



Executive summary

The Pecking Order 2025 – Romania

Driving change in the fast-food industry for better chicken welfare

Why this report matters

Chickens raised for meat, known as “broiler” chickens, are the most farmed land animals in the world. Yet they receive minimal protection under outdated EU and Romanian laws. In 2023, more than 6.4 billion chickens were slaughtered in the EU, and over 300 million of those in Romania¹ alone. These birds are largely kept in intensive indoor systems that prioritize production over welfare, causing them to suffer from lameness, overcrowding and inhumane slaughter practices.

The fast-food industry, as a major buyer of chicken meat, has both the influence and responsibility to improve these conditions. Through publicly committing to procurement policies, fast-food chains can drive change that improves the welfare of millions of chickens and help meet consumer expectations.

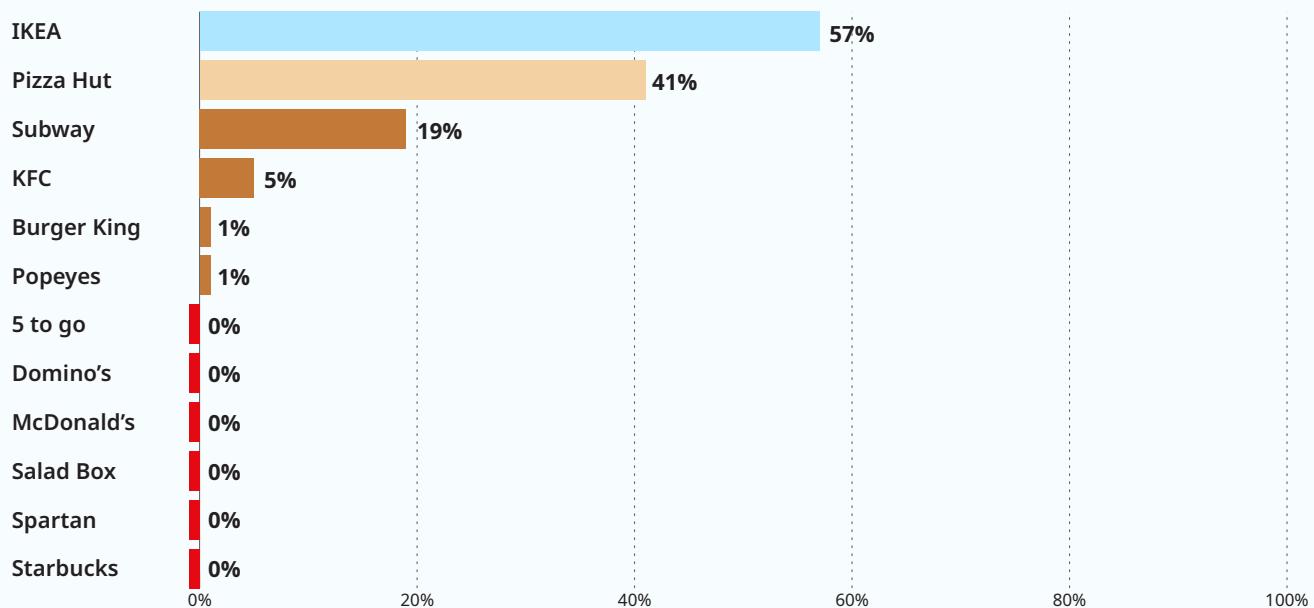
The Pecking Order is a benchmarking tool that evaluates how well fast-food companies are performing on chicken welfare, based on the science-based European Chicken Commitment (ECC). The 2025 edition assesses 12 leading chains in Romania and compares their progress with companies in six other EU countries. The findings reveal progress—with clear paths forward for industry, producers and lawmakers, but also reveal companies that have stagnated and need to do more.

Company and industry insights: Small steps, slow progress

- Only two companies—IKEA and Pizza Hut—have made chicken welfare commitments, aligned with ECC. Subway had an ECC policy but is no longer fully aligned due to a missing deadline.
- 83% of assessed companies still have no public chicken welfare policy aligned with ECC, including major international brands like Burger King, KFC and McDonald's, and national chains like 5 to go, Salad Box and Spartan.
- Six companies scored 0%, including major players like McDonald's and Starbucks.
- IKEA and Subway report on their progress, demonstrating growing engagement with higher welfare standards. Unfortunately, no company has fully implemented the ECC in Romania or publicly confirmed that 100% of its chicken meat meets ECC standards.
- While some parent companies communicate globally, none of the assessed companies provide information on chicken welfare on their Romanian websites. This limits awareness and understanding for Romanian consumers.

