	
CN	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway China to introduce commitments in line with BCC.</p>	
DK	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway Denmark to introduce commitments in line with BCC.</p>	
IN	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway India to introduce commitments in line with BCC.</p>	
KE	0	0	0	0	6	Very poor				<p>The country is covered by Subway’s global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway Kenya to introduce commitments in line with BCC.</p>	

Table 13 'The pecking order 2021' global and local scores and commentary for Subway

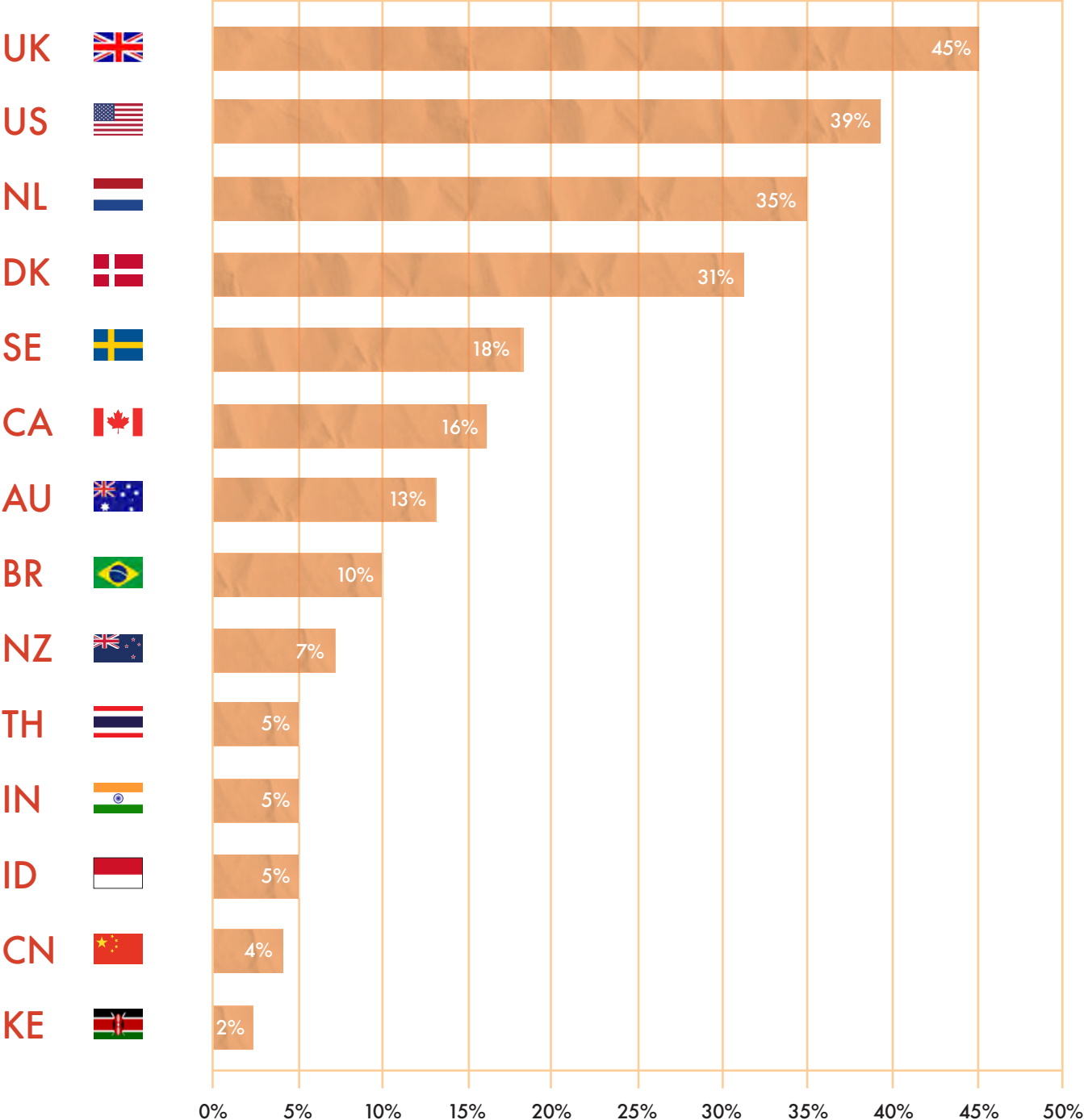
NL	0	0	0	0	6	Very poor	The country is covered by Subway's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We note Subway Netherlands has stated it is conducting a feasibility study regarding the requirements of the BCC and we encourage it to provide an update on the outcome.
NZ	0	0	0	0	6	Very poor	The country is covered by Subway's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway New Zealand to introduce commitments in line with BCC.
SE	0	0	0	0	6	Very poor	The country is covered by Subway's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway Sweden to introduce commitments in line with BCC.
TL	0	0	0	0	6	Very poor	The country is covered by Subway's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We encourage Subway Thailand to introduce commitments in line with BCC.
UK	0	0	0	0	6	Very poor	The country is covered by Subway's global animal welfare policy; however, this does not make relevant commitments to chicken welfare. The country does not provide any additional chicken welfare commitments. We note Subway UK has stated it is conducting a feasibility study regarding the requirements of the BCC; we encourage it to provide an update on the outcome.
US	30	30	0	60	4	Getting started	Subway USA has a chicken welfare commitment that addresses the key welfare issues of stocking densities, chickens bred for measurably improved welfare outcomes, provision of meaningful enrichment, use of humane slaughter processes and third-party auditing. It does this by aligning with Global Animal Partnership Standards. We encourage Subway USA to make its commitments explicit and start reporting on progress against these commitments.

