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The Pecking Order 2025 – Romania

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



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Executive summary

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 Yet they receive minimal protection under outdated EU and Romanian laws.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.

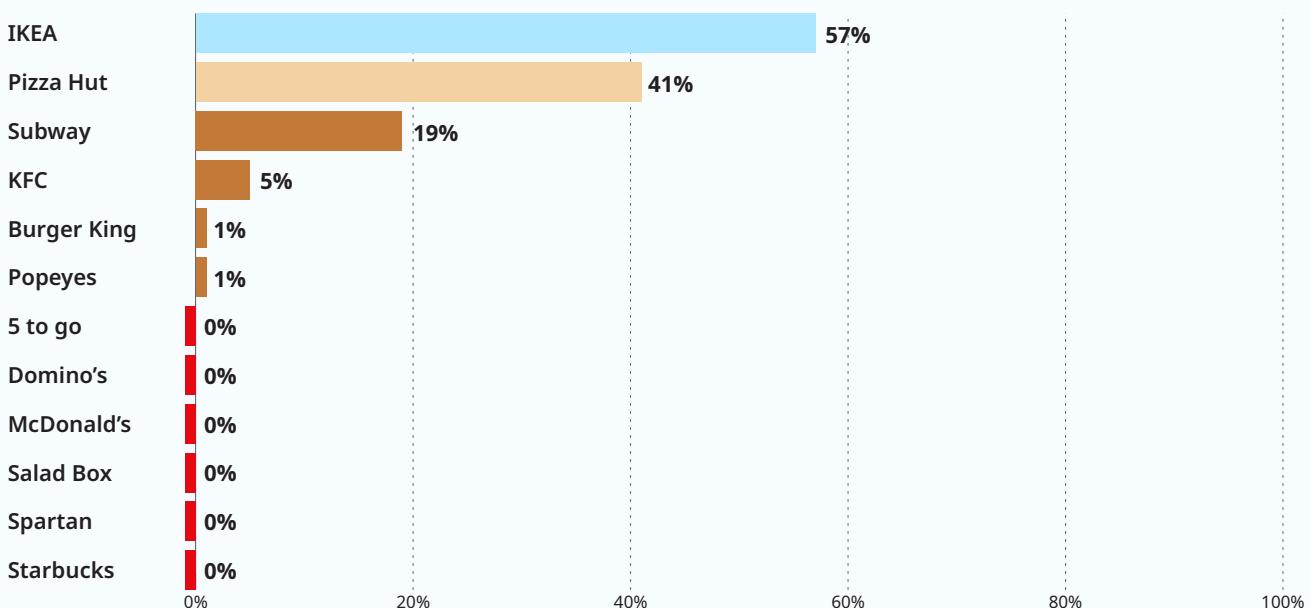
The Pecking Order is a benchmarking tool that evaluates how well fast-food companies are performing on chicken welfare, based on the science-based European Chicken Commitment (ECC). The 2025 edition assesses 12 leading chains in Romania and compares their progress with companies in six other EU countries. 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.

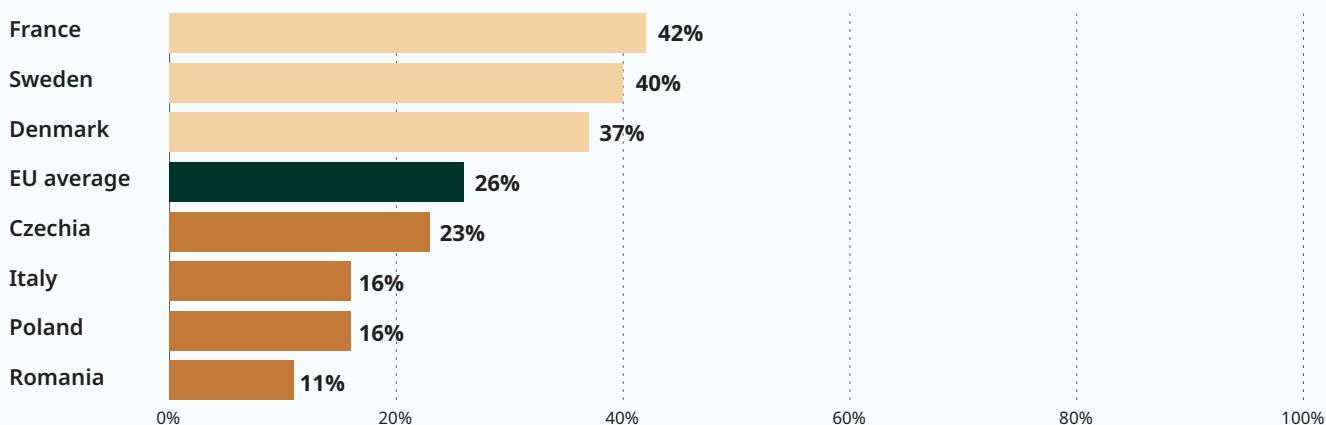


EU insights: Romania's performance is the weakest in the EU

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

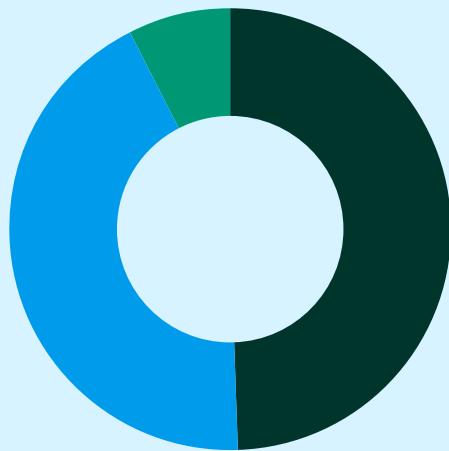
- There is an EU-wide increase in scores. The EU average rose to 26% in 2025, up from 22% in 2024. This improvement is also driven by positive developments in Czechia, Italy and France. The EU fast-food industry improved from "Very poor" to the "Poor" category.
- France leads with a 42% average, showing 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.

