



# 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

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The meat chicken is by far the most numerous bird on the planet – let alone on the plate. Given its short, miserable life, arguably, the meat chicken also represents the biggest terrestrial animal welfare issue in history. But we now have a real prospect to make that history. More and more companies take their corporate social responsibility and switch to meat chickens produced according to the ‘Better Chicken Commitment’ – or ‘European Chicken Commitment’ for Europe. That doesn’t mean these chickens will live ‘the good life’. But it does mean their welfare is substantially improved.

Every year, The Pecking Order ranks fast-food restaurants on their progress towards this Better Chicken Commitment. The outcome so far is both encouraging and disappointing. Progress has been real and is changing the lives of chickens by the millions, the tens of millions – the hundreds of millions even. Big brands have committed themselves and have started implementation. Because they acknowledge their responsibility for animal welfare – and perhaps also because they care about their reputation and about the expectations of their customers and their staff. Moreover, they probably appreciate the cost-efficiency of the animal welfare improvements – and see the writing on the wall: legislation will catch up and it makes sense to be prepared.

At the same time, given the suffering of billions of birds every day, progress has also been too slow. Too many companies are still in denial. Too many companies close their eyes for the plight of the animals they sell. Too many companies think they can get away with greenwashing. They must think twice. And The Pecking Order is a duly reminder.

Especially this year’s European edition. So far, The Pecking Order was published by World Animal Protection. But this year is different and underlines the collective determination of animal welfare organizations to improve the lives of chickens. This year, the European Pecking Order is a united project by World Animal Protection, the Albert Schweitzer Stiftung, Animal Equality, L214 and Animals without Borders. Moreover, the assessment agency Chronos has recalibrated the methodology, so that it puts more emphasis on implementation – and therefore on actual positive impact on the lives of animals. These changes were made possible thanks to a generous donation by the Barth Misset foundation.

Let The Pecking Order be both a carrot and a stick for companies to act. A source of inspiration and a source of embarrassment. Let The Pecking Order be the start of new generations of meat chickens that have more space and less injuries, that live in enriched environments, experience natural light and are killed more humanely. It’s the very least we owe to them.



**Dirk Jan Verdonk**  
**Country director**  
**World Animal Protection Netherlands**







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

## The Pecking Order 2022: Project overview

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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 European 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 European Methodology are based on the European Chicken Commitment (ECC), which has been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific asks of ECC 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 ECC can be found at <https://welfarecommitments.com/letters/>

TPO has thirteen questions organised under two pillars<sup>1</sup>, with seven questions in the first pillar and six questions in the second. Each question focuses on a specific attribute of the ECC 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 ECC.



## 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 ECC criteria.<sup>2</sup>

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. French companies are assessed on an additional question in each pillar. The questions concern the use of 'winter gardens'.

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



TPO Europe 2022 conducted a total of 45 assessments covering the markets of Germany, France, Spain, Italy, and Croatia. Table 2 below shows in which markets each company has been assessed in.

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

|               |   | Germany   | France    | Spain    | Italy    | Croatia  | Total     |
|---------------|---|-----------|-----------|----------|----------|----------|-----------|
| Burger King   |    | Assessed  | Assessed  | Assessed | Assessed | Assessed | 5         |
| Domino's      |    | Assessed  | Assessed  | Assessed | Assessed | Assessed | 5         |
| KFC           |    | Assessed  | Assessed  | Assessed | Assessed | Assessed | 5         |
| McDonald's    |    | Assessed  | Assessed  | Assessed | Assessed | Assessed | 5         |
| Pizza Hut     |    | Assessed  | Assessed  | Assessed |          |          | 3         |
| Starbucks     |    | Assessed  | Assessed  | Assessed | Assessed |          | 4         |
| Subway        |    | Assessed  | Assessed  | Assessed | Assessed |          | 4         |
| Holder Group  |  |           | Assessed  |          |          |          | 1         |
| Buffalo Grill |  |           | Assessed  |          |          |          | 1         |
| O'Tacos       |  |           | Assessed  |          |          |          | 1         |
| Quick         |  |           | Assessed  |          |          |          | 1         |
| Autogrill     |  |           | Assessed  |          |          |          | 1         |
| IKEA          |  | Assessed  |           | Assessed | Assessed |          | 3         |
| Accor         |  |           |           | Assessed |          |          | 1         |
| Dussmann      |  |           |           |          | Assessed |          | 1         |
| L'Osteria     |  | Assessed  |           |          |          |          | 1         |
| Vapiano       |  | Assessed  |           |          |          |          | 1         |
| Kaykan        |  |           |           |          |          | Assessed | 1         |
| Surf'n Fries  |  |           |           |          |          | Assessed | 1         |
| <b>Total</b>  |   | <b>10</b> | <b>12</b> | <b>9</b> | <b>8</b> | <b>6</b> | <b>45</b> |







Photo: Description here. Credit: World Animal Protection

## The Pecking Order 2022: Key findings

### 1. Tier Ranking – companies are making commitments to broiler chicken welfare but fall behind in performance reporting

The assessments found that no company received an overall Tier 1 status. With an overall Tier 2 status, KFC Germany was the highest scoring assessment showing good progress in managing the welfare of chickens in their supply chains. KFC Germany's assessment showed it as one of the leading companies in terms of Commitments & Targets whilst also being 1 of only 3 assessments to receive a Tier 4 Performance Reporting ranking. KFC France, IKEA Germany, IKEA Italy, and IKEA Spain all placed in Tier 3 overall, indicating that these companies are making progress in their approach to broiler chicken welfare. The Tier 4 companies (22%) indicate a reasonable proportion of assessed companies are beginning their journey to better manage broiler chicken welfare. However, the majority of assessments fell into Tiers 5 (9%) and 6 (58%). This indicates that the assessed fast-food and food service companies are mostly performing very poorly in their approaches to broiler chicken welfare in the supply chain.



**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   |
|----------------------------------|---|---|--|
| <b>Tier 1</b><br>Leading         |   | Accor Spain, Domino's France, Domino's Germany, Holder Group France, IKEA Germany, IKEA Italy, IKEA Spain, KFC France, KFC Germany, L'Osteria Germany, Pizza Hut France, Pizza Hut Germany, Pizza Hut Spain, Subway France, Subway Germany, Subway Italy, Subway Spain<br><b>(17)</b>   |  |
| <b>Tier 2</b><br>Good            | KFC Germany<br><b>(1)</b>   |   |  |
| <b>Tier 3</b><br>Making progress | IKEA Germany, IKEA Italy, IKEA Spain, KFC France<br><b>(4)</b>  |   |  |
| <b>Tier 4</b><br>Getting started | Accor Spain, Domino's Germany, Domino's France, Holder Group France, L'Osteria Germany, Pizza Hut Germany, Pizza Hut Spain, Subway Germany, Subway Italy, Subway Spain<br><b>(10)</b>   |   | KFC Germany, KFC Italy, KFC Spain<br><b>(3)</b>  |
| <b>Tier 5</b><br>Poor            | KFC Italy, KFC Spain, Pizza Hut France, Subway France<br><b>(4)</b>   | Burger King France, KFC Italy, KFC Spain<br><b>(3)</b>  | KFC France, IKEA Germany, IKEA Spain, IKEA Italy<br><b>(4)</b>   |
| <b>Tier 6</b><br>Very poor       | Autogrill France, Buffalo Grill France, Burger King Croatia, Burger King France, Burger King Germany, Burger King Italy, Burger King Spain, Domino's Croatia, Domino's Italy, Domino's Spain, Dussman Italy, KFC Croatia, Koykan Croatia, McDonalds France, McDonalds Croatia, McDonalds Spain, McDonald's Germany, McDonald's Italy, O'Tacos France, Quick France, Starbucks France, Starbucks Germany, Starbucks Italy, Starbucks Spain, Surf'n Fries Croatia, Vapiano Germany<br><b>(26)</b> | Autogrill France, Buffalo Grill France, Burger King Croatia, Burger King Germany, Burger King Italy, Burger King Spain, Domino's Croatia, Domino's Italy, Domino's Spain, Dussman Italy, KFC Croatia, Koykan Croatia, McDonalds Croatia, McDonalds France, McDonalds Germany, McDonalds Italy, McDonalds Spain, O'Tacos France, Quick France, Starbucks France, Starbucks Germany, Starbucks Italy, Starbucks Spain, Surf'n Fries Croatia, Vapiano Germany<br><b>(25)</b> | Accor Spain, Autogrill France, Buffalo Grill France, Burger King Croatia, Burger King France, Burger King Germany, Burger King Italy, Burger King Spain, Domino's Croatia, Domino's France, Domino's Germany, Domino's Italy, Domino's Spain, Dussman Italy, Holder Group France, KFC Croatia, Koykan Croatia, L'Osteria Germany, McDonalds Croatia, McDonalds France, McDonalds Germany, McDonalds Italy, McDonalds Spain, O'Tacos France, Pizza Hut France, Pizza Hut Germany, Pizza Hut Spain, Quick France, Starbucks France, Starbucks Germany, Starbucks Italy, Starbucks Spain, Subway France, Subway Germany, Subway Italy, Subway Spain, Surf'n Fries Croatia, Vapiano Germany<br><b>(38)</b> |



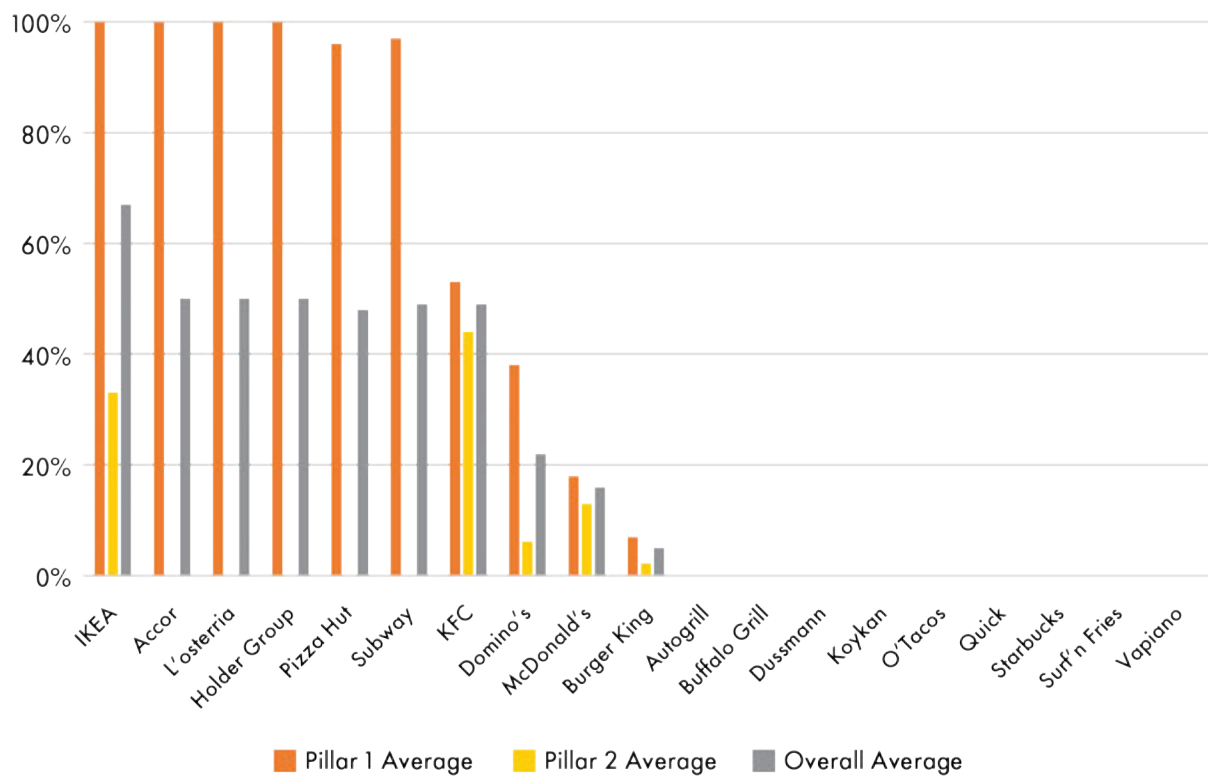


Looking only at the Commitments & Targets Pillar, all 17 companies (38%) in Tier 1 are aligned with the European Chicken Commitment (ECC). Notably, IKEA (Germany, Spain, and Italy), Subway (Germany, Spain, Italy, and France) and Pizza Hut (Germany, France, and Spain) have made an ECC commitment in all markets they were assessed in. Accor, Holder Group, and L'Osteria assessed in single markets have also made ECC commitments. However, 25 companies (56%) in Tier 6 and have not made broiler welfare commitments.

Looking at the Performance Reporting Pillar, companies are generally performing poorly with no assessments graded in the top three tiers. Eighty-four (84%) companies fall in Tier 6 showing little or no performance reporting on broiler chicken commitments. Three assessments (KFC Germany, KFC Italy, and KFC Spain) have Tier 4 status, indicating that these companies are getting started on reporting specific ECC 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 ECC 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 ECC deadline.

