



# Canada moving the menu 2024

Ranking the top restaurant chains on meat reduction policies and plant-based offerings



# Table of Contents

<b>Introduction.....</b>	<b>3</b>
<b>Background.....</b>	<b>4</b>
The negative impacts of meat consumption.....	4
Meat reduction and diversified proteins .....	5
Plant-based by default .....	6
Impacts of meaningful change .....	6
<b>Individual restaurant rankings.....</b>	<b>7</b>
Summary.....	8
Reviving plant-based successes: keeping innovation on the menu.....	8
Burger breakdown .....	9
Chicken choices .....	9
Coffee critique.....	9
Sandwich selections.....	10
Latin/Mexican-inspired match-up .....	10
Family restaurant round-up.....	10
<b>Overview of company rankings .....</b>	<b>11</b>
<b>Conclusion and recommendations .....</b>	<b>12</b>
<b>Appendix A: Scoring approach and methodology.....</b>	<b>13</b>
Detailed restaurant rankings .....	13
Grades and descriptors.....	13
Plant-based diversification of menus.....	14
<b>References .....</b>	<b>16</b>

**Cover photo:** Homemade plant-based burger on a whole wheat bun, resting on a wooden surface. Credit: Linda Hugues.



## Introduction

Moving the menu 2024 assesses the top chain restaurants across six different cuisine categories in Canada on their inclusion of plant-based product offerings and efforts toward reducing animal-based foods in their businesses—critical steps to protecting our planet and building a equitable, sustainable, and humane food system.

Meaningfully increasing and promoting non-animal proteins while reducing the role of meat on restaurant menus must be a key component of a company’s sustainability strategy. This shift is crucial for creating a more humane and sustainable food system that benefits animals, people, and the planet and for feeding future generations.



## Background

### The negative impacts of meat consumption

Canadians eat nearly twice the global average amount of meat per capita, but that is shifting.<sup>2</sup> Over 800 million animals are killed annually for food in Canada, the majority coming from factory farms, which are responsible for immense animal suffering and catastrophic environmental damage.

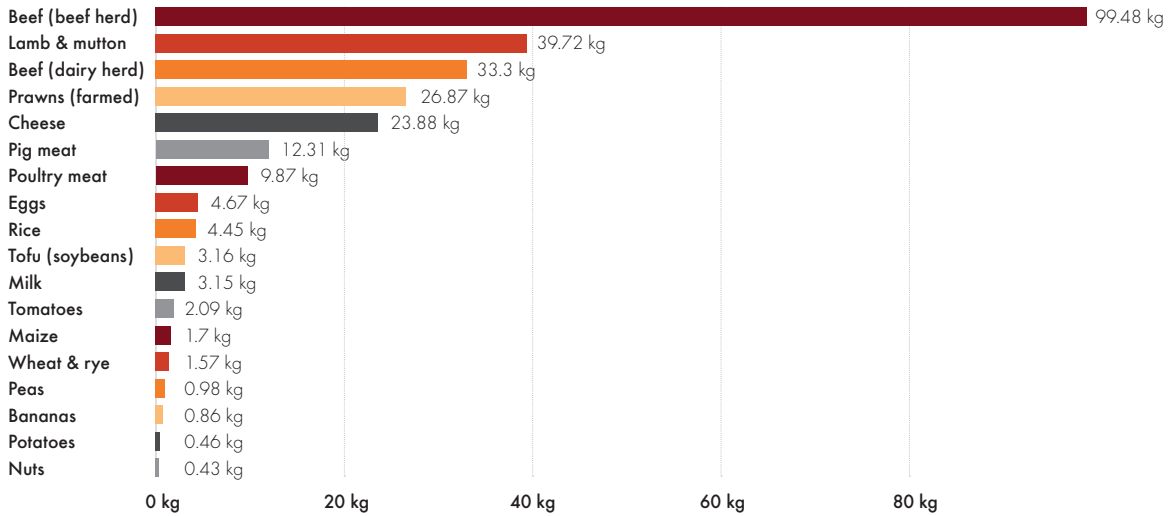
Factory farms prioritize profit above all else, resulting in billions of animals across the globe being forced to live in cramped, unnatural and unsanitary conditions. Additionally, animals on factory farms are routinely subjected to painful mutilations without anesthesia and face a violent death. Animal agriculture is also a major contributor to greenhouse gas emissions, **contributing nearly 15% globally**.<sup>3</sup> It is also the most emission-intensive sector in Canada.<sup>4</sup> Even if other industries became carbon-neutral in the next 25 years, emissions from the food system alone would exceed the 1.5°C limit.<sup>5</sup>