Access to all reports in Romanian:
humaneworld.org/thepeckingorderromania

Access to all reports in English:
humaneworld.org/thepeckingorder





About The Pecking Order

Chickens raised for meat, known as “broiler” chickens, are the most farmed land animals, yet they receive minimal protection under outdated EU laws. In 2023, over 6.4 billion chickens were slaughtered in the EU, with Romania accounting for over 300 million.⁶

The fast-food industry is a major buyer of chicken meat and has the influence and responsibility to drive needed welfare improvements. *The Pecking Order* assesses how leading national and international fast-food companies are progressing on broiler chicken welfare, based on the European Chicken Commitment criteria.

This report compares Romanian companies to each other and to peers in six other EU countries, showing where Romania’s fast-food industry stands. It aims to support companies, producers and lawmakers in creating a food system that reflects both scientific standards and public expectations—while informing consumers who care about animal welfare, especially chickens.



Why chicken welfare matters

Introduction

Chickens raised for meat, known as “broiler” chickens, are the most farmed land animals. In 2023 alone, over 6.4 billion chickens were slaughtered in the EU. Romania ranked eighth, accounting for more than 300 million chickens.⁷

Despite their numbers, chickens remain subject to outdated and minimal EU welfare standards, which fall short of recent scientific recommendations. Current industry practices cause serious welfare issues and no longer meet public expectations regarding animal welfare.

The fast-food sector, as a major buyer of chicken meat, plays a central role in shaping how chickens are kept and killed. This gives the industry both significant influence and responsibility in driving animal welfare improvements across supply chains.

Conventional chicken production fails animals and humans

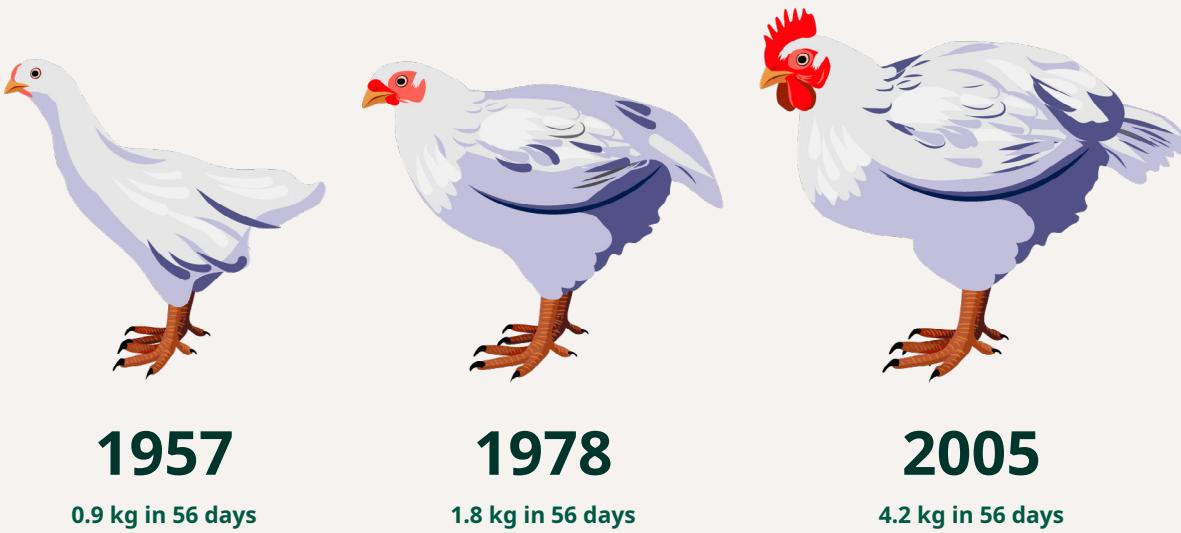
Chickens are active, social and curious animals, with notable cognitive abilities and complex behavioural needs. However, today’s chicken production systems fail to meet these needs, causing serious welfare issues.

Approximately 90% of chickens are raised in intensive indoor systems in the EU, in which tens of thousands of birds with fast growth rates are packed into barns at high stocking densities.⁸ The vast majority of chicken production in Romania follows the same model, which prioritises maximum output over animal welfare.

 **Further reading:** [Overview of chicken welfare issues vs. ECC](#) in more detail.

Key welfare concerns include:

- **Fast-growing breeds** suffer from lameness, difficulty walking^{9,10,11} and muscle damage.¹²
- **Overcrowding** restricts movement, harms health¹³ and suppresses natural behaviours.^{14,15}
- **Barren environments** lack enrichment, perches or natural daylight.
- **Ineffective slaughter methods**, such as live shackling and electrical waterbaths, cause unnecessary stress and suffering.