Image: 19-day-old broiler (meat) chickens in an indoor, deep-litter system typical of independent farms in East Africa.
Georgina Goodwin/World Animal Protection



Corporate performance – country focus









Table 14 'The pecking order 2021' average percentage scores per country





Australia

Table 15 'The pecking order 2021' company results snapshot for Australia

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	38%	4	Getting started	53%	43%	17%
	34%	4	Getting started	37%	33%	33%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

**Australian companies are middle scorers in 'The pecking order 2021'.
The country places seventh out of the 14 countries in the assessment,
with an average company score of 13%.**

Key findings.








- Of the eight companies found in Australia, two score no points and six of them – McDonald's, Nando's, Burger King, KFC, Starbucks and Pizza Hut – score some.
- McDonald's receives 38%, or Tier 4 (Getting started), Nando's receives 34% overall, or Tier 4 (Getting started), Burger King receives 10%, or Tier 6 (Very poor), and KFC, Pizza Hut and Starbucks all receive 6%, or Tier 6 (Very poor).
- It is disappointing that Burger King, KFC, Pizza Hut and Starbucks score so poorly in Australia; these companies have signed up to the BCC in other markets. They should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Australia.
- The two companies receiving zero points in Australia – Domino's and Subway – have both signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Australia.





Brazil

Table 16 'The pecking order 2021' company results snapshot for Brazil

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	32%	4	Getting started	37%	27%	33%
	18%	5	Poor	20%	17%	17%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Brazilian companies in 'The pecking order 2021' are middle scorers.

The country places eighth out of the 14 countries that are included in the assessment, with an average company score of 10%.

Key findings.







- Of the seven companies found in Brazil, two score no points and five – McDonald's, Subway, Burger King, KFC and Pizza Hut – score some.
- McDonald's receives 32%, or Tier 4 (Poor), Subway receives 18%, or Tier 5 (Poor), Burger King receives 10%, or Tier 6 (Very poor), and KFC and Pizza Hut both receive 6%, or Tier 6 (Very poor).
- It is disappointing that Subway, Burger King, KFC and Pizza Hut score so poorly in Brazil given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Brazil.
- The two companies to receive zero points in Brazil – Domino's and Starbucks – have signed up to the BCC in other markets. This company should ensure its values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Brazil.





Canada

Table 17 'The pecking order 2021' company results snapshot for Canada

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	54%	3	Making progress	77%	77%	10%
	43%	3	Making progress	53%	43%	33%
	18%	5	Poor	20%	17%	17%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%



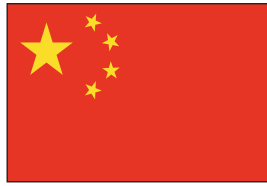
Canadian companies in 'The pecking order 2021' are middle scorers.

