



The Pecking Order 2022



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Cover photo: World Animal Protection is calling for better welfare standards for the broiler industry. Credit: World Animal Protection / Georgina Goodwin



Foreword

Each year billions of chickens are subjected to unnecessary suffering at the hands of fast-food companies who refuse to take the welfare of the chickens in their meat supply chain seriously.

These inquisitive and social animals often live their entire lives in chronic pain, suffering from lameness, skin lesions and even heart failure caused by selective breeding, which leads to an unnaturally fast growth rate. Cramped on factory farm floors with little to no environmental enrichment, they are also prevented from exhibiting their natural behaviours such as foraging, dustbathing, and perching.

Every year since the publication of The Pecking Order 2019, fast-food restaurants have been ranked on their chicken welfare policies, taking into account their commitments to make improvements and their reporting on implementing these commitments. Since then, while there has been some progress made on improving chicken welfare and some companies are innovating by offering meat-free options on their menus, most companies have received embarrassingly low scores in The Pecking Order 2022. Even where companies have committed, they are either not reporting on it or implementing it in their supply chain is slow.

This year's results tell us that some of the world's leading food companies are deliberately ignoring large-scale animal cruelty in their supply chains and, as a result, are eroding their social license to operate.

Shockingly, big brands continue to ignore urgent consumer demands and animal welfare science, subjecting billions of chickens to unimaginable suffering. Companies' inaction is not only an animal welfare issue, but human health is also being jeopardised due to antibiotic overuse in farming, fueling a deadly superbug crisis. Raising welfare standards will reduce the need for routine antibiotics used to prevent disease amongst animals kept in appalling conditions, thereby helping to lower the risk of antibiotic resistance in humans.

These companies are failing people, animals, and the planet. They know that consumers are not interested in paying for animal suffering and are increasingly holding companies accountable for how animals used in their supply chains are treated.

There is no justification for profiting from the pain of billions of sentient animals. The Pecking Order has shone a light on the chicken meat industry over the last four years and highlighted the welfare standards of the most influential global fast-food brands. While we welcome the progress of some, others must be held accountable for their shameful lack of consideration of animal welfare.



A stylized, handwritten signature in black ink.

Vince Cinches
Interim Head of Global Campaigns – Animals in Farming
World Animal Protection





Photo: Stock image of an undisclosed poultry farm. Credit: iStock/DuxX

The Pecking Order 2022: Project overview



The Pecking Order (TPO) assesses iconic fast-food brands and food service companies on their approach to dealing with the welfare of chickens in their supply chains.

TPO began in 2019 as an assessment of how global fast-food brands were dealing with chicken welfare throughout their global supply chains. For TPO 2022 it has evolved into a localised approach, evaluating how international and national fast-food brands and food service companies are making broiler chicken welfare commitments within individual markets and reporting on their progress in implementing those commitments.



The Pecking Order 2022: Methodology

The Pecking Order 2022 Global Methodology document provides detailed information on the purpose of the TPO benchmark, assessment criteria, approach and scoring system. It should be read in conjunction with this report.

The criteria for TPO Global Methodology are based on the Better Chicken Commitment (BCC), which has been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific asks of BCC provide a clear and consistent set of improvements that focus on the breed of chicken as well as the sheds in which they are housed, amongst other criteria. More information on the BCC can be found at <https://welfarecommitments.com/letters/>

TPO has thirteen questions organised under two pillars, with seven questions in the first pillar and six questions in the second. Each question focuses on a specific attribute of the BCC to improve chicken welfare. The pillars are reflected below:



Pillar 1: Commitments & targets

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



Pillar 2: Performance reporting

Questions focus on reporting of progress against published commitments. The score in Pillar 2 reflects the extent to which a company has implemented its commitments in relation to the BCC criteria.¹

Each company receives a pillar percentage score, which combine, with equal weighting, for an overall percentage score. Scores are also translated into Tiers and Grades as shown in the table below.