Overall score of Romanian fast-food companies on broiler chicken welfare

The score combines a company's commitments to improve chicken welfare with its progress in putting those commitments into action, based on the ECC criteria.

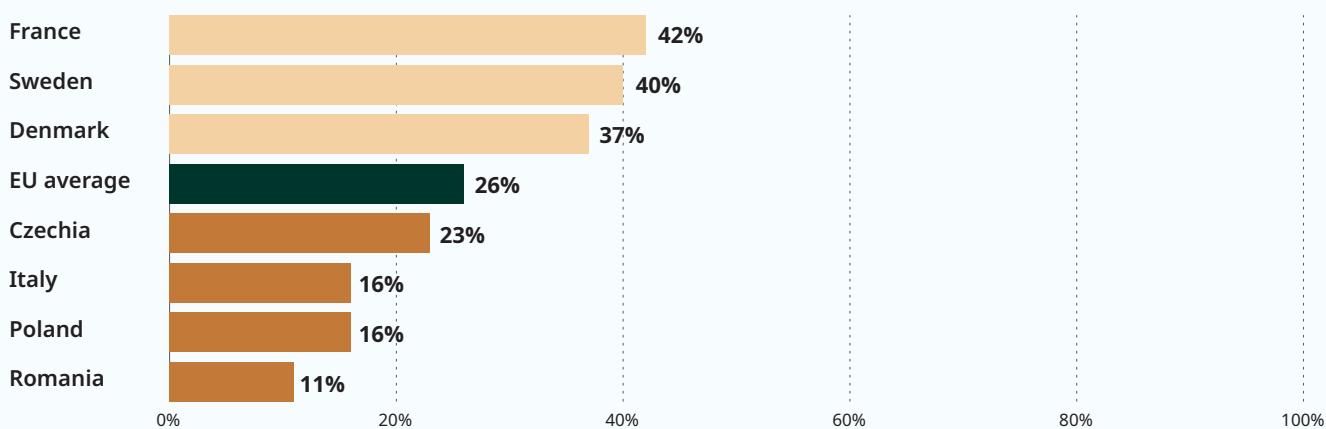


EU insights: Romania's performance is the weakest in the EU

Across the EU, 81 fast-food chains were evaluated in seven countries. Company scores within a country reflect the state of broiler chicken welfare in a country's fast-food industry. All countries together reflect the state of affairs in the EU.

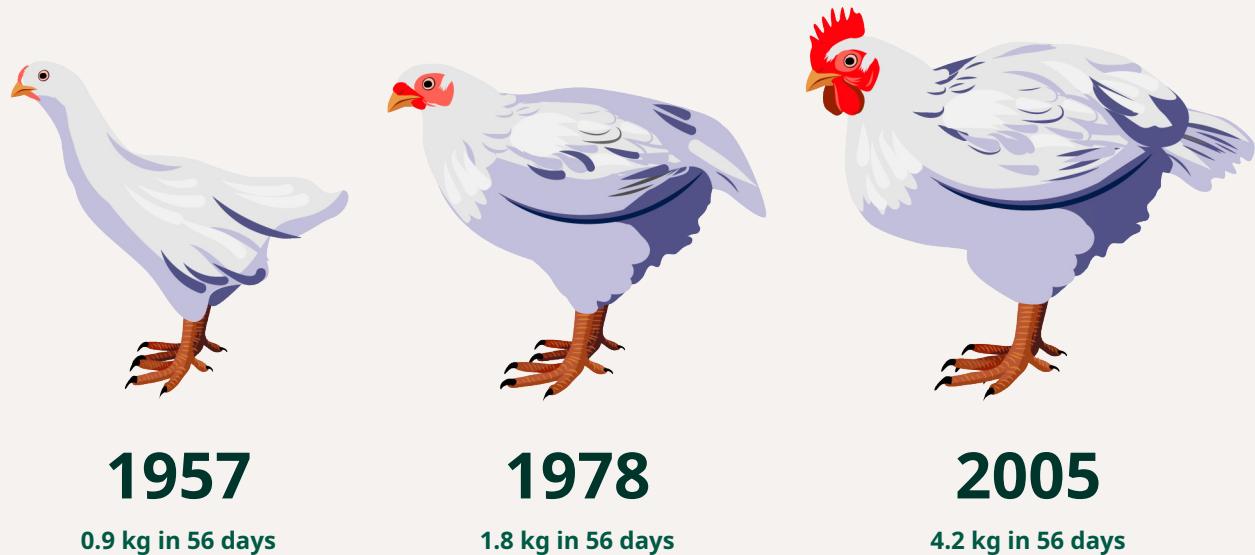
The average fast-food industry score by country on broiler chicken welfare (2025)

