



The Pecking Order 2025

Meat Chicken Welfare Benchmark
of the European Restaurant Sector



In association with:



ESSEREANIMALI



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Foreword

Action is needed now!

Animal welfare is arguably the one issue that truly unites Europeans. According to the latest Eurobarometer survey, 91% of Europeans believe it is important to protect the welfare of farmed animals and ensure they have decent living conditions.¹ And without doubt, the welfare of broiler chickens remains the number one animal welfare challenge in the EU – both because of the vast number of animals involved and the prolonged suffering they endure. You would think: one and one make two – companies would make broiler welfare their top priority.

To some extent, this is happening. More than 300 companies have now committed to the European Chicken Commitment (ECC), and in the Netherlands, all supermarkets have already adopted chicken welfare standards that go even further than the ECC. This new edition of The Pecking Order – ranking fast food companies on chicken welfare – also shows progress. France leads with an average score of 42%, proving that better welfare is achievable. Across the EU, there is a general upward trend: the average score rose to 27% in 2025, up from 23% in 2024, driven by improvements in Czechia, Italy, and France.

But let us not fool ourselves: progress is far too slow. Many fast-food companies still fall dramatically short of implementing their commitments. They urgently need to step up – not only because it's the right thing to do, but also to maintain credibility and public trust. Already, accusations of greenwashing are mounting – and not without reason. Some companies gained positive publicity when they committed to the ECC but have since quietly withdrawn their support. Others remain publicly committed but have not begun proper implementation. This is not only a shirking of responsibility; it is also deceiving the public, pure and simple. In particular, the adoption of higher-welfare chicken breeds remains a critical weak spot. This report therefore pays special attention to this crucial aspect of the European Chicken Commitment.

2026 will be a decisive year for animal welfare. It marks the deadline for full implementation of the ECC, and the year when the European Commission is expected to propose the first reforms to EU farm animal welfare legislation in over a decade. These developments are deeply connected. The Pecking Order highlights the urgent need for both companies and policymakers to take responsibility for chicken welfare.

We cannot allow the suffering of billions of sentient animals to continue. The time for action is long overdue. Action is needed now. And I really mean: now.



Dirk Jan Verdonk
Director World Animal Protection Netherlands

¹ Special Eurobarometer on Attitudes of Europeans towards Animal Welfare (EURCAW). 2023.
<https://www.eurcaw-ruminants-equines.eu/special-eurobarometer-on-attitudes-of-europeans-towards-animal-welfare/>





Photo credit: World Animal Protection

Executive summary

TPO: Project overview

The food industry has a critical role to play in improving the lives of broiler chickens – the most farmed land animals in the world, yet among the most mistreated.

Recognising this, civil society organisations in Europe launched the European Chicken Commitment (ECC) in 2017, following the success of the Better Chicken Commitment in the United States a year earlier. The ECC sets out minimum welfare standards that food businesses are expected to meet by 2026, creating a clear pathway for companies to drive meaningful change in their supply chains.

To measure progress and hold companies accountable, World Animal Protection established The Pecking Order (TPO) benchmark in 2019. Initially focused on global fast-food brands, the benchmark has since expanded to assess both international and national fast-food and food service companies in Europe. In 2024, TPO introduced a requirement for companies to publish detailed roadmaps toward ECC compliance, transforming commitments into measurable progress.² The methodology for 2025 remains unchanged.

The 2025 data reflect the addition of 2 new countries (Sweden and Denmark) and 6 new companies to the dataset (Espresso House, Joe & The Juice, Max Burger, Popeyes, Sibylla, and Sunset Boulevard).

² Please see the separate TPO 2025 Methodology document for more information on the methodology.



Results

This year's findings again highlight mixed progress across Europe. In 2025, The Pecking Order assessed 27 food service companies across seven European markets: the Czech Republic, Denmark, France, Italy, Poland, Romania, and Sweden.³

The average score for Commitment and Targets is 41%, while Performance Reporting lags behind at just 12%. Of the 81 companies evaluated, 37 have either committed to the ECC or have fully aligned their broiler welfare policies with ECC standards. However, only 31 companies provided (some) reporting on broiler welfare progress.

France achieved the highest average country score with 42%, with Sweden and Denmark following close behind with average scores of 40% and 37% respectively. The other countries have significantly lower scores, with 23% for Czech Republic, 16% for Italy and Poland, and 11% for Romania.

Figure 1. Summarized overview of The Pecking Order 2025 results.



Despite the 2026 ECC deadline, progress remains far too slow. Since its launch, the Pecking Order has tracked only limited improvements, with a small number of frontrunners taking meaningful responsibility. Companies must urgently accelerate implementation of ECC standards if they are to honour their commitments and deliver impact at scale.

³ Please see the Annex (pg. 23) for an overview of which companies have been assessed in which European countries.



The European Chicken Commitment

The ECC outlines a set of six science-based criteria designed to significantly improve the welfare of broiler chickens.⁴

Figure 2. ECC Framework

By 2026, the ECC will require its suppliers to meet the following requirements for 100% of the [fresh, frozen, and processed] chicken in their supply chain

- ✓ Comply with all EU animal welfare laws and regulations, regardless of the country of production.
- ✓ Implement a maximum stocking density of 30kg/m² or less. Thinning is discouraged and if practiced must be limited to one thin per flock.
- ✓ Adopt breeds that demonstrate higher welfare outcomes: either the following breeds, Hubbard Redbro (indoor use only).
- ✓ Meet higher environmental standards with at least 50 lux of light, two metres of perch space and two pecking substrates per 1,000 birds, adherence to Annex 2.3 of the EU Broiler Directive air quality limits, and no cages or multi-tier systems.
- ✓ Adopt controlled atmospheric stunning using inert gas or multi-phase systems, or effective electrical stunning without conscious inversion.
- ✓ Demonstrate compliance with the above standards via third-party auditing and annual public reporting on progress towards this commitment.

Of these, the requirement to shift to higher-welfare breeds is often viewed as the cornerstone of the commitment. This report therefore takes a closer look at what the breed criterion entails, why breed transition is essential for broiler welfare, and how far the industry has progressed to date.

⁴ See <https://welfarecommitments.com/europeletter/> for the original commitment letter.





Photo credit: World Animal Protection

Deep Dive: Broiler Breed Criteria

One of the six core welfare criteria of the European Chicken Commitment (ECC) requires companies to source chicken exclusively from higher-welfare breeds. By 2026, all suppliers must therefore use breeds that deliver demonstrably improved welfare outcomes for 100% of the chickens in a company's supply chain—whether their meat is fresh, frozen, or processed.

The ECC maintains a list of slower-growing breeds that have been scientifically approved through the RSPCA Broiler Breed Welfare Assessment Protocol – a standardised testing process that determines whether a breed meets defined welfare benchmarks.⁵ This protocol provides a transparent, standardised framework for assessing whether a broiler breed delivers acceptable welfare outcomes.