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

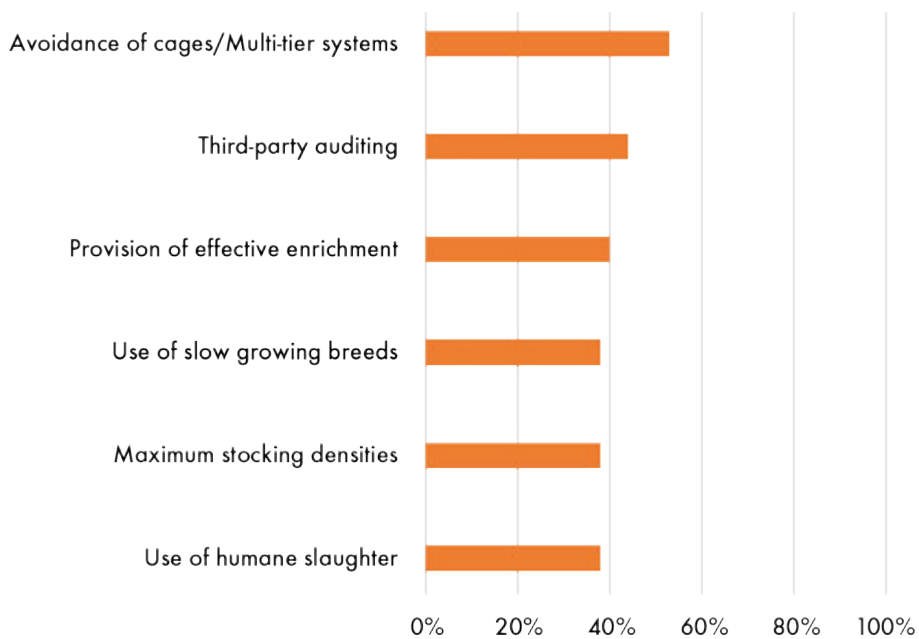


## 2. Commitments & targets – companies most commonly have a commitment to avoid cages and multi-tier systems

The first question in the Commitments & Targets Pillar assesses whether a company has any form of broiler welfare policy, the research found that 25 companies (56%) had published a broiler chicken welfare policy.

The most common specific commitment was that 53% of companies have published a commitment to avoid the use of cages/multi-tier systems. The next most commonly published commitment was for third-party auditing (44%), while 40% of assessments found a commitment on the provision of effective enrichment. The remaining commitments on the use of slower growing breeds, maximum stocking densities and the use of humane slaughter were only found in 38% of assessments.

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

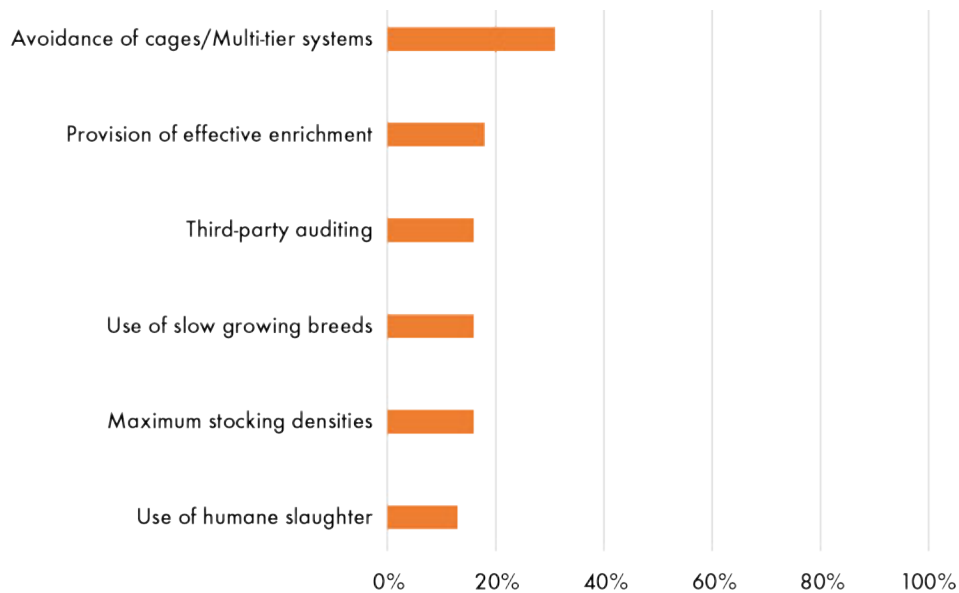


### 3. Performance Reporting – low levels of performance reporting amongst all specific broiler welfare commitments

As discussed above disclosure in the Performance Reporting Pillar is poor. The assessments found performance reporting (31% of assessments) against the avoidance of cages/multi-tier systems commitment, this is likely due to the higher number of companies having the commitment and its characteristic as a more established broiler welfare issue.

Low levels of reporting are shown on the other commitments of; effective enrichment provision (18%), third-party auditing, the use of slower growing breeds and maximum stocking densities all at 16%, and the use of humane slaughter the least reported commitment at 13%.

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

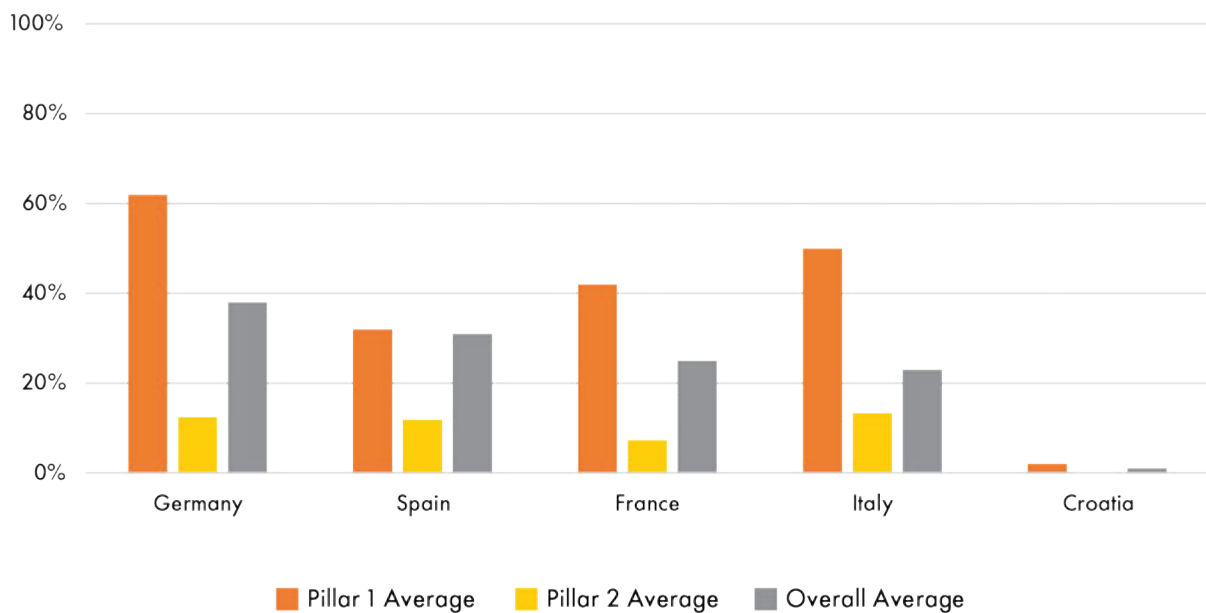


## 4. Broiler chicken welfare appears to be better managed in certain markets

Viewing the assessments by country Germany appears to be the best performing country with an average overall score of 38%, breaking down into 62% for Commitments & Targets and 12% for Performance Reporting. Spain has the second highest average overall score at 31%, followed by France 25%, Italy 23%, and Croatia 1% (see figure 4)<sup>3</sup>.

Croatia as a market is a noticeable laggard to the others with the lowest average scores across both pillars and overall.

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



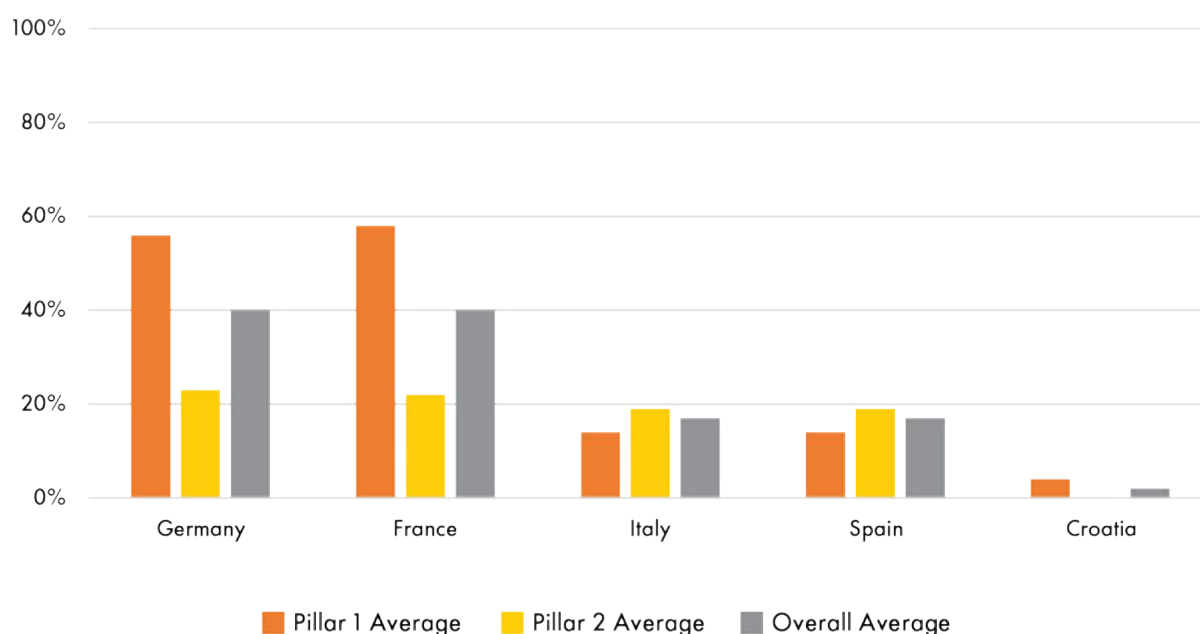
3. It should be noted that France is assessed on additional questions on the use of winter gardens (Q1.8 and 2.7) in each pillar. KFC France was the only company that scored on question 1.8 and no company scored on question 2.7. Due to this additional question (where scoring was limited) France's average scores are depressed compared to other markets.





There are limitations to analysing and comparing country 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 McDonalds). Figure 5 shows that in this case Germany and France with average overall scores of 40% are clear leaders. In Italy and Spain, the average overall score was 17%, whilst Croatia 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 McDonalds)





## The Pecking Order 2022: Croatia

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2022, it has evolved into a localized approach, evaluating those companies' implementation progress in their chicken welfare commitments within individual markets.

The criteria for TPO are based on the *European Chicken Commitment* (ECC) (<https://welfarecommitments.com/letters/europe/>), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2022 conducted 45 assessments covering the markets of Germany, France, Spain, Italy, and **Croatia**. The following 6 companies have been assessed in the Croatian market:



In general, TPO’s company evaluation is organized under two pillars:



**Pillar 1: Commitments & targets**

This score reflects whether a company has any form of broiler welfare policy as well as the scope and completeness of a company’s time-bound commitment to the ECC criteria. Assessments were made on whether the company has published a commitment to: avoid cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.



**Pillar 2: Performance reporting**

This score reflects the extent to which a company has implemented its commitments in relation to the ECC criteria. Assessments were made on the company's performance on specific broiler welfare commitments: avoidance of cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.

These two pillars combine, with equal weighting, for an overall percentage score, which is translated into overall tiers and grades.

| Tier | Grade           | TPO 2021 percentage bands | TPO 2022 percentage bands |
|------|-----------------|---------------------------|---------------------------|
| 6    | Very poor       | 0-12                      | 0-25                      |
| 5    | Poor            | 13-26                     | 26-49                     |
| 4    | Getting started | 27-42                     | 50-59                     |
| 3    | Making progress | 43-71                     | 60-75                     |
| 2    | Good            | 72-88                     | 76-85                     |
| 1    | Leading         | 89-100                    | 86-100                    |



## Key findings: Croatia







- **Broiler chicken welfare appears to be better managed in certain markets**

To improve comparability, it was possible to isolate the companies that were assessed across all markets (Burger King, KFC, and McDonalds). In this case, Germany and France with average overall scores of 40% are clear leaders. **In Croatia, the average overall score was 0% (with an exception of KFC 7%).**

- Most performance reporting was about not using cages/multi-tier, which is something no company does normally. Therefore, **low levels of performance reporting are shown on the extent to which a company has implemented its commitments in relation to the ECC criteria.**

- **Overall tiers and grades for the assessed companies operating in Croatia**

All of the six assessed companies in Croatia are performing very poorly in their approaches to broiler chicken welfare within their supply chains.

| Company   | Overall score % | Overall score tier | Overall score grade | Commitments & targets % | Commitments & targets tier | Commitments & targets grade | Performance reporting % | Performance reporting tier | Performance reporting grade |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 7%              | 6                  | Very poor           | 14%                     | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |





## Tier 6 - "Very poor"

- **Burger King Croatia overall score % is 0%** (0% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).
- **Domino's Croatia overall score % is 0%** (0% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).
- **KFC Croatia overall score % is 7%** (14% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).
- **Mcdonald's Croatia overall score % is 0%** (0% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).
- **Koykan overall score % is 0%** (0% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).
- **Surf'n Fries overall score % is 0%** (0% in the Commitments & Targets pillar and 0% in the Performance Reporting pillar).

