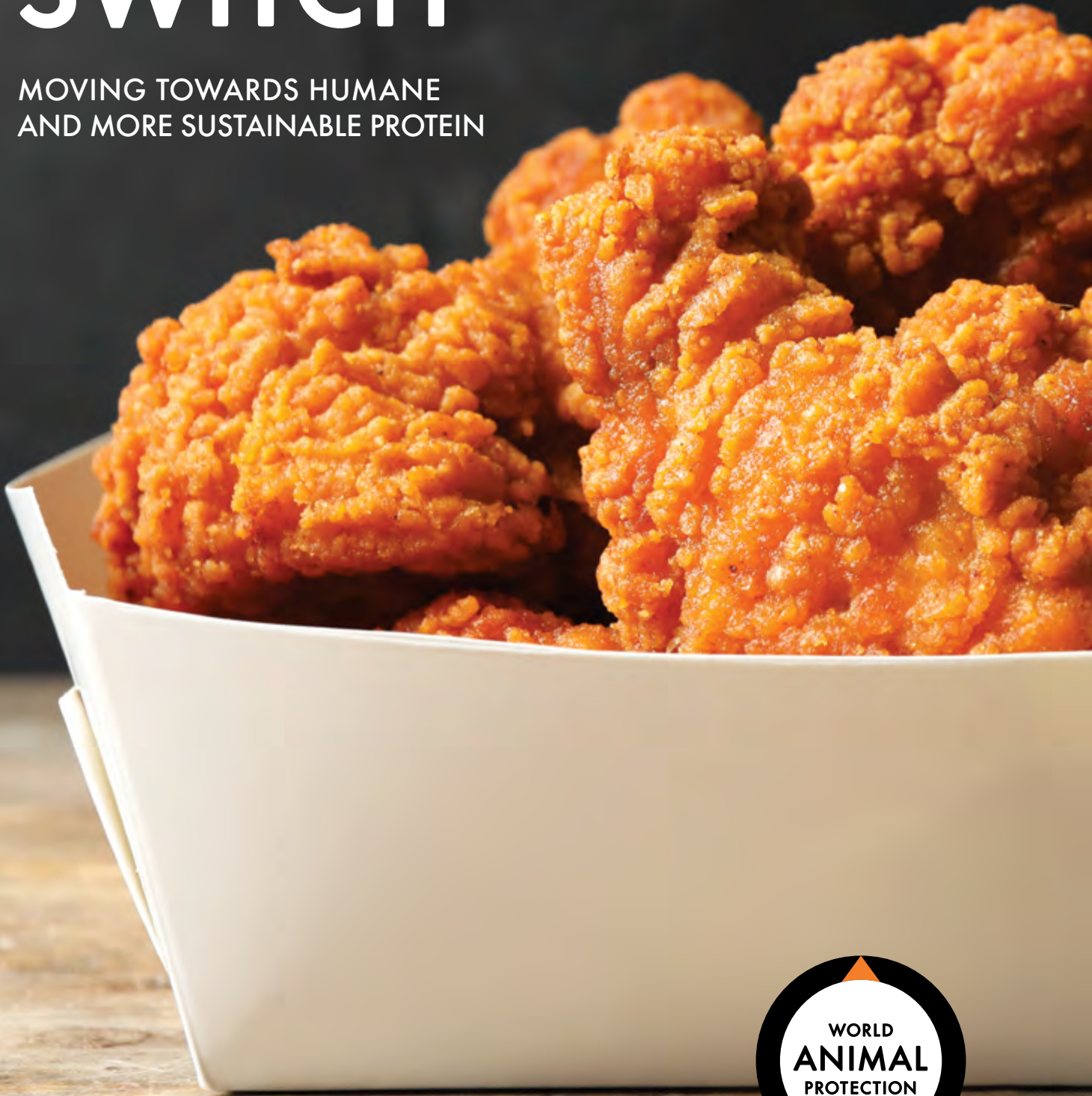


THE PROTEIN SWITCH

MOVING TOWARDS HUMANE
AND MORE SUSTAINABLE PROTEIN



Acknowledgements

World Animal Protection acknowledges the Traditional Owners of the country where this report was written. We pay our respects to their Elders past, present and future.