⁵ Royal Society for the Prevention of Cruelty to Animals (RSPCA). 2017. *Broiler Breed Welfare Assessment Protocol 2017*.
<https://science.rspca.org.uk/sciencegroup/farmanimals/standards/chickens>



The RSPCA Broiler Breed Welfare Assessment Protocol

1

Breed proposal

A new broiler breed is proposed for assessment by a breeding company or producer and submitted to the RSPCA Broiler Breed Welfare Assessment Protocol for independent testing.

2

Trial setup

Trials are established at designated Welfare Assessment Centres under controlled conditions.

- ✓ This approach minimises external influences, ensuring that welfare outcomes reflect the breed's characteristics.
- ✓ Birds are reared with consistent access to light, ventilation, space, enrichment, and high-quality feed.
- ✓ Each new breed is compared with a control group (typically Hubbard JA757) under identical conditions.
- ✓ Trials continue until birds reach a standardised live weight.

4

Data review and decision

Results are submitted to the RSPCA and reviewed by the ECC Technical Working Group (TWG) for potential approval. The TWG evaluates scientific evidence and supporting data to decide whether the breed meets ECC standards.

- ✓ If welfare outcomes are comparable to or better than the control, and growth rate falls within the required threshold, the breed is approved under RSPCA Assured standards and added to the ECC list of approved slower-growing breeds.
- ✗ If the new breed performs worse than the control or its growth rate falls outside the required threshold, it is rejected.

3

Evaluation

Once trials are complete, birds from both the test and control breeds are evaluated using quantitative welfare measures (see full list below).

5

Reassessment

Approved breeds are re-evaluated at least every eight years, or sooner if new evidence emerges. This ensures the ECC list remains scientifically robust and adaptable as new higher-welfare breeds are developed.

The specific welfare parameters on which broiler chickens are assessed under the RSPCA Protocol are:

Walking ability

Each bird is observed walking at least 10 paces and scored on a scale from 0 (normal, smooth gait) to 5 (unable to walk properly or only able to crawl). This is a key indicator of leg health and mobility.

Feather cover

Assessed visually and scored from 0 (full, even feathering) to 2 (body largely bare). Poor feather cover may indicate discomfort, feather pecking, or other welfare issues.

Breast plumage dirtiness

Scored from 0 (clean breast) to 2 (breast heavily soiled). Dirtiness is linked to poor litter quality, inactivity, or skin lesions.

Leg straightness (angular leg deviations)

Birds are checked for structural leg abnormalities including inward/outward bowing, twisting, or rotation of the legs. Deviations can impair movement and cause chronic discomfort.

Pododermatitis (foot-pad dermatitis)

The underside of the foot is assessed for lesions, scored from 0 (no lesion) to 2 (severe lesion covering more than 75% of the pad). This is an indicator of litter condition and time spent inactive.

Hock burn

The hocks are assessed for lesions or swelling, scored from 0 (none) to 2.0 (severe lesion). It indicates contact irritation, often from poor litter quality or prolonged sitting.

Approved Breeds

Under the ECC, companies can only meet the breed criterion by sourcing from breeds that have been approved through the RSPCA Broiler Breed Welfare Assessment Protocol. This ensures that the ECC's breed standard is based entirely on independent, science-based welfare outcomes. The current ECC-approved breeds include a range from Hubbard and Aviagen.

All of these breeds have consistently delivered welfare outcomes comparable to or better than the control breed JA757. Key factors include a slower growth rate well below fast-growing commercial breeds, better leg health with fewer cases of lameness and better mobility, lower mortality, greater activity levels compared with conventional breeds, and reduced incidence of contact dermatitis, such as hock burn or food-pad lesions.

Recent additions to the Rowan Range (Rustic Gold, Ranger Gold, Ranger Classic, Rambler Ranger) demonstrate that welfare outcomes can be achieved alongside improved feed efficiency and commercial viability, making them practical options for producers.⁶

Breeds must be reassessed at least every eight years—or earlier if new evidence arises—to ensure continued compliance with welfare benchmarks.



From Hubbard:

JA757 (2006, control breed)

JACY57 (2020)

JA787 (2020, currently under derogation)

JA957 (2006)

JA987 (2020, currently under derogation)
Norfolk Black (2019)

Redbro (indoor use only, 2022, currently
under derogation for free-range).



From Aviagen (Rowen Range):

Range Gold (2017)

Rambler Ranger (2017)

Ranger Classic (2023, currently
under derogation for free-range)

Rustic Gold (2024, currently under
derogation for free-range)

Interconnectedness ECC Criteria

The breed criterion does not stand alone. Its full welfare benefits only materialise when implemented alongside the other ECC standards. For example, slower-growing breeds need enriched environments, adequate space, and natural light to express their behavioural needs. Conversely, providing enrichment to fast-growing breeds will have limited effect if the breed's genetic predispositions remain unaddressed. In this way, the breed criterion amplifies the impact of the other ECC criteria, and vice versa.

The ECC is therefore not a menu of optional measures but a holistic framework. The criteria are designed to work together, creating cumulative improvements that are far greater than the sum of individual changes.

⁶ Aviagen. 2024. "Aviagen Rustic Gold Receives RSPCA Approval." *The Poultry Site*, June 7.
<https://www.thepoultrysite.com/news/2024/06/aviagen-rustic-gold-receives-rspca-approval>



The Case Against Fast-Growing Breeds

Fast-growing broilers make up the vast majority of chickens raised for meat worldwide. They are engineered to reach slaughter weight in just 5 to 6 weeks, delivering high productivity and meat yield; however, this comes at the expense of fundamental welfare needs.

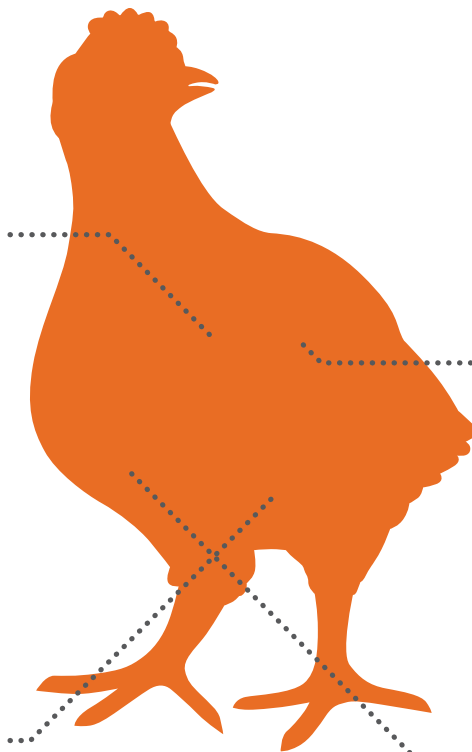
The European Food Safety Authority (EFSA) has identified a wide range of welfare problems associated with rapid growth, including bone lesions, locomotory disorders, cardiovascular problems, and behavioural restrictions.⁷ These outcomes are direct consequences of decades of genetic selection for extreme feed conversion and muscle growth, which have outpaced the birds' physiological capacity to cope.