Table 1: Tier and Grade percentage thresholds

Tier	Grade	TPO 2022 percentage bands
6	Very poor	0-25
5	Poor	26-49
4	Getting started	50-59
3	Making progress	60-75
2	Good	76-85
1	Leading	86-100

1. Companies are scored on the proportion of supply that meets the specific BCC requirement and companies score partial points (1 point) when reporting is limited in scope.



TPO Global 2022 conducted a total of 64 assessments covering the markets of Australia, Brazil, Canada, China, India, Indonesia, Kenya, Thailand and USA. The table below shows in which countries each company has been assessed in.

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









	Australia	Brazil	Canada	China	India	Indonesia	Kenya	Thailand	USA	Total
Burger King 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	9
Domino's 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	9
KFC 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	9
McDonald's 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed		Assessed	Assessed	8
Nando's 	Assessed		Assessed		Assessed				Assessed	4
Pizza Hut 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed	9
Starbucks 	Assessed	Assessed	Assessed	Assessed	Assessed	Assessed		Assessed	Assessed	8
Subway 	Assessed	Assessed	Assessed	Assessed	Assessed		Assessed	Assessed	Assessed	8
Total	8	7	8	7	8	6	5	7	8	64





Photo: The Better Chicken Commitment addresses the health and welfare issues associated with fast-growing breeds. Credit: Georgina Goodwin/World Animal Protection

The Pecking Order 2022: Key findings

1 Tier ranking and overall scores – a few companies are making commitments to broiler chicken welfare but all companies fall behind in performance reporting

The assessments found that no company received an overall Tier 1 to Tier 3 status. With an overall Tier 4 status, Domino's Australia, Subway Canada, Starbucks USA and Subway USA were the highest scoring assessments indicating that they are Getting Started on their journey to better manage broiler chicken welfare.

Domino's Australia, Subway Canada, Starbucks USA and Subway USA's assessments showed them as the Leading companies in terms of Commitments & Targets. However, the companies all placed in Tier 6 for Performance Reporting, suggesting that they are Very Poor at reporting progress of implementing their chicken welfare commitments in their supply chains.

McDonald's Canada and McDonald's USA placed in Tier 5 overall, with the remaining 91% of assessments falling into Tier 6. This indicates that most of the assessed fast-food and food service companies are performing very poorly overall in their approaches to broiler chicken welfare in the supply chain.

With a Tier 5 status, McDonald's Canada was the highest scoring assessment in the Performance Reporting pillar, and the only company to not be placed in Tier 6. This indicates that all companies assessed are performing very poorly in terms of Performance Reporting.



Table 3: Table showing the Tier and Grade ranking for each assessment's total overall score, commitments & targets score, and performance reporting score.