Research was done by Ashley Avci with input from World Animal Protection staff (staff including Ben Pearson, Fran Kearey, Rochelle Flood and Suzanne Milthorpe).






Table of Contents

Foreword	5
Introduction	6
Factory farming is a global problem	6
Spotlight on chickens	7
A global solution... but Australia lags behind	8
Methodology	10
Key findings	11
Australian fast-food restaurants are falling behind	12
Conclusion and recommendations	14
References	16
Appendix 1: Individual brand results	19
Domino's	19
Starbucks	19
Nando's	20
Guzman Y Gomez	20
Hungry Jack's/Burger King	21
Subway	21
Pizza Hut	21
McDonald's	22
KFC	22



Foreword

World Animal Protection moves the world to protect animals and in doing so, protect communities and the planet. The two greatest threats to animals – our industrial farm-based food system and the ongoing exploitation of wildlife and destruction of their habitats – not only cause suffering for billions of sentient beings every year, but contribute to environmental destruction, climate change and pandemics.

To avoid more suffering, and environmental catastrophe, we must transition to plant-based proteins and ensure that as we do so, animals that are farmed, benefit from high welfare standards.

The protein transition will not happen without the fast-food sector contributing. The consumption of fast-food is growing and a large proportion of it is meat and other animal products from industrial, low-welfare farming systems. However, there are some encouraging signs globally.

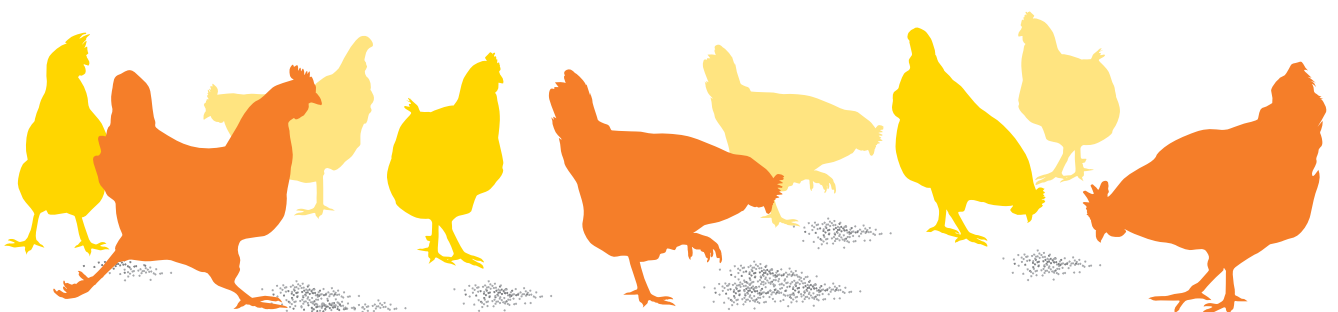
A number of fast-food brands have signed on to the Better Chicken Commitment, which is significant given chicken is the most farmed land animal. Many well-known fast-food brands are also offering a number of plant-based menu items.

Chicken is the most industrially farmed low-welfare meat in Australia. However, in Australia, as this report documents, there is little progress to date. This report evaluates nine major fast-food brands to assess what plant-based meals are offered for customers, and what their commitments are on chicken welfare.

Unfortunately, despite 75 per cent of Australians regularly eating fast-food, only one fast-food chain has signed the Better Chicken Commitment. While most fast-food brands offer plant-based alternatives, some companies are still lagging in this area too.

Australians care about the welfare of farmed animals and the planet. Disappointingly, a number of well-known Australian fast-food companies fall well short of the policies and practises of their overseas counterparts.

Australian animals and consumers deserve better. They deserve the choice of higher welfare products, and a comprehensive range of plant-based options. Given Australians are among the world's biggest consumers of meat, we must lead the transition towards more humane and sustainable proteins, and Australian fast-food companies need to play their part.



