The Pecking Order

Up to scratch?

How leading global fast-food companies are failing the chickens their businesses depend on.

WORLD ANIMAL PROTECTION

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Foreword

The unacceptable ways that chickens are raised for their meat and the pain and stress they are often caused is rightly putting food retailers under increasing scrutiny.

Most of the 60 billion chickens farmed annually worldwide endure acute and severe suffering. Starting as new-born chicks, they are forced to reach their slaughter weight in around 40 days. Such an unnaturally fast growth rate places an enormous strain on their young bodies. Their lives are made even worse through cruel confinement in crowded, featureless and unnaturally lit sheds.

For years these brutal farming practices have thrived behind closed doors, invisible to most consumers. But times are changing. Consumer awareness of the high price chickens pay for our fast food enjoyment is increasing, just as it did for the suffering of caged egg-laying hens some years ago.

Through our Change for Chickens campaign, awareness is growing. World Animal Protection met with KFC in October 2018. We handed them a petition from more than half a million people in over ten countries urging the company to give its chickens better lives. Forward thinkers from all parts of society are coming together to say, "enough is enough".

Such mounting pressure means the time to act is now.

The solutions are already available. These are higher-welfare farming methods using chicken breeds that grow at healthier rates. The chickens enjoy meaningful environments with more space, natural light and 'enrichment' to provide stimulation. These environments promote important natural behaviours and keep these inquisitive, lively animals healthy and active. This higher-welfare approach to chicken production must become the new standard across the globe.

Thankfully industry is beginning to embrace these solutions too. Nearly 100 companies have already committed to improving the lives of chickens within the next few years. But there is still a long way to go. And 'The Pecking Order 2018' – the first report of its kind – from World Animal Protection exposes just how far.

Our assessment shows that some of the biggest and most iconic food companies in the world are doing little to improve the lives of the chickens on which their businesses depend. In the current climate where consumers are calling for change for chickens, companies that do nothing are taking a significant business risk. They are ignoring the opportunities created by higher animal welfare standards.

Our intention is for companies to use 'The Pecking Order 2018' to help identify and implement solutions that will grow their businesses. By doing so they can radically change the lives of the animals they use for the better. This seems like a fair deal.

Our doors are open for conversation

Jonty Whittleton, global campaign head,
World Animal Protection

Executive Summary

Nine of the world's most iconic fast-food companies are not up to scratch in protecting and managing the welfare of the chickens that make their businesses possible and profitable. Not one of the companies assessed for 'The Pecking Order 2018' had an effectively-implemented strategic commitment to chicken welfare. This is despite increased customer concern for the way the animals used by these businesses are treated.

Chickens that supply the fast-food industry are farmed on a huge industrial scale. Fast growth rates leading to lameness and immense pain and suffering are the norm as is extreme close confinement, in enormous, featureless sheds containing tens of thousands of birds.

This report, 'The Pecking Order 2018', from World Animal Protection is the first ever assessment of global brands' commitment to the welfare of chickens farmed for meat. It was conducted in August 2018.

The results show an almost universal disregard among the brands within their policies, business targets and objectives for improving the treatment of chickens throughout their global supply chains.

Notable exceptions occur in some regions. For example, in the UK, natural light and enrichment are being introduced by a few companies. And in the US, big promises have been made by several of the companies featured in 'The Pecking Order 2018' to transform their treatment of chickens. However, in most areas where they operate, companies do not even guarantee a humane slaughter for the chickens used in their businesses.

Brands featured in 'The Pecking Order 2018' are:

Burger King

Domino's PLC & Domino's Inc

Starbucks

KFC

Pizza Hut

Subway

Nando's

McDonald's

These companies were chosen based on parameters including:

Scale

They are serving millions of customers worldwide every single day

Volume

They are serving up meat from hundreds of millions of chickens every year

Popularity

They are loved by consumers around the world who trust them to do the right thing when it comes to animal welfare

To conduct the assessment, World Animal Protection used the publicly available information provided by each company and assessed their performances in the following key areas:

Policies

serving millions of customers worldwide every single day

Objectives and targets

serving up meat from hundreds of millions of chickens every year

Performance reporting

the companies, and the brands they build, are loved by consumers around the world who trust them to do the right thing when it comes to animal welfare.

