



**Humane
World for
Animals™**

Formerly called
Humane Society International

The Pecking Order 2024 – Romania

Paving the path forward for improved
chicken welfare in the fast-food industry



Chickens are active, social, curious animals with surprising cognitive abilities. Yet, conventional chicken production ignores their natural abilities and causes serious animal welfare problems.

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The fast-food industry is an important buyer of chicken meat and as such has the ability and responsibility to drive improvements on farms to support higher animal welfare.

Introduction

More than 6.4 billion chickens, commonly known as 'broiler chickens', were slaughtered in the European Union in 2023.¹ Romania is a significant player in Europe's chicken industry, ranking eighth in the EU, responsible for slaughtering 300.8 million chickens,² and supplying both local and international markets. The fast-food industry, a major chicken meat buyer, influences how these animals are kept and killed.

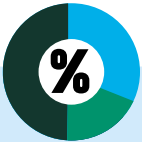
Current chicken production methods have led to serious welfare problems, and scientific studies reveal the depth and degree of suffering endured. Surveys highlight the significant consumer concern for the welfare of farmed animals and the increasing demand for more ethically produced products. Companies around the world are adopting higher welfare standards, and there is a growing call to address outdated EU legislation. Combined, these factors indicate that a reform of the poultry sector in Europe and Romania is needed. The fast-food industry has the power to make meaningful change for the better.

The Pecking Order is designed to help drive this change by providing insights into higher animal welfare standards and holding companies accountable for the conditions of animals in their supply chains. This initiative aims to improve the lives of millions of chickens, ensuring they have basic protections that align with animal welfare science and the criteria of the science-based European Chicken Commitment (ECC).

The Pecking Order 2024 – Romania evaluates the fast-food industry's progress in Romania by assessing the progress of 12 leading fast-food chains and summarizing the industry's movement toward improved broiler chicken welfare standards. It aims to encourage better practices among companies in the fast-food industry, provide producers key insights to stay ahead of the curve, guide lawmakers in supporting industry welfare improvements, and help consumers make more informed food choices.

The case for updated legislation

More than 25 years ago the European Union adopted overarching legislation on the protection of animals kept for farming purposes (Council Directive 98/58/EC). In 2007, the EU adopted Directive 2007/43/EC, known as the Broiler Directive, which lays down minimum standards for chickens kept and slaughtered for meat.



Europeans and farm animal welfare

84% of Europeans and

69% of Romanians want better protection for farmed animals.³

89% of European consumers state that it is important to implement stricter rules for farm animal welfare.⁴



In its 2020 Farm to Fork Strategy, the European Commission acknowledged the need to update and expand the scope of the European Union's existing body of animal welfare legislation by the end of 2023 but has yet to deliver any legislative proposals concerning the welfare of animals on-farm. The current legislation, including the Broiler Directive, is outdated and does not reflect scientific understandings of animal welfare. The European Food Safety Authority (EFSA) published a series of [scientific opinions](#) on farm animal welfare in 2023, which highlight the shortcomings in current law and the need for legislative change to improve the welfare of animals kept and killed for food.

European Chicken Commitment

The Pecking Order evaluates the fast-food industry using the science-based criteria of the [European Chicken Commitment \(ECC\)](#), agreed to by animal welfare organizations worldwide. These criteria set minimum standards for addressing the most urgent welfare issues in broiler chicken production, as current EU legislation falls short. Current law permits overcrowding, dim lighting, barren environments and inhumane slaughter. It also allows the use of fast-growing genetic lines of chickens, who grow to market weight so quickly that they are prone to debilitating, painful skeletal disorders and walking abnormalities.^{5,6,7} The ECC standards align with the EFSA recommendations, providing guidance for producers and businesses to better adhere to science, respond to evolving consumer sentiment and demand, and prepare for future broiler chicken welfare legislation.

Current EU legislation, which is also the law for Romania, is compared to the ECC criteria in Table 1. The EU legislation covering broiler chicken welfare is the Directive for chickens kept for meat production (Council Directive 2007/43/EC).

Criteria	EU legislation ⁸	ECC requirement ⁹
Legislation	General Directive on the protection of animals kept for farming purposes and directive for chickens kept for meat production	Compliance with EU animal welfare directives, regardless of the country of production
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
Daylight	At least 20 lux light intensity	At least 50 lux light intensity, including natural light
Perches	No requirements	At least 2 meters of usable perch space per 1,000 birds
Enrichment	No requirements	At least 2 pecking substrates per 1,000 birds
Air quality	Requirements for the holdings: (a) the concentration of ammonia (NH ₃) does not exceed 20 ppm and the concentration of carbon dioxide (CO ₂) does not exceed 3,000 ppm measured at the level of the chickens' heads; (b) the inside temperature, when the outside temperature measured in the shade exceeds 30 degrees C, does not exceed this outside temperature by more than 3 degrees C; (c) the average relative humidity measured inside the house during 48 hours does not exceed 70% when the outside temperature is below 10 degrees C.	At least the requirements of Annex 2.3 of the EU Directive protecting chickens raised for meat (as stated under EU legislation)
Cages	Cages allowed	No cages or multitier systems ^a
Slaughter	Electrical waterbath stunning permitted ¹⁰	Controlled atmospheric stunning using inert gas or multiphase systems, or effective electrical stunning without live inversion
External audits	Authorities carry out inspections to verify compliance on an adequate proportion of animals kept within each Member State	Required to demonstrate compliance

Table 1: Comparison EU legislation and ECC criteria

^a Broiler chickens kept for meat production are not typically reared in cages, but breeding birds (i.e., parent and grandparent generations) may be housed in cages or multitier systems where their movement is restricted, and they do not have access to litter.