As presented with the data above, KFC is the only company in Croatia showing some, very minimal results. As a comparison, KFC Germany is the leading company in Europe in broiler chicken welfare, with an overall percentage score of 79% (tier 2, grade "Good Progress" by being in Tier 1 in the Commitments & Targets pillar while also being 1 of only 3 companies in Tier 4 in the Performance Reporting pillar with a 57% implementation of its commitment).

## Recommendations: Croatia

1. Adopt the European Chicken Commitment (ECC) and publish it on your website with a link<sup>4</sup> to the policy. In order to meet the 2026 deadline, the assessed companies need to vigorously expedite both their implementation of the European Chicken Commitment's criteria and their respective reporting.
2. Once the public announcement has been made, World Animal Protection, as a leading international animal welfare organization, would be pleased to congratulate you on your commitment.

*This summary was prepared by World Animal Protection and not a partner organization. Unfortunately, our former partner on this project, Animals Without Borders Croatia, had to step down due to capacity limitations and other priority work.*

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4. <https://welfarecommitments.com/letters/europe/>





## The Pecking Order 2022: Hrvatska

Izveštaj *The Pecking Order* (TPO) bavi se procjenjivanjem čuvenih brandova brze hrane i uslužnih tvrtki za brzu hranu glede dobrobiti pilića brojlera u lancima dostave od 2019. Ona je 2022. evoluirala u lokalizirani pristup te vrši procjenu napretka u provedbi od strane tvrtki kad su u pitanju obveze glede dobrobiti pilića na pojedinačnim tržištima.

Kriteriji za TPO utemeljeni su na *Europskoj obvezi glede pilića* (*European Chicken Commitment - ECC*) (<https://welfarecommitments.com/letters/europe/>), razvijenoj sukladno s najnovijom znanosti po pitanju dobrobiti, a u cilju rješavanja najurgentnije problematike vezane za dobrobit pilića brojlera.

TPO Europa 2022. izvršio je 45 procjena koje obuhvaćaju tržišta Njemačke, Francuske, Španjolske, Italije i **Hrvatske**. Na hrvatskom tržištu rađena je procjena sljedećih 6 tvrtki:



Općenito, procjenjivanje tvrtki od strane TPO organizirano je u okviru dva stupa:



### 1: Obveze i ciljevi

Ova ocjena odražava ima li tvrtka ikakav oblik politike za dobrobit brojlera, kao i opseg i potpunost vremenski vezane obveze tvrtke prema kriterijima ECC-a. Procjene su vršene na tome je li tvrtka objavila obvezu da će: izbjegavati kaveze/višeredne sustave, imati reviziju trećih strana, učinkovito obogaćivanje, uporabu sporouzgojnih vrsta, maksimalnu gustoću držanja, humano klanje.



### 2: Izvješćivanje o izvedbi

Ova ocjena odražava omjer do kog je tvrtka provela svoje obveze u odnosu na kriterije ECC-a. Procjene su vršene na izvedbi tvrtke glede specifičnih obveza po pitanju dobrobiti brojlera: izbjegavanje kaveza/višerednih sustava, revizija trećih strana, učinkovito obogaćivanje, uporaba sporouzgojnih vrsta, maksimalna gustoća držanja, humano klanje.

Ova dva stupa objedinjuju se, sa jednakim ponderom, kako bi se dobila sveukupna postotna ocjena, koja se prevodi u sveukupne stupnjeve i razrede.

| Stupanj | Razred  | Postotni rasponi TPO 2021 | Postotni rasponi TPO 2022 |
|---------|---|---------------------------|---------------------------|
| 6       |  Vrlo loše         | 0-12                      | 0-25                      |
| 5       |  Loše              | 13-26                     | 26-49                     |
| 4       |  Počinje se        | 27-42                     | 50-59                     |
| 3       |  Pravi se napredak | 43-71                     | 60-75                     |
| 2       |  Dobro             | 72-88                     | 76-85                     |
| 1       |  Vodeći            | 89-100                    | 86-100                    |



## Ključni nalazi: Hrvatska







- Dobrobiti glede pilića brojlera izgleda da se bolje upravlja na nekim tržištima**

Kako bi se unaprijedila usporedivost, bilo je moguće izolirati tvrtke koje su procjenjivane diljem svih tržišta (Burger King, KFC i McDonalds). U ovom slučaju, Njemačka i Francuska sa prosječnim sveukupnim ocjenama od 40% su jasno vodeće zemlje. **U Hrvatskoj, prosječna sveukupna ocjena bila je 0% (uz iznimku KFC-a 7%).**

- Najviše izvješćivanja o izvedbi bilo je vezano za nekorištenje kaveza/višerednog držanja, što nijedna tvrtka obično ne radi. Stoga, **niske razine izvješćivanja o izvedbi prikazane su glede omjera do kog je tvrtka provela svoje obveze u odnosu na kriterije ECC-a.**

- Sveukupni stupnjevi i razredi za procjenjivane tvrtke koje posluju u Hrvatskoj**

Svih šest tvrtki koje su procjenjivane u Hrvatskoj imaju vrlo lošu izvedbu u svom pristupu dobrobiti pilića brojlera u svojim dostavnim lancima.

| Tvrtka  | Sveukupna ocjena % | Stupanj sveukupne ocjene | Razred sveukupne ocjene | Obveze i ciljevi % | Stupanj obveza i ciljeva | Razred obveza i ciljeva | Izvjешćivanje o izvedbi % | Stupanj izvješćivanja o izvedbi | Razred izvješćivanja o izvedbi |
|---|--------------------|--------------------------|-------------------------|--------------------|--------------------------|-------------------------|---------------------------|---------------------------------|--------------------------------|
|  | 0%                 | 6                        | Very poor               | 0%                 | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |
|  | 0%                 | 6                        | Very poor               | 0%                 | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |
|  | 7%                 | 6                        | Very poor               | 14%                | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |
|  | 0%                 | 6                        | Very poor               | 0%                 | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |
|  | 0%                 | 6                        | Very poor               | 0%                 | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |
|  | 0%                 | 6                        | Very poor               | 0%                 | 6                        | Very poor               | 0%                        | 6                               | Very poor                      |





## Stupanj 6 - "Vrlo loše"

- Sveukupna ocjena % tvrtke Burger King Hrvatska je 0% (0% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).
- Sveukupna ocjena % tvrtke Domino's Hrvatska je 0% (0% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).
- Sveukupna ocjena % tvrtke KFC Hrvatska je 7% (14% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).
- Sveukupna ocjena % tvrtke Mcdonald's Hrvatska je 0% (0% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).
- Sveukupna ocjena % tvrtke Koykan je 0% (0% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).
- Sveukupna ocjena % tvrtke Surf'n Fries je 0% (0% u stupu Obveze i ciljevi te 0% u stupu Izvješćivanje o izvedbi).

Kako je predstavljeno u gornjim podacima, KFC je jedina tvrtka u Hrvatskoj koja pokazuje neke, vrlo minimalne rezultate. U usporedbi, KFC Njemačka je vodeća tvrtka u Europi glede dobrobiti pilića brojlera, sa sveukupnom postotnom ocjenom od 79% (stupanj 2, ocjena „Dobar napredak“ te spadanjem u Stupanj 1 u stupu Obveze i ciljevi, dok je također 1 od samo 3 tvrtke u Stupnju 4 u okviru stupa Izvješćivanje o izvedbi, sa 57% sprovedbe svojih obveza).

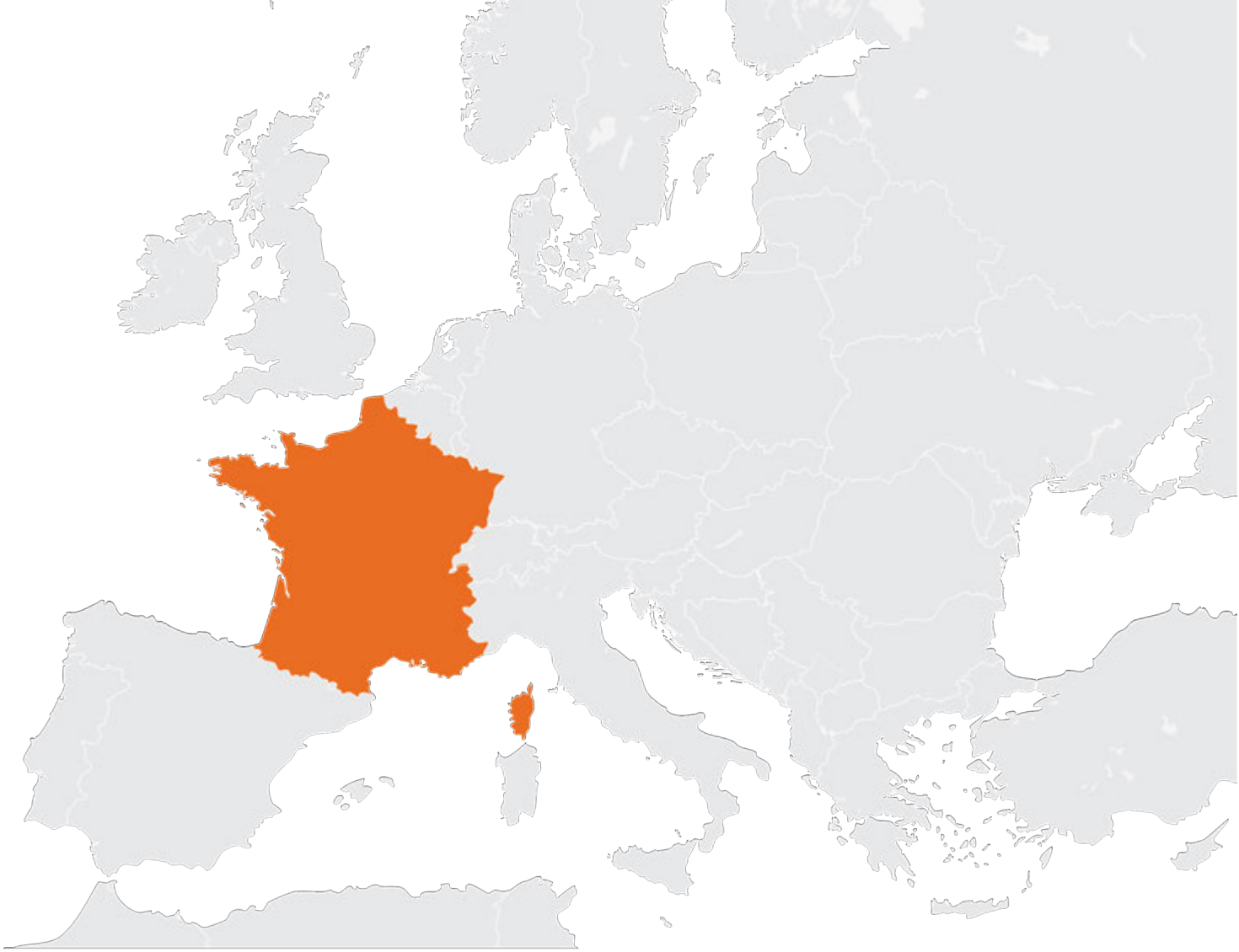
## Preporuke: Hrvatska

1. Usvojiti Europske obveze glede pilića (ECC) i objaviti ih na svom mrežnom mjestu sa poveznicom<sup>5</sup> ka politici. Kako bi se ispunio rok do 2026. godine, tvrtke koje su procjenjivane moraju užurbano ubrzati i svoju provedbu kriterija iz Europskih obveza glede pilića i svoje odnose izvješćivanje.
2. Kad se načini javna objava, World Animal Protection, kao vodeća međunarodna organizacija za dobrobit životinja, imat će čast da vam čestita na vašem opredjeljenju.

Ovaj sažetak pripremila je organizacija World Animal Protection, a ne partnerska organizacija. Nažalost, naš bivši partner u ovom projektu, Animals Without Borders Hrvatska, morao je odustati zbog ograničenih kapaciteta i drugih prioritetnih poslova.

5. <https://welfarecommitments.com/letters/europe/>





## The Pecking Order 2022: France

TPO Europe 2022 conducted 45 assessments covering the markets of Germany, **France**, Spain, Italy, and Croatia. The following 12 companies have been assessed in the French market:



## Key findings: France

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### Commitment to phase out the worst practices in chicken farming and slaughter: some promising policies...

Like all French retailers, several restaurant chains have understood the urgent need to exclude the worst chicken farming and slaughtering practices from their supply chains. For example, in France, Domino's, Holder Group, KFC, Pizza Hut and Subway have committed to meet all the criteria of the European Chicken Commitment (ECC) by 2026.

Holder Group (Paul's bakeries) stands out from the other chains by guaranteeing, in addition, that at least 20% of its chicken meat purchased in France will come from farms that give the animals access to outdoor.

L214 is asking all restaurant chains to include this free-range part in their commitment, in addition to meet the ECC criteria. Doing so enables them to consider citizens' expectations (93% of French people are against keeping chickens in buildings for life), to take into account the situation of chicken farms in France (almost 18% of chickens are already raised in free-range systems), and of course, to guarantee that a certain number of animals will have access to an environment that better meets their behavioural needs.