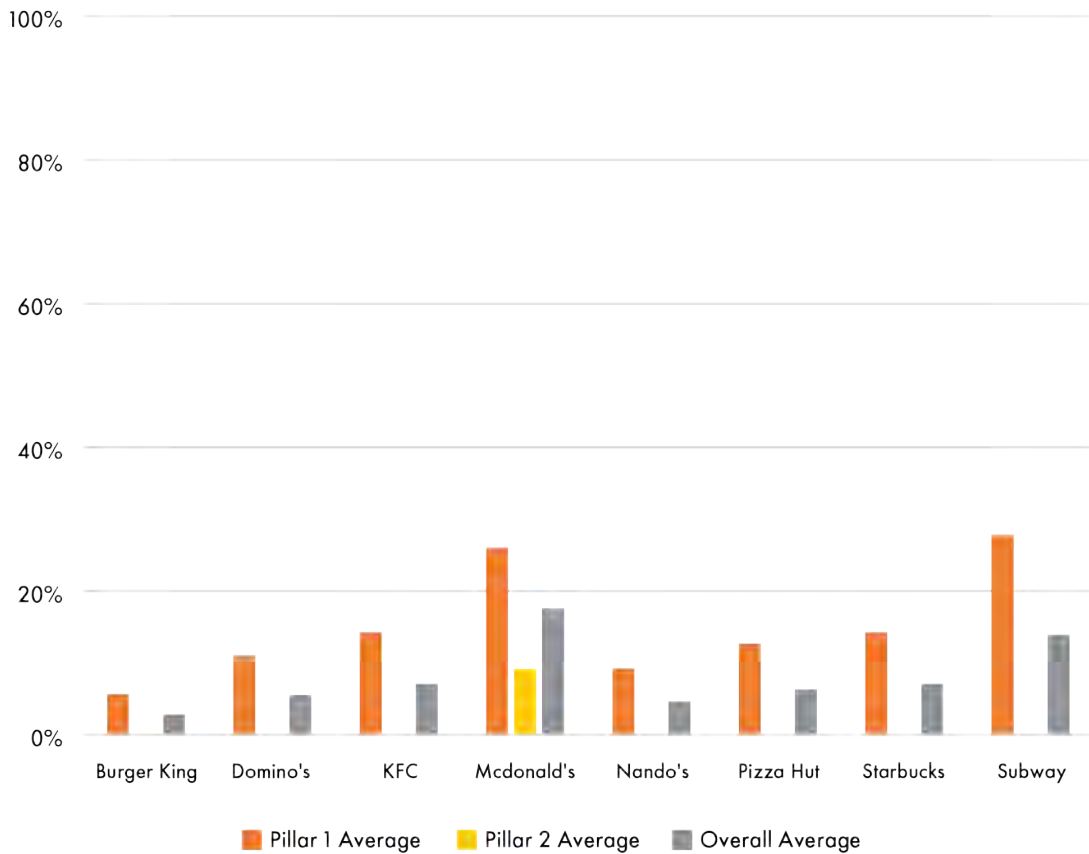
	Total overall	Pillar 1 – Commitments & Targets	Pillar 2 – Performance Reporting
Tier 1 Leading		Domino's Australia, Subway Canada, Starbucks USA, Subway USA (4)	
Tier 2 Good			
Tier 3 Making progress			
Tier 4 Getting started	Domino's Australia, Subway Canada, Starbucks USA, Subway USA (4)		
Tier 5 Poor	McDonald's Canada, McDonald's USA (2)	McDonald's Australia, McDonald's Canada, McDonald's USA (3)	McDonald's Canada (1)
Tier 6 Very poor	Burger King Australia, KFC Australia, McDonald's Australia, Nando's Australia, Pizza Hut Australia, Subway Australia, Starbucks Australia, Burger King Brazil, Domino's Brazil, KFC Brazil, McDonald's Brazil, Pizza Hut Brazil, Starbuck's Brazil, Subway Brazil, Burger King Canada, Domino's Canada, KFC Canada, Nando's Canada, Pizza Hut Canada, Starbucks Canada, Burger King China, KFC China, McDonald's China, Domino's China, Pizza Hut China, Starbucks China, Subway China, Burger King India, KFC India, McDonald's India, Nando's India, Pizza Hut India, Subway India, Starbucks India, Domino's India, Burger King Indonesia, KFC Indonesia, McDonald's Indonesia, Domino's Indonesia, Pizza Hut Indonesia, Starbucks Indonesia, Burger King Kenya, Domino's Kenya, KFC Kenya, Pizza Hut Kenya, Subway Kenya, Burger King Thailand, KFC Thailand, McDonald's Thailand, Domino's Thailand, Pizza Hut Thailand, Subway Thailand, Starbucks Thailand, Burger King USA, KFC USA, Domino's USA, Nando's USA, Pizza Hut USA (58)	Burger King Australia, KFC Australia, Nando's Australia, Pizza Hut Australia, Starbucks Australia, Subway Australia, Burger King Brazil, Domino's Brazil, KFC Brazil, McDonald's Brazil, Pizza Hut Brazil, Starbuck's Brazil, Subway Brazil, Burger King Canada, KFC Canada, Nando's