Researchers found the following issues:

1. None of the companies has an effectively-implemented strategic commitment to chicken welfare.
2. Fast-food companies have started to develop chicken welfare policies, but they do not go far enough – the geographic scope and content is limited.
3. It is unclear whether company commitments to improving chicken welfare are being translated into tangible objectives and targets.
4. There is limited information on how these companies are performing in relation to their animal welfare policies.

World Animal Protection is challenging companies to source chickens who grow at a healthier rate, and to use farms that provide the necessary space, natural light and environment to keep the animals healthy and active.

Next steps are to give all the companies in this report clear guidance on how to improve their performance on chicken welfare. Their progress or otherwise will be assessed for 'The Pecking Order 2019' and made publicly available again.

These assessments are central to our Change for Chickens campaign that is inspiring and mobilising consumers to hold companies publicly and openly accountable on their chicken welfare practices.

Moving the world for farm animals

From offices in Australia, Brazil, Canada, China, Costa Rica, Denmark, India, Kenya, the Netherlands, New Zealand, Sweden, Thailand, UK and USA, we move the world to protect animals. During 2017 we gave 321 million animals better lives through our campaigns that focus on animals in farming; animals in disasters and animals in the wild.

Our practical, solution-focussed approaches are mobilising consumers, the food industry, governments and farmers to transform the lives of farm animals. Through our Change for Chickens campaign, launched in 2016, we are working to end the suffering of the world's 40 billion chickens factory farmed for their meat.

Why protecting chicken welfare is important

Around 60 billion meat chickens – also known as broilers – are raised around the world for consumption each year. Of these, more than 40 billion are factory farmed. They spend most of their lives in heavily crowded sheds, often with little or no natural light. They have few opportunities to explore, perch, dustbathe, or do many of the things they would naturally do if they were living outside.

As global demand for chicken meat and fast food increases, chickens are being forced to change along with the methods used to farm them. Intensively farmed chickens are genetically selected to grow much more rapidly and have disproportionally large chests. As a result, their legs are often unable to support their own body weight.

Figure 1.1 shows how the body weight of a typical chicken in the United States has increased substantially during the last century while the market or slaughter age has substantially decreased. This extreme growth rate is even more shocking when comparing the changing physical appearance and weights of chickens over just the last few decades (Figure 1.2).

Figure 1.1
Changes in average broiler age and weight at slaughter in the United States

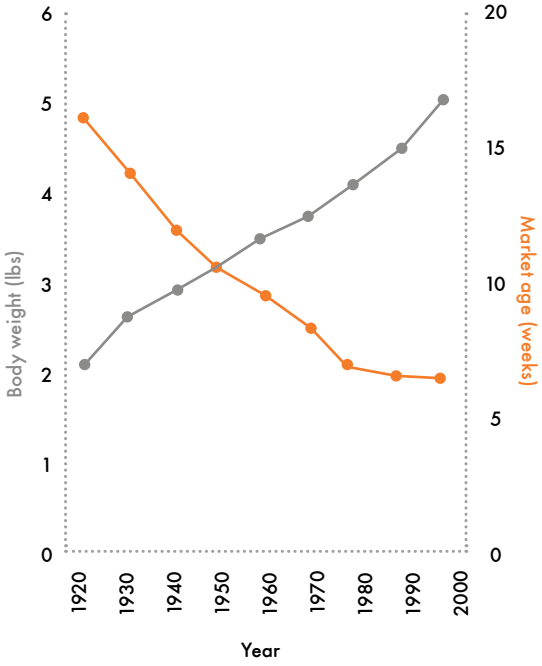
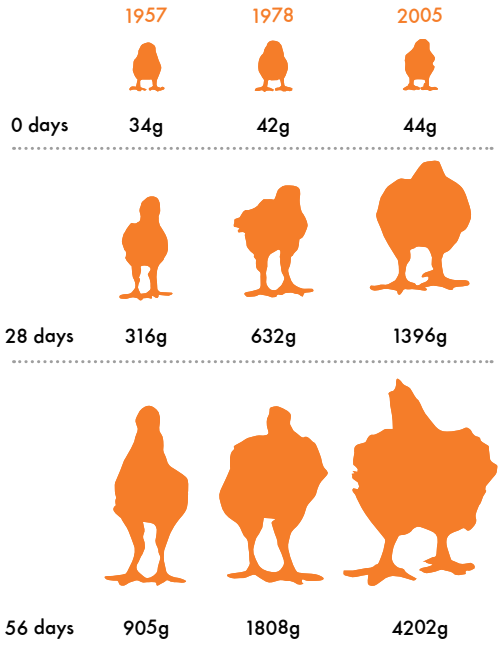


