



The Pecking Order 2020



How most global fast-food companies still ignore
the suffering of chickens in their businesses



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Foreword

Since publication of 'The pecking order 2019', around 60 billion chickens have been farmed for their meat. Most have experienced a life of suffering, through rapid growth and cruel confinement in crowded, featureless and unnaturally lit sheds. For too long these brutal farming practices have thrived behind closed doors, invisible to most of us.

The unacceptable ways that these feeling, intelligent animals are raised is rightly putting food retailers under increasing scrutiny. A wide range of stakeholders – including financial institutions and consumers, and organisations such as World Animal Protection – are expressing their concern and calling for transparency.

As of July 2019, 29 financial institutions representing £2.3 trillion in assets under management have joined the Global Investor Collaboration on Farm Animal Welfare. This is a unique investor initiative that seeks to move major food companies to improve their management of critical animal welfare issues. Investor pressure has also resulted in the New York Pension Fund's warning given to McDonald's in 2018 over the poor treatment of their chickens.

Consumers worldwide are increasingly aware of the brutality of factory farming; they are keen to invest their money in companies that are investing in animal welfare. Our recent study into the economic implications of moving from conventional to higher welfare chicken production systems shows far lower production costs than previously indicated. Furthermore, competition from substitute and even lab-grown meat products is just around the corner. These developments mean that higher welfare credentials are more likely to be attractive to consumers selecting meat and other animal proteins.

The increased scrutiny is slowly starting to have a positive impact, with more than 140 companies signing up to the Better Chicken Commitment. This is a robust and progressive promise developed by a group of the world's leading animal protection organisations to improve the lives of chickens in several meaningful ways. It calls for slower growing chickens and the provision of more space and better lighting. But let's face facts; change is not happening fast enough...

Risking businesses

Most fast-food chains featured in 'The pecking order 2020' have not aligned with the Better Chicken Commitment. KFC has climbed up the ranking after signing up to the Better Chicken Commitment in multiple countries, but most other companies show stagnation or even lower scores since 2019.

This situation is clearly unacceptable. Companies are taking a significant risk by ignoring their responsibilities to the animals at the hearts of their businesses.

And even those companies already signed up to the Better Chicken Commitment, in one or a handful of markets, are exposed to risk. Concern for animal welfare does not stop at country borders; companies should make global welfare commitments wherever possible.

Ultimately, improving the lives of chickens is a critical issue for companies dependent on them, and wishing to remain relevant in a rapidly evolving marketplace where animal welfare is no longer negotiable.

We are transforming the food industry by helping companies to manage and measure higher welfare broiler systems at a global level. 'The pecking order 2020' is the only tool that allows this.

We look forward to working with you to progress chicken welfare and make your business more resilient in doing so.



Jonty Whittleton

Global campaign head

World Animal Protection

About 'The pecking order 2020': Creating change for chickens

World Animal Protection launched its Change for Chickens campaign in 2016 to move the industry to produce or supply broiler chickens from higher welfare systems. During this time, we have worked with some of the most relevant food industry stakeholders – from retailers to farmers to consumers – to make this change happen.

'The pecking order', now in its second year, was created to provide nine iconic fastfood chains with a framework to measure and manage broiler welfare performance worldwide. It also enables the measurement of performances against peers and is the only tool of its kind available in the world.

The criteria for 'The pecking order 2020' are based on the Better Chicken Commitment. This simple, robust set of improvements was created by a group of the world's leading animal protection organisations and draws on the latest scientific evidence.

Companies 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 for each of them, giving 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'. Companies are given the opportunity to review their completed assessments prior to publication.

Transparency is crucial in managing broiler welfare. For this reason, only publicly available information is considered in 'The pecking order 2020'.

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 companies featured in each edition of 'The pecking order', and in the detailed methodology notes, attached in the link below.

In this edition, we have reviewed the methodology to better reflect the levels and geographic scopes of corporate broiler welfare management. We also now require companies to detail the specific aspects of any commitment to improve chicken welfare – it is not sufficient to cite local regulations and/or certification schemes as a shorthand.