Introduction

Factory farming is a global problem

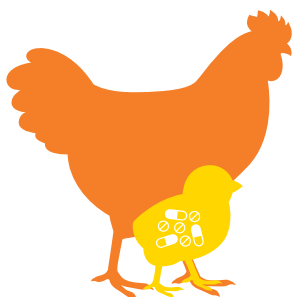
Every year, billions of factory farmed animals are condemned to a life of cruelty and suffering to feed a growing human population.¹ Kept in barren, overcrowded sheds and left to stand in their own excrement. A maximum number of animals are kept in the minimum space, bred and fed to grow as large as possible, in the least possible amount of time.

These conditions are stressful, painful and cruel. They also provide a direct pathway to disease and illness.

For the duration of their short lives, factory farmed animals are pumped with antibiotics to be kept alive until their death date, contributing to the rise in antibiotic-resistant bacteria. Antibiotic resistance, or superbugs, is one of the biggest threats to global health today. Currently, it is estimated that superbugs are responsible for 1.3 million human deaths each year.² This is projected to rise to 10 million deaths a year by 2050.³ Farming large numbers of genetically similar animals in confined spaces also leads to increased risk of disease spread, including zoonotic diseases that can spread from animals to humans.⁴

That is not all. A new major study found that rearing animals for food causes twice the pollution of producing plant-based food alternatives.⁵ Global food production is currently responsible for a third of human induced greenhouse gas emissions, with the production of meat being responsible for 60% of those emissions.⁶

The global food production system is broken. Factory farming is not just an Australian problem, it is a global problem that requires global solutions. An estimated 50% more food is required by 2050 to meet the current rate of population growth.⁷ Relying on the current meat production system, two planets' worth of resources would be needed just to meet the world's meat demand under this projection.⁸ This level of pressure on vital ecosystems is unsustainable. Whether it be another pandemic, disease outbreak or natural disaster, our food system will face future challenges. This would put intolerable pressure on vital ecosystems. We must work together now to build a food system that is humane and sustainable.





SPOTLIGHT ON CHICKENS

Chickens are the most intensely farmed land animal in the world,⁹ and in Australia it's no different.

In less than 10 years, the average number of chickens raised for meat annually in Australia has increased by 100 million. More than 675 million meat chickens were killed in the 2020/21 financial year.¹⁰ That's almost two million chickens killed for meat in Australia every day. Most of these chickens are factory farmed in sheds with 40,000–60,000 birds.¹¹

To keep up with demand for chicken meat, factory farms breed chickens to grow three times as fast as traditional breeds.¹² Designed to grow and grow, chickens used for meat have been genetically selected to reach 'slaughter weight' as fast as possible. The cost to the welfare of the birds is significant. Every stage of their life involves suffering.

A 30 gram chick can reach slaughter weight, around 2 kilograms, in as little as six weeks.¹³ This growth rate is equivalent to a 3 kilogram newborn human baby reaching 300 kilograms in two months.¹⁴

The breeding presents some of the worst welfare challenges for chickens.

Prior to slaughter many chickens are unable to support the weight of their body. They suffer from lameness, leg injuries and are unable to walk.¹⁵ Their rapid growth rate also causes their heart and lungs to overwork.¹⁶

Birds unable to stand, or birds living in poorly managed litter spend their life laying in their own faeces. Many chickens develop painful lesions on their bodies from continuous contact with litter.¹⁷

Poor welfare conditions, fast growth genetics and overcrowded spaces cause stress and can compromise a bird's immune system.¹⁸ The use of fast-growing breeds with poor welfare outcomes is of particular concern. A Dutch study found that fast-growing broiler breeds require three times more antibiotics than slower-growing breeds.¹⁹ By using slower-growing breeds with better welfare outcomes, industry can help reduce their antibiotic use.

A global solution... but Australia lags behind

To solve these problems, global economic, sustainability and public health experts have called for diversification of protein supply. In recent years a growing number of world-leading authorities have released reports urging consumers to reduce their meat consumption and reliance on industrial animal agriculture.