Antibiotics and public health

The intertwined relationship between antibiotics, public health and chicken production has far-reaching implications for both animal welfare and human health. Antibiotics have been widely used in chicken production to enhance growth and prevent diseases, yet their misuse and overuse has contributed to antibiotic-resistant bacteria, impacting animals and humans alike. The transmission of antibiotic-resistant bacteria from animals to humans raises concerns about the emergence of difficult-to-treat infections, potentially resulting in increased mortality rates.¹¹

Since January 2022, EU legislation prohibits routine antibiotic use in animal farming, including preventative (prophylactic) group treatments.¹² The Feed Additives

Regulation, which took effect in January 2006, bans antibiotics for growth promotion, allowing use only for medicinal purposes under veterinary supervision.¹³

Romania ranks 13th out of 31 European countries regarding the highest sales of antibiotics for farmed animals. Romania scores above the median of all 31 countries. Cyprus has the highest usage, followed by Poland; Norway has the lowest usage.¹⁴

Slower-growing chickens, breeds required under the ECC, have better immunity,^{15,16} are more robust and require fewer antibiotics.^{17,18} Combined with a lower stocking density, the slower-growing breeds help reduce the use of antibiotics and mitigate the development of antibiotic-resistant pathogens.

Romania's broiler chicken industry

Romania is a significant part of Europe's broiler chicken industry, supplying both domestic and international markets with poultry products. In 2023, more than 6.4 billion chickens were slaughtered in the European Union. Romania ranked eighth, responsible for slaughtering 300.8 million chickens.¹⁹

Chicken meat production plays an important role in Romania's economy. The sector has experienced solid growth since 2000.²⁰ Forecasts suggest production will rise over the next decade, making the need for improved welfare an even more urgent issue. Chickens are the most slaughtered animals by numbers in Romania.²¹

The European fast-food market, including Romania,²² is expected to continue growing, driven by consumers' fast-paced lifestyle, expansion of international food chains, technological advancements in online ordering and delivery, and strategic promotions.²³ This growth suggests that fast-food chains will be a major factor in the chicken industry's expansion in Europe and in Romania.

Currently, approximately 90% of chickens are raised in intensive indoor systems in the European Union, in which tens of thousands of birds with fast growth rates are packed into barns at high stocking densities.²⁴ The vast majority of chicken production in Romania follows the same intensive indoor production model. So far, only a few chicken producers in Romania use alternative, higher welfare farming models, consistent with the ECC criteria, or raise higher welfare chicken breeds.

Romanian companies and ECC

The European food sector is evolving as customer demand for higher animal welfare products increases. Over 380 companies in Europe have committed to meeting the ECC criteria. Table 2 lists 13 companies in Romania that have already made this commitment.²⁵ The four fast-food companies in the section 'Restaurants' are assessed in this report.

Restaurants	Hospitality	Food service	Manufacturer
Holder Group, including sub-brand PAUL	Louvre Hotels, including sub-brand Golden Tulip	Sodexo	Freiberger Lebensmittel GmbH & Co. Produktions- and Vertriebs KG
IKEA	Accor, including sub-brands Sofitel, Swissotel, Pullman, Novotel, Mercure and Ibis Styles		Bonduelle
Pizza Hut UK & Europe			Dr. Oetker
Subway			Danone
			Nestlé, including all sub-brands
			Unilever, including sub-brand Knorr

Table 2: Companies in Romania with ECC



Except for feed and water lines, conventional production facilities are empty barns. The chickens are unable to express their natural curiosity or innate behaviour patterns such as perching or foraging.

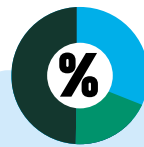
Shifting consumer preferences

Consumer preferences have changed over the years, with people wanting to know more about how their food is produced. This shift is changing fast-food menus. Recent surveys show more concern for farmed animal welfare and a growing demand for more ethically produced products.

According to the 2023 Eurobarometer, the official European Commission poll, over 90% of Europeans indicate that it is important to protect the welfare of farmed animals, with nearly eight out of 10 Romanians sharing this view.²⁶ A 2023 report by Novel Research, commissioned by Humane Society International (now called Humane World for Animals), found that 92% of Romanians consider it “very important” to ensure good welfare for farmed animals, a consensus across all sociodemographic groups.²⁷

The 2023 Eurobarometer also revealed that 60% of Europeans and 51% of Romanians are willing to pay up to 20% or more for products from animal welfare-friendly farming systems.²⁸ Novel Research found that 80% of Romanians are willing to pay up to 10% more for higher animal welfare products.²⁹ The statistics and polling vary, but the trends are clear: Romanian consumers are asking for companies to make animal welfare a priority.

A recent Maia Research study, commissioned by Humane World for Animals, showed that from 2018 to 2022, EU retail/grocery sales of chicken decreased by 1.1%, overall. During this same period, sales of chicken provided with higher welfare (i.e., free-range and organic) grew by 8.9%. Combined, higher welfare chicken meat increased market share by 10%. In Romania, retail sales of chicken grew by 8.4%, with free-range and organic chicken meat sales increasing by 13.9%, boosting their market share by 5.1%.³⁰ These numbers show that consumers are buying more higher welfare products at the grocery store.



Romanians and farm animal welfare

- 92%** of Romanians find it very important to ensure good farm animal welfare.³¹
- 80%** of Romanians are willing to pay up to 10% more for higher animal welfare products.³²
- 13.9%** increase of retail sales of free-range and organic chicken meat in Romania between 2018-2022.³³