The full methodology for 'The pecking order 2020' is found here:

worldanimalprotection.org/PeckingOrder2020

The pecking order 2020 results: Overview

Company	Scores				Total score as a percentage	Tier	
	Corporate commitments	Objectives and targets	Performance reporting	Total score			
	20	18	6	44	49%	3	Making progress
	18	18	0	36	40%	4	Getting started
	18	18	0	36	40%	4	Getting started
	10	9	3	22	24%	5	Poor
	7	6	6	19	21%	5	Poor
	6	3	0	9	10%	6	Very poor
	7	2	0	9	10%	6	Very poor
 (PLC)	4	2	2	8	9%	6	Very poor
 (Inc)	0	0	0	0	0%	6	Very poor

Analysing the results: Scoring highs and lows

'The pecking order 2020' results give cause for celebration and concern. Encouragingly, KFC advances from tier 5 to tier 3. This is due to a robust commitment from the brand to improve chicken welfare in six European countries. See page 19 for a more detailed account of this move and its profound future impact on chicken welfare.

However, three companies – McDonald's, Burger King and Pizza Hut – drop points for 2020. Burger King shows the sharpest decline (30%) from 2019.

Starbucks, Subway, Nando's and, Domino's PLC, Domino's Inc all show no change in score for 2020. Of these, Domino's Inc is the only company in 'The pecking order 2020' to achieve zero points. This should be of great concern to the company, its investors and consumers.



Corporate commitments are not coming fast enough –

only three companies have signed up to the Better Chicken Commitment. This is insufficient given the scale of suffering chickens face. More than 140 companies around the world have signed up to the Better Chicken Commitment and we urge all brands featured in 'The pecking order 2020' to follow suit.



The geographic scope of commitments is too narrow –

the commitments are limited to the USA, Canada and a handful of European countries. More progress is needed.



Performance reporting is still limited –

four companies are reporting at least some performance on their broiler welfare commitments. However, this reporting is limited to certain commitments and geographies. This situation makes it hard to hold companies to account against the commitments that they've made. We hope that companies will improve their performance reporting for 'The pecking order 2021'.

Change from 2019



Gained points and moved up two tiers



No movement

SUBWAY

No movement



Lost points, but no movement down a tier



No movement



Lost points and dropped down two tiers



Lost points and dropped down one tier



No movement

(PLC)



No movement

(Inc)

Measuring up: Criteria scoring specifics

<p>Global policies</p> <p>Broiler welfare is a global issue and should be tackled at a global level.</p>	<ul style="list-style-type: none">• The only companies covered by a global policy are KFC and Pizza Hut, due to the overarching animal welfare policy of their parent company Yum! Brands. This policy does not include criteria to ensure broilers are reared in higher welfare systems.• Burger King, Domino's PLC, McDonald's, Nando's, Starbucks and Subway have policies, but limited in scope.
<p>Slower growing breeds</p> <p>In line with the Better Chicken Commitment, only chicken breeds that demonstrate higher welfare outcomes should be used.</p>	<ul style="list-style-type: none">• Only KFC, Starbucks and Subway have committed to move to breeds that grow at a slower, more balanced rate, in line with the Better Chicken Commitment• They have not reported progress on the use of slower growing breeds.
<p>Stocking density</p> <p>In line with the Better Chicken Commitment, the maximum stocking density should be 30kg/m² or 6lb/ft². Cages or multi-tier systems must not be used.</p>	<ul style="list-style-type: none">• Three companies are committed to limiting stocking densities within a clear timeline (2026 for commitments in Europe, and 2024 in North America): KFC has committed in six European countries, and Starbucks and Subway in the USA and Canada.• Burger King does not seem to be committed to the Better Chicken Commitment.• Domino's PLC, McDonald's and Nando's have committed to keeping broilers out of cages, but not to stocking densities in line with the Better Chicken Commitment.• Most companies do not report their progress.
<p>Enrichment</p> <p>In line with the Better Chicken Commitment, specific environmental standards must be met, including lighting, perches, pecking substrates, etc.</p>	<ul style="list-style-type: none">• Only KFC, Starbucks and Subway have committed to providing the necessary enrichments in line with the Better Chicken Commitment.