### ...but opacity on progress

However, the companies surveyed have at worst published no information, and at best incomplete information, about any progress they have made. All the ECC criteria must be fulfilled by 2026, a necessary duration to change practices but not always understood by citizens. The progressive implementation of the criteria is crucial to ensure that the commitments made are reached, and it is obvious that detailed reporting is essential to reassure consumers about the progress made by companies. Furthermore, L214 reminds companies that have committed to meeting the ECC criteria that they are obliged, by these criteria, to publish an annual progress report. L214 therefore invites them to honour their commitments by publishing as soon as possible and in a precise manner the progress made since the publication of their policy.



## Inertia and "smoke and mirrors" strategy

The other requested companies, namely Autogrill, Buffalo Grill, Burger King, McDonald's, O'Tacos, Quick and Starbucks, have either not published any policy to raise the standards of chicken farming and slaughter, or have pretended to consider these issues by communicating derisory policies.

We denounce this "smoke and mirrors" strategy, particularly adopted by Burger King. Burger King is promoting the "Nature d'éleveurs" approach, which is rather permissive as it allows the use of fast-growing breeds and stocking densities that lead to health and welfare problems for broilers. Communicating such half-measures gives an illusion of action to consumers: such communications are misleading and irresponsible.

We strongly urge all these companies to make real changes by publicly committing to meet all the ECC criteria by 2026 at the latest. No initiatives that fall below the ECC requirements can be considered sufficient for broilers according to scientific expertise. For example, in its report of 21st March 2000<sup>6</sup>, the EU Scientific Committee on Animal Health and Animal Welfare recommended a maximum density of 25 kg/m<sup>2</sup> and indicated that a density higher than 30 kg/m<sup>2</sup> (the maximum density tolerated by the ECC) would cause serious animal welfare problems (see paragraph 7.5.6 on pages 66-67 of the report).

Furthermore, in 2022, a study by the *Welfare Footprint Project*<sup>7</sup> shows that the selection of slower-growing breeds would reduce the time spent by chickens in disabling pain by 66% and the time spent in excruciating pain by 78%, compared to standard factory farms. With regard to slaughter, the same study indicates that replacing electrical waterbath stunning with controlled atmosphere killing using CO<sub>2</sub> would drastically reduce "severe" forms of pain and almost eliminate the possibility of any individual animal abuse in slaughterhouses.

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6. <https://welfarecommitments.com/letters/europe/>

7. <https://welfarefootprint.org/research-projects/>

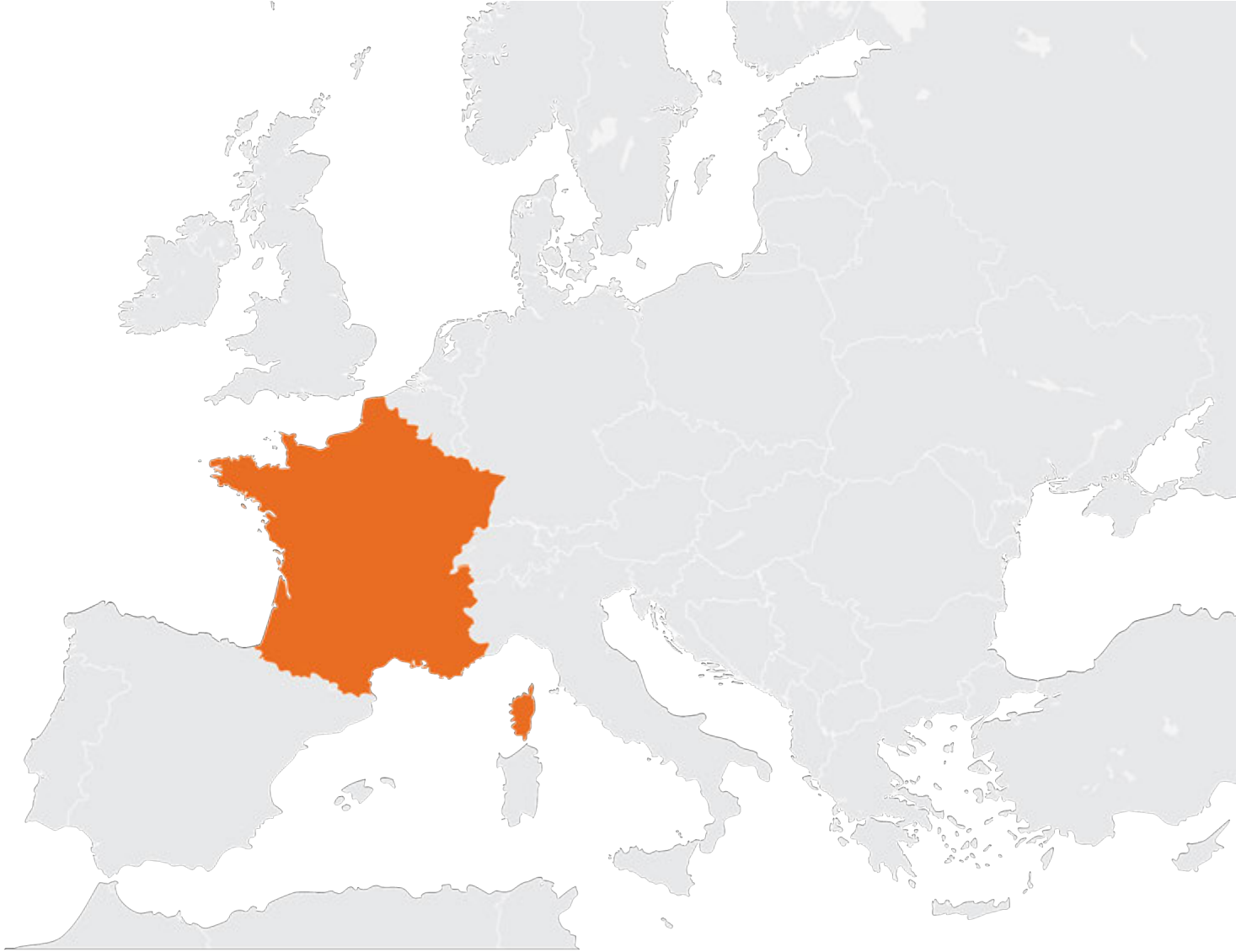




## Scoring overview: France

| Company   | Overall score % | Overall score tier | Overall score grade | Commitments & targets % | Commitments & targets tier | Commitments & targets grade | Performance reporting % | Performance reporting tier | Performance reporting grade |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|    | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|    | 0%              | 6                  | Very poor           | 0%                      | 6                          | 0%                          | 0%                      | 6                          | Very poor                   |
|    | 23%             | 6                  | Very poor           | 35%                     | 5                          | Poor                        | 11%                     | 6                          | Very poor                   |
|    | 52%             | 4                  | Getting started     | 88%                     | 1                          | Leading                     | 14%                     | 6                          | Very poor                   |
|  | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  | 69%             | 3                  | Making progress     | 88%                     | 1                          | Leading                     | 49%                     | 5                          | Poor                        |
|  | 17%             | 6                  | Very poor           | 20%                     | 6                          | Very poor                   | 14%                     | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 44%             | 5                  | Poor                | 88%                     | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 44%             | 5                  | Poor                | 88%                     | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |





## The Pecking Order 2022: France

TPO Europe 2022 a réalisé 45 évaluations couvrant les marchés de l'Allemagne, de la **France**, de l'Espagne, de l'Italie et de la Croatie. Les 12 entreprises suivantes ont été évaluées sur le marché français :



## Key findings: France

### Engagement contre les pires pratiques d'élevage et d'abattage des poulets : des prises de conscience encourageantes...

A l'instar de l'ensemble des chaînes de supermarchés, plusieurs chaînes de restauration ont pris conscience de l'urgence qu'il y a à exclure les pires pratiques d'élevage et d'abattage des poulets de leurs chaînes d'approvisionnement. Ainsi, en France, Domino's, le groupe Holder, KFC, Pizza Hut et Subway se sont engagés à respecter l'ensemble des critères du European Chicken Commitment (ECC) d'ici 2026.

Le groupe Holder (boulangeries Paul) se démarque des autres chaînes en garantissant, de façon additionnelle, que 20 % au moins de ses volumes de viande de poulets achetés en France proviendront d'élevages donnant accès à l'extérieur aux animaux.

L214 demande à l'ensemble des entreprises de restauration d'inclure cette part de plein air dans leur engagement, en plus du respect des critères de l'ECC, afin de mieux répondre aux attentes des citoyens (93 % des Français sont contre l'enfermement à vie des poulets en bâtiment), de prendre en compte la spécificité de la production de poulets en France (près de 18 % de la production est déjà plein air), et bien sûr, de garantir qu'un certain nombre d'animaux auront accès à un environnement répondant davantage à leurs besoins comportementaux.

### ...mais une opacité sur les progrès réalisés

Toutefois, les entreprises interrogées n'ont, au pire, publié aucune information, et au mieux publié que des informations incomplètes, au sujet des progrès éventuellement réalisés.

L'ECC porte sur un échéance 2026, un temps certes nécessaire pour faire évoluer les pratiques, mais parfois difficile à comprendre pour les citoyens. La mise en place progressive des critères est cruciale pour permettre le respect des engagements pris, et il est évident qu'un reporting précis est indispensable pour rassurer les consommateurs sur les avancées des entreprises.

Par ailleurs, L214 rappelle aux entreprises qui se sont engagées à respecter les critères de l'ECC qu'elles sont tenues, par ces critères-mêmes, de publier un reporting annuel d'avancement. L214 les invite donc à honorer leurs engagements en publiant au plus vite et de façon précise les progrès réalisés depuis la publication de leur politique.



## Inaction et poudre aux yeux

Le reste des entreprises sondées, à savoir Autogrill, Buffalo Grill, Burger King, McDonald's, O'Tacos, Quick et Starbucks n'ont publié aucune politique visant à relever les standards d'élevage et d'abattage des poulets, ou ont feint la prise en compte de ces problématiques en communiquant sur des démarches dérisoires.

Nous dénonçons cette stratégie de "poudre aux yeux" opérée notamment par Burger King. L'enseigne fait la promotion de *Nature d'éleveurs*, une démarche peu exigeante autorisant l'utilisation de races de poulets à croissance rapide ainsi que des densités de peuplement conduisant à des problèmes de santé et de bien-être pour les poulets. Communiquer sur ce type de demi-mesures donne une illusion d'action aux consommateurs : ces communications sont trompeuses et irresponsables.

Nous demandons fermement à l'ensemble de ces entreprises d'opérer de réels changements en s'engageant publiquement, et au plus vite, à respecter l'ensemble des critères de l'ECC d'ici 2026 au plus tard. Toutes les initiatives dont les exigences sont inférieures à celles de l'ECC ne peuvent être considérées comme suffisantes pour les poulets au regard de l'expertise scientifique. À titre d'exemple, dans son rapport du 21 mars 2000<sup>9</sup>, le comité scientifique de l'Union Européenne (*Scientific Committee on Animal Health and Animal Welfare*) préconise une densité maximale de 25 kg/m<sup>2</sup> et indique qu'une densité supérieure à 30kg/m<sup>2</sup> (densité maximale tolérée par l'ECC) engendre des problèmes graves de bien-être animal (voir paragraphe 7.5.6 aux pages 66-67 du rapport).

Par ailleurs, en 2022, une étude du *Welfare Footprint Project*<sup>10</sup> démontre que l'adoption de races à croissance plus lente permettrait de réduire de 66 % le temps passé par les poulets à ressentir des douleurs continues invalidantes et de 78 % le temps passé en douleur intense insupportable, en comparaison à ce qui est observé dans les élevages intensifs standards. Concernant l'abattage, la même étude indique que le remplacement de l'électronarcose par la mise à mort par atmosphère contrôlée utilisant du CO2 permettrait de réduire drastiquement les formes de douleur "d'intensité aiguë" et d'éliminer pratiquement toute possibilité de maltraitance individuelle des animaux à l'abattoir.