Canada, Pizza Hut Canada, Starbucks Canada, Domino's Canada, Burger King China, Domino's China, KFC China, McDonald's China, Pizza Hut China, Starbuck's China, Subway China, Burger King India, Domino's India, KFC India, McDonald's India, Pizza Hut India, Starbuck's India, Subway India, Nando's India, Burger King Indonesia, KFC Indonesia, McDonald's Indonesia, Domino's Indonesia, Pizza Hut Indonesia, Starbucks Indonesia, Burger King Kenya, Domino's Kenya, KFC Kenya, Pizza Hut Kenya, Subway Kenya, Burger King Thailand, KFC Thailand, McDonald's Thailand, Domino's Thailand, Pizza Hut Thailand, Subway Thailand, Starbucks Thailand, Burger King USA, Domino's USA, KFC USA, Nando's USA, Pizza Hut USA (57)	Domino's Australia, Burger King Australia, KFC Australia, McDonald's Australia, Nando's Australia, Pizza Hut Australia, Subway Australia, Starbucks Australia, Burger King Brazil, Domino's Brazil, KFC Brazil, McDonald's Brazil, Pizza Hut Brazil, Starbuck's Brazil, Subway Brazil, Burger King Canada, Domino's Canada, KFC Canada, Nando's Canada, Pizza Hut Canada, Starbucks Canada, Subway Canada, Burger King China, KFC China, McDonald's China, Domino's China, Pizza Hut China, Subway China, Burger King India, KFC India, McDonald's India, Nando's India, Pizza Hut India, Subway India, Starbucks India, Domino's India, Burger King Indonesia, KFC Indonesia, McDonald's Indonesia, Domino's Indonesia, Pizza Hut Indonesia, Starbucks Indonesia, Burger King Kenya, Domino's Kenya, KFC Kenya, Pizza Hut Kenya, Subway Kenya, Burger King Thailand, KFC Thailand, McDonald's Thailand, Domino's Thailand, Pizza Hut Thailand, Subway Thailand, Starbucks Thailand, Burger King USA, KFC USA, Domino's USA, Nando's USA, Pizza Hut USA, McDonald's USA, Starbucks USA, Subway USA (63)