<p>Humane slaughter processes</p> <p>In line with the Better Chicken Commitment, chickens should be slaughtered using controlled atmospheric stunning or via effective electrical stunning without live inversion. The latter point applies to Europe only.</p>	<ul style="list-style-type: none">• In addition to the three companies that align with the Better Chicken Commitment in limited markets – KFC, Subway and Starbucks – McDonald’s has also committed to using controlled atmospheric stunning in North America.• There is no progress on humane slaughter reporting by any company.
<p>Third party auditing</p> <p>In line with the Better Chicken Commitment, companies should demonstrate compliance with the above standards via third-party auditing and annual public reporting on progress towards this commitment.</p>	<ul style="list-style-type: none">• All companies apart from Domino’s Inc and Domino’s PLC have at least some form of commitment to use third-party auditors, although not globally.• KFC and Nando’s are the only companies to report on the proportion of their operations that are audited by a third party.
<p>Timelines</p> <p>In line with the Better Chicken Commitment, companies should meet their commitments by 2024 in the USA and Canada, and by 2026 in Europe.</p>	<ul style="list-style-type: none">• KFC, Starbucks and Subway are the only companies in ‘The pecking order 2020’ to align with timelines set out in the Better Chicken Commitment.• McDonald’s has a timeline of 2024 for its commitments to improve chicken welfare, even though they do not fully align with the Better Chicken Commitment.

Specific aspects of the Better Chicken Commitment are available here:

welfarecommitments.com/letters





What we found: Company performances



What we found

KFC scores 44 out of 90. This means that the company is graded as 'making progress', or tier three in 'The pecking order 2020'.

In 2019, KFC publicly committed to the Better Chicken Commitment in the UK, Ireland, Germany, Netherlands, Sweden and Belgium. These markets now have time-bound commitments (2026) on chicken welfare and will implement reporting against those targets.

KFC has significantly improved its overall score since the 2019 assessment, which has moved the company up two tiers.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
20	18	6	44	49%	3	Making progress	Gained points and moved up two tiers



What we found

Starbucks scores 36 out of 90, meaning the company is graded as 'getting started', or tier 4 in 'The pecking order 2020'.

Starbucks has signed the Better Chicken Commitment and commits to aligning its broiler welfare standards for the USA and Canada with Global Animal Partnership (GAP) standards.

The total score for Starbucks is the same as its 2019 assessment, so the company remains in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
18	18	0	36	40%	4	Getting started	No movement





What we found

Subway scores 36 out of 90. This means the company is graded as 'getting started', or tier 4 in 'The pecking order 2020'.

Subway has signed the BCC and commits to aligning its broiler welfare standards for the USA and GAP standards.

The total score for Subway is the same as its 2019 assessment, so the company remains in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
18	18	0	36	4%	4	Getting started	No movement



What we found

McDonald's scores 22 out of 90. The company is graded as 'poor', or tier 5 in 'The pecking order 2020'.

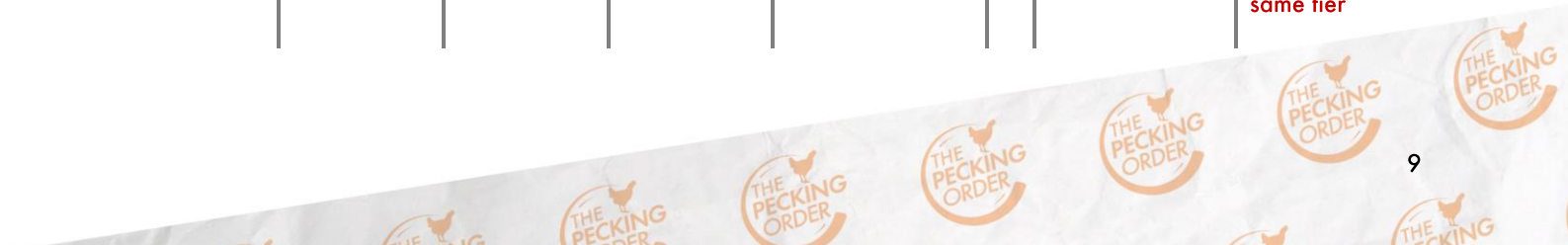
The company has committed to aligning with two issues covered by the Better Chicken Commitment in the USA and Canada by 2024. These are the use of humane slaughter processes and compliance with broiler welfare standards via third-party auditing.