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8. <https://welfarecommitments.com/letters/europe/>

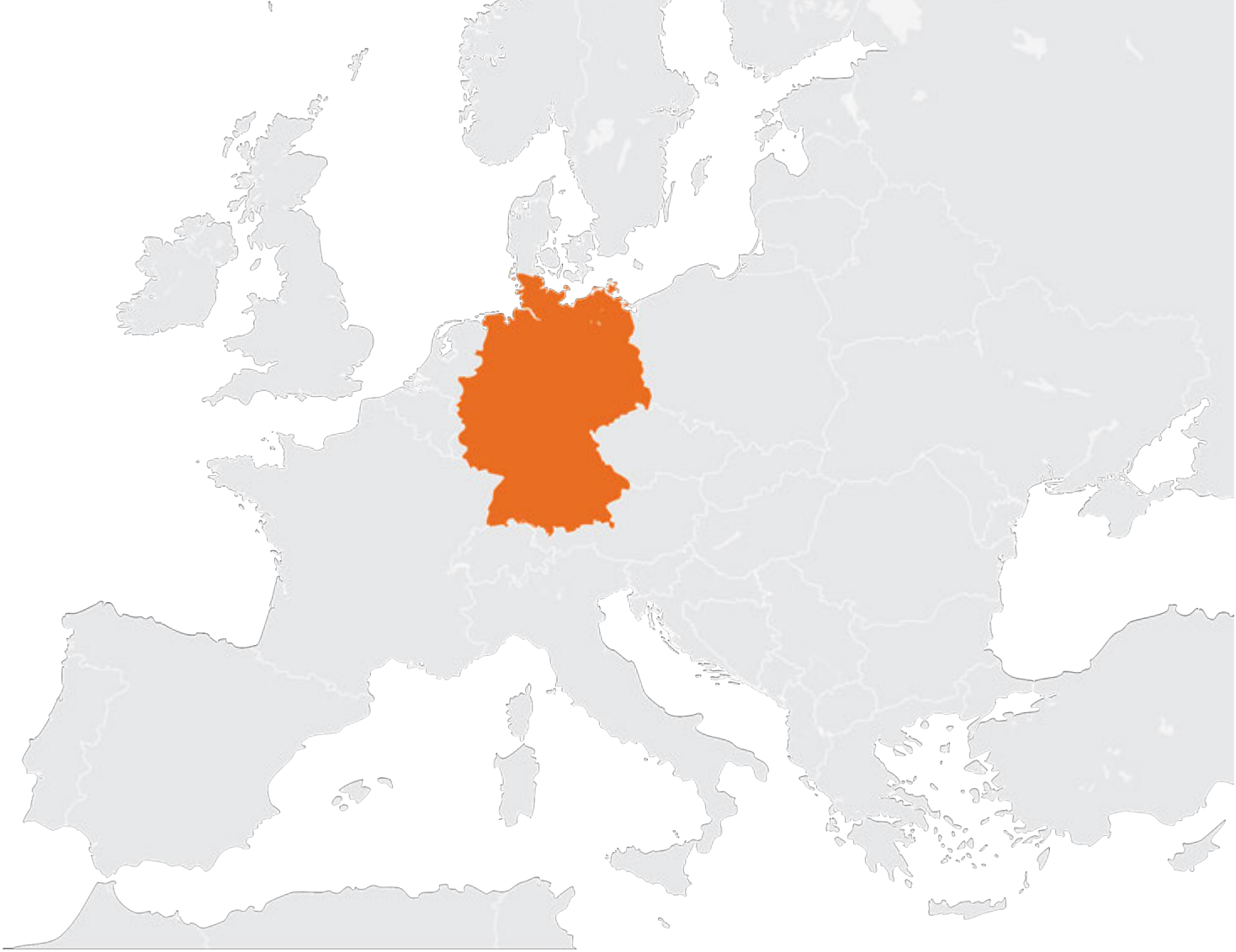
9. <https://welfarefootprint.org/research-projects/>



## Aperçu de la notation: France

| Entreprise  | Score global % | Niveau de score global | Note globale   | Engagements et objectifs % | Niveau des engagements et des objectifs | Grade des engagements et des objectifs | Rapport sur les performances % | Niveau de rapport de performance | Grade du rapport de performance |
|---|----------------|------------------------|----------------|----------------------------|---|--|--------------------------------|----------------------------------|---------------------------------|
|    | 0%             | 6                      | Très faible    | 0%                         | 6                                       | Très faible                            | 0%                             | 6                                | Très faible                     |
|    | 0%             | 6                      | Très faible    | 0%                         | 6                                       | Très faible                            | 0%                             | 6                                | Très faible                     |
|    | 23%            | 6                      | Très faible    | 35%                        | 5                                       | Faible                                 | 11%                            | 6                                | Très faible                     |
|    | 52%            | 4                      | Pour commencer | 88%                        | 1                                       | Leading                                | 14%                            | 6                                | Très faible                     |
|   | 50%            | 4                      | Pour commencer | 100%                       | 1                                       | Leading                                | 0%                             | 6                                | Très faible                     |
|  | 69%            | 3                      | Des progrès    | 88%                        | 1                                       | Leading                                | 49%                            | 5                                | Faible                          |
|  | 17%            | 6                      | Très faible    | 20%                        | 6                                       | Très faible                            | 14%                            | 6                                | Très faible                     |
|  | 0%             | 6                      | Très faible    | 0%                         | 6                                       | Très faible                            | 0%                             | 6                                | Très faible                     |
|  | 44%            | 5                      | Faible         | 88%                        | 1                                       | Leading                                | 0%                             | 6                                | Très faible                     |
|  | 0%             | 6                      | Très faible    | 0%                         | 6                                       | Très faible                            | 0%                             | 6                                | Très faible                     |
|  | 0%             | 6                      | Très faible    | 0%                         | 6                                       | Très faible                            | 0%                             | 6                                | Très faible                     |
|  | 44%            | 5                      | Faible         | 88%                        | 1                                       | Leading                                | 0%                             | 6                                | Très faible                     |





## The Pecking Order 2022: Germany

With an average overall result of 38%, **Germany's food service companies score highest in the Pecking Order Report.** The following 10 companies have been assessed in the German market:



## Key findings: Germany

- When it comes to animal welfare, some of the largest food service companies in the German market fall far behind their competitors.
- In order to meet the 2026 deadline, those companies need to vigorously expedite both their implementation of the European Chicken Commitment's criteria and their respective reporting.
- Some companies are leading by example by gradually transforming their supply chains and reporting on it (more or less) transparently.

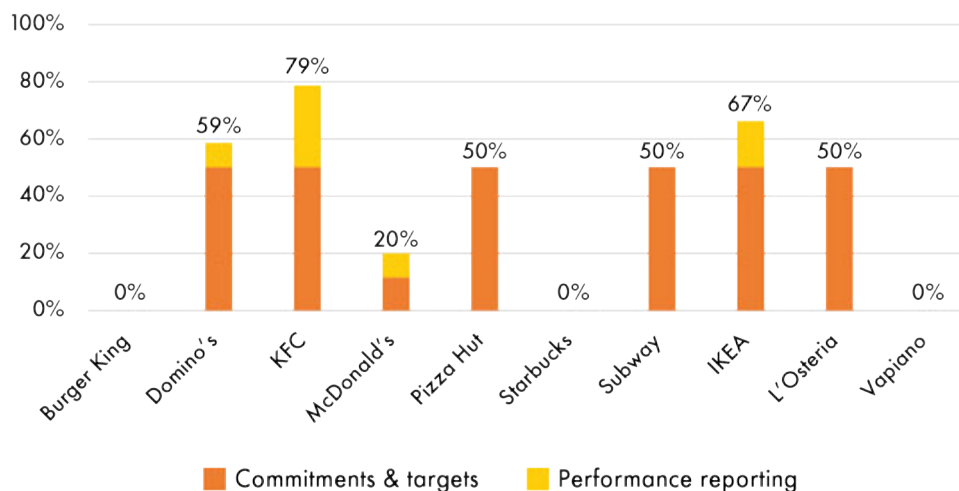
German companies score an average of 62% for the »Commitments & Targets« Pillar, and 12% for the »Performance Reporting« Pillar. With an average overall score of 38%, they achieve the highest values in the Pecking Order Report and are ahead of companies in Spain (overall score: 31%) and France (25%). However, when considering only the companies doing business in more than one country (Burger King, KFC, Domino's, McDonald's), Germany and France are on par.

### Results of the German companies at a glance

In some cases, the results of the German companies differ considerably from each other. Regarding the »Commitments & Targets« Pillar, for example, six companies (Domino's, IKEA, KFC, L'Osteria, Pizza Hut, and Subway) achieve 100%. That means that these companies have committed to implementing all the criteria of the European Chicken Commitment. The other four companies assessed fall far behind by scoring 23% (McDonald's) or even a flat 0% (Burger King, Starbucks, Vapiano).











Regarding the »Performance Reporting« Pillar, only four German companies scored at all, and none of them achieved the full score.

Figure 6: Results for the German market





## Scoring overview: Germany

| Company   | Overall score % | Overall score tier | Overall score grade | Commitments & targets % | Commitments & targets tier | Commitments & targets grade | Performance reporting % | Performance reporting tier | Performance reporting grade |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|    | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|    | 59%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 17%                     | 6                          | Very poor                   |
|    | 67%             | 3                  | Making progress     | 100%                    | 1                          | Leading                     | 33%                     | 5                          | Poor                        |
|    | 79%             | 2                  | Good                | 100%                    | 1                          | Leading                     | 57%                     | 4                          | Getting started             |
|  | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  | 20%             | 6                  | Very poor           | 23%                     | 6                          | Very poor                   | 17%                     | 6                          | Very poor                   |
|  | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |



## Results of the German companies in detail

### KFC

With an overall result of 79%, KFC Germany scores highest in the international ranking and received Tier 2 status (»good«). With a score of 100%, KFC is one of the leading companies internationally regarding the »Commitments & Targets« Pillar. When it comes to »Performance Reporting«, KFC also comes out on top in an international comparison, with a score of 57%.

It should be emphasized that KFC publishes percentage data on its supply chain transformation at EU level—thus providing the most precise data of all companies. However, KFC should improve disclosure of the country-specific data for Germany and the speed of transformation.

### IKEA

IKEA achieves an overall score of 67%, thereby receiving Tier 3 status (»making progress«). While the company has made a full commitment to the Chicken Commitment, its implementation of the criteria has been poor so far. On the positive side, IKEA provides data on supply chain transformation at a global level. Again, there is room for improvement in terms of disclosure of the country-specific data for Germany and the speed of implementation.

### Domino's

With an overall score of 59%, Domino's receives Tier 4 status (»getting started«). The company has committed to fully implementing the criteria of the Chicken Commitment and therefore achieves 100% regarding the »Commitments & Targets« pillar. With 17%, however, implementation is inadequate. Domino's does not provide precise information on its supply chain transformation.

### L'Osteria

With a total of 50%, also L'Osteria only receives Tier 4 status (»getting started«). A value of 100% for »Commitments & Targets« contrasts with 0% for »Implementation«. The company, which only recently joined the European Chicken Commitment, has yet to provide information on the transformation of its supply chains.



## Subway

Like L'Osteria, Subway scores 50% overall, thus also receiving Tier 4 status. The points of criticism are the same: a very poor overall implementation of the Chicken Commitment and no reporting on the transformation of its supply chains.

## Pizza Hut

The third company to score a total of 50% is Pizza Hut: 100% for »Commitments & Targets« but 0% for implementation.

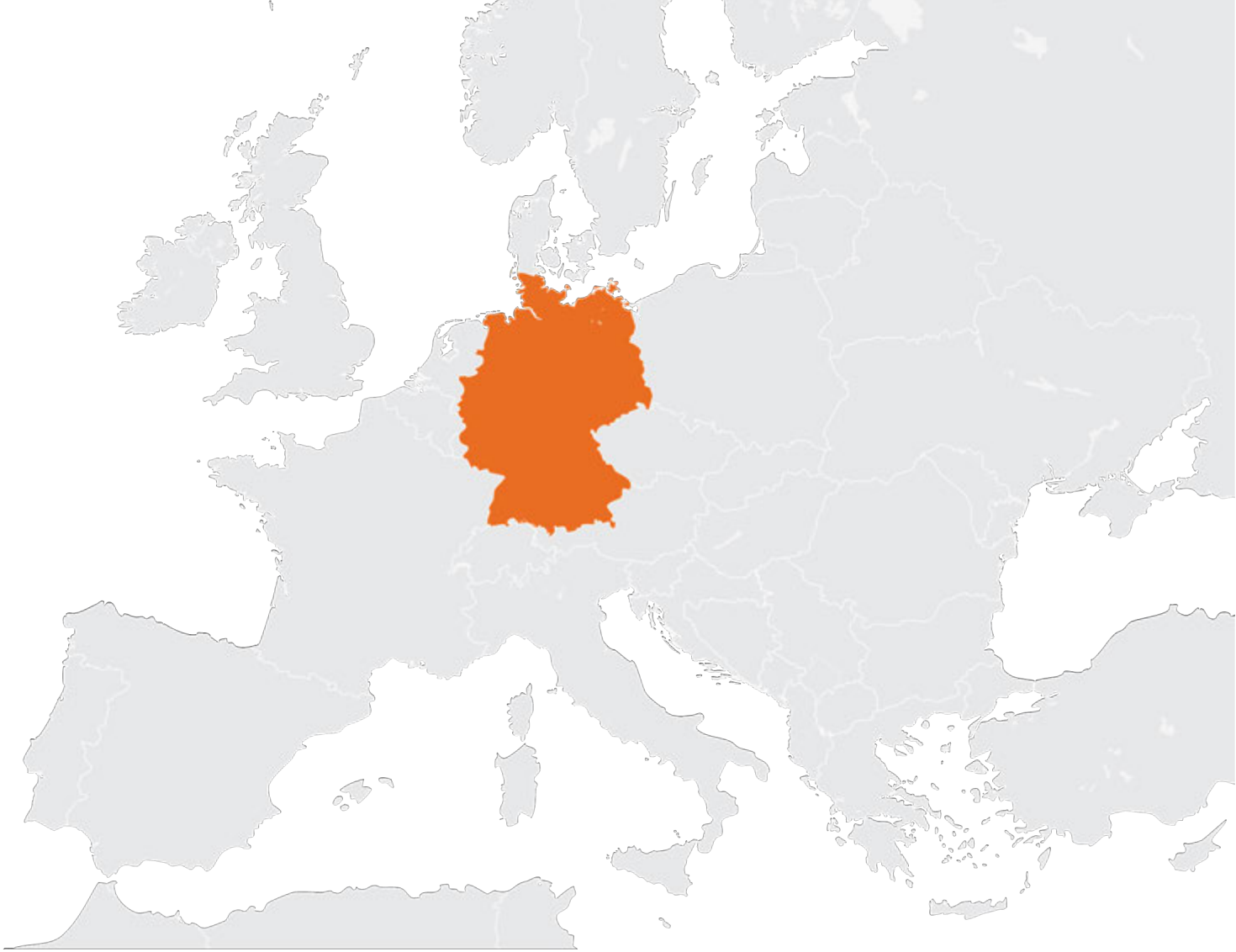
## McDonald's

With an overall score of just 20%, McDonald's receives Tier 6 status (»very poor«). The company has its own broiler chicken commitment, but this meets only some criteria of the European Chicken Commitment—such as cage-free housing. As a result, McDonald's scores just 23% for the »Commitments & Targets« Pillar. For implementation, it scores 17%.