They stress the critical need to increase global plant-protein production and consumption and move away from low-welfare industrial food systems that threaten human and animal health.²⁰

There is also a growing concern among consumers about the issues inherent in factory farmed meat. The chart below is taken from the 2018 Futureye Report. This report was commissioned by the Federal Department of Agriculture, and it looks at the shifting attitudes of Australians on the issue of animal welfare and the animal agriculture industry.

Despite growing concerns among Australian consumers, fast-food restaurants across Australia are failing to act. This places them behind global competitors when it comes to chicken welfare.

A number of international fast-food brands have responded to consumer demand and signed on to the Better Chicken Commitment. The Better Chicken Commitment (BCC) is the leading set of minimum welfare standards for chickens used for meat.²¹

Drawing on the latest scientific evidence the BCC guidelines aim to improve the lives of chickens from birth to slaughter. The BCC criteria include the use of slower-growing breeds, useable perch space, the provision of natural light, greater air quality and more humane slaughter methods.

The BCC is gaining momentum worldwide. More than 500 major food companies across Europe and North America have signed on to the BCC.

Which of the following concerns you about farming animals in Australia?



Figure: Chart from Futureye Report, 2018 (pg 33)

The BCC policy is now starting to be adopted by major food companies across Australia.

We know that the current standards for chickens kept in factory farms in Australia fail to provide any quality of life. The BCC standards are considered best practice, exceeding standards currently set out by local animal welfare bodies.

All animals deserve a good life. It is unacceptable that companies whose business relies on chickens' lives as a primary resource do nothing to improve their short existence.

And despite enduring significant economic disruption due to the COVID-19 pandemic, the plant-based meat sector achieved remarkable growth. Growing awareness of the welfare, health and sustainability benefits and the fundamental role in feeding the future has seen record investment by private industry, government and consumers.²²

Plant-based food is projected to be a AU\$3 billion opportunity for Australia by 2030.²³ Plant-based alternatives such as the 'Impossible Burger' and 'Beyond Burger' have attracted considerable financial, media and research attention. Their success inspired other food companies to create their own versions of the products. The plant-based food market is only projected to grow. A recent report by Bloomberg Intelligence found the plant-based food market may reach a market value of US\$162 billion, making up 7.7% of the global protein market by 2030.²⁴

There has never been a better time for food businesses, government, agriculture, and investors to come together to ensure Australia becomes a strong international competitor in the plant-based protein market.



Methodology

This report assesses nine major fast-food companies' availability of plant-based menu options and their commitment to giving chickens good lives. The United Kingdom, and the United States were chosen to provide a point of comparison, to see how Australian companies are performing against their international counterparts.

For the plant-based component, companies have been assessed on availability of plant-based main meal options. The meal must be a permanent menu item, available nation-wide and year-round.

Companies' performance on meat chicken welfare is assessed against the BCC. Companies need to have signed onto the BCC to achieve the highest rating. Those that have received a mid-tier rating on meat chicken welfare, need to have all chicken in their supply chain certified by RSPCA, or equivalent.²⁵

While RSPCA certification is a good first step, the certification does not currently address the issue of fast-growing broiler breeds, one of the biggest concerns with chickens raised for meat in Australia.

A traffic light system is used to rate both components and present the scores in an easily digestible way. The legend below presents the reasoning behind each scoring methodology. Where a company is not present in the market, the rating will be left blank. Transparency is critical in managing chicken welfare and performance. For that reason, only publicly available information is used to rate performance.

LEGEND



Plant-based rating



Green

At least two main meal options that are plant-based, available year-round.



Amber

One main meal option that is plant-based, available year-round.



Red

No main meal item available that is plant-based.



Chicken welfare rating



Green

Have signed on to the Better Chicken Commitment and have announced this publicly.



Amber

Entire meat chicken supply chain is RSPCA Approved or other certification scheme*, this information is publicly available.²⁶












Red

No publicly available chicken welfare commitments. Have not signed onto either of the above welfare standards.