McDonald's has also committed to providing birds with meaningful enrichment. But this does not align with the standards set in the Better Chicken Commitment. Additionally, McDonald's has not committed to selecting chickens bred for better welfare outcomes and limiting stocking densities to a maximum of 30kg/m².

McDonald's has a global commitment to avoid the use of broiler cages. However, it is not clear if this commitment applies to all chicken products in the company's supply chain.

The total score for McDonald's has not changed significantly since the previous assessment in 2019. There is a slight decline in score due to a stricter approach to the methodology, including limitations in product scope. The company remains in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
10	9	3	22	24%	5	Poor	Lost points but remained in the same tier





What we found

Nando's scores 19 out of 90. This means the company is graded as 'poor' or tier 5 in 'The pecking order 2020'.

Nando's has not published any global corporate commitments to improving broiler chicken welfare. Welfare standards are published and appear to be defined at the country operations level. Nando's UK and Ireland is the only Nando's website with a dedicated section on broiler chicken welfare. This includes information on enrichments and third-party auditing processes. Several Nando's countries – Australia, Canada, New Zealand, United Kingdom and Ireland – commit to no broiler cages, but none discuss stocking densities.

The total score for Nando's is the same as the 2019 assessment and the company stays in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
7	6	6	19	21%	5	Poor	No movement



What we found

Burger King scores 9 out of 90. The company is graded as 'very poor' or tier 6, in 'The pecking order 2020'.

The company says it is committed to making improvements by 2024 in the USA and Canada regarding stocking density, breed selection, environment and the use of third-party auditing. But it does not specify the level of detail.

Burger King reported in 2016 that its broiler chicken welfare commitments aligned with the GAP standards. These commitments are not reiterated in subsequent reports, so it is not clear this is still Burger King's intention.

This means a significant drop in Burger King's score as the 2016 commitments are no longer considered applicable.

The total score for Burger King has significantly declined since the 2019 assessment and the company has dropped two tiers.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
6	3	0	9	10%	6	Very poor	Lost points and dropped one tier



What we found

Pizza Hut scores 9 out of 90. The company is graded as 'very poor' or tier 6 in 'The pecking order 2020'.

Pizza Hut is covered by Yum! Brands' global animal welfare policy. However, the policy does not align with or explicitly state commitment to the higher welfare objectives in the Better Chicken Commitment.

Pizza Hut UK's chicken is Red Tractor certified. However, the company does not clarify how this certification scheme helps Pizza Hut meet Better Chicken Commitment higher welfare requirements.

The total score for Pizza Hut has declined since the previous assessment in 2019. The company has dropped one tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
7	2	0	9	10%	6	Very poor	Lost points and dropped one tier



What we found

Domino's Pizza Group PLC scores 11 out of 90. This means the company is graded as 'very poor' or tier 6 in 'The pecking order 2020'.

Domino's Pizza Group PLC has a global animal welfare policy including a specific section on broiler chicken welfare. It covers stocking densities, enrichment, slaughter processes and auditing.

All cooked chicken from Domino's Pizza Group is cage free.

The company also reports on broiler chicken stocking densities in its UK and Ireland supply chain. However, its commitments on stocking density, enrichment, slaughter processes and auditing do not meet the Better Chicken Commitment's welfare requirements.

The total score for Domino's Pizza Group PLC has improved since the previous assessment in 2019. This is through their commitment to source all their cooked chicken meat from cage-free systems, but the company remains in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
4	2	2	8	9%	6	Very poor	No movement



(Inc)

What we found

Domino's Pizza Inc scores 0 out of 90. The company is graded as 'very poor' or tier 6 in 'The pecking order 2020'.