## Burger King, Starbucks, Vapiano.

No pledge to the Chicken Commitment, no implementation: With a total of 0%, Burger King, Starbucks and Vapiano receive the worst status of Tier 6.





## The Pecking Order 2022: Deutschland

Mit einer durchschnittlichen Gesamtbewertung von 38 % **erzielen die deutschen Systemgastronomen die höchsten Werte im Masthuhn-Report**. Die folgenden 10 Unternehmen wurden auf dem deutschen Markt bewertet:



# Key insights: Deutschland

- Einige der größten Unternehmen in der Systemgastronomie fallen beim Tierschutz auf dem deutschen Markt weit hinter die Konkurrenz zurück.
- Die Unternehmen müssen die Umsetzung der Kriterien der Masthuhn-Initiative und das Reporting darüber viel stärker forcieren, um die Deadline 2026 zu schaffen.
- Einige Unternehmen gehen mit gutem Beispiel voran, indem sie ihre Lieferketten schrittweise umstellen und (mehr oder weniger) transparent darüber berichten.

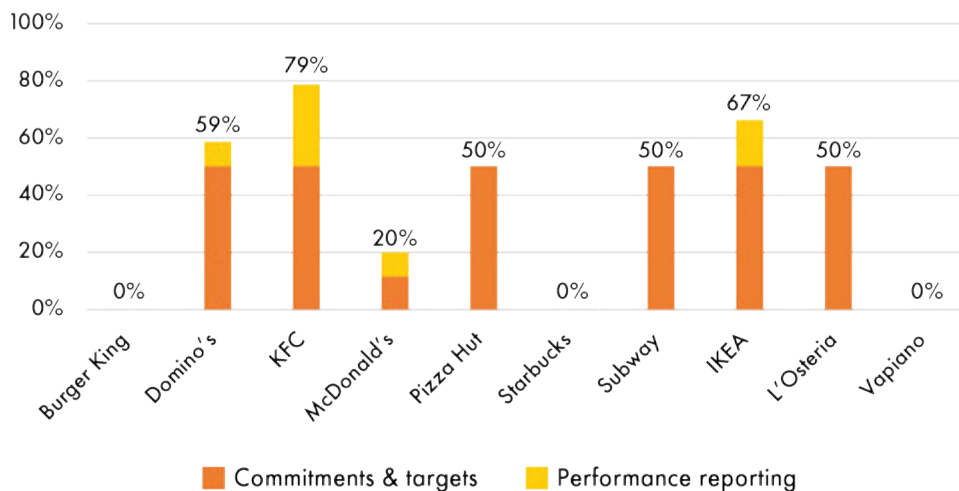
Die deutschen Unternehmen erreichen durchschnittlich 62 % im Bereich "Selbstverpflichtungen und Ziele" und 12 % im Bereich "Umsetzung und Berichterstattung". Mit einer durchschnittlichen Gesamtbewertung von 38 % erzielen sie die höchsten Werte im Masthuhn-Report und liegen vor den Unternehmen in Spanien (Gesamtergebnis: 31 %) und Frankreich (25 %). Betrachtet man allerdings nur die Unternehmen, die in mehreren Ländern aktiv sind (Burger King, KFC, Domino's, McDonald's), sind die Ergebnisse von Deutschland und Frankreich gleichauf.

## Ergebnisse der deutschen Unternehmen im Überblick











Die Ergebnisse der deutschen Unternehmen liegen teilweise sehr weit auseinander. Im Bereich "Selbstverpflichtungen und Ziele" erreichen beispielsweise sechs Unternehmen (Domino's, IKEA, KFC, L'Osteria, Pizza Hut und Subway) 100 %. Diese Unternehmen haben sich also dazu verpflichtet, alle Kriterien der Europäischen Masthuhn-Initiative umzusetzen. Die anderen vier untersuchten Unternehmen liegen weit dahinter mit 23 % (McDonald's) oder sogar glatten 0 % (Burger King, Starbucks, Vapiano).

Im Bereich "Umsetzung und Berichterstattung" punkten überhaupt nur vier deutsche Unternehmen. Keines von ihnen erreicht jedoch die volle Punktzahl.

Figure 7: Ergebnisse für den deutschen Markt



## Ergebnisse im Überblick: Deutschland

| Unternehmen   | Gesamtwertung % | Gesamtwertung Stufe | Gesamtwertung Urteil     | Selbstverpflichtungen & Ziele % | Selbstverpflichtungen & Ziele Stufe | Selbstverpflichtungen & Ziele Urteil | Umsetzung & Berichterstattung % | Umsetzung & Berichterstattung Stufe | Umsetzung & Berichterstattung Urteil |
|---|-----------------|---------------------|--------------------------|---------------------------------|-------------------------------------|--------------------------------------|---------------------------------|-------------------------------------|--------------------------------------|
|    | 0%              | 6                   | Sehr schlecht            | 0%                              | 6                                   | Sehr schlecht                        | 0%                              | 6                                   | Sehr schlecht                        |
|    | 59%             | 4                   | Erste Schritte           | 100%                            | 1                                   | Führend                              | 17%                             | 6                                   | Sehr schlecht                        |
|    | 67%             | 3                   | Sichtbare Verbesserungen | 100%                            | 1                                   | Führend                              | 33%                             | 5                                   | Schlecht                             |
|   | 79%             | 2                   | Gut                      | 100%                            | 1                                   | Führend                              | 57%                             | 4                                   | Erste Schritte                       |
|  | 50%             | 4                   | Erste Schritte           | 100%                            | 1                                   | Führend                              | 0%                              | 6                                   | Sehr schlecht                        |
|  | 20%             | 6                   | Sehr schlecht            | 23%                             | 6                                   | Sehr schlecht                        | 17%                             | 6                                   | Sehr schlecht                        |
|  | 50%             | 4                   | Erste Schritte           | 100%                            | 1                                   | Führend                              | 0%                              | 6                                   | Sehr schlecht                        |
|  | 0%              | 6                   | Sehr schlecht            | 0%                              | 6                                   | Sehr schlecht                        | 0%                              | 6                                   | Sehr schlecht                        |
|  | 50%             | 4                   | Erste Schritte           | 100%                            | 1                                   | Führend                              | 0%                              | 6                                   | Sehr schlecht                        |
|  | 0%              | 6                   | Sehr schlecht            | 0%                              | 6                                   | Sehr schlecht                        | 0%                              | 6                                   | Sehr schlecht                        |



## Ergebnisse der deutschen Unternehmen im Detail

### KFC

Mit einem Gesamtergebnis von 79 % erreicht KFC Deutschland im internationalen Ranking die höchste Punktzahl und landet auf Stufe 2 ("gut"). Im Bereich "Selbstverpflichtungen und Ziele" ist KFC mit 100 % eines der international führenden Unternehmen. Auch bei "Umsetzung und Berichterstattung" hat KFC im internationalen Vergleich mit 57 % die Nase vorn.

Hervorzuheben ist, dass KFC prozentuale Angaben zur Lieferketten-Umstellung auf EU-Ebene veröffentlicht – damit liefert KFC die präzisesten Angaben aller Unternehmen. Verbessern sollte KFC die länderspezifischen Angaben für Deutschland und das Tempo der Umstellung.

### IKEA

IKEA erreicht insgesamt ein Ergebnis von 67 % und landet auf Stufe 3 ("sichtbare Verbesserungen"). Das Unternehmen hat zwar eine vollständige Verpflichtung zur Masthuhn-Initiative, setzt die Kriterien bisher aber nur schlecht um. Positiv ist, dass IKEA Angaben zur Lieferketten-Umstellung auf globaler Ebene liefert. Verbesserungspotenzial gibt es auch hier bei den länderspezifischen Angaben für Deutschland und bei der Schnelligkeit der Umsetzung.

### Domino's

Domino's landet mit insgesamt 59 % auf Stufe 4 ("erste Schritte"). Das Unternehmen hat sich verpflichtet, die Kriterien der Masthuhn-Initiative vollständig umzusetzen und erhält daher 100 % im Bereich "Selbstverpflichtungen und Ziele". Die Umsetzung ist jedoch mangelhaft (17 %). Zur Umstellung der Lieferkette macht Domino's keine präzisen Angaben.

### L'Osteria

Mit insgesamt 50 % erreicht L'Osteria ebenfalls nur Stufe 4 ("Erste Schritte"). Einem Wert von 100 % im Bereich "Selbstverpflichtungen und Ziele" stehen 0 % bei der Umsetzung gegenüber. Das erst kürzlich der Masthuhn-Initiative beigetretene Unternehmen macht bislang keine Angaben zur Umstellung seiner Lieferketten.





## Subway

Subway erreicht wie L'Osteria insgesamt 50 % und landet ebenfalls auf Stufe 4. Die Kritikpunkte sind dieselben: Eine sehr schlechte Umsetzung des vollen Masthuhn-Commitments und kein Reporting zur Lieferketten-Umstellung.

## Pizza Hut

Das dritte Unternehmen, das im Gesamtergebnis 50 % erreicht, ist Pizza Hut: 100 % im Bereich "Verpflichtungen und Ziele", aber 0 % bei der Umsetzung.

## McDonald's

McDonald's landet mit einem Gesamtergebnis von nur 20 % auf Stufe 6 ("sehr schlecht"). Das Unternehmen hat ein eigenes Broiler-Commitment, das aber nur wenige Punkte der Masthuhn-Initiative erfüllt - etwa die käfigfreie Haltung. Daher erreicht McDonald's im Bereich "Verpflichtungen und Ziele" nur 23 %. Für die Umsetzung gibt es 17 %.

## Burger King, Starbucks, Vapiano.

Keine Verpflichtung zur Masthuhn-Initiative, keine Umsetzung: Mit insgesamt 0 % landen Burger King, Starbucks und Vapiano auf der schlechtesten Stufe 6.





## The Pecking Order 2022: Italy

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2022, it has evolved into a localized approach, evaluating those companies' implementation progress in their chicken welfare commitments within individual markets.

The criteria for TPO are based on the *European Chicken Commitment* (ECC), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2022 conducted 45 assessments covering the markets of Germany, France, Spain, **Italy**, and Croatia. The following companies have been assessed in the Italian market:



TPO’s company evaluation is organized under two pillars:



**Pillar 1: Commitments & targets**

This score reflects whether a company has any form of broiler welfare policy as well as the scope and completeness of a company’s time-bound commitment to the ECC criteria. Assessments were made on whether the company has published a commitment to: avoid cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.



**Pillar 2: Performance reporting**

This score reflects the extent to which a company has implemented its commitments in relation to the ECC criteria. Assessments were made on the company's performance on specific broiler welfare commitments: avoidance of cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.

These two pillars combine, with equal weighting, for an overall percentage score, which is translated into overall tiers and grades.

| Tier | Grade           | TPO 2021 percentage bands | TPO 2022 percentage bands |
|------|-----------------|---------------------------|---------------------------|
| 6    | Very poor       | 0-12                      | 0-25                      |
| 5    | Poor            | 13-26                     | 26-49                     |
| 4    | Getting started | 27-42                     | 50-59                     |
| 3    | Making progress | 43-71                     | 60-75                     |
| 2    | Good            | 72-88                     | 76-85                     |
| 1    | Leading         | 89-100                    | 86-100                    |



## Key findings: Italy








- **Broiler chicken welfare appears to be better managed in certain markets**

To improve comparability, it was possible to isolate the companies that were assessed across all markets (Burger King, KFC, and McDonalds). In this case, Germany and France with average overall scores of 40% are clear leaders. In Italy, the average overall score was only 16%.

- Most performance reporting was about not using cages/multi-tier, which is something no company does normally. Therefore, **low levels of performance reporting are shown on the extent to which a company has implemented its commitments in relation to the ECC criteria.**

- **Overall tiers and grades for the assessed companies operating in Italy**

Most companies that were assessed are performing poorly/very poorly in their approaches to broiler chicken welfare in their supply chains. Where companies might have ECC-aligned policy commitments in place, there is still little to no evidence of implementation of those commitments, which is very concerning.

| Company   | Overall score % | Overall score tier | Overall score grade | Commitments & targets % | Commitments & targets tier | Commitments & targets grade | Performance reporting % | Performance reporting tier | Performance reporting grade |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 67%             | 3                  | Making progress     | 100%                    | 1                          | Leading                     | 33%                     | 5                          | Poor                        |
|  | 44%             | 5                  | Poor                | 31%                     | 5                          | Poor                        | 57%                     | 4                          | Getting started             |
|  | 20%             | 6                  | Very poor           | 23%                     | 6                          | Very poor                   | 17%                     | 6                          | Very poor                   |
|  | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |



### Tier 6 - "Very poor"

- **McDonald's Italy's overall score % is 20%** (23% in the *Commitments & Targets* pillar and 17% in the *Performance Reporting* pillar).
- **Starbucks Italy's overall score % is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar).
- **Burger King Italy's overall score % is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar).
- **Dussmann Italy's overall score % is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar).