Graphic 1: Chickens raised conventionally are bred for extremely rapid weight gain.¹⁶

Why chicken welfare matters

Antibiotics have been widely used in conventional chicken production to enhance growth and prevent diseases, yet their misuse and overuse has contributed to antibiotic-resistant bacteria, impacting animal welfare and human health. Slower-growing chickens have better immunity,^{17,18} are more robust and require fewer antibiotics^{19,20,21} than conventional chickens.

 **Further reading:** [Insights into tackling antibiotic resistance through better chicken welfare](#)

EU law is outdated

Current EU legislation permits overcrowded and barren conditions, dim lighting and inhumane slaughter of chickens. It also allows the use of fast-growing genetic lines of chickens, who reach market weight so quickly that they suffer from painful skeletal disorders and walking abnormalities.^{22,23,24}

In 2023, the European Food Safety Authority (EFSA) published a series of [scientific opinions](#) on farm animal welfare, that underline the serious shortcomings of existing EU law and the urgent need for legislative change to improve the welfare of animals kept and killed for food.

One science-based solution is the [European Chicken Commitment \(ECC\)](#). Agreed upon by animal welfare organisations worldwide, the ECC sets minimum standards that address the most urgent welfare issues in broiler chicken production. The key areas include stocking density, growth rate, daylight, perches and enrichment, air quality, cages and slaughter. These standards align with EFSA's recommendations and provide guidance for companies and lawmakers. In Table 1, current EU legislation, which is also the law for Romania, is compared to some key ECC welfare criteria.

 **Further reading:** [Full comparison EU broiler chicken legislation vs. all ECC criteria](#)

Criteria	EU legislation ²⁵	ECC requirement ²⁶
Stocking density	A maximum stocking density of 33-42 kg/m ²	A maximum stocking density of 30 kg/m ²
Breeds	Low welfare, fast-growing genetic lines permitted	Only slower-growing genetic lines with higher welfare outcomes permitted
Enrichment	Not required	Perches and pecking materials required
Slaughter	Electrical waterbath stunning permitted ²⁷	Controlled atmospheric stunning using inert gas or multiphase systems, or effective electrical stunning without live inversion

Table 1: Comparison EU legislation and key ECC criteria

Companies are changing Romania's industry

As demand for higher-welfare products grows, the food industry is responding. Over 400 leading companies in Europe have already committed to the ECC, including businesses operating in Romania. Examples of companies:²⁸

- **Restaurants**
 - IKEA, PAUL, Pizza Hut, Subway
- **Manufacturers and Retailers**
 - Bonduelle, Danone, Dr. Oetker, Nestlé, Biosano
- **Hospitality and Food Service**
 - Accor Hotels, Louvre Hotels, Sodexo

These early movers are helping to set new expectations and standards for higher welfare chicken production. With the 2026 ECC deadline approaching, this is a crucial year for these companies to demonstrate meaningful progress toward their commitments.

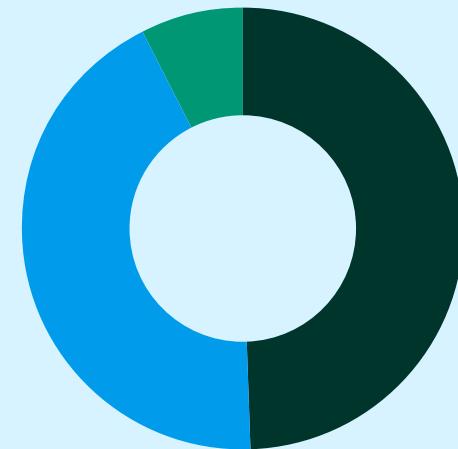
So, why does chicken welfare matter?

Chickens suffer intensively in the current meat industry. Improving their welfare is not only the right thing to do, but also important for the future of the chicken sector. As customers increasingly ask for higher welfare products and market standards change, improving how chickens are kept will help the industry grow and keep Romania competitive in the European market. As a major buyer, the fast-food industry holds significant influence and responsibility in driving animal welfare improvements across supply chains.



Public expectations are shifting

Consumer preferences have changed over the years. Recent surveys show more concern for farmed animal welfare and a growing demand for more ethically produced products.



92% of Romanians find it very important to ensure good farm animal welfare.²⁹

80% of Romanians are willing to pay up to 10% more for higher animal welfare products.³⁰

13.9% increase of retail sales of free-range and organic chicken meat^a in Romania between 2018-2022.³¹

✓ Companies that invest in animal welfare build stronger brand trust, reduce reputational risks and future-proof their supply chains.

✓ **Further reading:** More insights in [Romania's chicken industry and its shifting consumer preferences](#)

^a The specific standards to qualify production as free-range or organic can vary. Generally, free-range and organic chickens are allowed access to outdoor areas during the day. Organic chickens follow stricter standards, including a 100% organic feed, no routine antibiotics, and more space both indoors and outdoors than free-range and conventional chickens.



Fast-food industry results

The Pecking Order 2025 provides an overview of how the fast-food industry in Romania performs on broiler chicken welfare. The report assesses 12 leading chains based on their publicly available procurement policies and practices, measured against the criteria of the ECC.

 Companies are assessed using a standardised methodology aligned with the ECC. For details, see Methodology and scope, pg. 27.

Company insights

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.