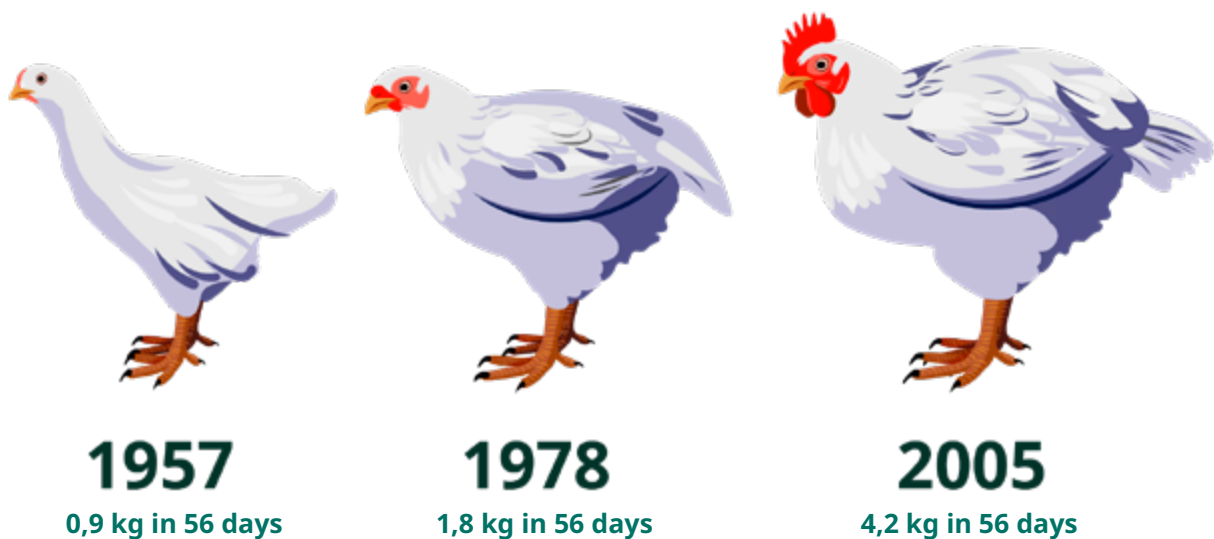
Broiler chicken welfare and the European Chicken Commitment

Chickens are active, social and curious animals with notable cognitive abilities and complex behavioural needs. They have a distinct vocal repertoire, with dozens of different kinds of calls. However, conventional chicken production fails to account for the complexity of these birds and causes serious welfare issues. The science is clear: Chickens raised for meat suffer greatly under conventional production methods. The ECC criteria aim to reduce this suffering and include the most prominent welfare issues. These include the following:

Welfare issue: Overcrowding



Overcrowding in commercial facilities reduces the health of the birds,³⁴ by, for example, increasing the risk of intestinal disease.³⁵ It also reduces chickens' ability to express natural behaviour^{36,37} and avoid disturbance.³⁸ High stocking density means more manure, which can lead to wet litter, a cause of foot pad lesions. It can also contribute to reduced walking ability, which may be the result of constrained activity and reduced mobility.³⁹



Graphic 1: Chickens raised conventionally are bred for extremely rapid weight gain.⁴⁶

How the ECC addresses it: Stocking density limits

The ECC sets limits on stocking density, the number of birds per square meter (m²), to ensure chickens have enough space to move and express natural behaviour.

Welfare issue: Rapid growth



Selective breeding for rapid weight gain causes severe welfare problems, including reduced mobility,⁴⁰ disproportionate kidney and lung size,⁴¹ and muscle damage, including wooden breast syndrome and white striping.⁴² Many chickens suffer from lameness and difficulty walking.^{43,44,45} In most flocks, by the time they approach slaughter weight, there are birds who become so crippled that they are unable to reach feed and water.

How the ECC addresses it: Higher welfare breeds

The ECC promotes the use of slower-growing, higher welfare breeds to reduce the health problems associated with rapid weight gain, improving mobility and overall welfare.

Welfare issue: Dim lighting



Lights are generally kept on at a low level for 18-20 hours a day to encourage the birds to eat more and gain weight faster. However, poor lighting disrupts sleep and the production of melatonin,⁴⁷ a hormone regulating growth and immune function.

The short night and prolonged hours of light can worsen skeletal issues.^{48,49,50}

How the ECC addresses it: Improved lighting

The ECC mandates higher light intensity, including natural daylight, to support better day and night cycles.

Welfare issue: Barren environments



Except for feed and water lines, conventional production facilities are empty barns. The chickens are unable to express their natural curiosity or innate behaviour patterns such as perching or foraging. They have little to do but sleep or eat.

How the ECC addresses it: Perches and environmental enrichment

The ECC requires that chickens have access to perches for roosting and pecking materials to create a more stimulating environment and improve their quality of life.

Welfare issue: Poor air quality



Crowded indoor settings can expose chickens to poor air quality due to pollutants including dust, bacteria, fungal spores and gases (carbon dioxide and ammonia), impacting respiration and health.⁵¹ Excessive ammonia levels over long periods of time can reduce the growth of chickens and increase flock mortality rate.⁵²

How the ECC addresses it: Cleaner air

The ECC sets standards for ventilation to maintain air quality and reduce exposure to pollutants, leading to improved air quality in the barn to support health and welfare.

Welfare issue: Cages

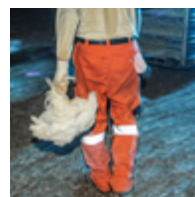


The use of cages for chickens limits both floor space and height, restricting movement and preventing natural behaviour such as foraging and dustbathing. The lack of movement and exercise is so severe that it can reduce bone strength.^{53,54,55} Broiler chickens kept for meat production are not typically reared in cages in the EU, but breeding birds (i.e., parent and grandparent generations) may be housed in cages or multitier systems where their movement is restricted, and they do not have access to litter.

How the ECC addresses it: No cages

The ECC prohibits the use of cages or multitier systems for broiler chickens. Broiler chicken cages cause severe welfare problems because chickens are so tightly crowded they barely have space to spread their wings.

Welfare issue: Ineffective stunning



The common electrical waterbath stunning method causes fear, stress and pain. The birds are first inverted (hung by their feet, upside down in shackles) while fully conscious. They may flap their wings to right themselves. The stunning is inconsistent, meaning that not all chickens are successfully rendered unconscious,^{56,57} causing severe pain and distress as their throats are cut for exsanguination.