### Tier 5 - "Poor"

- **KFC Italy's overall score % is 44%** (31% in the *Commitments & Targets* pillar and 57% in the *Performance Reporting* pillar).

### Tier 4 - "Getting started"

- **Subway Italy's overall score % is 50%** (100% in the *Commitments*<sup>10</sup> & *Targets* pillar and 0% in the *Performance Reporting* pillar).

### Tier 3 - "Making progress"

- **IKEA Italy's overall percentage score is 67%**, to a large extent thanks to having an ECC-aligned policy commitment<sup>11</sup> because, when it comes to performance reporting, **IKEA is failing in implementation just like it happens in other European countries (33%)**.

**KFC Germany is the leading company in Europe** in broiler chicken welfare, with an overall percentage score of **79%** (tier 2, grade "Good Progress" by being in Tier 1 in the *Commitments & Targets* pillar while also being 1 of only 3 companies in Tier 4 in the *Performance Reporting* pillar with a 57% implementation of its commitment).

## Recommendations: Italy

1. Adopt the ECC and publish it on your website with a link<sup>12</sup> to the policy.
2. Make arrangements with suppliers.
3. Once the public announcement has been made, Animal Equality, as an international animal protection organization, is able to facilitate the implementation of your commitment.

10. <https://www.subway.com/PressReleases/ECC%20Statement%20and%20Response%20Book.pdf>

11. <https://www.ikea.com/gb/en/this-is-ikea/sustainable-everyday/ikea-food-better-chicken-pub4fcff351>

12. <https://welfarecommitments.com/letters/europe/>





## The Pecking Order 2022: Italy

Dal 2019, *The Pecking Order* (TPO) valuta i marchi iconici di fast-food e le aziende di servizi alimentari in merito al benessere dei polli da carne nelle loro catene di approvvigionamento. Nel 2022 si è evoluto in un approccio localizzato, valutando i progressi compiuti da queste aziende nell'attuazione dei loro impegni per il benessere dei polli nei singoli mercati.

I criteri per la TPO si basano sull'European Chicken Commitment (ECC), sviluppato in linea con la più recente scienza del benessere animale con lo scopo di affrontare i problemi più urgenti dei polli allevati a scopo alimentare.

TPO Europe 2022 ha condotto 45 valutazioni che hanno riguardato i mercati di Germania, Francia, Spagna, **Italia** e Croazia. Nel mercato italiano sono state valutate le seguenti aziende:



La valutazione aziendale della TPO è organizzata su due pilastri:



### Pilastro 1: Impegni e obiettivi

Questo punteggio riflette se un'azienda ha una qualche forma di politica sul benessere dei polli, nonché la portata e la completezza dell'impegno con deadline temporale precisa dell'azienda rispetto ai criteri dell'ECC. È stato valutato se l'azienda ha pubblicato un impegno per: evitare gabbie/sistemi a più livelli, audit da parte di terzi, arricchimento ambientale efficace, uso di razze a crescita lenta, densità massima di allevamento, macellazione in grado di evitare inutili sofferenze.



### Pilastro 2: Monitoraggio e pubblicazione delle prestazioni

Questo punteggio riflette la misura in cui un'azienda ha effettivamente implementato gli impegni in relazione ai criteri ECC. Sono state valutate le prestazioni dell'azienda in relazione a specifici impegni per il benessere dei polli: evitare gabbie/sistemi a più livelli, verifica da parte di terzi, arricchimento ambientale efficace, uso di razze a crescita lenta, densità massima di allevamento, macellazione in grado di evitare inutili sofferenze.

Questi due pilastri si combinano, con uguale ponderazione, per ottenere un punteggio percentuale complessivo, che viene tradotto in livelli e voti complessivi.

| Livello | Grado              | TPO 2021 gamma percentuale | TPO 2022 gamma percentuale |
|---------|--------------------|----------------------------|----------------------------|
| 6       | Molto scarso       | 0-12                       | 0-25                       |
| 5       | Scarso             | 13-26                      | 26-49                      |
| 4       | Un primo inizio    | 27-42                      | 50-59                      |
| 3       | Progressi in corso | 43-71                      | 60-75                      |
| 2       | Buono              | 72-88                      | 76-85                      |
| 1       | Guida              | 89-100                     | 86-100                     |





## Risultati principali: Italy

- **Il benessere dei polli da carne sembra essere gestito meglio in alcuni mercati**

Per migliorare la comparabilità, è stato possibile isolare le aziende che sono state valutate in tutti i mercati (Burger King, KFC e McDonalds). In questo caso, Germania e Francia, con punteggi medi complessivi del 40%, sono chiaramente leader. In Italia, il punteggio medio complessivo è solo del 16%.

- La maggior parte delle relazioni aziendali sui progressi sulle prestazioni riguardava il non utilizzo di gabbie/multi-livello, cosa che nessuna azienda fa normalmente. Pertanto, **i bassi livelli di trasparenza delle prestazioni si riflettono sulla misura in cui un'azienda ha attuato i propri impegni in relazione ai criteri ECC.**

- **Livelli e voti complessivi per le aziende valutate che operano in Italia**

La maggior parte delle aziende valutate ha risultati scarsi/molto scarsi per quanto riguarda l'approccio al benessere dei polli nelle loro catene di approvvigionamento. Laddove le aziende hanno assunto impegni allineati ai criteri CEC, le prove di attuazione di tali impegni sono ancora scarse o inesistenti, il che è molto preoccupante.

| Azienda   | Overall score % | Overall score tier | Overall score grade | Commitments & targets % | Commitments & targets tier | Commitments & targets grade | Performance reporting % | Performance reporting tier | Performance reporting grade |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|  | 0%              | 6                  | Molto scarso        | 0%                      | 6                          | Molto scarso                | 0%                      | 6                          | Molto scarso                |
|  | 0%              | 6                  | Molto scarso        | 0%                      | 6                          | Molto scarso                | 0%                      | 6                          | Molto scarso                |
|  | 67%             | 3                  | Progressi in corso  | 100%                    | 1                          | Guida                       | 33%                     | 5                          | Scarso                      |
|  | 44%             | 5                  | Scarso              | 31%                     | 5                          | Scarso                      | 57%                     | 4                          | Un primo inizio             |
|  | 20%             | 6                  | Molto scarso        | 23%                     | 6                          | Molto scarso                | 17%                     | 6                          | Molto scarso                |
|  | 0%              | 6                  | Molto scarso        | 0%                      | 6                          | Molto scarso                | 0%                      | 6                          | Molto scarso                |
|  | 50%             | 4                  | Un primo inizio     | 100%                    | 1                          | Guida                       | 0%                      | 6                          | Molto scarso                |



### Livello 6 - "Molto scarso"

- **Il punteggio complessivo di Mcdonald's Italia è del 20%** (23% nel pilastro Impegni e obiettivi e 17% nel pilastro Monitoraggio e pubblicazione delle prestazioni).
- **Il punteggio complessivo di Starbucks Italia è dello 0%** (0% nel pilastro Impegni e obiettivi e 0% nel pilastro Monitoraggio e pubblicazione delle prestazioni).
- **Il punteggio complessivo di Burger King Italia è pari allo 0%** (0% nel pilastro Impegni e Obiettivi e 0% nel pilastro Monitoraggio e pubblicazione delle prestazioni).
- **Il punteggio complessivo di Dussmann Italia è pari allo 0%** (0% nel pilastro Impegni e Obiettivi e 0% nel pilastro Monitoraggio e pubblicazione delle prestazioni).

### Livello 5 - "Scarso"

- **Il punteggio complessivo di KFC Italia è del 44%** (31% nel pilastro Impegni e obiettivi e 57% nel pilastro Monitoraggio e pubblicazione delle prestazioni).

### Livello 4 - "Un primo inizio"

- **Il punteggio complessivo di Subway Italia è del 50%** (100% nel pilastro Impegni<sup>13</sup> e obiettivi e 0% nel pilastro Monitoraggio e pubblicazione delle prestazioni).

### Livello 3 - "Progressi in corso"

- **Il punteggio percentuale complessivo di IKEA Italia è del 67%**, in gran parte grazie all'impegno di una politica aziendale allineata con l'European Chicken Commitment,<sup>14</sup> perché, quando si tratta di rendicontare le prestazioni, IKEA fallisce nell'attuazione proprio come accade in altri Paesi europei (33%).
- **KFC Germania è l'azienda leader in Europa** per quanto riguarda il benessere dei polli da carne, con un punteggio percentuale complessivo del 79% (livello 2, grado "Buono stato di avanzamento", essendo nel livello 1 del pilastro Impegni e obiettivi ed essendo anche una delle sole 3 aziende nel livello 4 del pilastro Monitoraggio delle prestazioni, con un'attuazione del 57% del suo impegno).

## Raccomandazioni: Italy

1. Adottare [l'ECC](#) e pubblicarlo sul proprio sito aziendale con un link<sup>15</sup> alla politica.
2. Prendere accordi con i fornitori.
3. Una volta fatto l'annuncio pubblico, Animal Equality, in qualità di organizzazione internazionale per la protezione degli animali, sarà lieta di congratularsi pubblicamente con le aziende che prendono tale impegno e di supportare in tutte le fasi necessarie.

13. <https://www.subway.com/PressReleases/ECC%20Statement%20and%20Response%20Book.pdf>

14. <https://www.ikea.com/gb/en/this-is-ikea/sustainable-everyday/ikea-food-better-chicken-pub4fcff351>

15. <https://wellfarecommitments.com/letters/europe/>



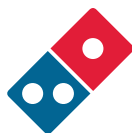


## The Pecking Order 2022: Spain

The Pecking Order (TPO) has been assessing iconic fast-food brands and food service companies on the welfare of broiler chickens in their supply chains since 2019. In 2022, it has evolved into a localized approach, evaluating those companies' implementation progress in their chicken welfare commitments within individual markets.

The criteria for TPO are based on the *European Chicken Commitment* (ECC) (<https://welfarecommitments.com/letters/europe/>), developed in line with the latest welfare science to tackle the most pressing welfare issues of broiler chickens.

TPO Europe 2022 conducted 45 assessments covering the markets of Germany, France, **Spain**, Italy, and Croatia. The following companies have been assessed in the Spanish market:



TPO’s company evaluation is organized under two pillars:



**Pillar 1: Commitments & targets**

This score reflects whether a company has any form of broiler welfare policy as well as the scope and completeness of a company’s time-bound commitment to the ECC criteria. Assessments were made on whether the company has published a commitment to: avoid cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.



**Pillar 2: Performance reporting**

This score reflects the extent to which a company has implemented its commitments in relation to the ECC criteria. Assessments were made on the company's performance on specific broiler welfare commitments: avoidance of cages/multi-tier systems, third-party auditing, effective enrichment, use of slow-growing breeds, maximum stocking densities, humane slaughter.

These two pillars combine, with equal weighting, for an overall percentage score, which is translated into overall tiers and grades.

| Tier | Grade           | TPO 2021 percentage bands | TPO 2022 percentage bands |
|------|-----------------|---------------------------|---------------------------|
| 6    | Very poor       | 0-12                      | 0-25                      |
| 5    | Poor            | 13-26                     | 26-49                     |
| 4    | Getting started | 27-42                     | 50-59                     |
| 3    | Making progress | 43-71                     | 60-75                     |
| 2    | Good            | 72-88                     | 76-85                     |
| 1    | Leading         | 89-100                    | 86-100                    |



## Key findings: Spain










- **Broiler chicken welfare appears to be better managed in certain markets**

To improve comparability, it was possible to isolate the companies that were assessed across all markets (Burger King, KFC, Domino's, and McDonalds). In this case, Germany and France with average overall scores of 40% are clear leaders. In Spain, the average overall score was only 17%.

- Most performance reporting was about not using cages/multi-tier, which is something no company does normally. Therefore, **low levels of performance reporting are shown on the extent to which a company has implemented its commitments in relation to the ECC criteria.**

- **Overall tiers and grades for the assessed companies operating in Spain**

Most companies that were assessed are performing poorly/very poorly in their approaches to broiler chicken welfare in their supply chains. Where companies might have ECC-aligned policy commitments in place, there is still little to no evidence of implementation of those commitments, which is very concerning.

| 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 |
|---|-----------------|--------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------|----------------------------|-----------------------------|
|  ACCOR       | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 0%                      | 6                          | Very poor                   |
|  BURGER KING | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|              | 0%              | 6                  | Very poor           | 0%                      | 6                          | Very poor                   | 0%                      | 6                          | Very poor                   |
|  IKEA        | 67%             | 3                  | Making progress     | 100%                    | 1                          | Leading                     | 33%                     | 5                          | Poor                        |
|  KFC         | 44%             | 5                  | Poor                | 31%                     | 5                          | Poor                        | 57%                     | 4                          | Getting started             |
|              | 20%             | 6                  | Very poor           | 23%                     | 6                          | Very poor                   | 17%                     | 6                          | Very poor                   |
|  Pizza Hut   | 50%             | 4                  | Getting started     | 100%                    | 1                          | Leading                     | 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                   |



## Tier 6 - "Very poor"

Of the fast-food brands assessed, Domino's Pizza, Starbucks and Burger King are performing the worst in their approaches to broiler chicken welfare in their supply chains. Domino's Pizza and Starbucks are both operated by **Aalsea** in Spain, and Burger King is owned by Restaurant Brands International.