Domino's Pizza Inc discusses animal welfare in its 2019 corporate stewardship report, but only in terms of legislation compliance. We could not find any other information relating to broiler chicken welfare, or to higher broiler welfare standards as set out in the Better Chicken Commitment.









The overall score for Domino's Pizza Inc is the same as the 2019 assessment, where we found no evidence of broiler chicken welfare. The company remains in the same tier.

Scores				Total score as a percentage	Tier		Change from 2019
Corporate commitments	Objectives and targets	Performance reporting	Total score				
0	0	0	0	0%	6	Very poor	No movement









For more detail on where we gathered the information that informs 'The pecking order 2020', please refer to [Annex 1](#)

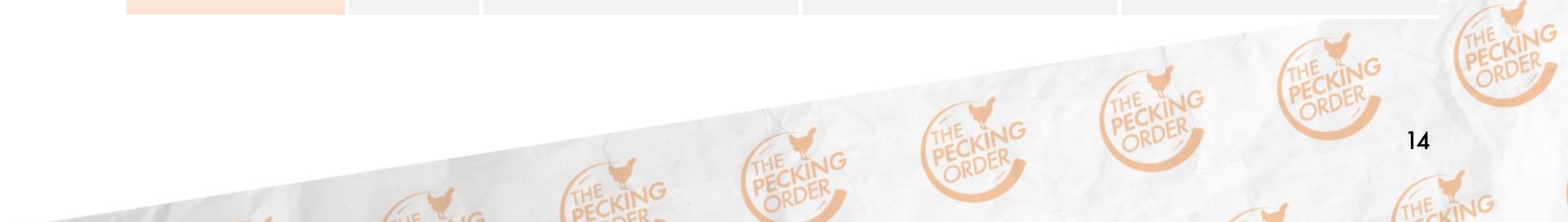


Getting it right: Our recommendations


Call to Action	Company	Policy	Objectives and targets	Performance reporting
<p>Better breeds</p> <p>Use chickens bred for measurably improved welfare outcomes, including detail on selected breeds – in line with the Better Chicken Commitment.</p>		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report progress on commitments within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report progress on commitments within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report progress on commitments within agreed timeframe.
		<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(PLC)</p>	<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(Inc)</p>	<ul style="list-style-type: none"> Commit to using better breeds. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.



Call to Action	Company	Policy	Objectives and targets	Performance reporting
<p>Freedom to move</p> <p>Avoid close confinement, specifically cages/multi-tier systems and limiting stocking densities to 30kg/m² or 6lb/ft² - in line with the Better Chicken Commitment.</p>		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the better chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the better chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the better chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Commit to improving stocking densities. 	<ul style="list-style-type: none"> Extend cages targets to other geographies and include time-bound target on improving stocking densities. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to improving stocking densities. 	<ul style="list-style-type: none"> Extend cages targets to other geographies and include time-bound target on improving stocking densities. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to avoiding cages/ improving stocking densities. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to avoiding cages/ improving stocking densities. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(PLC)</p>	<ul style="list-style-type: none"> Commit to avoiding cages/ improving stocking densities. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(Inc)</p>	<ul style="list-style-type: none"> Commit to avoiding cages/ improving stocking densities. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.





Call to Action	Company	Policy	Objectives and targets	Performance reporting
<p>Meaningful enrichments</p> <p>Provide chickens with meaningful enrichment (eg including perches, pecking substrates and lighting) – in line with the Better Chicken Commitment.</p>		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken Commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken Commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken Commitment within agreed timeframe.
		<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(PLC)</p>	<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(Inc)</p>	<ul style="list-style-type: none"> Commit to enrichment improvements. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.





Call to Action	Company	Policy	Objectives and targets	Performance reporting
<p>Humane slaughter</p> <p>Use humane slaughter processes, including the requirement for pre-slaughter stunning and avoidance of shackling – in line with the Better Chicken Commitment.</p>		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to humane slaughter. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to humane slaughter. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to humane slaughter. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(PLC)</p>	<ul style="list-style-type: none"> Commit to humane slaughter. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(Inc)</p>	<ul style="list-style-type: none"> Commit to humane slaughter. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.