Figure 1.2
How meat chickens have changed*



*Age-related changes in size of University of Alberta Meat Control strains unselected since 1957 and 1978 and Ross 308 broilers (2005). Within each strain, iages are of same bird at 0, 28 and 56 days of age.

Main welfare problems for chickens caused by intensive farming

1 Growing too quickly

The modern meat chicken has been developed through extreme genetic selection. Each chicken is expected to reach its slaughter weight in around 40 days – a weight it would naturally take around three months for chickens to reach. This rapid growth can cause severe health problems including painful lameness, because the chickens' legs cannot support their rapidly growing bodies, and heart and lung strain. These health problems mean the animals often spend much of their lives sitting down and are in constant pain from their lameness.

2 Overcrowding misery

A typical chicken shed can hold tens of thousands of animals. Most sheds are so densely packed that in the last week of their lives, each bird will only have a surface area smaller than an A4 piece of paper in which to live. Consequently, they cannot move around or behave naturally. Such severe overcrowding can cause lameness and painful skin diseases.

3 The use of cages

Cages are used to raise chickens in some geographies and supply chains. These barren systems severely restrict movement and behaviour and involve even more extreme overcrowding. Consumers are already clear that cages are unacceptable for chickens as a result of campaigns against the caging of egg-laying hens.

4 Unnatural, boring environments

A typical, featureless chicken shed stops the animals behaving naturally; they cannot perch, forage, explore, or dustbathe to clean their feathers. These natural behaviours are important for chickens' health. They help prevent physical problems – like lameness and skin problems including sores and rashes. Natural behaviours are vital for stress relief and pleasure too.

5 Unnatural lighting

Most chickens spend their whole lives in closed sheds without any natural light. Lights are left on for long periods to encourage rapid growth, often with only a short period of darkness. This practice stops the chickens from resting and developing naturally, which increases their stress levels and susceptibility to panic.

6 Squalid conditions

While good quality ground material (litter) is certainly preferred and enables dust bathing, factory-farmed chicken lives are often made a misery by poor quality litter. Because so many chickens live closely together the litter gets wet, thick and dirty with their ammonia-rich droppings. These conditions stop the birds naturally scratching and bathing. They can cause painful sores and rashes on their feet, legs and breasts, and harsh ammonia fumes can cause lung and eye problems.

What must change?

We want fast-food chains to only use chickens who grow at a healthier rate and ensure that they are raised in higher-welfare indoor systems.

To save billions of chickens from suffering, these higher-welfare indoor systems outlined below, must become the new standard for chicken production across the globe.

Healthier breeds

Companies must use chicken breeds that grow at a healthier rate.

Freedom to move

Companies must ensure that chickens have the space to behave more naturally. Cages must never be used.

Meaningful environments

Companies must give chickens the opportunity to enjoy natural behaviours via enrichment – including perches or platforms and pecking objects – natural lighting and high-quality litter.

Humane slaughter

Companies must ensure that chickens are slaughtered using more humane methods that avoid live shackling and render all animals unconscious before slaughter.

World Animal Protection's specific requirements for improving chicken lives in Europe and for North America can be found here:

Europe | North America

How fast-food leaders are protecting chickens

We want fast-food chains to only use chickens who grow at a healthier rate and ensure that they are raised in higher-welfare indoor systems.

To save billions of chickens from suffering, these higher-welfare indoor systems outlined below, must become the new standard for chicken production across the globe.

Assessing the situation – our methodology

This report – the first of its kind – assesses how nine major fast-food companies treat the chickens upon which their businesses depend.