How the ECC addresses it: Improved stunning without live inversion

The ECC requires that slaughterhouses use controlled atmosphere stunning with inert gas or multiphase systems, or effective electrical stunning without live inversion, which improve animal welfare. These practices ensure chickens are rendered unconscious before they are handled and shackled upside down on the line, reducing their suffering.

The Pecking Order 2024: Methodology

The Pecking Order 2024 European Methodology document offers comprehensive insights into the benchmark's purpose, assessment criteria, approach and scoring system. This document was shared with all assessed companies before the evaluation period began.

The criteria for *The Pecking Order* are based on the ECC. The assessment evaluates the progress of the fast-food companies in two pillars. There are 14 questions, and each question focuses on a specific attribute of the ECC to improve chicken welfare.

Each company receives a pillar percentage score, which combine, with equal weighting, for an overall percentage score. Scores are also translated into Tiers and Grades as shown in Table 3.

Tier	Grade	Overall result %
1	Leading	86-100
2	Good	76-85
3	Making progress	60-75
4	Getting started	50-59
5	Poor	26-49
6	Very poor	0-25

Table 3: Tier and Grade percentage thresholds

The report only uses information that the companies have shared publicly, such as on their national or international websites, or in their annual reports. Before the ranking process, all the companies were informed about the analysis and had the opportunity to publish any missing information.

In 2024, an additional question has been included in the Commitments and Targets Pillar 1, asking companies whether they have a published road map in place to achieve the requirements of the ECC. This question has been included to encourage companies to publish progress milestones toward achieving the requirements within a specified time frame.

Pillar 1: Commitments and Targets

Questions focus on published time-bound commitments to improve chicken welfare. The score in Pillar 1 reflects the scope and completeness of a company's commitment to the specific criteria outlined in the ECC.

Pillar 2: Performance Reporting

Questions focus on reporting of progress against each of the elements of the ECC. The score in Pillar 2 reflects the extent to which a company has implemented its commitments in relation to the ECC criteria.

European and Romanian fast-food chains

This report targets leading international and national fast-food chains serving chicken meat. The 2024 European edition of *The Pecking Order* assessed 75 fast-food chains across Czechia, France, Germany, Italy, Poland, Romania and Spain. Humane World for Animals Europe evaluated Poland and Romania, focusing on nine international and three national chains in Romania. These national chains were selected for their size, brand visibility or existing animal welfare commitments.

World Animal Protection initiated *The Pecking Order* project. The 2024 European report and methodology are available at [World Animal Protection \(worldanimalprotection.org/pecking-order-2024\)](http://worldanimalprotection.org/pecking-order-2024).



Results













Company	ECC	Pillar 1: Commitments and Targets	Pillar 2: Performance Reporting	Overall score %	Overall score grade	Change since 2023
International brands						
 PAUL <small>depuis 1889</small>	✓	82%	17%	49%	Poor	+
	✓	95%	0%	47%	Poor	=
	✓	82%	0%	41%	Poor	-
	✓ ^b	18%	20%	19%	Very poor	-
	✗	11%	0%	5%	Very poor	+
	✗	3%	0%	1%	Very poor	+
	✗	0%	0%	0%	Very poor	=
	✗	0%	0%	0%	Very poor	=
	✗	0%	0%	0%	Very poor	=
National brands						
	✗	0%	0%	0%	Very poor	=
	✗	0%	0%	0%	Very poor	=
	✗	0%	0%	0%	Very poor	=

Table 4: Overview of individual scores of the Romanian fast-food companies
Calculation of the overall score is based on the overall results of two pillars.

^b In 2021, Subway committed to ECC with a 2026 deadline but removed in 2023 the deadline.

Results on company level

The data shows the overall scores for the 12 assessed fast-food companies based on their publicly available procurement policies and practices on chicken welfare. PAUL, IKEA and Pizza Hut lead the ranking with scores of 49%, 47% and 41%, respectively. These companies have set strong chicken welfare targets, but their overall performance is affected by low scores in reporting their progress on these targets. PAUL outperforms IKEA and Pizza Hut due to better communication about the company's progress. The three leading companies are followed by Subway and KFC, with overall scores of 19% and 5%, respectively.

IKEA scores highest in Pillar 1, being the first to get points for publishing a road map showing milestones toward achieving its welfare goals. Subway received few points for its welfare commitment because the company removed its deadline. Subway and PAUL are the only chains that scored

above zero in Pillar 2. Subway has published some progress related to decreasing stocking density, adding enrichment and moving to higher welfare slaughter practices for a proportion of the chickens in the European supply chain, while PAUL mentions not using cages and multitier systems.

The international brands Burger King, Domino's, McDonald's and Starbucks, along with national companies 5 to go, Salad Box and Spartan, received low overall scores of 1% or 0%.

Results on industry level

The Romanian fast-food industry, represented by the 12 assessed companies operating in Romania, has an average overall score of 14%, falling into the "Very Poor" category. The score is slightly lower than in 2023, which was 17%. The average score has been impacted by an extra question to Pillar 1 (Commitments and Targets) and Subway's lower score due to the unexplained removal of its ECC deadline.