The country places sixth out of the 14 countries included in the assessment, with an average company score of 16%.

Key findings.








- Of the eight companies found in Canada, three score no points and five – Burger King, McDonald's, Nando's, KFC and Pizza Hut – score some.
- Burger King receives 54%, or Tier 3 (Making progress), McDonald's receives 43%, or Tier 3 (Making progress), Nando's receives 18%, or Tier 5 (Poor), and KFC and Pizza Hut both receive 0%, or Tier 6 (Very poor).
- The clear highlight is Burger King's relatively high scores, which is largely the result of the company's signing of the BCC in the USA and Canada.
- It is disappointing that Nando's, KFC and Pizza Hut score so poorly in Canada given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Canada.
- The three companies receiving zero points in Canada – Starbucks, Subway and Domino's – have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Canada.





China

Table 18 'The pecking order 2021' company results snapshot for China

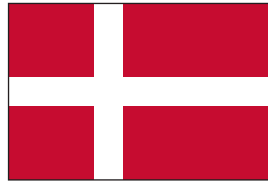
Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Chinese companies in 'The pecking order 2021' are relatively low scorers. The country places 13th out of the 14 countries included in the assessment, with an average company score of 4%.

Key findings.



- Of the seven companies that are found in China, five score no points and two of them – Burger King and McDonald's – receive some.
- McDonald's receives 16%, or Tier 5 (Poor) and Burger King receives 10%, or Tier 6 (Very poor).
- It is disappointing that Burger King scores so poorly in China given that this company has signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in China.
- The five companies receiving zero points in China – KFC, Pizza Hut, Starbucks and Subway – have all signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in China.
- China receives the highest number of zero scores out of all countries featuring in 'The pecking order 2021'. This reinforces that much more needs to be done to improve the welfare of chickens in this market.





Denmark

Table 19 'The pecking order 2021' company results snapshot for Denmark

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	92%	1	Leading	100%	100%	77%
	67%	3	Making progress	100%	100%	0%
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Danish companies in 'The pecking order 2021' are relatively high scorers. The country places fourth out of the 14 countries included in the assessment, with an average company score of 31%.

Key findings.




- Of the six companies that are found in Denmark, two score zero points and four of them – KFC, Domino's, McDonald's and Burger King – score some.
- KFC receives 92%, or Tier 1 (Leading), Domino's received 67%, or Tier 3 (Making progress), McDonald's receives 16%, or Tier 5 (Poor) and Burger King receives 10%, or Tier 6 (Very poor).
- The clear highlights are KFC's and Domino's' relatively high scores. This is due to the companies signing up to the BCC in Denmark, and other European countries.
- It is disappointing that Burger King scores so poorly in Denmark given that this company has signed up to the BCC in other markets. This company should ensure its values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Denmark.
- The two companies receiving zero points in Denmark – Starbucks and Subway – have both signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Denmark.





India

Table 20 'The pecking order 2021' company results snapshot for India

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Indian companies in 'The pecking order 2021' are relatively low scorers. The country places 11th out of the 14 countries included in the assessment, with an average company score of 5%.

Key findings.






- Of the eight companies found in India, four score no points and four – McDonald's, Burger King, KFC, and Pizza Hut – score some.
- None of these companies score highly. McDonald's receives 16%, or Tier 5 (Poor), Burger King receives 10%, or Tier 6 (Very poor), and KFC and Pizza Hut both receive 6%, or Tier 6 (Very poor).
- It is disappointing that Burger King, KFC and Pizza Hut score so poorly in India given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in India.
- The four companies receiving zero points in India – Domino's, Nando's, Starbucks and Subway – have all signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in India.





Indonesia

Table 21 'The pecking order 2021' company results snapshot for Indonesia

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	16%	5	Poor	20%	10%	17%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Indonesian companies in 'The pecking order 2021' are relatively low scorers. The country places 12th out of the 14 countries included in the assessment, with an average company score of 5%.

Key findings.




- Of the six companies that are found in Indonesia, three score no points and three – McDonald's, KFC and Pizza Hut – score some.
- None of these companies score highly. McDonald's receives 16%, or Tier 5 (Poor), and KFC and Pizza Hut receive 6%, or Tier 6 (Very poor).
- It is disappointing that KFC and Pizza Hut score so poorly in Indonesia given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Indonesia.
- The three companies receiving zero points in Indonesia – Burger King, Domino's and Starbucks – have all signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Indonesia.