Looking at the Performance Reporting Pillar, companies are generally performing poorly with no assessments graded in the top four tiers. Sixty-three (98%) companies fall in Tier 6 showing very little or no performance reporting on broiler chicken commitments. One assessment (McDonald's Canada) has Tier 5 status, indicating that this company is poorly reporting on specific BCC aligned broiler welfare commitments.

The general trend of better scores in the Commitments & Targets Pillar versus the Performance Reporting Pillar suggests that where companies might have BCC aligned policy commitments in place there is still little to no evidence of implementation of those commitments, a potentially concerning trend given the proximity of the BCC deadline, which is 2024 in USA and Canada.

Figure 1: Graph showing the average Overall and Pillar scores by company

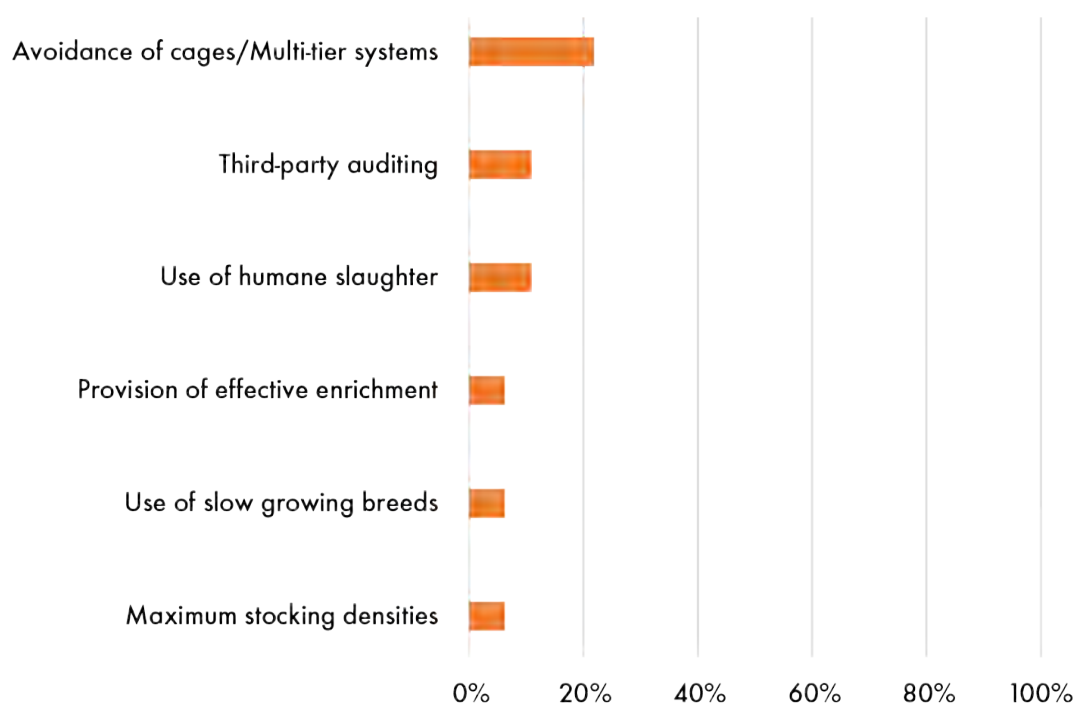


2. Commitments & targets – companies most commonly have a commitment to avoid cages and multi-tier systems

The first question in the Commitments & Targets Pillar assesses whether a company has any form of broiler welfare policy, the research found 56% of companies have published a broiler chicken welfare policy or similar commitment.

The most common specific commitment, aligned with BCC requirements, was that 22% of companies have published a commitment to avoid the use of cages/multi-tier systems. The next most commonly published commitments were for humane slaughter processes and third-party auditing (11%). The remaining commitments on the use of slower growing breeds, provision of enrichment and maximum stocking densities were only found in 6% of assessments.

Figure 2: Graph showing the proportion of assessments with specific BCC-related broiler chicken welfare commitments

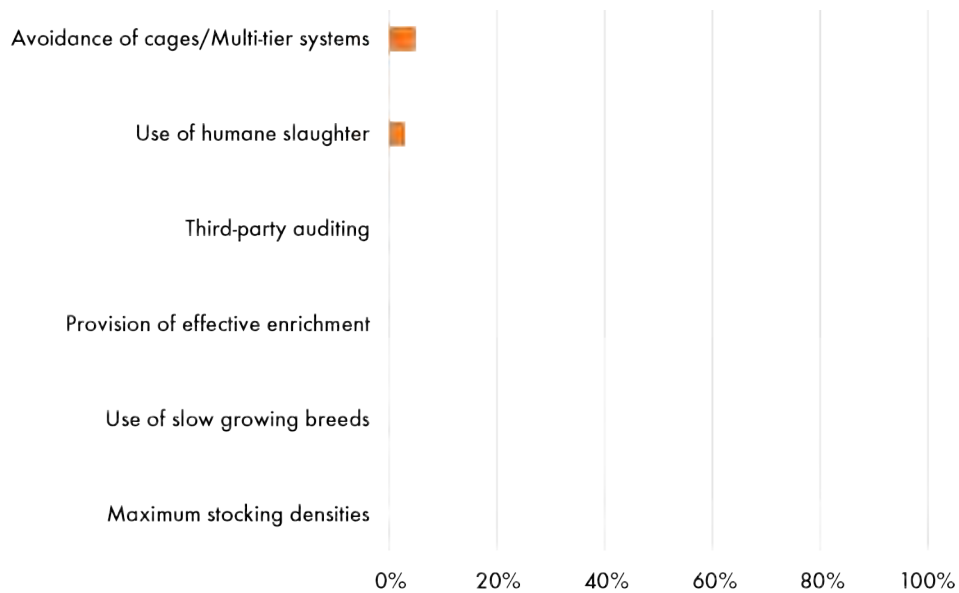


3. Performance reporting – low levels of performance reporting amongst all specific broiler welfare commitments

As discussed earlier, disclosure in the Performance Reporting Pillar is poor. The assessments found minimal performance reporting against the avoidance of cages/multi-tier systems commitment (5% of assessments) and use of humane slaughter commitment (3% of assessments).