Key findings

Improvements have been made in recent years.²⁷ Most major fast-food restaurants now offer at least two plant-based main meals. However while KFC and McDonald's Australia have trialled plant-based options, they remain the only two Australian restaurants that do not offer permanent plant-based alternatives.

Australian results summary

Company	PLANT-BASED RATING	CHICKEN WELFARE RATING
Domino's 	✓	✓
Hungry Jack's 	✓	✗
Starbucks 	✓	○
Nando's 	✓	○
Guzman Y Gomez 	✓	○ *
SUBWAY 	✓	✗
Pizza Hut 	✓	✗
McDonald's 	✗	○
KFC 	✗	✗










The results show that KFC is underperforming in all areas. Their lack of plant-based menu alternatives falls short in comparison to the other major food companies. They are also falling short on chicken welfare. While KFC in the UK and six other countries across Europe have adopted the BCC, KFC in Australia has so far declined to do so.

KFC Australia's supply chain accounts for millions of the chickens raised in factory farms across Australia. Last year, more than 35,000 people signed a petition calling on KFC Australia to sign the BCC.²⁸ The petition was ignored.

Domino's Australia ranks highest for having the best offering of more humane and sustainable protein. In comparison to their benchmarked counterparts, they are industry leaders in meat chicken welfare through their adoption of the BCC. To date, Domino's is the only fast-food company in Australia to commit to higher-welfare farming, by ensuring slower-growing breeds with better welfare outcomes will be introduced into their supply chain, and by providing chickens with the opportunity to experience more space, enrichment and natural light.

Australian fast-food restaurants are falling behind

Plant-based – results summary

Company	Australia	UK	US
Domino's 	✓	✓	✓
Hungry Jack's 	✓	✓	○
Starbucks 	✓	✓	○
Nando's 	✓	✓	✓
Guzman Y Gomez 	✓	N/A	✓
SUBWAY 	✓	✓	✓
Pizza Hut 	✓	✓	✓
McDonald's 	✗	✓	✗
KFC 	✗	✗	✗

LEGEND



Green

At least two main meal options that are plant-based, available year-round.



Amber




































One main meal option that is plant-based, available year-round.



Red

No main meal item available that is plant-based.

Chicken welfare – results summary

Company	Australia	UK	US
Domino's 			
Hungry Jack's 			
Starbucks 			
Nando's 			
Guzman Y Gomez 	 *	N/A	
SUBWAY 			
Pizza Hut 			
McDonald's 			
KFC 			

LEGEND



Green

Have signed on to the Better Chicken Commitment and have announced this publicly.



Amber

Entire meat chicken supply chain is RSPCA Approved or other certification scheme*, this information is publicly available.²⁶



Red

No publicly available chicken welfare commitments. Have not signed onto either of the above welfare standards.

Of the companies assessed across the three markets, six UK companies and three US companies have signed onto the BCC. Disappointingly, only one of the nine iconic Australian fast-food companies has signed the commitment. We commend Domino's Australia for pledging to improve the lives of millions of chickens, and we urge others to do the same.

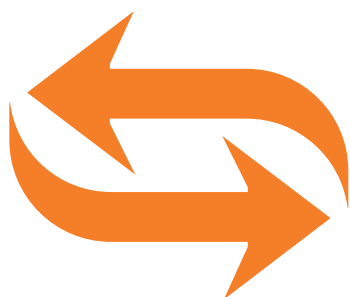
Conclusion and recommendations

Our current food system is unsustainable, cruel and dangerous. To avoid further environmental damage and animal suffering, a transition from animal protein to plant protein must occur rapidly. As that transition is underway, better welfare standards for chickens must be introduced, given the massive number of chickens farmed and the suffering they endure.

While some of the companies in this report have made progress on chicken welfare and updating their menus with plant-based options, some major companies including KFC, are not moving fast enough. They are not only falling behind emerging international standards of animal welfare and the move towards plant-based protein, but they are out of step with their own customers who want their food to be sustainable, and farmed animals to be given a life worth living.