Factory farming also drives the production of vast quantities of feed crops which alone have devastating environmental impacts, including the destruction of precious wildlife habitat, biodiversity loss, water

pollution, pesticide pollution, soil degradation, and increased greenhouse gas emissions, resulting from both fertilizer production and application. Increasing plant-based menu items and meals would also significantly reduce antibiotic use in food production, reducing the risk of antimicrobial resistance (AMR), of which the overuse in animal farming is a significant contributor.<sup>6</sup> If companies continue their current practices, by 2050, the number of chickens and pigs killed for meat will be three times that of cows. Far from the “climate-friendly” protein sources as major meat companies claim, the mass production and slaughter of chickens and pigs for food has enormous planetary impacts. A recent study by World Animal Protection found that reducing US consumption of chickens and pigs by 50% by 2040 would be equivalent to taking eight million cars off the road for a year.<sup>7</sup> Moreover, even if pork and chicken production produce fewer GHG emissions than beef production, they are larger emitters than plant-based agriculture. Similarly, Navis Research found that if Canadians reduce their animal food consumption by 50% by 2030, the emissions reduction impact would amount to 13.5 Mt, equivalent to getting six million cars off the road annually.<sup>8</sup>

**Figure 1. Greenhouse gas emissions per kilogram of food product**

Greenhouse gas emissions are measured in kilograms of carbon dioxide equivalents (kgCO<sub>2</sub>e) per kilogram of food product. This means non-CO<sub>2</sub> greenhouse gases are included and weighted by their relative warming impact.



Source: Poore, J., & Nemecek, T. (2018). Reducing food's environmental impacts through producers and consumers. [OurWorldInData.org/environmental-impacts-of-food](https://www.ourworldindata.org/environmental-impacts-of-food)

## Meat reduction and diversified proteins

The protein landscape is evolving rapidly, with a growing emphasis on reducing meat intake and embracing innovative protein sources that do not require the raising or killing of animals. Many plant-based proteins from classic tofu and seitan, to newer entries like Beyond Meat and Impossible Burger, are increasingly popular among consumers.

Emerging proteins include fermentation-based products produced using microorganisms like bacteria, yeast, or algae, and cell-cultivated meat produced directly from animal cells.

Plant-based protein consumption has surged in recent years. A 2021 EKOS poll found that 35% of all Canadians had reduced or eliminated their animal product consumption in the past year.<sup>9</sup> That includes dairy products – approximately 30% of Canadians have consumed dairy alternatives in the past year and the market is projected to experience continuous growth.

The global market for plant-based foods is projected to reach USD 22.3 billion by 2029. North America holds the highest market share, and Canada has significant growth opportunities to tap into. With a retail value of \$700 million, the Canadian plant-based food sector is growing at 12-14% per year.<sup>10</sup> A July 2021 survey conducted by Hanover Research found that more than half of consumers polled in Canada and the US indicate they would reconsider going to a restaurant that did not offer vegetarian or vegan options. Fifty percent of these consumers indicated that the presence of vegetarian options has increased in importance in the past two years.<sup>11</sup> As consumers become more conscious of their dietary choices, there is a growing demand for plant-based alternatives. By embracing fermentation proteins, cultivated meat, and plant-based options, restaurants can play a pivotal role in shaping the future of protein consumption and support a more ethical and environmentally friendly food system.

## Plant-based by default

“Plant-based by default” refers to offering plant-based dishes as the primary or default option, where animal-based products may be present (such as dairy-based cheese or mayonnaise) but can easily be modified or removed. Amid shifting consumer preferences and growing environmental concerns, the inclusion of plant-based by default options has become a core focus in menu development.

