



The Pecking Order 2025

European Methodology

Introduction

The Pecking Order assesses iconic fast-food brands and other food service companies on their approach to managing and reporting on the welfare of chickens in their supply chains. It is now in its seventh iteration, following the publication of annual reports since 2019 (accessible here: [2019](#), [2020](#), [2021](#), [2022](#) [2023](#) and [2024](#))

The Pecking Order benchmark's aim is to drive disclosure amongst leading food service companies on their efforts to improve the welfare of broiler chickens across their operations and to demonstrate the progress being made. Using the guidelines of the European Chicken Commitment (ECC), The Pecking Order began as an annual assessment to understand how leading companies were implementing and reporting on their chicken welfare commitments across their international supply chains. Since 2022, the methodology has been revised to reflect a more localised approach, focused on evaluating how international and national fast-food brands and food service companies are managing and implementing their broiler chicken welfare commitments within selected individual markets.

Summary of Changes to the Methodology

The Pecking Order made significant changes to the methodology in 2022 to focus on the implementation of company commitments at the national level. In 2023, a partial points option was introduced for Q1.1 to differentiate between companies that communicate their published broiler welfare commitments in-country and those companies for which there is no evidence of in-country communication. The Pecking Order 2024 methodology remained largely the same as 2023, with an additional question in the Commitments & Targets pillar focused on whether companies have published a roadmap for meeting the specific requirements in the European Chicken Commitment. No changes to the methodology have been made between 2024 and 2025.

This document details The Pecking Order 2025 methodology. The full list of evaluation criteria and accompanying notes on how they are to be assessed are provided in the Appendix.

Why We Developed The Pecking Order

Chickens are the most numerous farmed land animals on the planet and some of the most abused. We developed The Pecking Order to help drive improvements in their welfare in the supply chains of major fast-food brands and food service companies. Our objectives are:

1. To provide a framework for companies to improve and manage chicken welfare.
2. To highlight where major fast-food brands and food service companies are not using best practices for chicken welfare as per the latest scientific consensus, and to support these companies to make the necessary improvements.
3. To champion those fast-food brands and food service companies that are making strong commitments to improve chicken welfare and reporting on their progress.
4. To provide a simple tool for consumers to understand how big brands are responding to the pressing need to improve chicken welfare and to help them to make their voice heard in order to drive progress.
5. To demonstrate to legislators the efforts of the food service sector to raise animal welfare standards beyond regulatory requirements.

What Is Assessed

The Pecking Order deliberately assesses companies solely on publicly available information published by the company (e.g. websites, corporate social responsibility reports, annual reports, etc.). We focus on published information because we believe that transparency on animal welfare provides an important accountability mechanism for companies. Transparency also allows the public, legislators, investors, and other stakeholders to understand and evaluate the comparative performance of companies on their management of broiler welfare risks and opportunities.

The assessors will consider the most recent versions of public company reports as valid information sources.

The primary focus of this evaluation is on the consumer brand (the subsidiary) in the national market – as this is what the public see and interact with – but the parent company, where it exists, is also assessed. This ensures that we are able to:

- Determine the scope of corporate commitments to broiler welfare standards and the level of the company at which they are being implemented (including in situations where the parent company is the primary driver of the subsidiary's approach to the aforementioned commitments); and
- Gauge corporate commitments and implementation at the national, consumer level.

Using an online benchmarking platform,¹ for each company, the assessors record:

- The company score;
- The scoring rationale (including, where relevant, the information sources used to inform the score); and
- Supporting notes and reflections on the company and on their scoring against the criteria.

The online benchmarking platform enables companies to review their preliminary assessments, provide comments to the assessment team and upload additional evidence as part of The Pecking Order quality control process.

The Assessment Methodology

The criteria

The criteria for The Pecking Order European methodology are based on the ECC, which has been developed in line with the latest welfare science and endorsed by animal protection organisations in multiple countries. The specific asks of the ECC provide a clear and consistent set of improvements that focus on stocking density, breeds, enrichments, broiler cages, slaughter process and auditing. More information on the ECC can be found [here](#).