Selective breeding for rapid growth has produced birds whose bodies develop faster than their bones and organs can support. The result is a cascade of welfare problems – from lameness and heart failure to chronic inactivity – that have become defining features of intensive broiler production.

Cardiovascular and metabolic

dysfunctions are also systemic. EFSA and EU reports note that rapid muscle development often outpaces the growth of the heart and lungs, leading to conditions such as ascites (fluid buildup in the abdominal cavity) and Sudden Death Syndrome (SDS).⁸

Lameness and skeletal disorders are among the most widespread problems. Research consistently shows that faster-growing genotypes display poorer gait scores, higher rates of leg deformities, and reduced mobility—factors that increase the risk of painful contact dermatitis as birds spend prolonged periods sitting.⁹ The inability to move freely or express natural behaviours such as perching, foraging, and dustbathing reflects severe behavioural restrictions rather than simple inactivity.



Mortality and culling rates remain significantly higher in fast-growing breeds, with many birds suffering skeletal collapse or metabolic failure before slaughter. Their heightened metabolic rate also makes them more vulnerable to heat stress, with studies documenting increased mortality and weight loss under high-temperature conditions.¹⁰

Contact dermatitis and behavioural restriction compound these issues. Fast-growing broilers are largely inactive—spending up to 80% of the day sitting. This immobility contributes to hock burns, footpad dermatitis, and breast lesions, while also preventing key behaviours such as foraging, exploration, and perching.¹¹

⁷ EFSA Panel on Animal Health and Welfare. 2023. *Scientific Opinion on the Welfare of Broilers on Farm*. EFSA Journal 21(12): 7788. <https://www.efsa.europa.eu/en/efsajournal/pub/7788>

⁸ European Commission. 2016. *Report from the Commission to the European Parliament and the Council on the Impact of Genetic Selection on Broiler Welfare*. https://www.parlementairemonitor.nl/9353000/1/j9tvgajcor7dxyk_j9vwij5epmj1ey0/vk36y8alalz

⁹ Riber, Anja B., and Anders Wurtz. 2023. "Impact of Growth Rate on the Welfare of Broilers." *Animals* 14, no. 22: 3330. <https://doi.org/10.3390/ani14223330>

¹⁰ Riber, Anja B., and Anders Wurtz. 2023. "Impact of Growth Rate on the Welfare of Broilers." *Animals* 14, no. 22: 3330. <https://doi.org/10.3390/ani14223330>

¹¹ Broiler Flocks in Production Systems Comparison. 2024. *PMC Articles*. <https://pmc.ncbi.nlm.nih.gov/articles/PMC11395773/>

Spotlight Box

KFC Backtracks on Breed Commitment: A Major Setback



KFC UK & Ireland has announced that it will not meet its 2026 pledge—made under the Better Chicken Commitment—to phase out fast-growing broiler breeds in favour of slower-growing, higher-welfare breeds. This reversal affects KFC operations across the UK and Ireland, and will very likely also impact other countries within KFC Western Europe, such as Germany, France, Denmark, the Netherlands, Belgium, and Sweden, where the company had previously committed to full compliance with ECC standards.¹²

From an animal welfare perspective, this backtracking is deeply concerning. The breed requirement is not an optional extra: it is the foundation upon which other ECC measures depend. Without slower-growing breeds, improvements to space, lighting, or enrichment deliver limited benefits.

KFC's reversal undermines its credibility as a company claiming to prioritise animal welfare and risks slowing broader industry progress.

Animal welfare organizations call on KFC to publish a clear, time-bound roadmap for breed transition and to recommit to full ECC compliance, to ensure ongoing progress, not backsliding.

Hidden Costs Among Parent Stock

Welfare problems linked to fast growth also extend to the parent stock (broiler breeders). To prevent obesity-related reproductive failure, breeder hens are subjected to extreme feed restriction, often receiving only 25–50% of the food they would consume if fed freely. This chronic hunger leads to frustration and stereotypic behaviours such as pacing, aggression, and feather pecking. Painful management practices, including beak trimming, are still used to control these behaviours.¹³

¹² Ungood-Thomas, Jon. "KFC Drops Pledge to Stop Using 'Frankenchickens' in the UK." *The Guardian*, November 23, 2024. <https://bit.ly/43VqTfc>

¹³ Bayrak, Alparslan. "The Weight of Evidence Against Fast Growth." *Faunalytics*, April 3, 2025. <https://faunalytics.org/the-weight-of-evidence-against-fast-growth/>; EFSA. December 2022. *Welfare of Broilers on Farm*. European Food Safety Authority. <https://www.efsa.europa.eu/en/efsajournal/pub/7788>



Spotlight Box

Environmental impact

Slower-growing broiler breeds take longer to reach slaughter weight and may use slightly more feed per kilogram of meat. Yet when viewed holistically, they also deliver environmental benefits alongside welfare gains.

Research comparing fast- and slower-growing breeds shows that mortality and culling rates are consistently lower in slower-growing flocks, with fewer carcasses rejected at slaughter. This reduces wasted feed, water, and energy, ultimately lowering emissions per kilogram of usable meat.¹⁴

Spotlight Box

Antibiotic use

Another key advantage is reduced antibiotic use. In conventional chicken production, antibiotics are used to prevent diseases and promote growth. Their overuse has contributed to the emergence of antibiotic-resistance bacteria, posing risks not only to animal health but also to the people that consume this meat.¹⁵

Data from Dutch farms show that slower-growing systems require around one-tenth of the antibiotics used in conventional fast-growing systems, reducing environmental contamination and the risk of antimicrobial resistance.¹⁶

¹⁴ Dixon, L. M. 2020. *Slow and steady wins the race: The behaviour and welfare of commercial faster growing broiler breeds compared to a commercial slower growing breed*. PLoS ONE 15 (4): e0231006. <https://doi.org/10.1371/journal.pone.0231006>

¹⁵ Hedman, H. D., Vasco, K. A., & Zhang, L. (2020). A review of antimicrobial resistance in poultry farming within low-resource settings. *Animals*, 10(8), 1264.

¹⁶ Compassion in World Farming, 2023. *The Impact of Breed on Broiler Welfare – Summary*. <https://bit.ly/484UqWy>





















Industry Adoption

Since its launch, the ECC has become an important framework driving broiler welfare reform across Europe, with more than 380 food companies now signed up.¹⁷ Yet implementation remains uneven – particularly on breed transition.