Consumers tend to choose a plant-based option when it is offered as a default choice. Recent studies have shown that vegetarian default interventions significantly decrease consumers’ choice of meat dishes<sup>12</sup> Likewise, when customers are offered more plant-based options, they will choose a plant-based meal more often. Studies show that increasing the availability and variety of plant-based items motivates consumers to choose them more often, making plant-based eating the norm rather than a niche.<sup>13,14</sup>







**Moving the menu is a rallying cry for restaurants to adopt ambitious meat reduction targets to foster the much-needed shifts to protect our long-term health and environment.**



## Impacts of meaningful change

When restaurants adopt meaningful meat reduction policies and integrate plant-based options into their menus, they play a crucial role in alleviating the immense suffering endured by billions of animals in factory farms, decreasing food-related emissions, protecting the environment, and aligning with several other sustainability targets. Increasing the sourcing of innovative animal-free products is one of the most effective ways to reduce animal suffering in their supply chains. By focusing on plant-based and other alternative proteins, companies can make significant strides in creating a more humane and sustainable food system.

# Individual restaurant rankings

Category	Restaurant	Score	Grade
 Burger breakdown	Harvey's (RECIPE UNLIMITED)	75	C
	Burger King (RBI)	60	C
	A&W	25	F
	McDonald's	0	F
	Wendy's	0	F
 Chicken choices	KFC (Yum!)	25	F
	Popeyes (RBI)	20	F
	Mary Brown's	0	F
 Coffee critique	Starbucks	95	C
	Tim Hortons (RBI)	60	C
	Second Cup	50	D
	Coffee Time	15	F
 Sandwich selections	Mr. Sub	60	C
	Subway	45	D
 Latin/Mexican-inspired matchup	Chipotle	150	B
	Taco Bell (Yum!)	50	D
 Family restaurant round-up	St-Hubert (RECIPE UNLIMITED)	100	C
	Kelseys (RECIPE UNLIMITED)	85	C
	The Keg (RECIPE UNLIMITED)	70	C
	Milestones	65	C
	Swiss Chalet (RECIPE UNLIMITED)	45	D
	Cora	40	D
	Sunset Grill	0	F

## Summary

This report ranks 23 of the top Canadian restaurant chains, organized into six popular categories: burgers, chicken, coffee, sandwich, Latin/Mexican-inspired and family restaurants. Evaluating restaurants in this manner enables companies to easily see how they compare to their most direct competitors.



### Reviving plant-based successes: keeping innovation on the menu

Many restaurants evaluated in this report have conducted successful trials of plant-based options but later discontinued them. Notably, McDonald's trialed the McPlant in 28 restaurants in Southwestern Ontario in 2019,<sup>15</sup> A&W tested plant-based chicken nuggets, getting rave reviews from Chatelaine Magazine,<sup>16</sup> Mary Brown's trialed plant-based chicken tenders and sandwiches, and both Tim Hortons and Starbucks temporarily offered plant-based breakfast items. Despite indications that these items would achieve similar success with a nationwide rollout, many companies have demonstrated a lack of meaningful investment in this space. It's crucial for these establishments to keep plant-based options on their menus and speak to their customers about their benefits, not only to promote meat reduction but also to offer a diversified protein menu that meets the growing consumer demand for sustainable and compassionate food choices.



## Summary (cont.)

### Burger breakdown

Burger King and Harvey's are the only burger chains not to receive an **F (very poor progress)** – both companies scored a **C (making progress)**. Burger King and Harvey's offer plant-based options like the Impossible Whopper and other plant-based burgers, and their parent companies, RBI (Restaurant Brands International) and RECIPE UNLIMITED respectively, acknowledge the benefits of plant-based options in their annual reporting. However, there is still significant room for improvement. Both companies need to increase the variety and number of plant-based menu items, commit more meaningfully to meat reduction in their supply chains, and promote the benefits of plant-based foods. While it should be noted A&W offers a Beyond Meat burger, they receive an **F grade (very poor progress)** as they lack a formal commitment to increasing plant-based offerings and reducing meat and dairy in their supply chain, as well as acknowledging the benefits of plant-based options.