No reporting was found for the other commitments related to enrichment provision, auditing, the use of slower growing breeds and stocking densities.

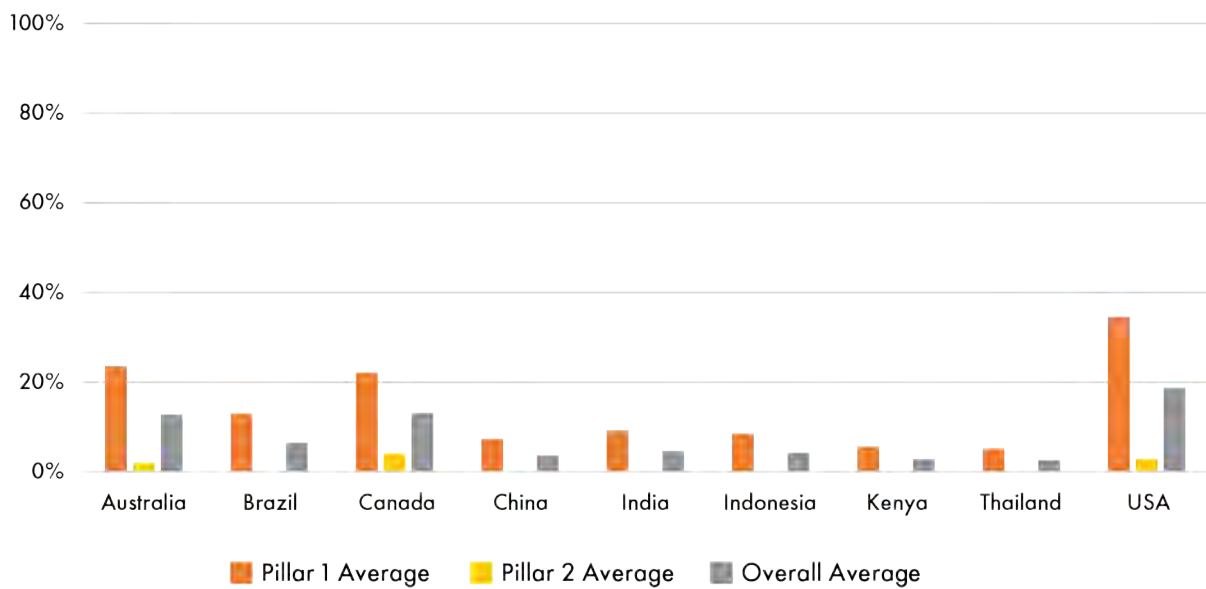
Figure 3: Graph showing the proportion of assessments with performance reporting on specific broiler welfare commitments



4. Broiler chicken welfare appears to be better managed in certain markets

Viewing the assessments by market USA appears to be the best performing with an average overall percentage score of 19%, breaking down into 35% for Commitments & Targets and 3% for Performance Reporting. Australia and Canada both have the second highest average overall percentage score at 13%, followed by Brazil 7%, India 5%, China and Indonesia at 4%, and Kenya and Thailand at 3% (see figure 4).

Figure 4: Graph showing the average Overall and Pillar scores by country



There are limitations to analysing and comparing market scores as the company universe was not the same in each market. To improve comparability, it is possible to isolate the companies that were assessed across all markets (Burger King, KFC, Domino's and Pizza Hut). Figure 5 shows that in this case, Australia's average overall score of 17% is the leader. In Brazil, Canada and USA, the average overall score was 6%. In China, India, Indonesia and Kenya, the average overall score was 4%, whilst Thailand had the lowest average overall score of 2%.

Figure 5: Graph showing the average Overall and Pillar scores by country (for companies assessed in all markets – Burger King, KFC, Domino's and Pizza Hut).