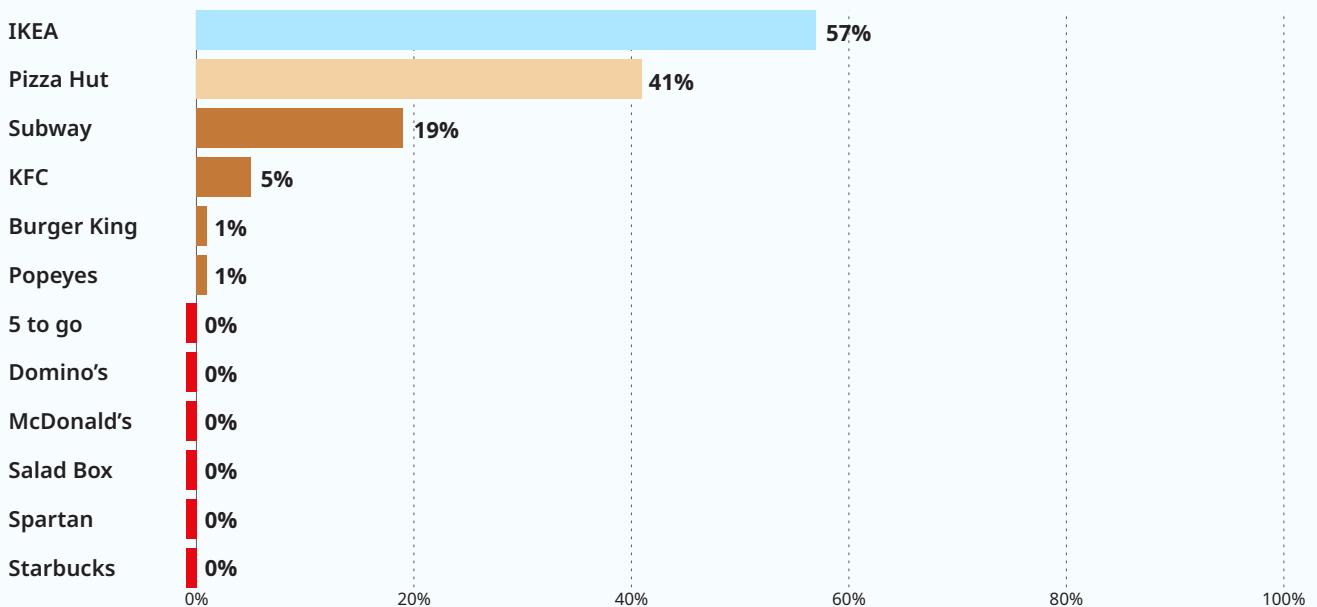


Table 2: Overview of individual overall scores of the Romanian fast-food companies in 2025

IKEA leads the 2025 ranking with a score of 57%. The company shows a strong ECC-aligned commitment, started reporting on implementation and published a clear road map with milestones. However, transparency on performance remains limited. Notably, IKEA Romania does not share chicken welfare updates on its own Romanian site, relying on the global parent company. Its overall performance is rated as "Getting started."

Pizza Hut ranks second (41%) with a strong ECC commitment, but no public reporting on implementation progress. It also fails to inform Romanian customers about chicken welfare, resulting in a "Poor" score.

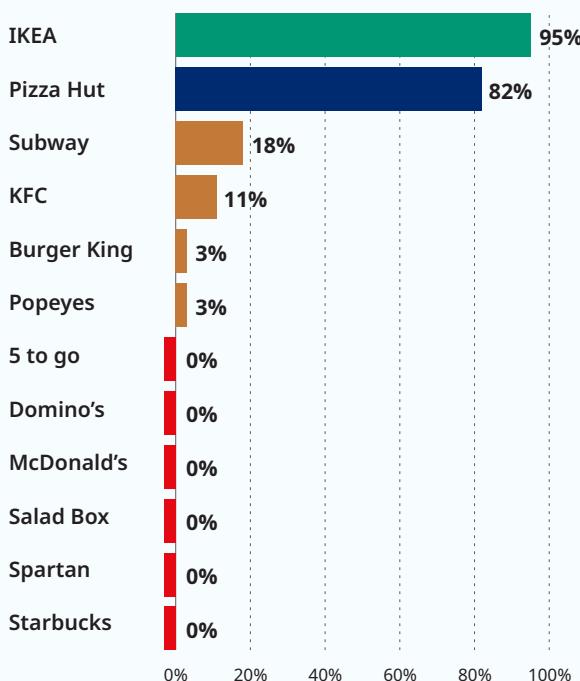
Subway places third (19%). While it once committed to the ECC, the removal of its 2026 deadline weakened its policy. However, it does share some limited updates, making it one of the few showing action in both pillars.

KFC (5%) has its own policy, but it is not aligned with ECC standards, and the company lacks public progress reporting.

The remaining international brands—Burger King, Domino's, McDonald's, Popeyes and Starbucks—and national chains 5 to go, Salad Box and Spartan, score between 0% and 1%. Popeyes, a new entrant, scores 1% without any ECC-aligned policy or public information on chicken welfare.

Pillar 1 Commitments and Targets score of Romanian fast-food companies

The score reflects the scope and completeness of a company's published time-bound commitments to improve broiler chicken welfare, based on the ECC criteria.