McDonald's and Wendy's show little to no progress in plant-based option availability or meat reduction commitments, receiving an **F grade (very poor progress)**. Overall, the burger restaurant sector has substantial room for growth in increasing plant-based options and reducing meat purchasing.

### Chicken choices

All chicken restaurants – KFC, Popeyes and Mary Brown's – received an **F (very poor progress)**, showing little to no action in promoting plant-based options or committing to meat reduction. While KFC offers a plant-based chicken sandwich, the company falls short in making meaningful commitments to meat reduction and increasing the volume of plant-based items in their supply chain. There is an urgent need for improvement within the chicken restaurant sector, given that billions of individual chickens are killed each year for meat products. These establishments have a clear opportunity to align with evolving consumer preferences and to promote sustainability in their operations.

### Coffee critique

Starbucks and Tim Hortons stood out with a **C (making progress)** but showed there is a need for continued improvement. While Starbucks offers a variety of plant-based by default beverages, it lacks plant-based food options. Tim Hortons offers some food and drink options which can be made fully plant-based (for example, by removing sauce with dairy in it). Both Tim Hortons and Starbucks upcharge for plant-based milk alternatives which can be a barrier to consumers choosing this option. Both companies are encouraged to implement more comprehensive commitments to plant-based options and adopt a policy to reduce animal protein purchasing.

Second Cup received a grade of **D (little progress)** reflecting their limited offerings of plant-based by default food options and their lack of commitment and advocacy to support a shift towards plant-based eating. Coffee Time received an **F (very poor progress)** due to their failure to demonstrate meaningful progress in integrating plant-based options into their menus and for not adopting policies that advocate for plant-based diets. This is even more conspicuous since Coffee Time has strong animal welfare policies, showing their commitment to higher standards for farm animals in their supply chain.<sup>17</sup>

## Summary (cont.)

### Sandwich selections

Mr. Sub leads this category with a grade of **C (making progress)** by promoting their plant-based sandwich options which are priced comparably with non-plant-based options. However, they made little to no progress in making sustainability commitments. Subway received a **D (little progress)** as it has not advocated for plant-based options in its reporting, lacks commitments to increase plant-based options, and does not promote plant-based products.

### Latin/Mexican-inspired matchup

Chipotle stands out, scoring a **B (good progress)**, and higher than all other restaurants in this and other categories. Chipotle offers a large selection of plant-based by default dining options and has extensive language in their reporting, advocating the benefits of plant-based options. Additionally, Chipotle has more transparent reporting about their supply chain than other restaurants assessed. Lastly, Chipotle actively promotes plant-based eating through promotions such as “Plant-based Fridays” where delivery is free on plant-based orders.<sup>18</sup> Chipotle could further improve by implementing commitments to decreasing animal protein purchasing and publicizing meat and dairy reduction commitments.

Taco Bell received a **D (little progress)**. While they have many items that can be easily modified to be plant-based, their lack of commitment towards increasing their fully plant-based offerings and promoting the benefits to their customers prevented them from receiving a higher score.

### Family restaurant round-up

The Keg, Kelseys, St-Hubert and Milestones were the highest-ranking companies in this category receiving a **C (making progress)** with all offering plant-based options. The Keg, Kelseys and St-Hubert also acknowledge the interest in plant-based options in their reporting. However, they can all further improve by setting public meat reduction commitments and decreasing animal protein purchasing.

Swiss Chalet and Cora scored a **D (little progress)** for having limited plant-based options. They also lost points for not having a commitment to increasing plant-based menu items or acknowledging the benefits of reducing meat and dairy consumption through their marketing and resources.

Sunset Grill has made no progress in offering plant-based food options to their customers or meaningful commitments to decrease their purchasing of animal protein and for this they received an **F (very poor progress)**.