Romanian fast-food industry brands making progress

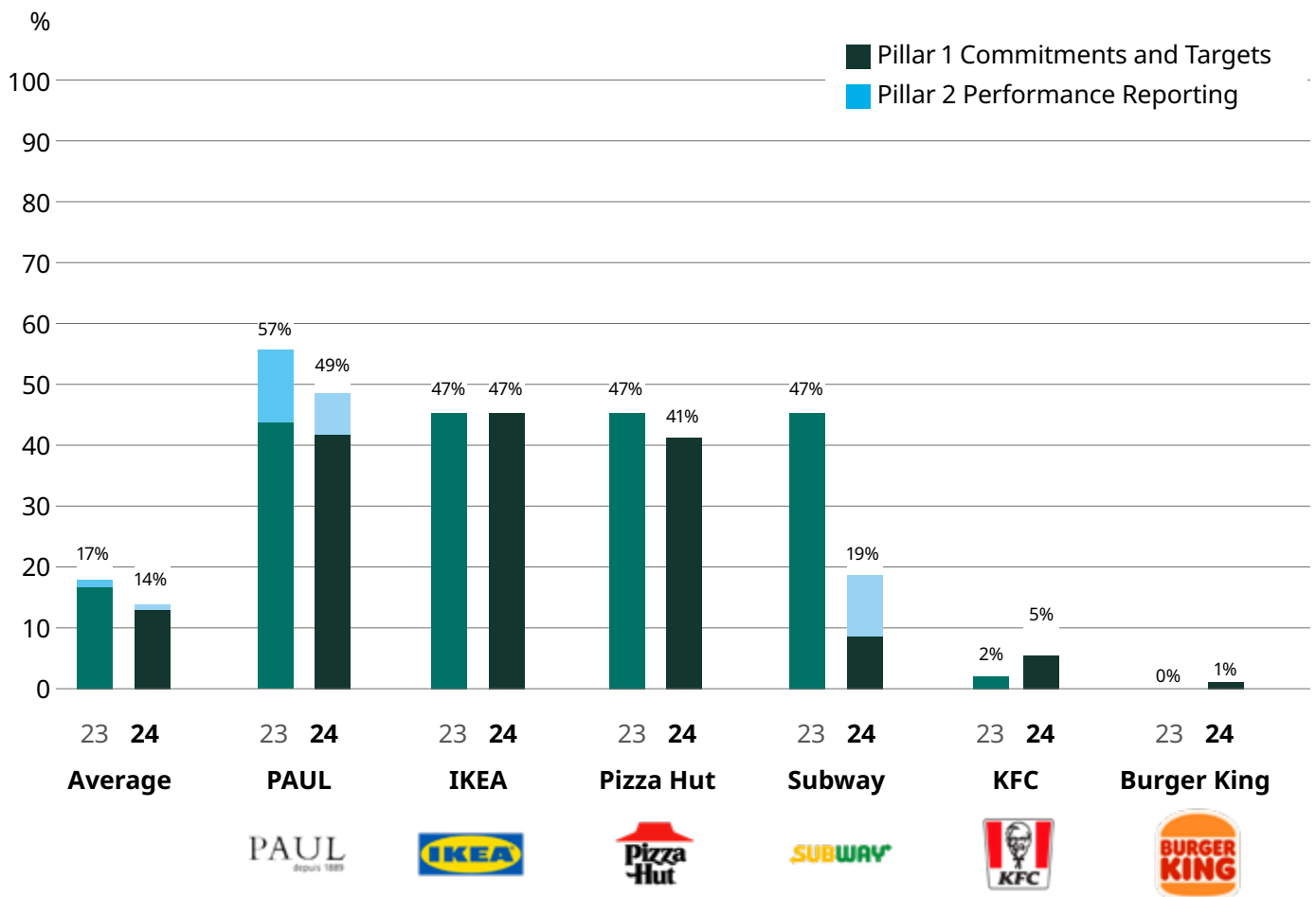


Figure 1: Industry brand overview based on assessed fast-food companies that made progress

Despite the lower score, there are positive developments in Romania's industry:

- Four out of 12 companies (33%), including IKEA, PAUL, Pizza Hut and Subway, have published commitments. Disappointingly, all brands, both international and national, exhibit "Poor" or "Very poor" performance in broiler welfare practices.
- Five companies, including Burger King, IKEA, KFC, PAUL and Subway, made changes to their online communications, and four have enhanced their communications regarding their commitments or performance impacting the lives of chickens positively.
- In 2024 IKEA received points for a published road map. The road map serves as an important tool for achieving commitments and reassuring consumers the company works on broiler chicken welfare.
- In 2023, five companies scored above zero, and this year Burger King joined as the sixth company as its parent company, Restaurant Brands International, made a general commitment to broiler chicken welfare.
- In 2023 only one company, Subway, communicated about its progress toward the implementation of its higher welfare commitment, and this year PAUL joined as the second company.

These changes indicate that companies are actively working on improving broiler chicken welfare. International brands generally score higher than national brands, mainly due to

commitments made by their parent companies through the ECC. However, the survey revealed that few fast-food brands communicate about broiler welfare on their websites in Romania, a shortfall which needs to be improved.

Industry brands with a 0% score

5
To Go



SALAD B^{OX}



Table 5: Industry brand overview on assessed fast-food companies without progress



Results on EU level

At the EU level, 75 fast-food chains were assessed in Czechia, France, Germany, Italy, Poland, Romania and Spain. The average industry score across these countries decreased from 25% in 2023 to 22% in 2024, placing most of the industry in the “Very Poor” category. This decline is mostly due to the inclusion of Czechia, which scored below the EU average, and the generally lower performance in the “Commitments” pillar, influenced by an extra question on publishing a road map.

There is notable variation in scores among the EU countries. France and Germany consistently score the highest, maintaining scores between 33%-36%, reflecting

stronger commitments to higher chicken welfare standards, though they still fall into the “Poor” category. Czechia, assessed for the first time in 2024, scored 19%. Spain and Poland scored slightly lower, between 17%-18%, suggesting the need for improvement in making commitments and implementing higher welfare practices and public reporting. Italy and Romania scored the lowest among the six EU countries, with 14% in 2024, underscoring a significant need for improvement. Except for France and Germany, the other five countries remain in the “Very Poor” category. Notably, all countries, except France, which remained at 36%, saw a decrease in scores from 2023 to 2024, with Italy, Spain, Romania and Germany experiencing the largest declines, while Poland dropped only 1%.^c