Kenya

Table 22 'The pecking order 2021' company results snapshot for Kenya

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	6%	5	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%



Kenyan companies in 'The pecking order 2021 are the lowest scorers.

The country places 14th out of the 14 countries included in the assessment, with an average company score of 2%.

Key findings.







- Of the five companies that are found in Kenya, three score no points and two – KFC and Pizza Hut – score some.
- Neither of these companies score highly. Both KFC and Pizza Hut receive 6%, or Tier 6 (Very poor).
- It is disappointing that KFC and Pizza Hut score so poorly in Kenya given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Kenya.
- The three companies receiving zero points in Kenya – Burger King, Domino's and Starbucks – have all signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Kenya.





Netherlands

Table 23 'The pecking order 2021' company results snapshot for Netherlands

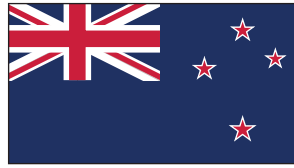
Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	92%	1	Leading	100%	100%	77%
	67%	3	Making progress	100%	100%	0%
	38%	4	Getting started	53%	43%	17%
	10%	6	Very poor	10%	10%	10%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Dutch companies in 'The pecking order 2021' are relatively high scorers. The country places third out of the 14 countries that are included in the assessment, with an average company score of 35%.

Key findings.




- Of the six companies found in The Netherlands, two score no points and four of them – KFC, Domino's, McDonald's and Burger King – score some.
- KFC receives 92%, or Tier 1 (Leading), Domino's receives 67%, or Tier 3 (Making progress), McDonald's receives 38%, or Tier 5 (Poor) and Burger King receives 10%, or Tier 6 (Very poor).
- KFC and Domino's receive such high points in 2021 due to the companies signing up to the BCC in multiple European countries, including The Netherlands.
- It is disappointing that Burger King scores so poorly in The Netherlands given that this company has signed up to the BCC in other markets. This company should ensure its values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in The Netherlands.
- The two companies receiving zero points in The Netherlands – Starbucks and Subway – have both signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in The Netherlands.





New Zealand

Table 24 'The pecking order 2021' company results snapshot for New Zealand

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
 Nando's	18%	5	Poor	20%	17%	17%
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

New Zealand companies in 'The pecking order 2021' are middle scorers. The country places ninth out of the 14 countries included in the assessment, with an average company score of 7%.

Key findings.







- Of the eight companies found in New Zealand, three score no points and five – Nando's, McDonald's, Burger King, KFC and Pizza Hut – score some.
- None of these companies score highly. Nando's receives 18%, or Tier 5 (Poor), McDonald's receives 16%, or Tier 5 (Poor), Burger King receives 10%, or Tier 6 (Very poor), and KFC and Pizza Hut both 6%, or Tier 6 (Very poor).
- It is disappointing that Nando's, Burger King, KFC and Pizza Hut score so poorly in New Zealand given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in New Zealand.
- The three companies receiving zero points in New Zealand – Domino's, Starbucks and Subway – have all signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in New Zealand.





Sweden

Table 25 'The pecking order 2021' company results snapshot for Sweden

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	92%	1	Leading	100%	100%	77%
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Swedish companies in 'The pecking order 2021' are relatively high scorers. The country places fifth out of the 14 countries included in the assessment, with an average company score of 18%.

Key findings.








- Of the seven companies found in Sweden, three score no points and four – KFC, McDonald's, Burger King and Pizza Hut – score some.
- KFC receives 92%, or Tier 1 (Leading), McDonald's receives 16%, or Tier 5 (Poor), Burger King receives 10%, or Tier 6 (Very poor), and Pizza Hut receives 6%, or Tier 6 (Very poor).
- KFC receives such high points in 2021 due to the company signing up to the BCC in multiple European countries, including Sweden.
- It is disappointing that Burger King and Pizza Hut score so poorly in Sweden given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Sweden.
- KFC has made real progress in Sweden and its parent company, Yum! Brands, also owns Pizza Hut. We would expect to see more consistency here, with Pizza Hut aligning with the BCC.
- Three of the companies receiving zero points in Sweden – Domino's, Starbucks and Subway – have all signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Sweden.