Timings

The Pecking Order assessments and reporting follow an annual cycle that enables the consistent tracking of corporate progress while also giving companies the necessary time to make changes to improve the welfare of the chickens in their supply chains and their related disclosure of these practices.

We work with a specialist, independent consultancy – Chronos Sustainability – which is responsible for conducting the data gathering, data analysis and quality assurance for The Pecking Order.

The timings for The Pecking Order 2025 are as follows:

- **April 2025:** updated methodology is shared with companies
- **5th May 2025 – 30th May 2025:** assessment period – assessments conducted by Chronos Sustainability

¹ The online benchmarking tool exists for the assessment process and is only accessible to the assessment team and assessed companies. The benchmarking tool will produce final assessment reports that will be published.

- **7th July 2025 – 1st August 2025:** company review period – companies invited to review their preliminary 2025 assessments
- **26th August 2025:** scoring is finalised
- **November 2025:** launch of the Pecking Order 2025

Companies may be assessed on any day within the assessment period (6th May– 30th May) and are assessed based on the information publicly available on the day of assessment. Information published after the assessments have been conducted and before the end of the company review period (26th August), may also be taken into consideration if it is proactively brought to the attention of the assessor team by the company or through one of the partner NGOs.

What we ask

The Pecking Order has questions organised under two pillars. Each question focuses on a specific attribute of the ECC to improve chicken welfare.

- **Pillar 1: Commitments & Targets** – questions focus on published time-bound commitments to improve chicken welfare.
- **Pillar 2: Performance Reporting** – questions focus on reporting of progress against published commitments.

In total, there are fourteen questions within the evaluation criteria. However, French companies are assessed on an additional question in each pillar compared to companies in the other markets assessed. The additional questions concern the use of 'winter gardens'.

The full list of evaluation criteria can be found in the Appendix.

Our scoring approach

Companies can score a maximum of three points for question 1.1 and a maximum of five points for questions 1.2 – 1.8, resulting in a total of 38 points available in the Commitments & Targets pillar. A maximum of five points is awarded for questions 2.1 –2.6, resulting in a total of 30 points available in the Performance Reporting pillar.² A total percentage score is calculated for each pillar. There are different scoring approaches for the questions in each pillar, as presented below.

² French companies with an additional question in each pillar can score 43 points and 35 points respectively.

Commitments & Targets scoring approach

Question 1.1 is an entry-level question and is scored as follows:

Points	Notes
0 points	No evidence of a policy that explicitly covers broiler chicken welfare.
1 point	The company has a policy that explicitly covers broiler chicken welfare but no evidence of communication in-country.
3 points	The company has a policy that explicitly covers broiler chicken welfare that is communicated in-country.

Questions 1.2 to 1.7 (and 1.9 for French companies) are scored as follows:

Points	Notes
0 points	No evidence of a commitment
1 point	Limited alignment to ECC: A company would score if its commitment (a) does not meet the deadline requirements, (b) does not include all the specific requirements i.e., environmental enrichment would need to meet all the environmental enrichment requirements, not just one, e.g., lighting, or (c) is limited in product scope (i.e., is limited to fresh meat, or excludes products as ingredients in recipes).
3 points	Substantial alignment to ECC: A company would score if it fully met the specific commitment in the question but did not meet all the aspects of the ECC i.e., the full suite of requirements (namely Questions 1.2-1.7).
5 points	Complete alignment to ECC: A company would score for a universal time-bound commitment that is aligned with the ECC and that forms part of a complete suite of ECC requirements.

Question 1.8 is scored as follows:

Points	Notes
0 points	No published roadmap or no ECC
3 points	The company has published a roadmap for meeting the ECC requirements within 6 years.
5 points	The company has published a roadmap for meeting the ECC requirements by 2026, or within 3 years.

Performance Reporting scoring approach

Performance reporting scoring is based on the percentage of supply that the national company reports as meeting the criteria of the question.

Either country-level or regional data will be accepted for assessments of countries within that region. The scoring for this is reflected in the first two columns of the table below. The

third column details how global data³ and/or reporting with limited product scope will be scored.