The average fast-food industry score by country 2023-2024

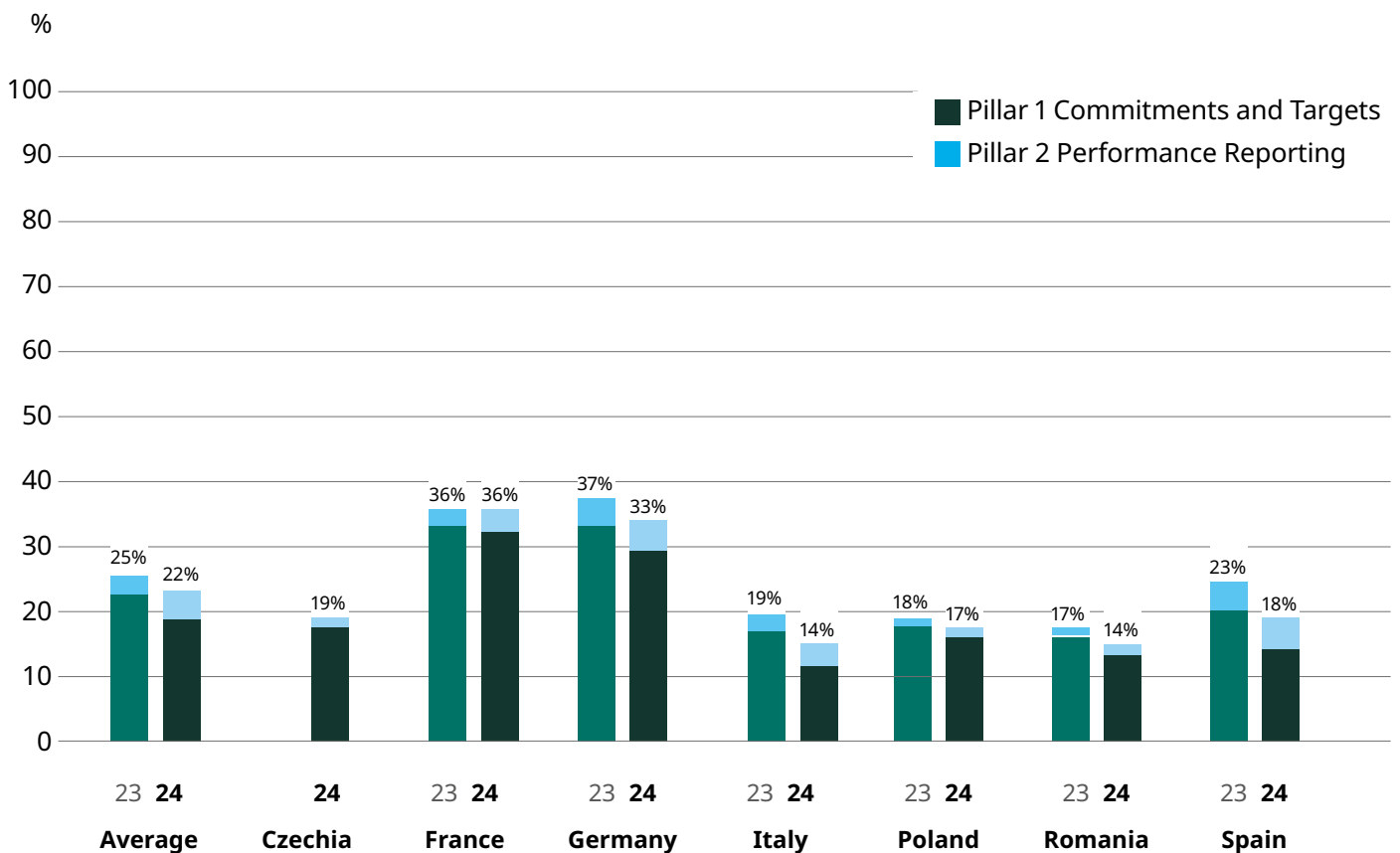


Figure 2: Overview of the country results based on the fast-food industry scores in that country

^cIt should be noted that France is assessed on additional questions on the use of winter gardens (Q1.9 and 2.7) in each pillar. PAUL was the only company that scored on question 1.9, and no company scored on question 2.7. Due to this additional question (where scoring was limited), France's average scores are depressed compared to other markets.

Analysing and comparing country scores is limited by variations in the presence of assessed companies across different countries. However, a comparison was made by focusing on the six companies assessed in all countries including Burger King, IKEA, KFC, McDonald's, Starbucks and Subway.

Figure 3 illustrates that in this scenario, the EU decreased from 25% in 2023 to 19% in 2024 (category "Poor"); again,

much of this was influenced by including the lower-scoring Czechia and the inclusion of a new question about road maps in the Targets and Commitments pillar. The French fast-food industry scored best for the EU with 36%, followed by Germany's industry with 24%. The rest of the countries score between 13%-17%, with the Polish, Czechian and Romanian fast-food industries displaying the lowest average score between 13%-14%. All countries except France are in the category "Very poor".

The average fast-food industry score by country 2023-2024 based on companies assessed in all countries