Pillar 2 Performance Reporting score of Romanian fast-food companies

The score reflects the extent to which a company has implemented its broiler chicken welfare commitments in relation to the ECC criteria.

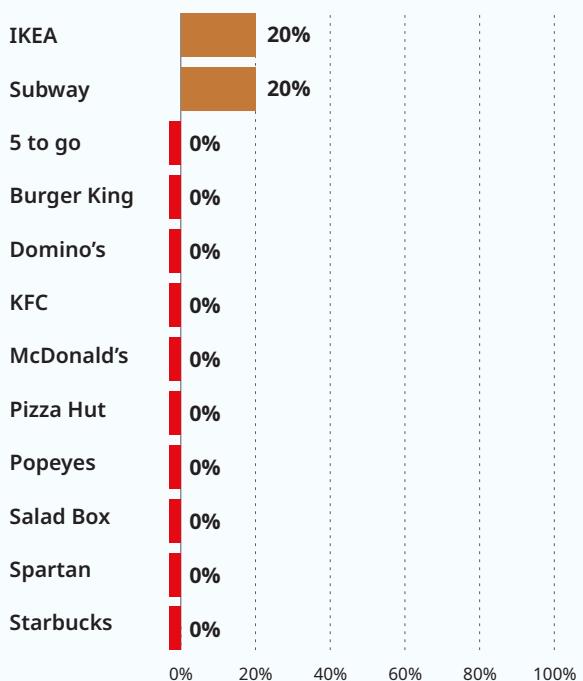


Table 3: Overview of individual scores Pillar 1 of the Romanian fast-food companies in 2025

Only two companies—IKEA and Pizza Hut—have committed to transitioning to chicken meat that meets the ECC criteria. IKEA leads in Pillar 1 Commitments and Targets for publishing a road map with milestones. Subway had fully committed to ECC standards, but the removal of its 2026 deadline has weakened its commitment, resulting in a lower score than Pizza Hut. KFC references its own standards, but these are not aligned with the science-based ECC criteria, which reflect EFSA recommendations on farm animal welfare. Most other companies lack any meaningful or time-bound commitments to improve chicken welfare.

Table 4: Overview of individual scores Pillar 2 of the Romanian fast-food companies in 2025

Only IKEA and Subway score in Pillar 2 Performance Reporting. In 2025, IKEA began reporting on its progress, providing updates on sourcing practices including lowering stocking density, eliminating cages and multilayer systems and using third-party certification. Subway shares progress on enrichment, stocking density and slaughter methods for parts of its European supply. However, none of the companies report on all ECC criteria or ensure full compliance across their supply chains. As a result, both receive low scores for implementation and are rated as "Very poor" in this pillar.

Industry insights

Broiler chicken welfare scores in Romanian fast-food industry (2023-2025)

Each company's score reflects its commitments and implementation efforts on chicken welfare over time, revealing overall stagnation in the Romanian fast-food industry.

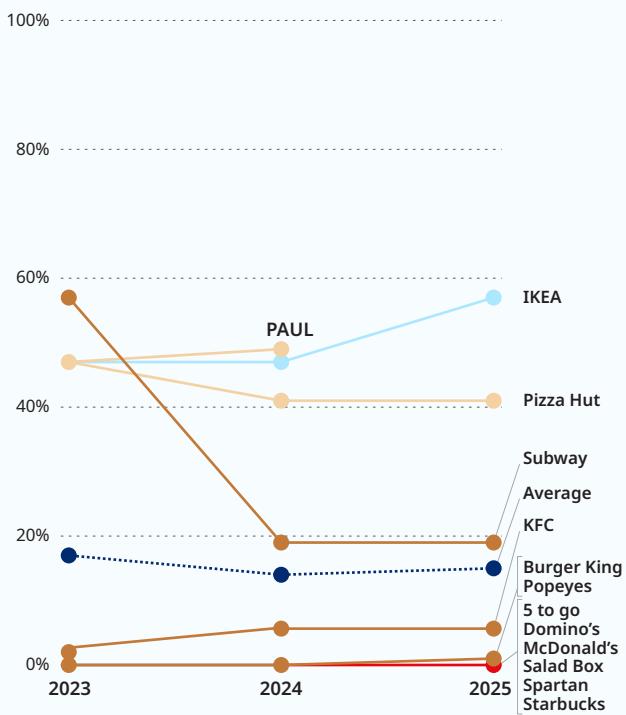


Table 5: Overview of individual scores of the Romanian fast-food companies in 2023-2025

The Romanian fast-food industry shows stagnation and decline in broiler chicken welfare. In 2025, the average overall score dropped to 11%, down from 14% in 2024 and 17% in 2023, indicating minimal progress and transparency. While the replacement of high-scoring fast-food company PAUL with low-scoring Popeyes partly explains the drop, the average would still have stagnated. These results highlight the limited three-year progress made across the industry as a whole.

Positive developments: Small steps by a few leading brands

- Commitments exist, but remain limited:** Only two companies—IKEA and Pizza Hut—have made chicken welfare commitments aligned with ECC. These are made at the parent company level. Subway weakened its chicken commitment by no longer setting a time-bound goal to improve chicken welfare.
- Some signs of improved transparency:** By 2025, half of the companies mention chicken welfare to some extent on their global websites. IKEA and Subway are the only brands reporting publicly on both their commitments and some progress toward implementation.
- IKEA leads in planning and reporting:** IKEA is the only company to publish a road map (in 2024 and 2025). A road map serves as an important tool for achieving commitments and reassuring consumers that the company is working on chicken welfare. In 2025, IKEA began reporting on its progress, making it one of only two brands scoring in both pillars.