Call to Action	Company	Policy	Objectives and targets	Performance reporting
<p>Compliance</p> <p>Demonstrate compliance with its chicken welfare standards via third-party auditing, or maintain the use of such auditing processes, and report on the proportion of suppliers assessed by third-party auditors against recognised standards – in line with the Better Chicken Commitment.</p>		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress toward meeting the Better Chicken commitment within agreed timeframe.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Commit to third-party auditing. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
		<ul style="list-style-type: none"> Extend commitment to other geographies. 	<ul style="list-style-type: none"> Meet time-bound targets where made and extend targets to other geographies. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(PLC)</p>	<ul style="list-style-type: none"> Commit to third-party auditing. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.
	 <p>(Inc)</p>	<ul style="list-style-type: none"> Commit to third-party auditing. 	<ul style="list-style-type: none"> Set time-bound targets. 	<ul style="list-style-type: none"> Report on progress.





Making progress: KFC – a case study

Committing to improve the lives of tens of millions of chickens

In July 2019, KFC signed up to the [Better Chicken Commitment](#) in six European countries: UK, Ireland, Germany, the Netherlands, Sweden and Belgium.

This commitment means that KFC will use chicken breeds that grow at a healthier, more balanced rate. They will also give these animals more space and natural light; and use enrichments such as perches and straw bales to encourage important natural behaviours – all by 2026. The company estimates these actions will positively affect 72 million chickens.

KFC asserts that what is not measured cannot be managed, so it will also use independent auditors to check its commitments and publicly report on progress annually. This follows the company's work to increase transparency in the UK and Ireland by developing new software that allows it to publish welfare data.

KFC will also fund research into better chicken welfare to find ways to accelerate its transition to higher welfare systems.

World Animal Protection has worked closely with KFC to raise the company's standards and will continue to do so. We want to support KFC, as it continues to improve chicken welfare, and to encourage similar commitments in the other markets where the company operates.

We will also be engaging with other fast food brands to follow KFC's lead and improve the lives of millions of chickens by making higher welfare systems the norm across their entire supply chains.

“ Signing up to the European Chicken Commitment isn't just a box-ticking exercise for us, we're doing this because we truly believe it's the right thing to do. Chicken is our business and we have a responsibility as the chicken brand, to make sure we're pushing improvement to chicken welfare standards across our supply chain.

Our business depends on the health, sustainability and reputation of chicken farming and, our customers care about improving the lives of the chicken we buy. That's why we're adding our voice to the campaign and encouraging others to do the same – because to inspire real change and provoke meaningful action, we need the industry to move with us. ”

Paula MacKenzie

General manager, KFC UK & Ireland



Looking worldwide: Where companies care about chicken welfare

Only three companies listed in 'The pecking order 2020' have signed up to the Better Chicken Commitment. These are KFC, Starbucks and Subway. It is not clear if Burger King is still signed up (see page 10 for more information on the score that Burger King receives in 'The pecking order 2020'). Unfortunately, these commitments only apply to some parts of the world as indicated in the map below.



Worldwide commitment key:

Subway: Canada and the United States

Starbucks: Canada and the United States

KFC: Belgium, Germany, Ireland, the Netherlands, Sweden and the United Kingdom

We urge all companies listed in 'The pecking order 2020' to step up and commit to improving the lives of chickens upon whom their businesses depend. High animal welfare matters globally.

Making the switch: The economics of moving to higher welfare production

We commissioned the Business Economics and Livestock Research Groups at the University of Wageningen in the Netherlands to research production costs of upgrading to higher welfare indoor farming systems.

The researchers used a tested, peer-reviewed model. They conducted an extensive literature review and consulted country-based experts and production companies when possible.

For this study, we selected five key markets based on volume production. These markets were the United States, Brazil, The Netherlands, China, and Thailand. They represented a combined production output of 26 billion chickens per year, or close to 50% of global broiler production.

The model calculates the increase in cost of switching from conventional production systems to higher welfare systems in line with World Animal Protection's Global Broiler Welfare Framework.

The welfare level of each system is calculated using the Welfare Quality® protocol. The ratio of cost increase relative to quantifiable welfare improvement is the welfare cost-efficiency.