- **McDonald's Spain's overall score is 20%** (23% in the *Commitments & Targets* pillar and 17% in the *Performance Reporting* pillar.)
- **Domino's Spain's overall score is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)
- **Starbucks Spain's overall score is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)
- **Burger King Spain's overall score is 0%** (0% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)

## Tier 5 - "Poor"

**KFC Spain** is performing poorly with no assessments graded in the top three tiers.

- **Overall score % is 44%** (31% in the *Commitments & Targets* pillar and 57% in the *Performance Reporting* pillar.)

## Tier 4 - "Getting started"

**Pizza Hut**<sup>16</sup>, **Subway**<sup>17</sup>, and **Accor Hotels**<sup>18</sup> have all adopted the ECC and are getting started on reporting specific ECC-aligned broiler welfare commitments.

- **Pizza Hut Spain's overall score is 50%** (100% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)
- **Subway Spain's overall score is 50%** (100% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)
- **Accor Hotels Spain's overall score is 50%** (100% in the *Commitments & Targets* pillar and 0% in the *Performance Reporting* pillar.)

16. [https://www.pizzahut.co.uk/\\_next/static/static/pdf/Sourcing\\_Code\\_of\\_Practice.6d6da7ae77dfe428fabc4c430e1682ce.pdf](https://www.pizzahut.co.uk/_next/static/static/pdf/Sourcing_Code_of_Practice.6d6da7ae77dfe428fabc4c430e1682ce.pdf)

17. [https://www.subway.com/PressReleases/ECC\\_Statement\\_and\\_Response\\_Book.pdf](https://www.subway.com/PressReleases/ECC_Statement_and_Response_Book.pdf)

18. <https://press.accor.com/accor-pledged-higher-broiler-chicken-welfare-in-europe/?lang=en#:~:text=Accor%20announces%20today%20that%20the,in%20its%20European%20supply%20chain.>



### Tier 3 - “Making progress”

- Thanks to having an ECC-aligned policy commitment<sup>19</sup>, **IKEA Spain’s** overall percentage score is 67%. However, when it comes to performance reporting, IKEA is failing in implementation (33%).
- **KFC Germany is the leading company in Europe in broiler chicken welfare** with an overall percentage score of 79% (tier 2, grade “Good Progress”). They are in Tier 1 in the *Commitments and Targets* pillar as well as one of only three companies in Tier 4 in the *Performance Reporting* pillar with a 57% implementation of its commitment.

## Recommendations: Spain

1. For those companies that have not done so yet, adopt the ECC and publish it on your website with a link<sup>20</sup> to the policy.
2. Make arrangements with suppliers.
3. Once the public announcement has been made, Animal Equality, as an international animal protection organization, is able to facilitate the implementation of your commitment.

19. <https://www.ikea.com/gb/en/this-is-ikea/sustainable-everyday/ikea-food-better-chicken-pub4fcff351>

20. <https://welfarecommitments.com/letters/europe/>







## The Pecking Order 2022: España

El Pecking Order (TPO) lleva evaluando el bienestar de los pollos de engorde en las cadenas de suministro de marcas icónicas de comida rápida y empresas de servicios alimentarios desde 2019. En 2022, ha evolucionado hacia un enfoque localizado, evaluando el progreso de implementación de esas empresas en sus compromisos de bienestar de los pollos dentro de mercados nacionales.

Los criterios del TPO se basan en el *Compromiso Europeo del Pollo / European Chicken Commitment (ECC)*, desarrollado en consonancia con los últimos avances científicos en materia de bienestar para abordar los problemas más acuciantes del bienestar de los pollos de engorde.

TPO Europe 2022 ha realizado 45 evaluaciones en los mercados de Alemania, Francia, **España**, Italia y Croacia. En el español se han evaluado las siguientes empresas:



La evaluación de las empresas por parte de TPO está organizada en dos pilares:



### Pilar 1: Compromisos y objetivos

Esta puntuación refleja si una empresa tiene algún tipo de política de bienestar los pollos de engorde en su cadena de suministro, así como el alcance y la exhaustividad del compromiso de la empresa con los criterios del ECC en un plazo determinado. Se ha evaluado si la empresa ha publicado un compromiso para: evitar las jaulas/sistemas de varios niveles, auditoría por parte de terceros, enriquecimiento efectivo, uso de razas de crecimiento lento, densidad de población máxima, sacrificio humano.



### Pilar 2: Informes de desempeño

Esta puntuación refleja el grado de cumplimiento de los compromisos de la empresa en relación con los criterios del ECC. Se ha evaluado el desempeño de la empresa en relación con los compromisos específicos de bienestar de los pollos de engorde: evitar las jaulas/sistemas de varios niveles, auditoría por parte de terceros, enriquecimiento efectivo, uso de razas de crecimiento lento, densidad de población máxima, sacrificio humano.










Estos dos pilares se combinan, con igual ponderación, para obtener una puntuación porcentual global, que se traduce en niveles y calificaciones globales.

| Nivel | Clasificación   | TPO 2021 rangos porcentuales | TPO 2022 rangos porcentuales |
|-------|---|------------------------------|------------------------------|
| 6     |  Muy pobre | 0-12                         | 0-25                         |
| 5     |  Pobre     | 13-26                        | 26-49                        |
| 4     |  Empezando | 27-42                        | 50-59                        |
| 3     |  Avanzando | 43-71                        | 60-75                        |
| 2     |  Bueno     | 72-88                        | 76-85                        |
| 1     |  Liderando | 89-100                       | 86-100                       |



## Principales resultados: España

- El bienestar de los pollos de engorde parece estar mejor gestionado en ciertos mercados**  
 Para mejorar la comparabilidad, fue posible aislar las empresas que fueron evaluadas en todos los mercados (Burger King, KFC, Domino's y McDonalds). En este caso, Alemania y Francia, con una puntuación media global del 40%, son líderes indiscutibles. En España, la puntuación media global fue sólo del 17%.
- La mayoría de los informes de desempeño se referían a la no utilización de jaulas/múltiples niveles, algo que ninguna empresa hace normalmente. Por lo tanto, se muestran **bajos niveles de información sobre el desempeño de una empresa en sus compromisos en relación con los criterios del ECC**.
- Niveles y calificaciones generales de las empresas evaluadas que operan en España**  
 La mayoría de las empresas evaluadas tienen un desempeño pobre/muy pobre en sus enfoques sobre el bienestar de los pollos de engorde en sus cadenas de suministro. En los casos en los que las empresas pueden tener compromisos políticos alineados con el ECC, todavía hay poca o ninguna evidencia de la implementación de esos compromisos, lo que es muy preocupante.

| Empresa   | Puntuación global % | Nivel de puntuación global | Calificación global de la puntuación | Compromisos y objetivos % | Nivel de compromisos y objetivos | Compromisos y objetivos de clasificación | Informes de rendimiento % | Nivel de informes de rendimiento | Grado de información sobre el desempeño |
|---|---------------------|----------------------------|--------------------------------------|---------------------------|----------------------------------|--|---------------------------|----------------------------------|---|
|  ACCOR       | 50%                 | 4                          | Empezando                            | 100%                      | 1                                | Liderando                                | 0%                        | 6                                | Muy pobre                               |
|  BURGER KING | 0%                  | 6                          | Muy pobre                            | 0%                        | 6                                | Muy pobre                                | 0%                        | 6                                | Muy pobre                               |
|              | 0%                  | 6                          | Muy pobre                            | 0%                        | 6                                | Muy pobre                                | 0%                        | 6                                | Muy pobre                               |
|  IKEA        | 67%                 | 3                          | Avanzando                            | 100%                      | 1                                | Liderando                                | 33%                       | 5                                | Pobre                                   |
|  KFC         | 44%                 | 5                          | Pobre                                | 31%                       | 5                                | Pobre                                    | 57%                       | 4                                | Empezando                               |
|              | 20%                 | 6                          | Muy pobre                            | 23%                       | 6                                | Muy pobre                                | 17%                       | 6                                | Muy pobre                               |
|  Pizza Hut   | 50%                 | 4                          | Empezando                            | 100%                      | 1                                | Liderando                                | 0%                        | 6                                | Muy pobre                               |
|              | 0%                  | 6                          | Muy pobre                            | 0%                        | 6                                | Muy pobre                                | 0%                        | 6                                | Muy pobre                               |
|  SUBWAY      | 50%                 | 4                          | Empezando                            | 100%                      | 1                                | Liderando                                | 0%                        | 6                                | Muy pobre                               |



## Nivel 6 - "Muy pobre"

De las marcas de comida rápida evaluadas, Domino's Pizza, Starbucks y Burger King son las que obtienen los peores resultados en sus planteamientos sobre el bienestar de los pollos de engorde en sus cadenas de suministro. Domino's Pizza y Starbucks son operados por **Aalsea** en España, y los derechos de explotación de Burger King en España pertenecen a **Restaurant Brands International.Mcdonald's**.

- La puntuación porcentual total de **McDonald 's España** es del **20%** (23% en el pilar de *Compromisos & Objetivos* y 17% en el pilar de *Informes de Desempeño*).
- La puntuación porcentual total de **Domino 's España** es del **0%** (0% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*).
- La puntuación porcentual total de **Starbucks España** es **0%** (0% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*).
- La puntuación porcentual total de **Burger King España** es **0%** (0% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*).

## Nivel 5 - "Pobre"

**KFC España** está obteniendo malos resultados, con ninguna de las evaluaciones entre los tres primeros niveles.

- La puntuación porcentual total es **44%** (31% en el pilar de *Compromisos & Objetivos* y 57% en el pilar de *Informes de Desempeño*).

## Nivel 4 - "Empezando"

**Pizza Hut**<sup>21</sup>, **Subway**<sup>22</sup>, y **Accor Hotels**<sup>23</sup> han adoptado el ECC y están comenzando a informar sobre los compromisos específicos de bienestar de los pollos alineados con la ECC.

- La puntuación porcentual total de **Pizza Hut España** es **50%** (100% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*.)
- La puntuación porcentual total de **Subway España** es **50%** (100% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*.)
- La puntuación porcentual total de **Accor Hotels España** es **50%** (100% en el pilar de *Compromisos & Objetivos* y 0% en el pilar de *Informes de Desempeño*.)

21. [https://www.pizzahut.co.uk/\\_next/static/static/pdf/Sourcing\\_Code\\_of\\_Practice.6d6da7ae77dfe428fab4c430e1682ce.pdf](https://www.pizzahut.co.uk/_next/static/static/pdf/Sourcing_Code_of_Practice.6d6da7ae77dfe428fab4c430e1682ce.pdf)

22. [https://www.subway.com/PressReleases/ECC\\_Statement\\_and\\_Response\\_Book.pdf](https://www.subway.com/PressReleases/ECC_Statement_and_Response_Book.pdf)

23. <https://press.accor.com/accor-pledged-higher-broiler-chicken-welfare-in-europe/?lang=en#:~:text=Accor%20announces%20today%20that%20the,in%20its%20European%20supply%20chain.>



### Nivel 3 - "Avanzando"

- Gracias a tener un compromiso de política<sup>24</sup> alineada con el ECC, la puntuación porcentual total de **IKEA España** es del **67%**. Sin embargo, cuando se trata de informar sobre el desempeño, **IKEA suspende en implementación** (33%).
- **KFC Alemania es la empresa líder en Europa en el bienestar de los pollos de engorde**, con una puntuación porcentual global del 79% (nivel 2, grado "Buen progreso"). Se encuentra en el nivel 1 en el pilar de *Compromisos & Objetivos*, y es una de las tres únicas empresas en el nivel 4 en el pilar de *Informes de Desempeño*, con un 57% de cumplimiento de su compromiso.

## Recomendaciones: España

1. Para las empresas que aún no lo hayan hecho, adopten el ECC y publiquenlo en su sitio web con un enlace a la política<sup>25</sup>.
2. Haga arreglos con sus proveedores.
3. Una vez hecho el anuncio público, Igualdad Animal, como organización internacional de protección de los animales, puede facilitar la implementación de su compromiso.

24. <https://www.ikea.com/gb/en/this-is-ikea/sustainable-everyday/ikea-food-better-chicken-pub4fcff351>

25. <https://welfarecommitments.com/letters/europe/>




*'Chronos Sustainability was contracted by World Animal Protection to provide guidance on the development of The Pecking Order 2022 methodology and act as an independent assessor in the data gathering process. Chronos Sustainability has not been involved in the drafting of this report'.*

Chronos Sustainability was established in 2017 with the objective of delivering transformative, systemic change in the social and environmental performance of key industry sectors through expert analysis of complex systems and effective multi-stakeholder partnerships. Chronos works extensively with international organisations on a range of sustainability related issues, developing tools and strategies to enable them to deliver impact at scale. For more information visit [www.chronossustainability.com](http://www.chronossustainability.com)

## World Animal Protection

5th Floor  
222 Grays Inn Road  
London WC1X 8HB  
UK

 +44 (0)20 7239 0500

 [info@worldanimalprotection.org](mailto:info@worldanimalprotection.org)

 W: [worldanimalprotection.org](http://worldanimalprotection.org)

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