Among the companies assessed this year, only PAUL (Czech Republic), Espresso House (Denmark and Sweden), KFC (also only for Sweden and Denmark) and Buffalo Grill (France) report measurable progress on breed transition.

The figure below shows which companies have a (time-bound) commitment to use chickens bred for measurably improved welfare outcomes (scored for Q1.3), compared to those that actually report on it.

Figure 5. Companies with a commitment and progress reporting on slower-growing breeds

| Commitment + Reporting | Commitment only (no reporting) | | |
|---|---|--|---|
|  (FR) |  (CZ) |  (DK, SW) |  (FR) |
|  (DK, SW) |  (FR) |  (CZ, FR) |  (DK) |
|  (DK, SW) |  (POL, FR) |  (DK, SW) |  (CZ, IT, POL, ROM, SW, FR) |
|  (CZ, FR) |  (CZ, DK, IT, POL, ROM, SW, FR) |  (CZ, DK, POL, ROM, SW, FR) |  (DK) |
| |  (CZ, FR) |  (FR) | |

¹⁷ Compassion in World Farming. *Our Impact for Farm Animal Welfare*. "Global Impact Report 2024." Accessed October 2025.
<https://www.ciwf.org.uk/our-impact/global-impact-report-2024/>



Barriers to Full Adaptation

Industry stakeholders often point to structural and financial barriers. Fast-growing breeds are deeply embedded in existing production systems, influencing everything from genetics and feed to housing design and processing lines. Transitioning to slower-growing breeds requires adjustments across the supply chain, including flock management, logistics, and slaughter planning.

A study commissioned by Eurogroup for Animals found that switching to slower-growing breeds typically raises production costs by around 18–19% across EU countries.¹⁸ This financial impact makes companies reluctant to act, especially in highly competitive, low-margin markets.

Additionally, the legislative environment poses challenges. EU Directive 2007/43/EC sets minimum welfare standards for broilers, but these standards often lag behind current welfare expectations and do not mandate the use of slower-growing breeds.¹⁹ This regulatory gap allows producers to continue using intensive systems without adopting higher welfare practices.

Transparency is another hurdle. Many ECC signatories have yet to publish detailed roadmaps for transition or disclose progress data, limiting accountability and consumer trust.

¹⁸ Eurogroup for Animals. *Paving the Way for Higher Welfare Broiler Breeds in the EU: From Market Initiatives to Legislation*. May 2024.
<https://bit.ly/3KOT1ai>

¹⁹ Eurogroup for Animals. *The Welfare of Broiler Chickens in the EU: From Science to Action*. November 2020.
https://www.eurogroupforanimals.org/files/eurogroupforanimals/2020-11/2020_11_19_eurogroup_for_animals_broiler_report.pdf



Commercial Viability

Despite these challenges, transitioning to slower-growing breeds can be commercially viable. The Netherlands offers a clear example of how market demand and industry collaboration can enable system-wide change.

Case Study

Plukon and the Dutch Transition



In the Netherlands, a multi-sector effort catalysed a national shift toward higher welfare broiler production. Starting in 2007 with the Better Leven 1-star label, the transformation accelerated during 2014–2015 under the “Chicken of Tomorrow” initiative, when all retail chains agreed to adopt a new standard. This proved to be the stepping stone for further improvements in the following years. Retailers responded to growing consumer demand and collectively demanded change from their suppliers. The alignment of NGOs, government, retailers, producers and processors created the conditions for large-scale breed transition.

Central to this change was replacing conventional fast-growing hybrids with slower-growing breeds. Breed transition was identified as the most effective lever to balance welfare gains with economic feasibility, and became the foundation of the new standard. By 2024, all fresh chicken meat sold in Dutch supermarkets came from higher-welfare, slower-growing broilers.²⁰

Plukon, one of Europe’s largest poultry processors, was instrumental in supplying ECC-approved slower-growing breeds. By coordinating with breeders and meeting retail demands for welfare-approved birds, Plukon helped bridge the upstream supply gap. Their willingness to invest in new genetics and processing adjustments enabled the system-level shift and illustrated that breed transition can be commercially viable within a cooperative industry framework.²¹

Current Trends in the EU

Intensive broiler systems dominate EU production, accounting for approximately 90% of broiler meat. Alternative systems, such as indoor higher-welfare, free-range, and organic, represent less than 10%. The industry is also highly consolidated: of over 20,000 professional producers, the top 10 account for more than 40% of EU production.²²

Besides the Netherlands (see spotlight box), where all fresh retail chicken now comes from slower-growing breeds, France remains the next most advanced market, with the Label Rouge system representing around 15% of production.²³ In most other Member States, higher-welfare breeds account for less than 5% of broilers slaughtered.²⁴

²⁰ Eurogroup for Animals. May 29, 2024. "What Are Member States Doing to Help Broiler Chickens Across the EU?"

<https://www.eurogroupforanimals.org/news/what-are-member-states-doing-help-broiler-chickens-across-eu>

²¹ Eurogroup for Animals. 2024. *Paving the Way for Higher Welfare Broiler Breeds in the EU: From Market Initiatives to Legislation.*

<https://bit.ly/4ag5IZk>

²² Better Chicken Commitment. 2024. *The Welfare of Broilers in the EU.* <https://betterchickencommitment.com/eu-broiler-chicken-welfare.pdf>

²³ Compassion in World Farming. 2023. *Information Sheet 1 – Broiler Production: Global.* <https://bit.ly/broiler-production-global>

²⁴ European Parliament. 17 October 2018. *Motion for a Resolution on Animal Welfare, Antimicrobial Use and the Environmental Impact of Industrial Broiler Farming.* https://www.europarl.europa.eu/doceo/document/B-8-2018-0484_EN.html