Points	Supply chain percentage of country / regional operations	Operations reporting and scope limitations
0 points	0% or no reporting	
1 point	1% – 25%	<p>A company would score where reporting is limited by scope (e.g., product scope, geographic scope or for Q2.3 elements of enrichment), for national level or global level reporting, and is less or equal to 50% of supply.</p> <p>A company would score where reporting is at global level (i.e. there is no national or regional level detail to the reporting) and is less than or equal to 50% of global supply.</p>
2 points	26% – 50%	<p>A company would score where reporting is limited by scope (e.g., product scope, geographic scope or for Q2.3 elements of enrichment), for national level or global level reporting, and is greater than 50% of supply.</p> <p>A company would score where reporting is at a global level (i.e. there is no national or regional level detail to the reporting) and is greater than 50% of global supply.</p>
3 points	51% – 75%	
4 points	76% – 99%	
5 points	100%	A company would score where reporting clearly shows that 100% of supply including the country under assessment has been achieved.

³ By global data we mean global aggregated data where we cannot clearly identify the proportion of supply for the country (or the region within which the country is located) under assessment. Global reporting of data where regional or country level proportions can be clearly identified would be assessed using the supply chain percentage in column 2.

Weightings

Each company will receive a percentage score for each pillar. The pillar scores are also combined to create an overall score, with each pillar given an equal weighting.

Commitments & Targets	Performance Reporting
50%	50%

The Pecking Order Tiers and Grades

Tiers and Grades are assigned for each pillar of the assessment and the overall score of the assessment, based on percentage scores. There are six scoring Tiers, with associated Grades, where Tier 6 is the lowest (or worst performing) and Tier 1 the highest (or best performing).

Tier	Percentage bands	Grade
6	0-25%	Very Poor
5	26-49%	Poor
4	50-59%	Getting Started
3	60-75%	Making Progress
2	76-85%	Good
1	86-100%	Leading

APPENDIX – Evaluation Criteria

This section presents the evaluation criteria for The Pecking Order 2025 with guidance notes on how each question will be assessed.⁴ Where legislative requirements exceed the ECC, companies are expected to meet those requirements.

Commitments & Targets Pillar

1.1 Has the company published a policy covering broiler chicken welfare?

Notes

- The policy and/or commitments must be available on the company's website (i.e. the question requires the policy and/or commitments to be both published and readily available).
- A policy does not need to be a stand-alone document. It can be part of a wider farm animal welfare policy but there must be an explicit acknowledgement of broiler chickens within the policy.
- In-country communication is defined as information on the country website that clearly states a commitment to the ECC or a published broiler chicken welfare policy.
- The policy must clearly be relevant to the country under review. The company could issue a policy for the national market in question or if the company only has a global policy it must include a statement that the policy covers all markets the company operates in. A global policy that does not clearly link to the national market would score 0 points.

1.2 – Has the company set a time bound commitment to achieve, or maintain, maximum stocking densities of 30 kg/m² or 6 lbs./sq. foot for all broiler chickens?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- Companies that already achieve the maximum stocking densities defined by the ECC should signal their commitment to continuing to meet these standards over time. However, we have granted points even if they have not stated so.
- In addition to maximum stocking densities, companies are expected to state that thinning is discouraged and, if practised, must be limited to one thin per flock.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those

⁴ References to the ECC in the notes of each question encompass the requirements set out in the ECC letter for European companies.

companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.3 – Has the company set a time bound commitment to use, or to continue to use, chickens bred for measurably improved welfare outcomes?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- The breeds identified by RSPCA include: Hubbard JA757, 787, 957, 987, or Norfolk Black, Rambler Ranger, Ranger Classic, and Ranger Gold, Hubbard Redbro (indoor use only), or others that meet the criteria of RSPCA Broiler Breed Welfare Assessment Protocol.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.4 – Has the company set a time bound commitment to provide, or to continue to provide, birds with specified meaningful enrichment?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- The focus of this question is on meaningful enrichment. It should be:
 - In Europe:
 - At least 50 lux of light, including natural light
 - At least 2 meters of usable perch space, and two pecking substrates, per 1,000 birds.
 - On air quality, at least the requirements of Annex 2.3 of the EU Broiler Directive, regardless of stocking density.
- For the purposes of assessing this question, companies are expected to have targets relating to all of these elements (on lighting, space, substrates, air quality) and, if these elements are not seen as appropriate, explaining the standards that are applied and provide robust evidence for why these alternative standards are seen as more appropriate.
- Companies that already meet the enrichment requirements specified here should signal their commitment to continuing to meet these requirements over time. However, we have granted points even if they have not stated so.

- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.5 – Has the company set a time bound commitment to avoid, or to continue to avoid, using broiler cages or multi-tier systems?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- Companies that have stated compliance with legislation on the prohibition of broiler cages but did not have a specific policy commitment in place, will not receive points. This is because legislation, even in the EU, does not cover all relevant issues and a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent.
- Companies that already avoid using broiler cages or multi-tier systems should signal their commitment to continue avoiding their use over time. However, we have granted points even if they have not stated so.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.6 – Has the company set a time bound commitment to use, or to continue to use, humane slaughter processes?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- In Europe, humane slaughter is defined as adopting controlled atmospheric stunning using inert gas or multi-phase systems, or effective electrical stunning without live inversion.
- Companies that already use humane slaughter methods should signal their commitment to continue their use over time. However, we have granted points even if they have not stated so.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and

focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.7 – Has the company set a time bound commitment to ensuring compliance with its broiler welfare standards via third party auditing, or to maintaining the use of such auditing processes?

Notes

- Companies must specify dates for achievement of the targets. To achieve points, the date must be met by 2026, or for companies committing after December 31, 2023, a longer timeline may be set in accordance with the ECC requirements. The specification of timeframe for the implementation of a broiler welfare commitment is critical.
- Companies that already use third party auditors should signal their commitment to continue to use them over time. However, we have granted points even if they have not stated so.
- The focus of this question is on third party auditing of broiler welfare to the standards aligned with the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

1.8 – Has the company published a roadmap for meeting the specific requirements in the European Chicken Commitment?

Notes

- Companies are eligible for points only if they have made a public ECC and the published roadmap covers all the specific requirements of the ECC.
- Companies must publish a roadmap specifying progress milestones and a public deadline for 100% compliance to achieve points.
- Companies that have published a roadmap for meeting the commitment within six years will be eligible for partial points.
- Companies that have published a roadmap for meeting the commitment within three years will be eligible for maximum points.

Performance Reporting Pillar

2.1 – Does the company report on the proportion of broiler chickens in their supply chain that is stocked at densities of 30 kg/m² or 6 lbs./sq. foot or less?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that meet the requirements outlined by the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

2.2 – Does the company report on the proportion of broiler chickens in their supply chain that has been bred for measurably improved welfare outcomes?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that meet the requirements outlined by the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

2.3 – Does the company report on the proportion of broiler chickens in their supply chain that is kept in enriched environments?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that meet the requirements outlined by the ECC.
- If the company has a commitment on environmental enrichment aligned with the ECC but only reports against some of the criteria, partial points will be given.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those

companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

2.4 – Does the company report on the proportion of broiler chickens in their supply chain that is not kept in broiler cages or multi-tier systems?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that meet the requirements outlined by the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

2.5 – Does the company report on the proportion of broiler chickens in their supply chain that is processed using humane slaughter methods?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that are processed using humane slaughter methods and that are in line with the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

2.6 – Does the company report on the proportion of broiler chickens in their supply chain that has been assessed by third party auditors?

Notes

- Companies are required to report on the proportion of supply of broiler chickens for their market (calculated by purchase volume or spend) that are third-party audited against the requirements outlined by the ECC.
- It is acknowledged that companies may limit the scope of their policy commitments to certain geographies or types of meat product (e.g. they may exclude processed meat and focus on fresh or frozen meat). Therefore, this question differentiates between those companies with universal commitments, those with geographic or product-related limitations to their commitments, and those that do not make commitments in this area.

Additional questions for French companies

Commitments & Targets

1.9 Has the company made a commitment for 20% of birds to be housed in free range and winter garden systems?

Performance Reporting

2.7 Does the company report on the proportion of broiler chickens in their supply chain that are housed in free range and winter garden systems (up to 20%)?