

Animal Welfare.  
Worldwide.



# The FOUR PAWS Food Delivery Service Challenge

A ranking of leading food delivery services' strategies for meat and dairy reduction towards animal welfare and climate mitigation



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## 1. Introduction

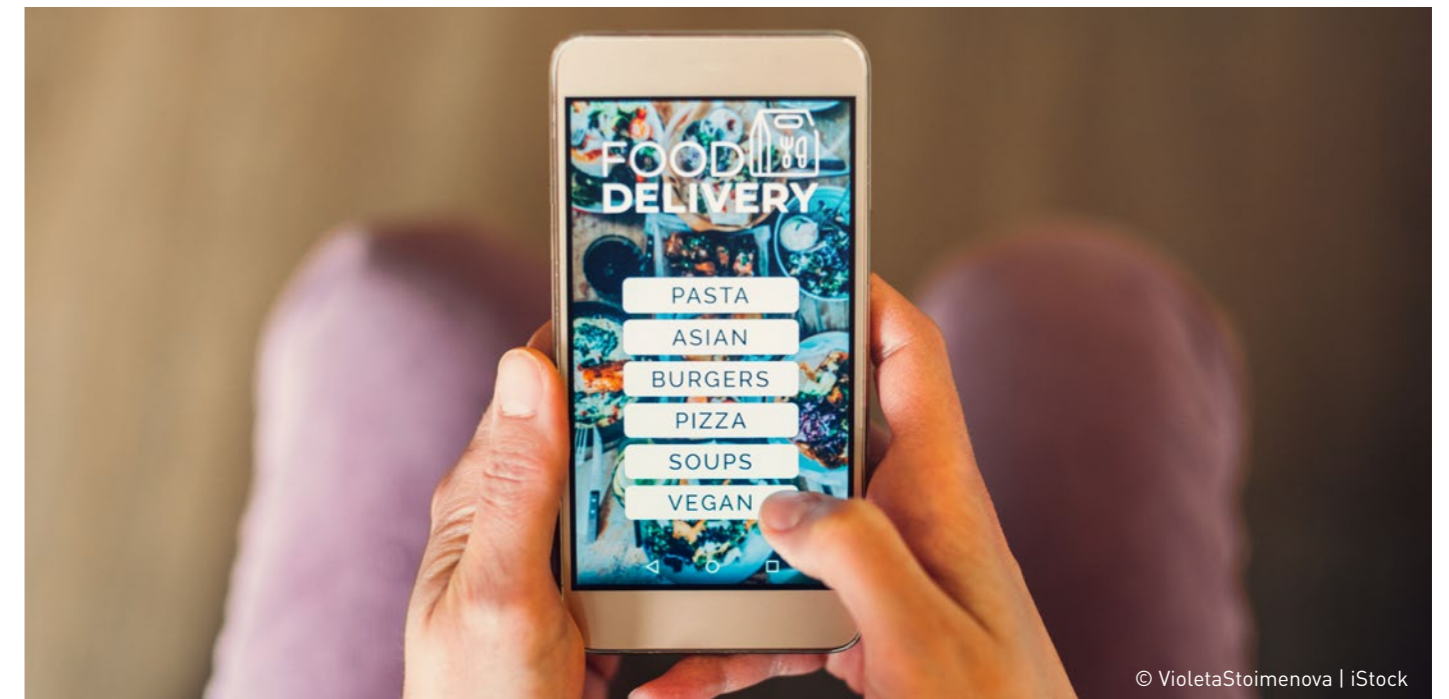
The FOUR PAWS Food Delivery Service Challenge embarks on a journey to assess how food delivery services<sup>a</sup> are leveraging their influence to address the factory farming crisis that is causing so much animal suffering and contributing to the climate crisis. This ranking is already

the eighth edition of the Atlas Challenge ranking series, the name of which was inspired by the Atlas Titan in Greek mythology who was responsible for bearing the weight of the world on his shoulders.

### Why food delivery services?

The food delivery service sector was chosen as FOUR PAWS sees it as instrumental in carrying us to a more sustainable world. In recent years – especially since the beginning of the pandemic in 2020 – the online food delivery market has rapidly grown in app users and revenues: The global number of users increased by 140% from 2018 to 2023 alone and is expected to grow up to 2.5 billion users by 2028<sup>2</sup>. The revenue of the global online meal delivery sector more than tripled from EUR 102 billion in 2017 to nearly EUR 364 billion in 2023<sup>3</sup> and is projected to reach a revenue of EUR 406 billion in 2024<sup>4</sup>. Due to the

rapid rise of food deliveries, many restaurants currently sell a significant share of their meals via delivery services. The food delivery services enable this transaction via their ordering platform and therefore require more scrutiny on what they are profiting from: Do they have any policies or measures in place to positively influence partnering restaurants and consumer choices away from animal protein and towards **vegan** options, for example through their app design, algorithms, social media? Do they take responsibility for moving the food sector away from factory farming?