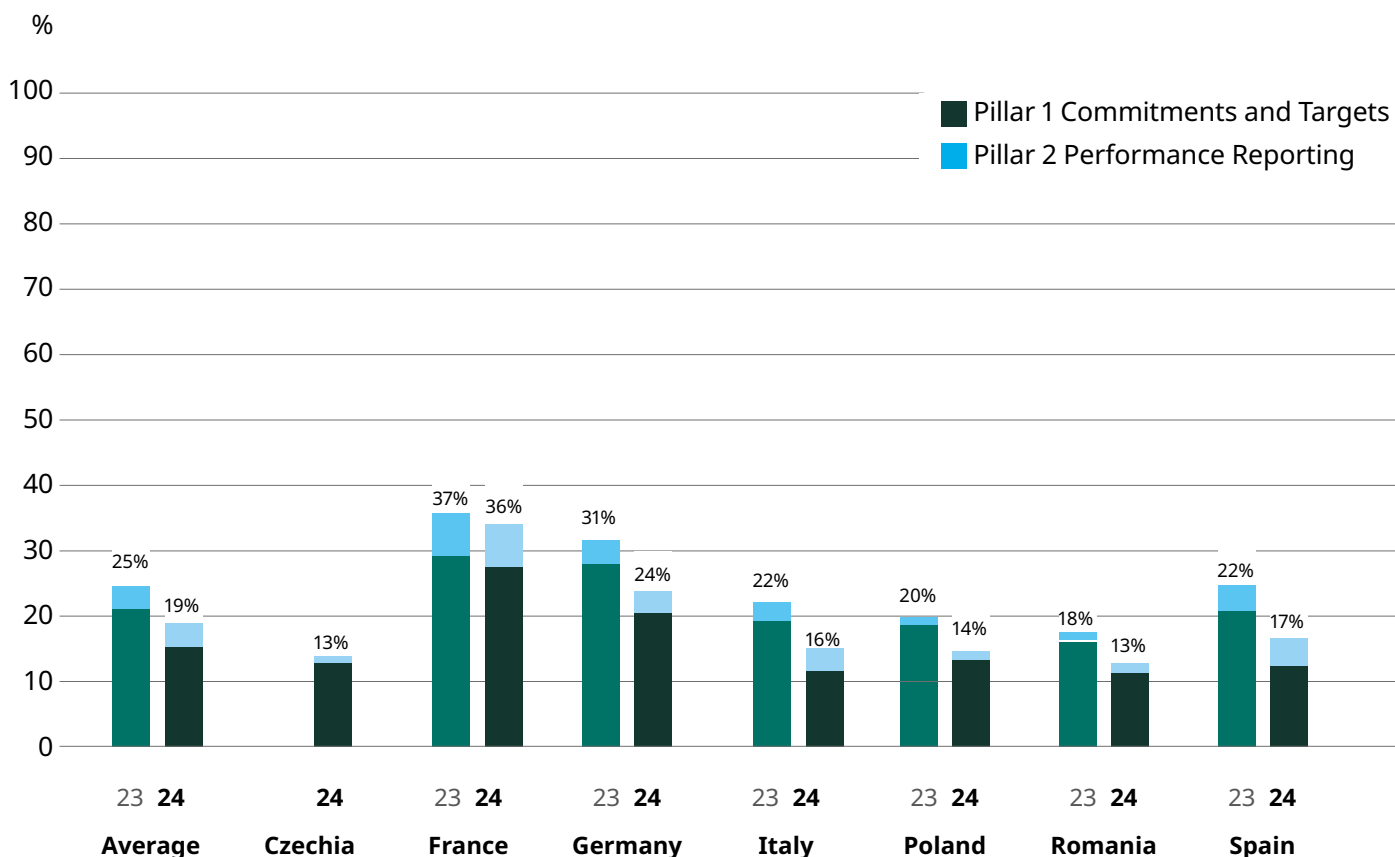


Figure 3: Overview of the country results based on the fast-food industry scores of companies assessed in all 7 EU countries: Burger King, IKEA, KFC, McDonald's, Starbucks and Subway.



Company results and advice

International fast-food companies



Since 2008, Burger King has opened 11 restaurants in Romania, operated by franchisees AmRest, Rex Concepts BK Romania and McWin. The parent company is Restaurant Brands International (RBI).

Burger King Romania scored 1% because RBI makes only a general comment about broiler chicken welfare on its website. Burger King can learn from its peers in France, the United Kingdom, the United States and Canada, where the chain has published its commitment to higher chicken welfare standards.



Domino's is owned by Domino's Pizza Inc. Since 2010, franchisee Radacini Group opened 25-plus stores in Romania.

Domino's Romania did not score any points as it lacks a published policy on chicken welfare. Domino's can learn from its counterparts in Belgium, Denmark, France, Germany, Luxembourg, the Netherlands and Poland, all of which have committed to the ECC.



In Romania, IKEA established its presence in 2007 and now has three stores.

In 2019, IKEA pledged to the Better Chicken Commitment for North America and Europe. IKEA Romania received an overall score of 47%, excelling in the commitment pillar with a 95% score for publishing chicken welfare standards on its global website. However, it received a 0% score for reporting progress.

IKEA Romania is the only assessed brand that has published a road map on chicken welfare in 2024 and the only international company that communicates about animal welfare on the Romanian company website. IKEA Romania can enhance its rating by providing comprehensive information on chicken welfare directly on its Romanian site, rather than referencing global resources. IKEA Poland serves as a good example, with its chicken welfare policy posted in Polish.



McDonald's, the market leader in Romania, has opened over 100 restaurants since its debut in 1995. It is operated by the franchisee Premier Capital.

McDonald's has a broiler chicken welfare policy, but it does not meaningfully address the most important welfare issues. McDonald's Romania falls outside the scope of this policy, even though it covers other countries in the EU, including Poland, Spain, Italy, Germany and Switzerland. Because the company's welfare commitment falls short of the ECC criteria, and excludes Romania, McDonald's Romania has a score of 0%. To enhance its standing, the company needs to commit to the ECC criteria. Publishing these commitments in a road map would enhance transparency.



KFC holds the second-largest presence among fast-food chains in Romania, having 100-plus restaurants established since 1997. The parent company is Yum! Brands and the franchisee Sphera Franchise Group. It is part of KFC Pan Europe.

KFC Pan Europe has a farm animal welfare programme that includes chicken welfare, resulting in KFC Romania receiving a 5% overall score. The policy has no concrete standards and is not aligned to ECC criteria, except for prohibition of cage use. KFC Romania can align to Western Europe and work on a road map to achieve ECC standards.



PAUL is part of the Holder Group. Since 2008, PAUL has opened 12 bakeries in Romania, which are operated by franchisee Moulin D'Or.