The study found that switching to higher welfare systems results in a cost increase in the range of 6-9 eurocents per kilogram of live bird, or 6.4-13.4%.

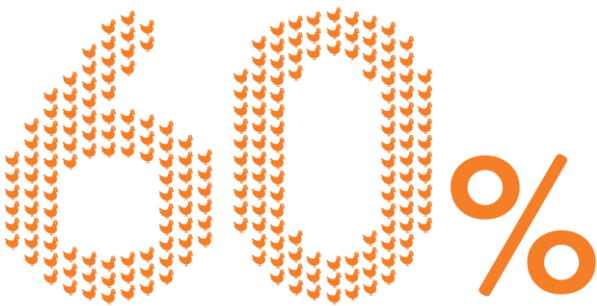
The switch involved increases in welfare scores ranging from 81-240 points in markets where welfare data was available. In addition to benefitting chicken welfare, higher welfare systems can bring about a broad range of system-wide gains. These include lower antibiotic use, decreased prevalence of salmonella and campylobacter, and better working conditions for farm workers.

And for the consumer, demand for higher quality products is very encouraging. Complementary research commissioned by World Animal Protection from 2016 to 2018 shows increasing proportions of respondents prefer to buy products from animals that have had a good quality of life. This is irrespective of price.

On average, more than 60% of chicken consumers surveyed globally (across 14 countries) said they would pay more for better quality, higher welfare products.

Ultimately, the results detailed in our report - 'Valuing higher welfare chicken: the financial case for kinder chicken production' - show that the cost of producing higher welfare chicken is lower than previously implied. They highlight that it is economically feasible for businesses to commit to doing what is right for chickens and consumers.

more than



of chicken consumers surveyed globally said they would pay more for better quality, higher welfare products.

Sharing a global vision: What a higher welfare farm looks like

1. Natural light fills the barn. This encourages activity, reduces stress and is a better experience for farm workers too.

2. Simple low-cost enrichments such as perches and pecking materials keep the chickens active and help them to behave naturally. This in turn reduces stress.

1

3. Lower stocking densities give the chickens more space to move and behave naturally.

4. Chicken breeds are used that grow at a slower, more natural rate. This reduces many of the physical and mental problems chickens experience with their fast growth, particularly when combined with the other improvements detailed here.

2

2

3

4

5

5. Deep, dry litter promotes good foot health and helps the chickens behave naturally. It encourages dust bathing, for example.



Looking to the future

'The pecking order 2020' shows that despite some progress, the nine leading fast-food brands must do more to improve the welfare of chickens on which their businesses depend globally.

We will convince, support and inspire these companies to improve their performance in the following ways.

- We will provide each company with details of its assessment and clear guidance, supported by our offer of technical expertise, on how they can improve their chicken welfare performance. The recommendations table in this report is a vital starting point.
- We will repeat the assessment annually, shining a light on the state of the fast-food industry regarding chicken welfare, and document progress (or regression) from year to year. We want fast-food companies to have full information about their supply chains.
- We will use this, and each subsequent issue of 'The pecking order', as a tool to inspire and mobilise our public audiences. We want them to hold companies to account on their chicken welfare practices and press for transparent public reporting.
- We will challenge companies to source chickens that grow at a healthier rate. They must also use farms that provide the necessary space, natural light and environment to keep the animals healthy and active. This progressive model of raising chickens must become the global standard.



Annex 1

Researching 'The pecking order 2020': Where we looked

For 'The pecking order 2020', we reviewed global parent and corporate communications and localised communications in the countries below.