Negative developments: Lack of national action and industry-wide stagnation

- Limited progress across the industry:** The average score has declined from 17% in 2023 to 11% in 2025, with no new ECC-aligned commitments and 83% of the companies still lacking a clear chicken welfare policy fully aligned with ECC. No company has fully implemented the ECC in Romania or publicly confirmed that 100% of its chicken meat meets ECC standards.
- Minimal transparency at the national level:** While some parent companies communicate globally, none of the assessed brands provide information on chicken welfare on Romanian websites. This limits awareness and understanding for Romanian consumers.
- Persistent inaction among most brands:** In 2025, six out of 12 companies scored 0%. National brands (5 to go, Salad Box, Spartan) remain completely inactive, scoring 0% in all years. Major international brands (Domino's, McDonald's, Starbucks) also continue to score 0%, despite global resources and consumer expectations.

EU insights

The average fast-food industry score by country on broiler chicken welfare (2023–2025)

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

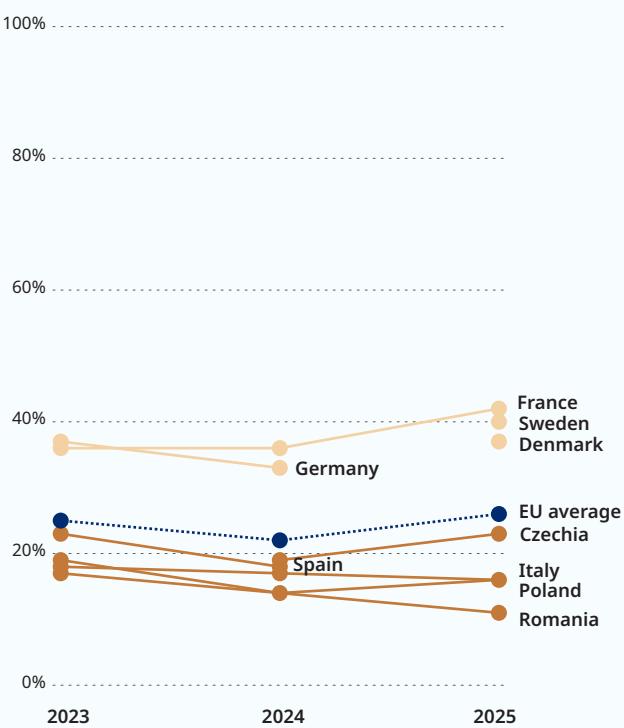


Table 6: Overview of the country results based on the fast-food industry scores in that country in 2023-2025

At the EU level, 81 fast-food chains were assessed in Denmark, Czechia, France, Italy, Poland, Romania and Sweden in 2025. 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 overview of the average fast-food industry score by country highlights the following:

- **Some EU industry progress:** There is an EU-wide increase in scores. The average EU score has risen to 26% in 2025, up from 22% in 2024. This improvement is driven not only by changes in country assessments—where high-scoring Germany and low-scoring Spain were replaced by higher-scoring newcomers Denmark and Sweden—but also by positive developments in Czechia, Italy and France. The EU fast-food industry improved from “Very poor” to the “Poor” category.
- **France shows consistent leadership:** France consistently scores the highest in EU, increasing its score from 36% to 42%. This indicates stronger commitments and transparency in France's fast-food sector. Nonetheless, it still falls into the “Poor” category.
- **Romania scores lowest across all countries:** Romania's industry average declined from 17% in 2023 to just 11% in 2025, the lowest score of all assessed countries in the latest year, highlighting both the urgency and the opportunity for action. Other countries show that improvement is possible as Czechia, France and Italy showed an increased score over the last year.

The Romanian fast-food industry shows limited collective progress on chicken welfare. While a few frontrunners are taking steps, most companies have yet to align with public expectations, scientific standards and the ECC criteria. Romania's fast-food industry scores lowest across all countries, highlighting both the urgency and the opportunity for action: improving how chickens are kept will help the industry and keep Romania competitive in the European market.





Learnings for industry-wide improvements

While the overall performance of Romania's fast-food sector remains poor, several examples show that positive change is both possible and already underway. These developments offer insight into what can be achieved by companies and serve as evidence for lawmakers that parts of the industry are beginning to act.

1. Chicken welfare commitments are achievable

Example: Pizza Hut

The adoption of the ECC by Pizza Hut Europe shows that fast-food chains operating in Romania can commit to higher welfare standards. Although Pizza Hut's overall score remains low due to limited progress reporting, its clear commitment represents a first and necessary step. This illustrates that aligning with ECC criteria is feasible in the Romanian market — a point further supported by the chicken welfare commitment of IKEA.

 **Further exploring:** Chicken Watch tracks animal welfare commitments that corporations are making. All companies with chicken welfare commitments are listed on: chickenwatch.org.

2. Road maps create accountability

Example: IKEA

IKEA is the only assessed company in Romania to publish a road map via its parent company, outlining its path to meeting ECC standards. A road map serves as an important tool for achieving commitments and reassuring consumers the company works on chicken welfare. This public plan sets a precedent for accountability and long-term planning within the sector. It also demonstrates to regulators and investors that clear implementation pathways are possible, even without regulatory pressure.