In 2020, Holder Group committed to the ECC in Europe for its sub-brand PAUL. PAUL Romania achieved an overall score of 49%, demonstrating a strong commitment with an 82% rating for disclosing its chicken welfare standards on its international website. It improved its performance reporting to 17% by reporting on its commitment to not use cages or multitier systems. To further improve its score, PAUL Romania needs to provide more information on chicken welfare and a road map on its Romanian website.



Pizza Hut opened its first store in Romania in 1994 and has 40-plus locations. It operates under franchisee Sphera Franchise Group and is a subsidiary of Yum! Brands Inc.

In 2020, Pizza Hut UK & Europe committed to the ECC. Pizza Hut Romania achieved an overall score of 41%, demonstrating a strong commitment with an 82% rating for disclosing its chicken welfare standards on its international website. The company scored 0% in performance reporting. To improve its score, Pizza Hut Romania needs to publish its own chicken welfare policy and road map and update the public on its implementation progress on its Romanian website.



Since 2012, Subway has opened 33 independently owned restaurants in Romania.

In 2021, Subway Group committed to the ECC, including in Romania. However, Subway removed the 2026 deadline for its commitment in 2023. As a result, Subway Romania scored 19%, with 18% in the commitment pillar and 20% in performance reporting. To improve its score, Subway Romania needs to state its commitment to the ECC, including a deadline and a road map, on its own website and start reporting on its progress.



Since 2007, Starbucks has opened 50-plus restaurants in Romania, operated by franchisee AmRest. The parent company is Starbucks Corporation.

As Starbucks Romania does not have a chicken welfare policy published, it scored 0%. Starbucks Romania can learn from its peers in the United Kingdom, the United States and Canada, where the chain has committed to improve chicken welfare standards.

National fast-food companies



5 to go is a Romanian coffee shop chain with over 500 locations in Romania. It surpasses Starbucks locally, making it the largest coffee chain in the country. The shops are operated through a franchise-based business model; the first shop opened in 2015.

5 to go has not published any information related to animal welfare generally or chicken welfare specifically. As a result, 5 to go receives a score of 0%. To improve its position, 5 to go must publish an animal welfare policy and a road map that includes chickens and aligns with the ECC and start reporting on its progress.



Spartan is a Romanian fast-food chain with 75 restaurants, of which around half operate under franchise agreements. It ranks as the third-largest player in the local restaurant industry, behind McDonald's and KFC. Founded in 2012, the Spartan restaurant chain operates as a subsidiary within the Strong MND Corporation.

Spartan has not published any information on animal welfare or chicken welfare specifically, resulting in a 0% score. To improve its standing, Spartan needs to publish a chicken welfare policy aligned with the ECC, create a road map and begin reporting on its progress.



The Romanian fast-food company Salad Box, founded in 2012, has approximately 30 restaurants in Romania. The franchise restaurants are owned by Sterling Cruise. It is also present in Czechia, France, Italy, Spain and 10 other countries.

Salad Box has not published a broiler chicken welfare policy, resulting in a score of 0%. However, the company has shown its awareness of animal welfare by committing in 2022 to achieving 100% cage-free eggs in Romania by the end of 2025.⁵⁸ To improve its score, the company needs to commit to the ECC, create a road map and start publishing its progress.

Key findings and ways forward



The Pecking Order 2024 – Romania provides a comprehensive overview of the fast-food industry's performance in broiler chicken welfare by analyzing 12 leading chains operating in Romania on their progress toward meeting the science-based criteria of the ECC. The report highlights weaknesses and areas of progress, offering clear insights into the path forward. It underscores the fast-food sector's important role in enhancing chicken welfare within Romania's broiler chicken industry.

Key findings

- **International disparities:** In 2024, *The Pecking Order* analyzed fast-food companies in Czechia, France, Germany, Italy, Poland, Romania and Spain. The French and German fast-food industries, represented by the assessed fast-food chains, lead with the highest overall scores, demonstrating stronger commitments and better implementation of chicken welfare standards. In contrast, Romanian chains have the lowest scores among the assessed EU countries in both 2023 and 2024, indicating a significant need for improvement. However, despite these low scores, there is evidence of progress.
- **The state of the industry:** While 33% of Romanian companies have published commitments to higher broiler welfare standards, the majority have not prioritized chicken welfare in their policies. There is an urgent need for these companies to align with ECC criteria, which address critical welfare issues in broiler chicken production. Moreover, most Romanian fast-food chains struggle with implementing their commitments and transparently reporting their progress.
- **International vs. national chains:** International chains in Romania often rely on the policies of their parent companies. While some positive movement is noted at the international level among global fast-food brands, these improvements are not yet reflected locally in Romania. National chains lag further, lacking any chicken welfare policies. It is essential for fast-food chains to ensure that their animal welfare commitments are both visible and actionable within the Romanian market.

Ways forward

- **Commitments and road maps:** Fast-food companies without a chicken welfare commitment should begin developing policies that align with ECC criteria. Those with existing commitments should create clear road maps to achieve their goals. Without visible commitments and road maps, consumers may assume the worst about a company's practices.
- **Collaboration between companies and producers:** Fast-food companies and chicken producers must proactively collaborate to meet ECC standards. Producers need dedicated buyers to justify the investments in higher welfare practices, while fast-food chains depend on these producers to ensure a consistent supply of higher welfare chicken for their menus. This partnership is essential for building a supply chain that meets ECC standards and responds to consumer preferences for higher welfare products.
- **Legislative action:** Romanian lawmakers play an important role in the industry's transition to higher broiler welfare practices by supporting, developing and enforcing legislation that aligns with ECC criteria and reflects current animal welfare science. Policymaking is essential to drive industrywide change, keeping Romania competitive and meeting consumer expectations for better farmed animal protection.

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 billions of chickens and align with consumer expectations for a more humane food system, visible on the menus of fast-food companies.



Support

Humane World for Animals Europe 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. To learn more or join our efforts, go to 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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