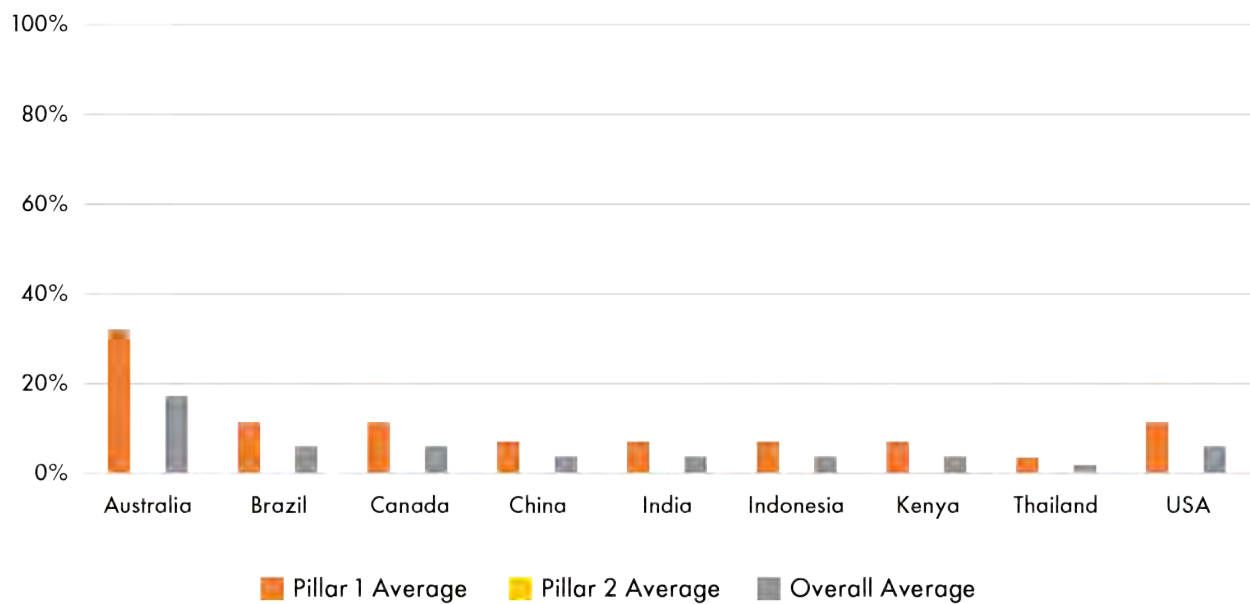


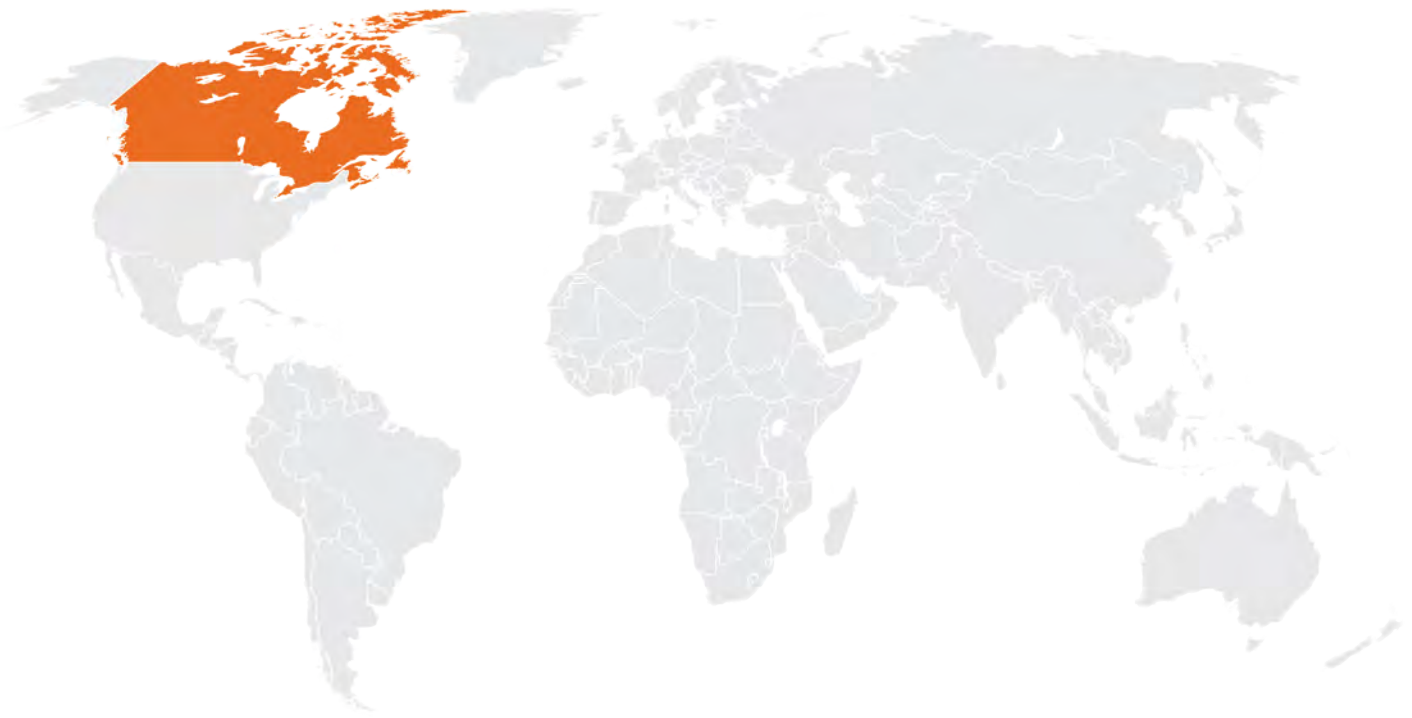


Photo: The Better Chicken Commitment ensures birds are provided with enrichments to satisfy their behavioural need to perch and peck.









The Pecking Order 2022: Canada

- When it comes to broiler chicken welfare, most of the largest food service companies in the Canadian market fall far behind their UK and European counterparts. For example, while KFC Canada has made no welfare commitments that align with the BCC, KFC subsidiaries in the UK and seven Europe countries have committed to the standards outlined in the European Chicken Commitment (ECC). Similarly, Nando's UK has committed to the BCC standards for broiler chicken welfare.
- Canadian companies scored poorly, with most receiving "very poor" across the three measures of 'overall grade', 'commitments & targets' grade and 'performance and reporting' grade.
- Except for Subway Canada, which scored 100% ('leading') under the Commitments and Targets pillar, other Canadian subsidiaries of global food services chains scored poorly.
- Subway has committed fully to the criteria outlined in the BCC but has failed to report on their progress towards meeting those commitments, hence their low score on the 'Performance and Reporting' pillar. Overall, Subway scored 50%, or 'getting started', which is far higher than other food services companies assessed in the Canadian market.