# Overview of company rankings

## Burger breakdown



C



C



F



F



F

## Chicken choices



F



F



F

## Coffee critique



C



C



D



F

## Sandwich selections



C



D

## Latin/Mexican-inspired matchup



B



D

## Family restaurant round-up



C



C



C



C



D



D



F

## Conclusion

Shifting to a predominantly plant-based food system is critical for meeting Canada's climate targets,<sup>19</sup> protecting the planet's resources and equitably feeding a growing global population. An overwhelming body of research and expert opinion point to the necessity of transitioning to predominantly plant-based diets to reduce land pressures, protect biodiversity and keep global temperature increases to under 2 °C by 2050.<sup>20,21,22,23</sup>

Sadly, most of the largest restaurant chains in Canada are falling short in their efforts to invest in a humane and sustainable food system. Few have taken meaningful steps to diversify the protein offerings on their menus, and none have set the clear meat reduction goals necessary to meet climate and other sustainability commitments. Some of these restaurants, however, have commitments for improved animal welfare in their supply chain, demonstrating a willingness to move towards a more humane food system. Expanding those commitments to include meat reduction is a powerful way to continue making progress for animals, as well as for the environment and human health.

The plant-based sector presents an opportunity for restaurants to create innovative menus that resonate with their customers while promoting sustainability and moving the world away from factory farming – the biggest source of animal suffering. However, most companies are failing to embrace the benefits of a plant-based by default food system. Despite some chains testing new plant-based menu items on a limited basis, few restaurant chains are investing in expanding their plant-based menus. As the plant-based sector continues to grow and other innovations emerge, restaurants must make these products available and promote their benefits to their customers. It is time for restaurants to step up and lead the way towards a more compassionate and sustainable future in the food industry.

## Recommendations

**To advance on all issues evaluated, companies must:**

- Position plant-based proteins as integral to achieving their broader sustainability goals;
- Invest in creating, adding, and promoting new plant-based by default menu items; ensure that these options are permanent and widely available;
- Set a public commitment to reduce the amount of animal products purchased by 25% by 2030, using 2020 volumes as a baseline;
- Adopt benchmarks for measuring progress and report annually on progress toward meeting sourcing and sustainability commitment; and
- Identify opportunities to incorporate additional animal-free innovations into their supply chain, including emerging fermentation and cell-cultivated products.

# Appendix A: Scoring approach and methodology

We assessed each company using publicly available information published by the company, such as websites, policy statements, annual reports, and press releases. Companies were notified via email of the full scoring methodology and the results of our initial assessments and were given the opportunity to respond. Companies were given grades ranging from A (leading on progress) to F (very poor progress).

## Detailed restaurant rankings

### Grades and descriptors

Note that scores are awarded based on a total across the three categories. For example, a restaurant may have a plant-based item on their menu but fail to meet the minimum for other criteria, thus being awarded an overall score of 'F'.

Criteria	Plant-based menu	Public plant-based commitments	Advocacy
<b>A</b> (Leading on progress)	5+ plant-based items. 40% of the menu or more is plant-based by default. Price parity in plant-based items.	Public time-bound commitment to increasing plant-based proteins by specific percentages. Commitment to decrease animal protein.	Public facing materials (social media, marketing, reports) advocate for plant-based products. Benefits of plant-based diet acknowledged in CSR/ESG reporting. Participation in external events centered around plant-based diet.
<b>B</b> (Good progress)	3-4 plant-based items. ~25% of menu is plant-based by default. Plant-based options have no more than a small price difference.	Meaningful public commitment to procurement of plant-based products. Mention of animal protein purchasing.	Benefits of plant-based products and impacts of existing plant-based products acknowledged in CSR/ESG reporting. Promote plant-based products on social media/public materials.
<b>C</b> (Making progress)	1-2 plant-based items. Some percentage of menu plant-based by default. Plant-based options have a large price difference.	Express interest in increasing plant-based products without timeline or a clear percentage. No mention of animal protein purchasing.	Have promoted plant-based products. Acknowledge consumer interest in plant-based.
<b>D</b> (Little progress)	Some plant-based items that must be modified, not plant-based by default.	Language in parent company reporting acknowledges benefits of plant-based products but without any clear commitment.	Some language refers to the benefits of plant-based products or environmental impact of animal protein.
<b>F</b> (Very poor progress)	None or one plant-based item.	No time-bound commitments to increasing plant-based products or meat reduction. Fails to commit to plant-based product increase or meat reduction.	No acknowledgment of plant-based diets or products in any materials.