Romania's fast-food industry scores lowest on chicken welfare among all assessed countries.



Key takeaways

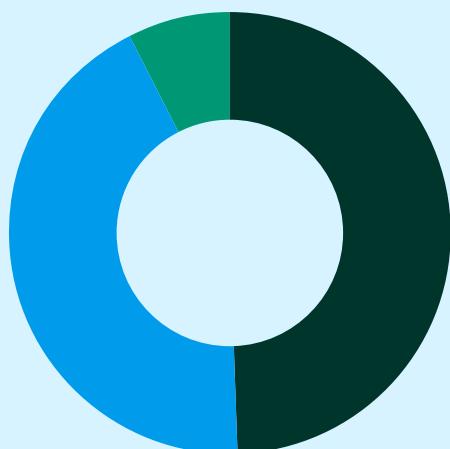
- There is an EU-wide increase in scores. The EU average rose to 26% in 2025, up from 22% in 2024. This improvement is also driven by positive developments in Czechia, Italy and France. The EU fast-food industry improved from "Very poor" to the "Poor" category.
- France leads with a 42% average, showing that better commitments and transparency are achievable.
- Romania has the lowest score among all countries, with an average industry score of 11% in 2025—down from 17% in 2023, highlighting both the urgency and the opportunity for action.



Chickens raised conventionally are bred for extremely rapid weight gain.²

Public expectations are shifting

Romanian consumers are increasingly concerned about animal welfare:



92% of Romanians find it very important to ensure good farm animal welfare.³

80% of Romanians are willing to pay up to 10% more for higher animal welfare products.⁴

13.9% increase of retail sales of free-range and organic chicken meat in Romania between 2018-2022.⁵

Brands that fail to act risk falling behind shifting consumer expectations.

What needs to happen next

- **Companies: From commitment to action**

Fast-food companies must take visible steps to improve chicken welfare. Those without a commitment should begin developing policies aligned with the ECC criteria. For companies that already have commitments, the next step is to publish clear road maps and timelines for implementation.

- **Producers: Collaboration toward higher welfare supply chain**

With only a few chicken producers in Romania using alternative, higher welfare farming models, aligned with the ECC criteria, fast-food chains and producers must collaborate closely to meet these standards, which can also help reduce reliance on antibiotics. Producers need dedicated buyers to justify investments in higher welfare, while fast-food chains rely on these producers for a steady supply of higher welfare chicken.

- **Lawmakers: Driving change through legislation**

Voluntary action alone will not shift the industry. Romanian and EU lawmakers must set clear, enforceable standards that apply to all companies. Aligning national legislation with ECC criteria and current animal welfare science, especially regarding stocking density and promoting slower-growing genetic lines, can level the playing field, support producers during the transition and ensure progress benefits all chickens.

As a key player in Europe's broiler chicken market, Romania's fast-food industry has both the opportunity and responsibility

to improve welfare standards. By supporting the shift toward higher welfare practices, the industry can help reduce the suffering of millions of chickens and align with consumer expectations and animal welfare science for a more humane food system, visible on the menus of fast-food companies.

**Explore the full report
for detailed insights, year
comparisons and methodology:**



References

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5. Maia Research. 2024. Customized EU Cage Free Eggs, Cage Free Chicken Meat and Crate Free Pork Industry Market Research Report. January 2024.



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