Photo credit: World Animal Protection / Tracks Investigations

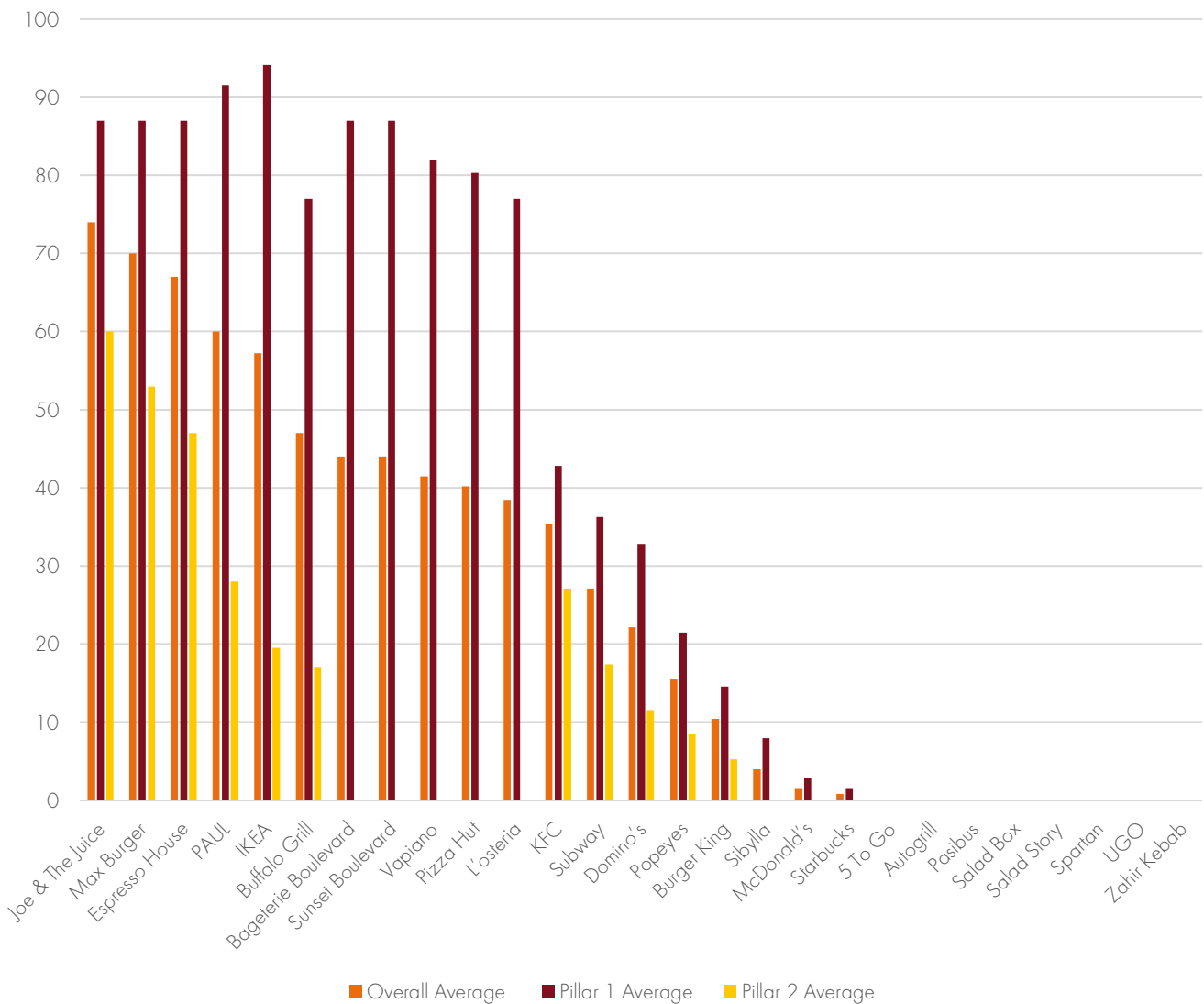
The Pecking Order Benchmark Results

Overall average score

The overall average score for the 81 companies assessed for 2025 is 27%, a combination of scores from Pillar 1 (Commitments & Targets) and Pillar 2 (Performance Reporting). This represents an increase from last year's average of 23%, and is again similar to the 27% score from 2023. However, as the companies and countries assessed for 2025 differ from the 2024 (and 2023) iteration of the benchmark, these scores are not fully comparable. Notably, seven companies have moved up a tier based on their overall score this year compared with their score from last year, among the companies for which comparable data are available.



Figure 6. Average Overall and Pillar scores by company, across all countries assessed.



The increase in average overall score has largely been driven by improvements in the scores achieved for performance reporting. For Pillar 1 of the assessment, which focuses on broiler welfare commitments, the average score was 41%, representing a slight increase from 39% in 2024. For Pillar 2, which focuses on performance reporting, the average score was 12%, representing a larger increase from 7% in 2024. The change in Pillar 1 scores was mostly due to the inclusion of new companies and countries in this year's assessment. In contrast, the increase in Pillar 2 scores reflects year-on-year improvements in performance reporting among companies assessed in both 2024 and 2025.



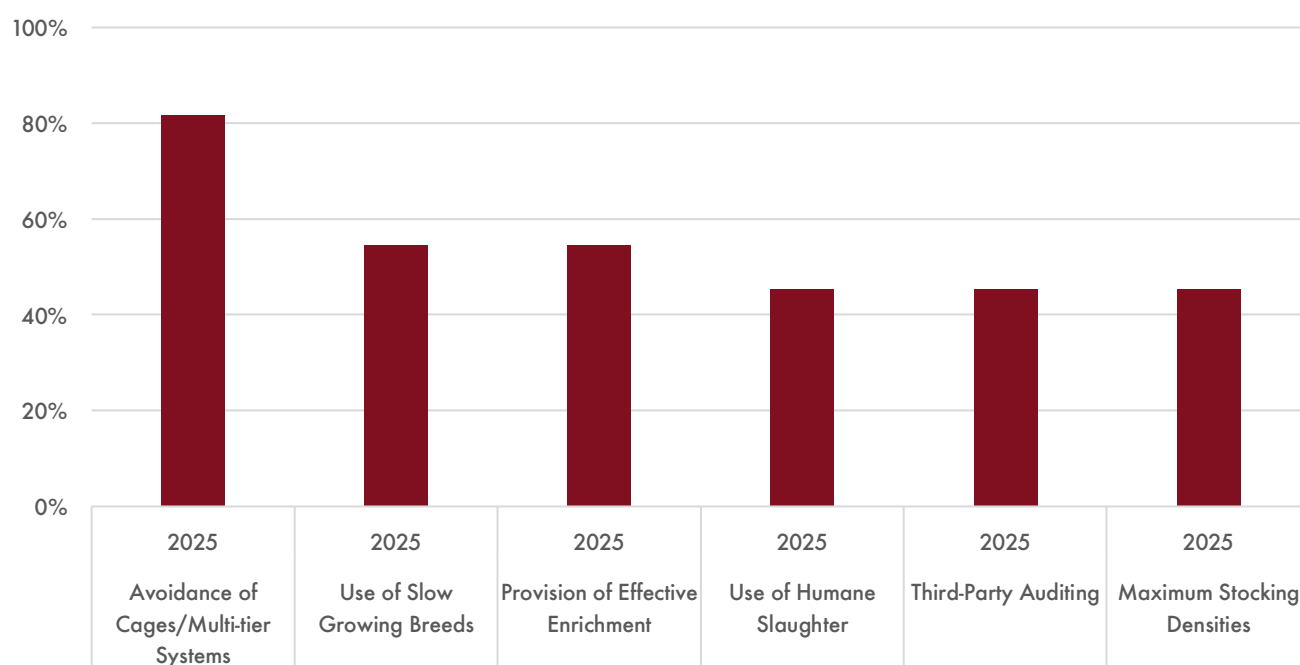
Pillar I - Commitments & Targets

60 companies (74%) have published some form of a broiler welfare policy, up from 53 companies (71%) in 2024, and 45 companies (65%) in 2023.