Thailand

Table 26 'The pecking order 2021' company results snapshot for Thailand

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	16%	5	Poor	20%	10%	17%
	10%	6	Very poor	10%	10%	10%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

Thai companies in 'The pecking order 2021' are relatively low scorers. The country places 10th out of the 14 countries included in the assessment, with an average company score of 6%.

Key findings.









- Of the seven companies found in Thailand, three score no points and four – McDonald's, Burger King, KFC and Pizza Hut – score some.
- None of these companies score highly. McDonald's receives 16%, or Tier 5 (Poor), Burger King receives 10%, or Tier 6 (Very poor), and KFC and Pizza Hut both receive 6%, or Tier 6 (Very poor).
- It is disappointing that Burger King, KFC and Pizza Hut score so poorly in Thailand given that these companies have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Thailand.
- Three of the companies receiving zero points in Thailand – Domino's, Starbucks and Subway – have both signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in Thailand.





UK

Table 27 'The pecking order 2021' company results snapshot for UK

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	92%	1	Leading	100%	100%	77%
	78%	2	Good	100%	100%	33%
	70%	3	Making progress	100%	100%	10%
	67%	3	Making progress	100%	100%	0%
	38%	4	Getting started	53%	43%	17%
	17%	5	Poor	37%	7%	7%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

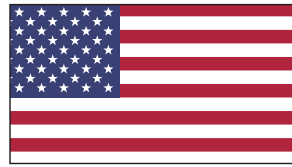
UK companies in 'The pecking order 2021' are the highest scorers.

The country places first out of the 14 countries included in the assessment, with an average company score of 45%.

Key findings.






- Of the eight companies found in the UK, two score no points and six – KFC, Nando's, Pizza Hut, Domino's, Burger King and McDonald's – score some.
- Four of these companies – KFC, Nando's, Burger King and Pizza Hut – score highly. KFC receives 92%, or Tier 1 (Leading), Nando's receives 78%, or Tier 2 (Good), Burger King receives 70%, or Tier 3 (Making progress) and Pizza Hut receives 67%, or Tier 3 (Making progress).
- McDonald's receives 38%, or Tier 4 (Getting started) and Domino's PLC receives 17%, or Tier 5 (Poor).
- KFC, Nando's, Burger King and Pizza Hut receive high points in 2021 due to the companies signing up to the BCC in the UK, and to other markets in some cases.
- It is very encouraging to see the strong performance of KFC in the UK. This is for signing up to the BCC in the UK and other European countries, and for its relatively robust progress reporting.
- The two companies receiving no points in the UK – Starbucks and Subway – have both signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in the UK.





USA

Table 28 'The pecking order 2021' company results snapshot for USA

Company	Overall score (%)	Tier	Grade	Scores (%) for the three question areas		
				Corporate commitments	Objectives and targets	Performance reporting
	67%	3	Making progress	100%	100%	0%
	67%	3	Making progress	100%	100%	0%
	54%	3	Making progress	77%	77%	10%
	43%	3	Making progress	53%	43%	33%
	6%	6	Very poor	17%	0%	0%
	6%	6	Very poor	17%	0%	0%
	0%	6	Very poor	0%	0%	0%
	0%	6	Very poor	0%	0%	0%

US companies in 'The pecking order 2021' are relatively high scorers.

The country places second out of the 14 countries included in the assessment, with an average company score of 39%.




Key findings.

- Of the eight companies found in the USA, two receive no points and six of them – Starbucks, Subway, Burger King, McDonald's, KFC and Pizza Hut – score some.
- Three of these companies – Starbucks, Subway and Burger King – score relatively highly. Starbucks and Subway both receive 67%, or Tier 3 (Making progress), and Burger King receives 54%, of Tier 3 (Making progress).
- McDonald's receives 43%, or Tier 3 (Making progress), and KFC and Pizza Hut both receive 6%, or Tier 6 (Very poor).
- It's encouraging to see three companies in the USA with relatively high scores by having criteria aligned with the BCC. However, there is still no progress reporting from Starbucks, Subway and Burger King, despite these companies originally making the commitment between four and five years ago.
- It is disappointing that KFC and Pizza Hut score so poorly in the USA given that they have signed up to the BCC in other markets. These companies should ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in the USA.
- The two companies receiving no points in the USA – Nando's and Domino's – have both signed up to the BCC in other markets. These companies should also ensure their values are aligned globally and make a stand to improve chicken welfare by signing up to the BCC in the USA.