 **Further exploring:** More information on [IKEA's road map](#).

IKEA Food Better Chicken Programme roadmap for North America, Europe, and Asia Pacific:

	Regions*		
	North America	Europe	Asia Pacific
Stocking density (30 kg/m ²)	2020	2020	2020
Lighting			
Flock health plan			
No routine use of antibiotics			
Environmental enrichment			
Environmental conditions			
Manure management plan			
Non-deforestation feed	2025	2025	2025
Phase out highest priority antibiotics			
Natural light			
Breed			
Slaughter and transport			Further analysis required

*IKEA Food operates in additional regions, and we expect them to be compliant with the Better Programmes by 2025. However, the initial focus is on the largest regions NA, EU, and AP — learnings will be used as input for implementation in the remaining regions. Further analysis is required with our suppliers in Asia Pacific.

Graphic 2: IKEA's road map to higher chicken welfare

3. Progress can be reported

Example: Subway

Subway is one of the few companies to report partial implementation of ECC standards, including improved stocking density, environmental enrichment and higher welfare slaughter methods for some of its supply. Although limited to

regional reporting, this example shows that transparency on chicken welfare is achievable—and that public reporting can be done even in early stages of transition.

 **Further exploring:** More information on Subway's progress reporting ([English](#))



Where do we currently stand and what progress have we made?

Subway® requires suppliers to report on their chicken welfare and we have committed to assessing progress through supplier questionnaires. Data below is from July 2022-June 2023.

- 59% of broiler chickens are reared at stocking densities of 30kg/m²
- 59% of broiler chickens provided with natural light
- 63% of broiler chickens provided with perches and pecking substrates
- 21% CAS slaughter
- 61% of third-party suppliers audited

Graphic 3: Subway's online progress reporting on ECC standards

4. Global policies must reach local markets

Examples: IKEA

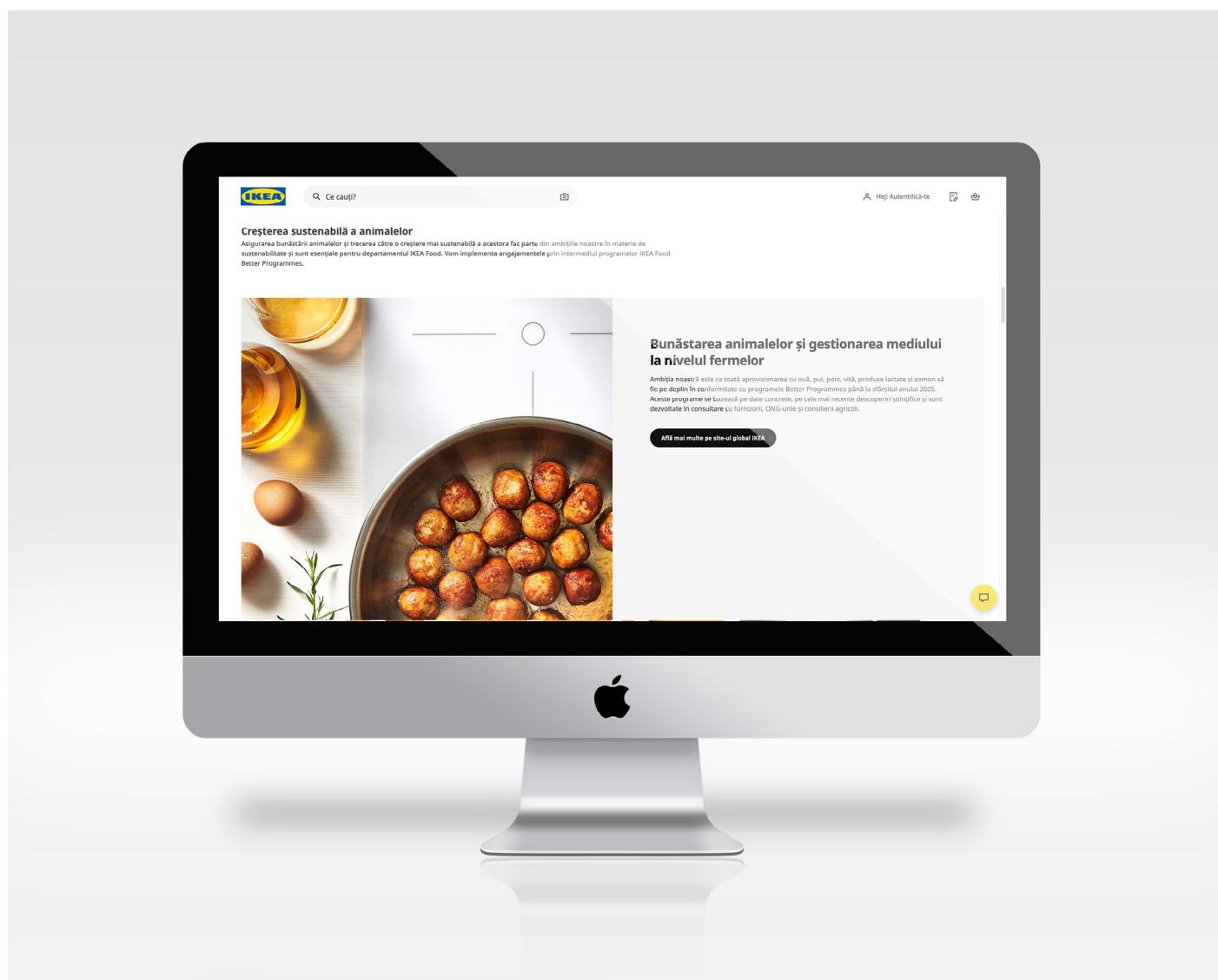
IKEA Romania sets a valuable example by being the only assessed company to include information on animal welfare directly on its Romanian-language website. This step toward transparency makes the company's broader sustainability efforts more accessible to Romanian consumers and shows that local communication on animal welfare is entirely feasible.