Of these 60 companies, 37 have either fully committed to the ECC or have policies fully aligned with its requirements. This list includes IKEA, L'Osteria, PAUL, Vapiano, Joe & the Juice, Espresso House and Max Burger, all of which have committed to the ECC in all markets where they were assessed. There are some companies who have committed to the ECC, but only for some markets: KFC (only for Denmark, Sweden and France), Domino's (Poland and France), Subway (Sweden and France), Burger King and Popeyes (France only) and Pizza Hut (for all markets, except Italy). Additionally, Bageterie Boulevard, Buffalo Grill, and Sunset Boulevard – each assessed in a single market – have also published commitments to meet ECC standards.²⁵

However, of the remaining 23 companies that have published a broiler welfare policy, only 11 include some of the ECC criteria. Figure 7 illustrates the proportion of ECC criteria included in these partial policies. The most commonly addressed criteria, included by 9 out of the 11 companies, continues to be the avoidance of cages and multi-tier systems. The other ECC criteria appear in only 45-55% (5 or 6) of these partial policies.

Figure 7. Proportion of the 11 companies with a broiler chicken welfare policy (but not fully aligned with the ECC), that include the specific ECC requirements, for 2025.



²⁵ Please see the Annex (pg. 23) for an overview of which companies have been assessed in which European countries.



Pillar II - Performance Reporting

Of the 81 companies assessed in the benchmark, only 31 (38%) provided some performance impact data on broiler chicken welfare within their supply chains.²⁶ This represents a slight increase from 25% of companies reporting in 2024 and 19% in 2023, largely due to the inclusion of new companies. Overall, reporting remains poor, as reflected in the average Pillar 2 score of just 12%.

Figure 8. Number of assessments who report on the specific ECC requirements.

| | | | |
|--|----------------|---------------------------------|----------------|
| Avoidance of cages / multitier systems (30%) | 24 / 81 | Use of humane slaughter (27%) | 26 / 81 |
| Third party auditing (23%) | 19 / 81 | Provision of enrichment (28%) | 23 / 81 |
| Maximum stocking density (27%) | 22 / 81 | Use of slow growing breeds (7%) | 6 / 81 |

The use of slower-growing breeds is the least reported-against commitment, with just 7% of companies reporting progress (7% in 2024). This 7% is made up by Buffalo Grill (France), Espresso House (Denmark and Sweden), KFC (Denmark and Sweden) and Paul (Czech Republic).

Buffalo Grill (France) reports that 10% of their supply chain is made up of slower growing breeds. The other companies, Espresso House (Denmark and Sweden), KFC (Denmark and Sweden) and Paul (Czech Republic), do not disclose what percentage of their supply chain meets the ECC criteria.

Scores in 2025 improved for 11 companies (14%) that were assessed in both 2024 and 2025, however, the majority of companies (81%) have published little to no performance reporting on broiler chicken welfare issues.

Roadmap

With many deadlines for commitments approaching, it is concerning that few companies publish roadmaps for implementation. Only 9 companies (11%) published a roadmap detailing interim steps towards full ECC implementation, compared to 10 companies (13%) in 2024. Coupled with limited performance reporting, this raises concerns as to whether companies are effectively planning for and acting on achieving the ECC criteria.

Companies that have a roadmap are Buffalo Grill in France, Paul in Czech Republic, and IKEA across all markets assessed.

²⁶ Please see the Annex (pg. 24) for an overview of the Tier and Grade ranking for each assessment's total overall score, commitments & targets score, and performance reporting score.



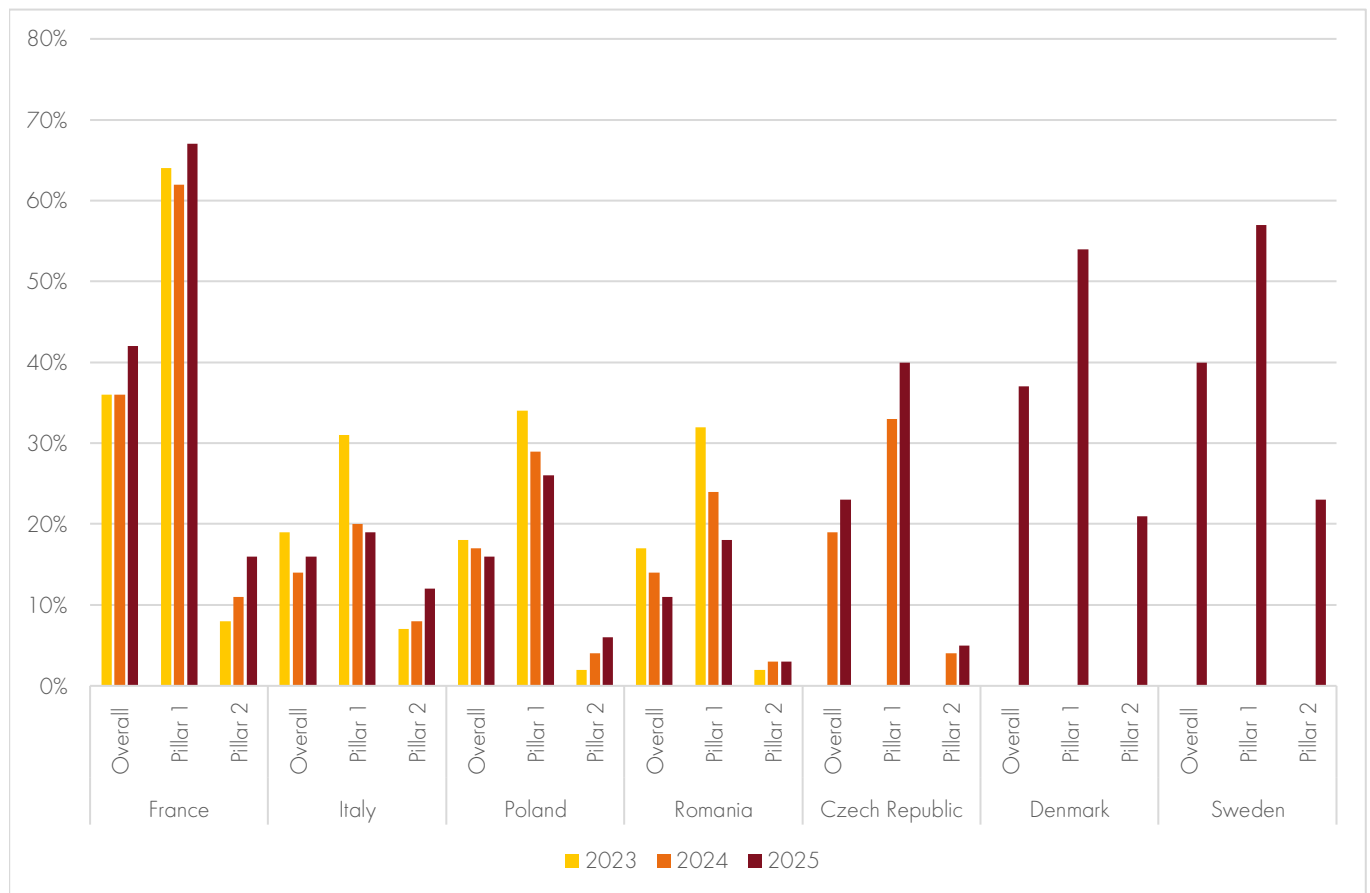
Country Comparison

Sweden and Denmark were added to the benchmark for the first time this year, becoming the second- and third-highest performing countries: Sweden with an average overall score of 40%, and 37% for Denmark.