The Better Chicken Commitment in detail

Table 29 The Better Chicken Commitment criteria across different regions

	USA and Canada	Europe	Rest of world
Timing 	All by 2024 , except breed	All by 2026	All by 2030
Parameters 	100% of chicken in supply chain (fresh, frozen and processed)	100% of chicken in supply chain (fresh, frozen and processed)	100% of chicken in supply chain (fresh, frozen and processed)
Breed 	By 2026 : approved by the Global Animal Partnership (GAP) standard for chickens, version 3, or RSPCA (Broiler Breed Welfare Assessment Protocol)	Approved by RSPCA (Broiler Breed Welfare Assessment Protocol)	Approved by GAP or RSPCA (Broiler Breed Welfare Assessment Protocol)
Stocking density 	<ul style="list-style-type: none"> No cages or multi-tier systems 30kg/m² or 6lb/ft² 	<ul style="list-style-type: none"> No cages or multi-tier systems 30kg/m² or 6lb/ft² 	<ul style="list-style-type: none"> No cages or multi-tier systems 30kg/m² or 6lb/ft²
Environmental standards 	<ul style="list-style-type: none"> 50 lux of light minimum For every 1,000 ft² (93m²), or part 1000 ft² (93m²) of indoor space there must be a minimum of 1 enrichment Air quality must not exceed 20 ppm ammonia and 10 mg/m³ dust (measured with calibrated meter or testing strip) 	<ul style="list-style-type: none"> 50 lux of light minimum, including natural light At least two metres of perches and two pecking substrates per 1,000 birds On air quality, meet Annex 2.3 of EU broiler directive, regardless of stocking density 	<ul style="list-style-type: none"> 50 lux of light minimum, including natural light At least two metres of perches and two pecking substrates per 1,000 birds
Slaughter 	<ul style="list-style-type: none"> Avoids pre-stun handling Multi-step, controlled atmosphere stunning 	<ul style="list-style-type: none"> Avoids pre-stun handling Multi-step, controlled atmosphere stunning 	<ul style="list-style-type: none"> Avoids pre-stun handling Multi-step, controlled atmosphere stunning
Compliance 	Demonstrate compliance with the above standards via third-party auditing	<ul style="list-style-type: none"> Compliance via third-party auditing Annual public reporting on progress towards this commitment Comply with all EU animal welfare laws and regulations, regardless of the country of production 	<ul style="list-style-type: none"> Compliance via third-party auditing Annual public reporting on progress towards this commitment



Take action

The BCC represents practical steps that companies should take to future-proof their supply chains and meet consumer demand for higher animal welfare standards.

If your company is yet to sign up to the BCC, you face significant operational and reputational risk. If your company has taken serious steps to improve chicken welfare but only in certain markets, there is a risk that your policies will not be seen as sufficiently robust.

For companies that feature in 'The pecking order 2021', we urge you to review your personalised report – which includes specific gaps in best practice on chicken welfare. This report will help you to develop a time-bound action plan to address these gaps. We are available to discuss these results further with you.

For relevant companies that do not feature in 'The pecking order 2021', regardless of the sector, there is an urgent need for you to take steps to improve chicken welfare. In joining the hundreds of companies already aligned with the BCC – including KFC, Burger King and Nando's – you will be supporting the large-scale production of higher welfare chicken. If you are a producer, indicating your ability to produce chicken to this standard will help other companies make the commitment.

To discuss any of the issues raised in 'The pecking order 2021', please contact Lynn Kavanagh, Farming Campaign Manager – LynnKavanagh@worldanimalprotection.ca

Image: Chickens in a barn on a certified chicken farm in Somerset, United Kingdom. World Animal Protection is calling for better welfare standards for the broiler industry. RSPCA Assured



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We help the world see how important animals are to all of us.

We inspire people to change animals' lives for the better.

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