- McDonald's Canada received some points for its commitment to more humane slaughter methods - 100% of the Canadian supply chain facilities utilize Controlled Atmospheric Stunning (CAS). The company has made specific commitments on measuring welfare outcomes and providing enrichments, which are positive improvements; however, they are not aligned with the BCC, hence their overall low score.
- It is clear most Canadian food service restaurants are not taking the welfare of meat chickens in their supply chain seriously. **To meet the 2024 deadline of the BCC, those companies scoring poorly will need to commit and expedite the implementation of the criteria outlined in the BCC, as well as ensure they are reporting on those commitments.**





The Pecking Order 2022: Canada

Company	Overall score %	Overall score tier	Overall score grade	Commitments & targets %	Commitments & targets tier	Commitments & targets grade	Performance reporting %	Performance reporting tier	Performance reporting grade
 BURGER KING	9%	6	Very poor	17%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
 KFC	7%	6	Very poor	14%	6	Very poor	0%	6	Very poor
	32%	5	Poor	31%	5	Poor	33%	5	Poor
 Nando's	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
 Pizza Hut	7%	6	Very poor	14%	6	Very poor	0%	6	Very poor
	0%	6	Very poor	0%	6	Very poor	0%	6	Very poor
 SUBWAY	50%	4	Getting started	100%	1	Leading	0%	6	Very poor



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