## Plant-based diversification of menus

For the purposes of this scorecard, we define a plant-based product as a manufactured food item that does not contain any animal ingredients and is promoted as a suitable, direct replacement for a main menu item that would conventionally contain animal products. As this is the first report of its kind in Canada, full points were given for menu item(s) that contained a non-plant-based item that was easily removed or modified to make the item fully plant-based (for example, mayonnaise or other sauce) as long as the food item was not dramatically altered in terms of substance. It is acknowledged this process may be considered somewhat subjective, but the goal was to be flexible in scoring to give companies the maximum number of points possible.

A maximum of 220 points were available across different criteria focused on the availability of plant-based options, the percentage of the menu that was plant-based by default, the price parity of plant-based options, plant-based commitments made by the company, and advocacy for a shift towards plant-based diets.

The scoring breakdown is defined as follows:

Category	Criteria	Points available
Number of plant-based menu items	3 or more plant-based items	20
	2 plant-based items	15
	1 plant-based items	10
	Bonus/additional points for fully plant-based by default items (no modification needed)	5
	0 plant-based items	0
Percentage of menu plant-based	50% or more plant-based by default	20
	25-40% plant-based by default	15
	Less than 25% plant-based by default	5
	None	0
Price parity in plant-based items	Plant-based options mirror price of comparable menu items/ No upcharge	25
	Upcharge in price for plant-based substitutions or items	0
Public meat/dairy reduction commitment	Timebound commitment to reduce meat/dairy by 50% or more	25
	Timebound commitment to reduce meat/dairy by 25% or more	15
	Public statement made in support of meat/dairy reduction	5
	Limited or no public commitment	0
Animal protein purchasing decreased 2020-2022	Company has indicated publicly that total animal protein purchases have declined since 2020	25
	No indication of decrease in protein purchasing	0
Public commitment to plant-based offering	Commitment exists	25
	Limited or no public commitment	0
Company advocates for plant-based diets	Public advocacy for plant-based diets through participation/ sponsorship in plant-based events	20
	Public-facing materials and information/social media posts support plant-based diets	20
	Public acknowledgment of the benefits of reducing meat/dairy consumption through marketing, resources, etc.	20
	Public acknowledgment of the benefits of plant-based eating through marketing, resources, etc.	20
<b>Total available</b>		<b>220</b>

# References

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- <sup>7</sup> Microsoft Word - LCA Consumer Report v1.3.docx (worldanimalprotection.us)
- <sup>8</sup> [https://www.worldanimalprotection.ca/siteassets/reports-pdfs/Animal-sourced-food-consumption-and-Canadas-emissions-targets-Navius-Research-22-08-30?\\_gl=1\\*10zfp4b\\*\\_gcl\\_au\\*MTM0ODMyNDA5NC4xNzI0NDI5MjE1\\*\\_ga\\*MjU2NDg0MDk1LjE3MjQ0MjkyMTU.\\*\\_ga\\_920BSG3JKP\\*MTcyNjYwNjUxNC44LjAuMTcyNjYwNjUxNC42MC4wLjA.](https://www.worldanimalprotection.ca/siteassets/reports-pdfs/Animal-sourced-food-consumption-and-Canadas-emissions-targets-Navius-Research-22-08-30?_gl=1*10zfp4b*_gcl_au*MTM0ODMyNDA5NC4xNzI0NDI5MjE1*_ga*MjU2NDg0MDk1LjE3MjQ0MjkyMTU.*_ga_920BSG3JKP*MTcyNjYwNjUxNC44LjAuMTcyNjYwNjUxNC42MC4wLjA.)
- <sup>9</sup> An EKOS Research Associates nationally representative survey of 2,143 Canadians conducted in July 2021, demonstrated that Canadians are concerned about the harmful effects of industrial animal agricultural on human health and the environment and support policies to transition to healthy and sustainable food systems.
- <sup>10</sup> Plant-based Food Market Size More Than Doubles to Touch USD 22.3 Billion with the CAGR of 11.82% by 2029 | BlueWeave Consulting ([yahoo.com](https://www.yahoo.com))
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- <sup>21</sup> <https://www.chathamhouse.org/2021/02/food-system-impacts-biodiversity-loss>
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