Recommendations:

1. All Australian fast-food companies must adopt the Better Chicken Commitment as their minimum chicken welfare standard;
2. All Australian fast-food companies must greatly increase the number of plant-based options on their menu. At the very least, they must match the offerings of their international counterparts.





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Appendix 1: Individual brand results



Domino's

Plant-based rating

✓ AUSTRALIA	✓ UK	✓ US
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Chicken welfare rating

✓ AUSTRALIA	✗ UK	✗ US
-------------	------	------



Starbucks

Plant-based rating

✓ AUSTRALIA	✓ UK	○ US
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Chicken welfare rating

○ AUSTRALIA	✓ UK	✓ US
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LEGEND

Plant-based rating

✓ Green At least two main meal options that are plant-based, available year-round.	○ Amber One main meal option that is plant-based, available year-round.	✗ Red No main meal item available that is plant-based.
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Chicken welfare rating

✓ Green Have signed on to the Better Chicken Commitment and have announced this publicly.	○ Amber Entire meat chicken supply chain is RSPCA approved or equivalent, this information is publicly available. ²⁶	✗ Red No publicly available chicken welfare commitments. Have not signed onto either of the above welfare standards.
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Appendix 1: Individual brand results (continued)



Plant-based rating

✓ AUSTRALIA

✓ UK

✓ US

Chicken welfare rating

○ AUSTRALIA

✓ UK

✗ US



Guzman Y Gomez

Plant-based rating

✓ AUSTRALIA

✓ US

Chicken welfare rating

○ AUSTRALIA *

✗ US

LEGEND

Plant-based rating



Green

At least two main meal options that are plant-based, available year-round.



Amber

One main meal option that is plant-based, available year-round.



Red

No main meal item available that is plant-based.

Chicken welfare rating



Green

Have signed on to the Better Chicken Commitment and have announced this publicly.



Amber

Entire meat chicken supply chain is RSPCA approved or equivalent, this information is publicly available.²⁶



Red

No publicly available chicken welfare commitments. Have not signed onto either of the above welfare standards.

Appendix 1: Individual brand results (continued)



Hungry Jack's/Burger King

Plant-based rating	AUSTRALIA	UK	US
Chicken welfare rating	AUSTRALIA	UK	US

SUBWAY Subway

Plant-based rating	AUSTRALIA	UK	US
Chicken welfare rating	AUSTRALIA	UK	US



Pizza Hut

Plant-based rating	AUSTRALIA	UK	US
Chicken welfare rating	AUSTRALIA	UK	US

LEGEND

Plant-based rating	Green At least two main meal options that are plant-based, available year-round.	Amber One main meal option that is plant-based, available year-round.	Red No main meal item available that is plant-based.
Chicken welfare rating	Green Have signed on to the Better Chicken Commitment and have announced this publicly.	Amber Entire meat chicken supply chain is RSPCA Approved or other certification scheme*, this information is publicly available. ²⁶	Red No publicly available chicken welfare commitments. Have not signed onto either of the above welfare standards.

Appendix 1: Individual brand results (continued)



Plant-based rating



McDonald's UK has pledged to be 'a marker leader' in plant-based foods by 2025 and commit to a 100% plant-based permanent menu option available across the country.

Chicken welfare rating



Plant-based rating

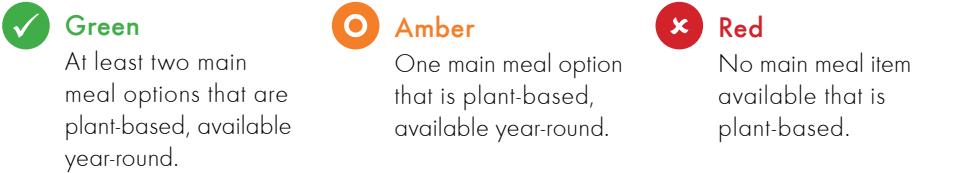


Chicken welfare rating



LEGEND

Plant-based rating



Chicken welfare rating







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