Companies in 'The Pecking Order 2018'

- Burger King
- Domino's PLC
- Domino's Inc
- KFC
- McDonald's
- Nando's
- Pizza Hut
- Starbucks
- Subway

We used publicly available information provided by each company to assess their performance in the following three key areas. Six questions were applied to each area.

Policies

The issues that companies choose to focus on. We developed six questions relating to management commitment to improve chicken welfare. The criteria are focused on our Change for Chickens campaign demands.

Objectives and targets

What companies say they're going to do, and by when. We developed six questions relating to time-bound targets linked to the management commitments outlined in the previous policies section.

Performance reporting

How companies are reporting on progress. We developed six questions focused on evidence of how companies are measuring performance against their chicken welfare commitments as a proportion of their global supply chain.

Companies could achieve a total of 90 points in 'The Pecking Order 2018'. The points are divided as follows.

Assessment criteria subject areas	Points
1. Corporate commitments	30 points
2. Objectives and targets	30 points
3. Performance reporting	30 points
Total	**90 points (100%)**

After finalising the scores, companies were graded as below.

Rank	Category score	Final score
Very good	25 - 30	75 - 90
Good	20 - 24	59 - 74
Fair	15 - 19	43 - 58
Poor	10 - 14	27 - 42
Very poor	5 - 9	11 - 26
Failing	0 - 4	0 - 10

These companies were chosen based on parameters including:

Scale

They are serving millions of customers worldwide every single day

Volume

They are serving up meat from hundreds of millions of chickens every year

Popularity

They are loved by consumers around the world who trust them to do the right thing when it comes to animal welfare

We rely on published information:

- to encourage better transparency and quality of information published by companies
- to avoid bias in terms of those companies we are working with
- to ensure that we assessed companies consistently.

The published information included:

- the material on companies' corporate (ie parent company) websites
- the material contained in annual reports
- corporate responsibility reports and other publications
- the material on subsidiary company websites
- company press releases frequently asked questions.

Following these initial assessments, individual company reports were reviewed by World Animal Protection to check the factual accuracy of the content and to ensure consistency of the assessment methodology.

Final confidential company reports were then created, showing individual scores and comments for each question, and overall company scores and comparable sector scores.

The Pecking Order 2018

Figure 1.1
Ranking of all companies

	Overall	Policies	Targets	Reporting
Burger King	Poor	60%	60%	0%
Starbucks	Poor	60%	60%	0%
Subway	Poor	60%	60%	0%
McDonald's	Very poor	33%	37%	17%
KFC	Very poor	30%	20%	20%
Pizza Hut	Very poor	30%	20%	20%
Nando's	Very poor	23%	20%	20%
Domino's, PLC	Failing	17%	0%	10%
Domino's, Inc	Failing	0%	0%	0%

No strategic commitment

Not one of the nine companies assessed had an effectively implemented strategic commitment to chicken wel-fare. They received grades from 'poor' to 'failing.'

Of the nine companies, three received 'poor' grades, four received 'very poor' grades and two were given 'failing' grades (see Figure 1).

Limited Policies

We found one of the nine companies – McDonald's – with a published global policy on chicken welfare. However, this policy only covers 70% of the company's operations. The policy is limited in scope by ignoring most of the most important issues affecting chicken welfare, such as healthier breed selection.

A further seven companies have published policies, but the policies are only limited to specific geographic regions. And in most cases, the geographic scope is limited to the companies' home markets and markets where non-governmental organisations campaign on animal welfare issues. Chicken welfare should be prioritised by these companies, regardless of where they're based.

Many of these policies are also limited in terms of the animal welfare issues they cover. Only Burger King, Starbucks and Subway policies clearly state positions on: close confinement; the use of chickens who grow at a healthier rate; the provision of meaningful environments, and humane slaughter.

Furthermore, across all these issues, no company has committed to improving the welfare of chickens in all their global locations. For example, four companies – Burger King, McDonald's, Subway and Starbucks – have committed that chickens in their supply chains will be humanely slaughtered. But these commitments are all limited to specific markets or geographic regions. Consequently, in certain areas chickens may be enduring stressful, painful deaths.