The highest-performing country remained France, with an overall average score of 42% (up from 36% in 2024 and 2023).

The Czech Republic averaged 23% (19% for 2024). Followed by Italy and Poland at 16%. While Italy's score had decreased from 19% in 2023 to 14% in 2024, their average score has gone up again, while Poland's average scores continues to slowly decrease, from 18% in 2023 to 17% in 2024, with another percentage point lower this year. Romania closes the list, unfortunately also in a downward trend, from 17% in 2023 and 14% in 2024 to having an average score of 11% for 2025.

Figure 9. Graph showing the comparison of Average Overall and Pillar scores by country from 2023-2025²⁷



²⁷ The 2025 edition of the TPO report is the first instance that companies in Denmark and Sweden have been assessed, which is why there is no comparable data from 2023-2024 for these countries. Similarly, 2024 was the first year Czech Republic was assessed, which is why there is no comparable data from 2023.





Photo credit: World Animal Protection

Conclusion

The 2025 *Pecking Order* shows that momentum for better broiler welfare exists, but the pace of change remains far too slow. Across 81 assessments in seven countries, corporate commitments have become more common – 37 companies now have policies fully aligned with the European Chicken Commitment (ECC), and the average score for Commitments & Targets stands at 41%. Yet performance reporting still lags behind, with an average Pillar 2 score of just 12% and only 31 companies publishing meaningful data. This widening gap between public pledges and demonstrable is - again - the defining finding of this year's benchmark.

Real improvement at scale demands more than voluntary pledges. Breed transition, arguably the most impactful ECC criterion, has seen limited adoption, despite clear examples of success. The Dutch case shows that full supply-chain change is achievable when retailers, processors, producers, government, and NGOs work together. But isolated frontrunners cannot deliver systemic reform alone, and backtracking by major brands risks slowing overall progress.

To accelerate change, two things are essential. First, companies must move from intention to implementation: publish time-bound roadmaps, set interim milestones, and report verified performance data across all ECC criteria. Transparency is not optional; it is the foundation for accountability and public trust. Second, the EU and Member States must introduce mandatory minimum welfare standards aligned with the ECC – including breed requirements, stocking densities, and enforceable auditing. Regulation can create a level playing field for producers and ensure that welfare progress does not depend solely on voluntary action.

The coming year will be decisive. With the 2026 ECC deadline imminent, companies, policymakers, and investors must act collectively and decisively. The welfare of billions of chickens – and the credibility of Europe's food industry – depends on whether these commitments are finally turned into measurable, lasting change.
















Photo credit: David Hogsholt / World Animal Protection

Annex

Assessment matrix of companies assessed in each market

In 2025, The Pecking Order assessed 27 food service companies across seven European markets: the Czech Republic, Denmark, France, Italy, Poland, Romania, and Sweden. In total, 81 company assessments were conducted. This report refers to the number of "companies" rather than "assessments", to align with previous editions of TPO. Since companies were assessed in multiple markets, the term "10 companies" could include multiple assessments of the same company in different markets. Table 1 below shows the markets in which each company was assessed.

Table 1: Assessment matrix showing which companies were assessed in each market.

| | | Czech Republic | Denmark | France | Italy | Poland | Romania | Sweden | Total |
|---------------------|---|----------------|----------|----------|----------|----------|----------|----------|-------|
| 5 To Go |  | | | | | | Assessed | | |
| Autogrill |  | | | | Assessed | | | | 3 |
| Bageterie Boulevard |  | Assessed | | | | | | | 1 |
| Buffalo Grill |  | | | Assessed | | | | | 1 |
| Burger King |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| Domino's |  | Assessed | Assessed | Assessed | | Assessed | Assessed | | 5 |
| Espresso House |  | | Assessed | | | | | Assessed | 1 |
| IKEA |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| Joe & The Juice |  | | Assessed | | | | | Assessed | |
| KFC |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| L'Osteria |  | Assessed | | Assessed | | | | | 2 |
| Max Burger |  | | Assessed | | | | | Assessed | |
| McDonald's |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| Pasibus |  | | | | | Assessed | | | 1 |
| PAUL |  | Assessed | | Assessed | | | | | 3 |
| Pizza Hut |  | Assessed | Assessed | Assessed | | Assessed | Assessed | Assessed | 5 |
| Popeyes |  | Assessed | | Assessed | | Assessed | Assessed | | |
| Salad Box |  | | | | | | Assessed | | 1 |
| Salad Story |  | | | | | Assessed | | | 1 |
| Sibylla |  | | | | | | | Assessed | |
| Spartan |  | | | | | | Assessed | | 1 |
| Starbucks |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| Subway |  | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | Assessed | 7 |
| Sunset Boulevard |  | | Assessed | | | | | | |
| UGO |  | Assessed | | | | | | | 1 |
| Vapiano |  | Assessed | | Assessed | | | | | 2 |
| Zahir Kebab |  | | | | | Assessed | | | 1 |
| Total | | 14 | 13 | 7 | 12 | 12 | 11 | 12 | 81 |



Companies tier for Overall and Pillar scores

Table 2 provides an overview of each company's total overall score, as well as their Pillar 1 Commitments & Targets and Pillar 2 Performance Reporting scores, shown per tier and grade. The symbols behind each company show whether they have moved up or down tiers or have remained in the same tier compared to 2024. The asterisk (*) symbol indicates that a company has been newly assessed in this year's report.

Notably, seven companies have moved up a tier based on their overall score this year and the average overall score in 2025 was 27%, compared to 23% in 2024.