Country									
Australia	✓	✓	✓	✓	✓	✓	✓		
Belgium		✓	✓	✓			✓		
Brazil	✓	✓	✓	✓		✓	✓		
Canada	✓	✓	✓	✓	✓	✓	✓		✓
China	✓	✓	✓	✓		✓	✓		
Denmark	✓	✓	✓	✓		✓			
France	✓	✓	✓	✓		✓	✓		
Germany	✓	✓	✓	✓		✓	✓	✓	
Iceland								✓	
India	✓	✓	✓	✓	✓	✓	✓		
Indonesia	✓	✓		✓		✓			
Ireland	✓	✓	✓	✓				✓	
Italy	✓	✓	✓	✓		✓			
Kenya	✓		✓				✓		
Liechtenstein			✓					✓	
Luxembourg		✓	✓	✓			✓	✓	
Netherlands	✓		✓	✓		✓	✓		
New Zealand	✓	✓	✓	✓	✓	✓	✓		
Norway		✓	✓	✓		✓	✓	✓	
Poland	✓	✓	✓	✓		✓	✓		
Portugal	✓	✓	✓	✓		✓	✓		
Russia	✓	✓	✓	✓		✓	✓		
South Africa	✓	✓	✓	✓	✓	✓	✓		
South Korea	✓	✓	✓	✓		✓	✓		
Spain	✓		✓	✓		✓	✓		
Sweden	✓	✓	✓	✓		✓	✓	✓	
Switzerland	✓	✓	✓	✓		✓	✓	✓	
Thailand	✓	✓	✓	✓		✓	✓		
United Kingdom	✓	✓	✓	✓	✓	✓	✓	✓	
United States	✓	✓	✓	✓	✓	✓	✓		✓

Glossary

- **Better Chicken Commitment** is a set of clear asks to improve chicken welfare, which has been agreed and endorsed by leading animal protection organisations around the world. In Europe the Better Chicken Commitment is also known as the European Chicken Commitment.
- **Business Benchmark on Farm Animal Welfare** (BBFAW) is a global ranking of food companies on farm animal welfare management, policy commitment, performance and disclosure. BBFAW was launched in 2012 and is updated annually. The annual ranking reports are publicly available. They are used by investors, companies, NGOs and other stakeholders to understand corporate practice and performance on farm animal welfare.
- **Global Animal Partnership**: 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 broilers, laying hens, pigs, turkeys, sheep, bison and beef cattle.
- **Global broiler welfare framework**: the global broiler welfare framework outlines World Animal Protection's position on what constitutes acceptable meat chicken welfare practice in indoor production. It includes a description of production requirements and corresponding welfare outcomes and benefits. The global broiler welfare framework was developed following a review of scientific evidence and independent private certification standards, as well as consultation with other international NGOs.
- **Global Investor Collaboration on Farm Animal Welfare**: This is a BBFAW initiative. The group, as of July 2019 included 29 investors, representing £2.3 trillion in assets under management. It encourages major global food companies to strengthen their management systems and processes on farm animal welfare. The investors do this by writing letters annually to the companies covered by the Benchmark. Leading and improving companies are commended on their performance, and poorer performers are encouraged to improve. The letters also explain that investors see farm animal welfare as a business risk needing effective management and as a potential future source of business opportunity and growth.
- **Red Tractor**: Red Tractor is a food quality certification programme managed by Assured Food Standards, a non-profit organisation operating in England, Northern Ireland, and Wales. It is the UK's largest food standards scheme and offers certification programmes for animal welfare, food safety, traceability and environmental protection.
- **Welfare Quality® Protocol**: The Welfare Quality® Protocol is an animal welfare assessment tool created by the Welfare Quality® (WQ) programme (2004-2015). The programme's objective was to harmonise assessment systems for the measurement of on-farm animal welfare in Europe. The harmonised protocols are based on a set of criteria and measurements that can be applied identically at farms. They allow welfare to be measured at larger scales, across countries, and even between multiple countries, consistently.





The Pecking Order is a Change for Chickens campaign project.

Change for Chickens is a registered Trade Mark of World Animal Protection.

World Animal Protection is grateful to the Open Philanthropy Project for generously supporting our work to reduce the suffering of farm animals and for making this report possible.

Chronos Sustainability provided technical expertise and developed an assessment methodology with World Animal Protection. It then carried out assessments of all the companies included in this report. Chronos Sustainability is a specialist advisor in delivering transformative, systemic change to organisations and businesses wishing to improve their social and environmental performances.

For more information on 'The pecking order 2020', please contact Jonty Whittleton, global campaign head - jontywhittleton@worldanimalprotection.org.

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