Encouragingly, seven of the nine companies – Burger King, KFC, McDonald's, Nando's, Pizza Hut, Starbucks and Subway – use third party auditors in certain geographies to check compliance with their company chicken welfare standards. This indicates a growing culture of introducing the management processes and controls necessary to ensure the effective implementation of animal welfare commitments.

No targets – no objectives

However, targets and objectives – standard corporate practices – relating to animal welfare policies are lacking. This absence suggests the companies assessed still need to make significant progress towards implementing their policies.

Two companies have not published any targets at all. The remaining companies have all set some targets, but differ in terms of the topics covered by the targets. The most common targets relate to avoiding the use of cages, humane slaughter and to the use of auditing processes to ensure compliance with chicken welfare standards during slaughter.

Other target areas include: maintaining stocking densities below 30 kg/m2 or 6 lb/ft2, the use of healthier chicken breeds and the provision of meaningful environments.

One company, McDonald's, set a global target prohibiting the use of chicken cages or multi-tier systems, but other corporate targets were all limited to specific geographic regions. And in almost all cases, these were the countries or markets where non-governmental organisations have been most active on animal welfare issues. As stated above, improving chicken welfare should be a priority for these companies, regardless of where they're based.

No performance reporting

Performance reporting is the moment of truth. It is where companies demonstrate how they are doing and explain how far they have progressed against their targets. It is also key to holding companies to account for their practices and their performance.

Of the nine companies, only five report any performance data, and this information is severely limited in scope. No company currently provides robust performance data on the issues that matter when it comes to chicken welfare – healthier chicken breeds, low stocking densities, meaningful environments and humane slaughter. This is to be expected to some extent given that the company's policies, and targets and objectives are not up to scratch. We hope that companies will improve their performance reporting when we update The Pecking Order every year.

Next steps

'The Pecking Order 2018' shows that the nine, leading fast-food brands have a long way to go in terms of protecting the welfare of the chickens that supply their businesses and to meet consumer interest.

We will use our research and findings to support them to climb up the Pecking Order in the following ways.

- We will provide each company with details of its assessment and clear guidance, supported by our technical expertise, on how they can improve their performance on chicken welfare. 'Managing change for chickens – our company checklist to improve chicken welfare' on page 22 is a vital starting point.
- We will repeat the assessment annually, to shine a light on the state of the fast-food industry regarding chicken welfare and document progress (or regression) from year to year.
- We will use this and each subsequent 'The Pecking Order' as a tool to inspire and mobilise our public audiences. We want them to hold companies to account on their chicken welfare practices and drive transparent public reporting.

We want fast-food companies to have full information about their supply chains. We are challenging them to source chickens that grow at a healthier rate. They must use farms that provide the necessary space, natural light and environment to keep the animals healthy and active. This model of raising chickens must become the global standard.

Managing change for chicken: Company checklist to improve chicken welfare

	Policy	Objectives & targets	Performance reporting
	Companies should have a published global policy on chicken welfare with clearly defined geographic/product scope and clear commitments to...	Companies are expected to set time bound targets to...	Companies are expected to report on the proportion of chickens in their global supply who are...
Healthier breeds	Use chickens bred for measurably improved welfare outcomes, including detail on selected breeds.	Use, or continue to use, chickens bred for measurably improved welfare outcomes.	Bred for measurably improved welfare outcomes.
Freedom to move	Avoid close confinement, specifically cages/multi-tier systems and limiting stocking densities to 30 kg/m2 or 6 lbs/ft2.	Achieve, or maintain, stocking densities of 30 kg/m2 or 6 lbs/ft2 and avoid, or continue to avoid, chicken cages/multi-tier systems for all chicken chickens.	Stocked at densities of 30 kg/m2 or 6 lbs/ft2 or less and/or not kept in chicken cages or multi-tier systems.
Meaningful environments	Provide chickens with meaningful environments (eg including perches, pecking substrates and lighting).	Provide, or continue to provide, birds with meaningful environments.	Kept in enriched environments.
Humane slaughter	Use humane slaughter processes, including the requirement for pre-slaughter stunning and avoidance of live shackling.	Use, or continue to use, humane slaughter processes.	Slaughtered using humane slaughter processes.

Photo courtesy of the RSPCA

The Pecking Order is a Change for Chickens campaign project.
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