Table 2: Showing the Tier and Grade ranking for each assessment's total overall score, commitments & targets score, and performance reporting score.

| | Total Overall | Pillar 1 – Commitments & Targets | Pillar 2 – Performance Reporting |
|--------------------------|---------------|--|----------------------------------|
| Tier 1 Leading | | Bageterie Boulevard Czech Republic (=) Domino's Poland (=) Espresso House Denmark* Espresso House Sweden* IKEA Czech Republic (=) IKEA Denmark* IKEA Italy (=) IKEA Poland (=) IKEA Romania (=) IKEA Sweden* Joe & The Juice Denmark* Joe & The Juice Sweden* KFC Denmark* KFC Sweden* Max Burger Denmark* Max Burger Sweden* PAUL Czech Republic (▲) PAUL France (=) Subway Sweden* Sunset Boulevard Denmark* Vapiano Czech Republic* (21) | |
| Tier 2 Good | | Buffalo Grill France (♥) Burger King France (=) Domino's France (=) IKEA France (=) KFC France (=) L'osteria Czech Republic* Pizza Hut Czech Republic* Pizza Hut Denmark* Pizza Hut Poland (=) Pizza Hut Romania (=) Pizza Hut Sweden* Popeyes France* Subway France (=) Vapiano France (=) (14) | |

Note: Tier increase (▲), tier drop (♥), same tier (=) and new companies *



| | Total Overall | Pillar 1 – Commitments & Targets | Pillar 2 – Performance Reporting |
|----------------------------------|---|--|--|
| Tier 3 Making progress | PAUL Czech Republic (▲) Burger King France (▲) Espresso House Denmark* Espresso House Sweden* IKEA Poland (▲) Joe & The Juice Denmark* Joe & The Juice Sweden* KFC Denmark* KFC Sweden* Max Burger Denmark* Max Burger Sweden* (11) | L'Osteria France (=) Pizza Hut France (=) (2) | Joe & The Juice Denmark* Joe & The Juice Sweden* (2) |
| Tier 4 Getting started | IKEA Czech Republic (▲) Domino's France (=) Domino's Poland (=) IKEA Denmark* IKEA France (▲) IKEA Italy (▲) IKEA Romania (▲) IKEA Sweden* KFC France (▼) PAUL France (=) Popeyes France* Subway Sweden* (12) | | KFC Denmark* KFC Sweden* Max Burger Denmark* Max Burger Sweden* (4) |
| Tier 5 Poor | Bageterie Boulevard Czech Republic (=) Buffalo Grill France (=) KFC Italy (=) L'osteria Czech Republic* L'osteria France (=) Pizza Hut Czech Republic* Pizza Hut Denmark* Pizza Hut France (=) Pizza Hut Poland (=) Pizza Hut Romania (=) Pizza Hut Sweden* Subway France (=) Sunset Boulevard Denmark* Vapiano Czech Republic* Vapiano France (=) (15) | | PAUL Czech Republic (▲) Burger King France (=) Domino's France (=) Domino's Poland (=) Espresso House Denmark* Espresso House Sweden* KFC France (=) KFC Italy (=) Popeyes France* (9) |
| Tier 6 Very poor | 5 To Go Romania (=) Autogrill Italy (=) Burger King Czech Republic (=) Burger King Denmark* Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Sweden* Domino's Czech Republic* Domino's Denmark* Domino's Romania (=) KFC Czech Republic (=) KFC Poland (=) KFC Romania (=) <i>(Continues in the next page)</i> | 5 To Go Romania (=) Autogrill Italy (=) Burger King Czech Republic (=) Burger King Denmark* Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Sweden* Domino's Czech Republic* Domino's Denmark* Domino's Romania (=) KFC Czech Republic (=) KFC Italy (=) KFC Poland (=) <i>(Continues in the next page)</i> | 5 To Go Romania (=) Autogrill Italy (=) Bageterie Boulevard Czech Republic (=) Buffalo Grill France (=) Burger King Czech Republic (=) Burger King Denmark* Burger King Italy (=) Burger King Poland (=) Burger King Romania (=) Burger King Sweden* Domino's Czech Republic* Domino's Denmark* Domino's Romania (=) IKEA Czech Republic (=) <i>(Continues in the next page)</i> |

Note: Tier increase (▲), tier drop (▼), same tier (=) and new companies *



| | Total Overall | Pillar 1 – Commitments & Targets | Pillar 2 – Performance Reporting |
|-----------------------------|--|---|--|
| Tier 6 (cont.) Very poor | McDonald's Czech Republic (=) McDonald's Denmark* McDonald's France (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Sweden* Pasibus Poland (=) Popeyes Czech Republic* Popeyes Poland* Popeyes Romania* Salad Box Romania (=) Salad Story Poland (=) Sibylla Sweden* Spartan Romania (=) Starbucks Czech Republic (=) Starbucks Denmark* Starbucks France (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Sweden* Subway Czech Republic (=) Subway Denmark* Subway Italy (=) Subway Poland (=) Subway Romania (=) UGO Czech Republic (=) Zahir Kebab Poland (=) (43) | KFC Romania (=) McDonald's Czech Republic (=) McDonald's Denmark* McDonald's France (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Sweden* Pasibus Poland (=) Popeyes Czech Republic* Popeyes Poland* Popeyes Romania* Salad Box Romania (=) Salad Story Poland (=) Sibylla Sweden* Spartan Romania (=) Starbucks Czech Republic (=) Starbucks Denmark* Starbucks France (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Sweden* Subway Czech Republic (=) Subway Denmark* Subway Italy (=) Subway Poland (=) Subway Romania (=) UGO Czech Republic (=) Zahir Kebab Poland (=) (44) | IKEA Denmark* IKEA France (=) IKEA Italy (=) IKEA Poland (=) IKEA Romania (=) IKEA Sweden* KFC Czech Republic (=) KFC Poland (=) KFC Romania (=) L'osteria Czech Republic* L'osteria France (=) McDonald's Czech Republic (=) McDonald's Denmark* McDonald's France (=) McDonald's Italy (=) McDonald's Poland (=) McDonald's Romania (=) McDonald's Sweden* Pasibus Poland (=) PAUL France (=) Pizza Hut Czech Republic* Pizza Hut Denmark* Pizza Hut France (=) Pizza Hut Poland (=) Pizza Hut Romania (=) Pizza Hut Sweden* Popeyes Czech Republic* Popeyes Poland* Popeyes Romania* Salad Box Romania (=) Salad Story Poland (=) Sibylla Sweden* Spartan Romania (=) Starbucks Czech Republic (=) Starbucks Denmark* Starbucks France (=) Starbucks Italy (=) Starbucks Poland (=) Starbucks Romania (=) Starbucks Sweden* Subway Czech Republic (=) Subway Denmark* Subway France (=) Subway Italy (=) Subway Poland (=) Subway Romania (=) Subway Sweden* Sunset Boulevard Denmark* UGO Czech Republic (=) Vapiano Czech Republic* Vapiano France (=) Zahir Kebab Poland (=) (66) |

Note: Tier increase (▲), tier drop (▼), same tier (=) and new companies*



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