To further strengthen its leadership position, IKEA Romania could also include its chicken welfare commitments—which are currently available only on its global English site—directly on the Romanian platform. This would provide full visibility of

the company's efforts and demonstrate consistency between international policy and national practice.

 **Further exploring:** More information on IKEA Romania's website ([Romanian](#))

Together, these examples illustrate that all elements of progress are already present in the Romanian fast-food landscape—from commitments and planning to partial implementation and reporting in local languages. The challenge now is to scale these practices across the industry and support them with legislation that makes higher welfare the norm, not the exception.



Graphic 4: IKEA Romania's website



Ways forward

Improving broiler chicken welfare in Romania's fast-food industry requires coordinated effort across the supply chain. Companies, producers and lawmakers, each have a vital role to play in creating a food system that aligns with consumer expectations and animal welfare science. Here is how they can take action:

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.

Without visible commitments and road maps, consumers may assume the worst about a company's practices. Brands like IKEA and Subway demonstrate that progress is possible. Others must now follow—by aligning their sourcing, reporting on implementation and communicating transparently to Romanian consumers.

Producers: Collaboration toward higher welfare supply chain

Chicken producers are key to enabling progress. Fast-food chains depend on a consistent supply of higher welfare chicken, while producers need dedicated buyers to justify investment in better welfare systems. This mutual reliance highlights the need for collaboration.

To prepare for the 2026 ECC deadline, producers must begin upgrading housing conditions, adopting slower-growing breeds, reducing stocking densities and improving slaughter practices. Fast-food companies can support this transition by committing to long-term sourcing partnerships and planning jointly with suppliers.

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—not just those from leading brands.

Stronger enforcement, public procurement standards, clear food labeling and targeted subsidies can accelerate change. Legislative leadership is essential to drive industrywide improvements, meet consumer expectations for better animal protection and keep Romania's industry aligned with evolving European standards.

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.



Methodology and scope

The Pecking Order 2025 benchmark assesses fast-food companies on their commitment to higher welfare standards for chickens raised for meat, based on the criteria of the European Chicken Commitment (ECC).

Companies are scored across two pillars:

- **Pillar 1 – Commitments and Targets:** Evaluates time-bound, published commitments aligned with ECC criteria.
- **Pillar 2 – Performance Reporting:** Assesses implementation progress across ECC criteria.

Tier	Grade	Description	Percentage bands
1	Leading	Strong chicken welfare commitments and/or clear progress in implementation	86-100%
2	Good	Solid chicken welfare commitments and/or active implementation	76-85%
3	Making progress	Moderate effort on chicken welfare and/or partial implementation	60-75%
4	Getting started	Attention to chicken welfare, but still in early stages	50-59%
5	Poor	Partial chicken welfare commitments and/or limited implementation	26-49%
6	Very poor	Weak chicken welfare commitments and/or minimal implementation	1-25%
6	No transparency	No public information on chicken welfare available	0%

Methodology and scope

Scores from both pillars are weighted equally and combined into an overall percentage, which is translated into a Tier and Grade. Only publicly available information is used. Companies were invited to verify and update data before the assessment cut-off date in August 2025.

In 2025, Humane World for Animals refined Tier 6 to distinguish between companies with minimal reporting and those providing no information on chicken welfare.

 [Full methodology and scoring criteria](#)

European and Romanian fast-food chains

This report targets leading international and national fast-food chains serving chicken meat. The 2025 European edition of *The Pecking Order* includes 81 fast-food chains across seven EU countries: Czechia, Denmark, France, Italy, Poland, Romania and Sweden. In 2025, Germany and Spain were replaced by Denmark and Sweden. In Romania, brands were selected based

on overlap in other EU countries, market share, public visibility or existing welfare policies. In 2025, fast-food brand PAUL was replaced by Popeyes. Humane World for Animals led the assessments in Poland and Romania.

Support

Humane World for Animals assists companies in enhancing animal welfare within their supply chains. This support benefits the animals and prepares businesses for shifting consumer demands and legislation. Additionally, we offer lawmakers knowledge and expertise on farm animal welfare policy.

 [Learn more or partner with us: \[www.humaneworld.org\]\(http://www.humaneworld.org\)](#)



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About us

Together, we tackle the root causes of animal cruelty and suffering to create permanent change.

With millions of supporters and work happening in over 50 countries, Humane World for Animals—formerly called Humane Society International—addresses the most deeply entrenched forms of animal cruelty and suffering. As the leading voice in the animal protection space, we work to end the cruelest practices, care for animals in crisis and build a stronger animal protection movement. Driving toward the greatest global impact, we aim to achieve the vision behind our name: a more humane world.



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