<sup>a</sup> The online food delivery market is a combination of grocery and meal delivery. Meal delivery is the delivery of prepared meals by a restaurant or a platform for direct consumption. Orders are typically placed in an app or on a website<sup>1</sup>. The FOUR PAWS Food Delivery Service Challenge is restricted to online meal platform delivery.

## Animal welfare issues

For FOUR PAWS, the most important issue is that of the poor animal welfare prevalent in most of the agricultural enterprises. This issue is inseparable from other major problems connected with factory farming and the over-consumption of meat and dairy: the degradation caused to our environment and climate, and the detrimental effect on human health. It is estimated that 92.2 billion farmed land animals<sup>b</sup> are used for food (meat, dairy and eggs) every year globally; of these, an estimated 83.3 billion are slaughtered for meat<sup>5</sup>. Approximately three quarters of farmed land animals are living in factory farms<sup>6,7</sup> – and factory farms are the leading cause for farm animal cruelty worldwide. Animals experience negative states

of welfare and cannot fulfil their basic needs. This often leads to the development of behavioural disorders, which in turn results in the animals being adapted to their housing environment for economic reasons and not vice versa (e.g. tail docking in fattening pigs as a reaction to mutual tail biting). Young animals are usually separated from their mothers at a very young age, and then reared artificially and kept individually despite being social animals<sup>8,9,10</sup>. They receive, at most, just the essential veterinary care and are subjected to cruel and painful mutilations without pain relief. To improve their weight gain, animals are commonly fed a high-concentrate feed instead of a species-appropriate quality diet. They do not



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<sup>b</sup> The figures relate to terrestrial animals in agriculture and do not include aquatic animals in agriculture, the number of which is many times higher still.

have access to the outdoor area or pasture but are kept in tight cages or stalls without littered lying areas<sup>11</sup>. Animals that are kept outside often do not have any suitable shelter available and suffer under heat or cold and muddy conditions<sup>12</sup>. Once the animals reach a certain stage in their lifecycle, they are transported for hours, days, or even weeks, partly across national borders, and finally slaughtered, often without prior stunning, causing further pain, suffering and distress. Farm animal welfare

## Climate issues

Aside from the animal welfare impact, animal agriculture is a dominant driver of the climate crisis and the leading source of two of three of the most harmful greenhouse gases on earth: methane (CH<sub>4</sub>) and nitrous oxide (N<sub>2</sub>O). In the EU, animal agriculture alone is responsible for 55% of total methane emissions through ruminant animals like cattle. Globally, it is the leading source of harmful methane emissions even above the burning of fossil fuels<sup>15</sup>. It is also the biggest emitter of nitrous oxide (67% of all human-made GHG emissions<sup>16</sup>) and due to land-intensive farm animal husbandry, particularly grazing cattle and animal feed, it takes up 80% of agricultural land use,

is becoming increasingly important to consumers<sup>13,14</sup> – therefore it should also be important to every company that is profiting from animal-based products. Even if the animals are not under the direct care of food delivery services, by enabling the sale of animal-based products, they also carry the responsibility on how much and what type of animal products are being bought and sold. FOUR PAWS recommends the [Five Domains Model](#) as a basis for [excellent-welfare husbandry systems](#).

while only 20% of agricultural land is used for crops for human consumption and non-food crops (textiles, energy etc.)<sup>17</sup>. The FOUR PAWS Meat Exhaustion Day Report concludes, using the scientifically renowned [Planetary Health Diet](#) as a reference, that most European countries have to reduce their meat consumption by at least 70% to stay within a healthy range for humans and the planet<sup>18</sup>. These findings are in line with earth system sciences and the 1.5°C heating limit of the [Paris Climate Agreement](#).

### Solution: reduce meat and dairy, increase plant-based options

A [flexitarian diet](#), which is rich in [plant-based](#) foods and low in animal-based foods, would significantly increase the feasibility of the Paris agreement and help to stay within the carbon budget by avoiding methane emissions from ruminants, reduce the need for higher carbon dioxide removals and facilitate the energy transition through less stringent goals. This would leave more time for adaptation which reduces pressure on carbon and energy prices as well as food expenditures and most likely increase social acceptance<sup>19</sup>. Therefore, a reduction in meat and dairy consumption and increase in plant-based foods

would not only benefit animal welfare and reduce animal suffering, but also dramatically reduce environmental impacts from food producers and suppliers like food delivery services<sup>20</sup>. Food delivery services can achieve this through taking various measures and setting goals in their [Corporate Social Responsibility \(CSR\)](#) or [Environmental, Social, and Governance \(ESG\)](#) – which is exactly what this report will take a closer look at.

## 2. Methodology

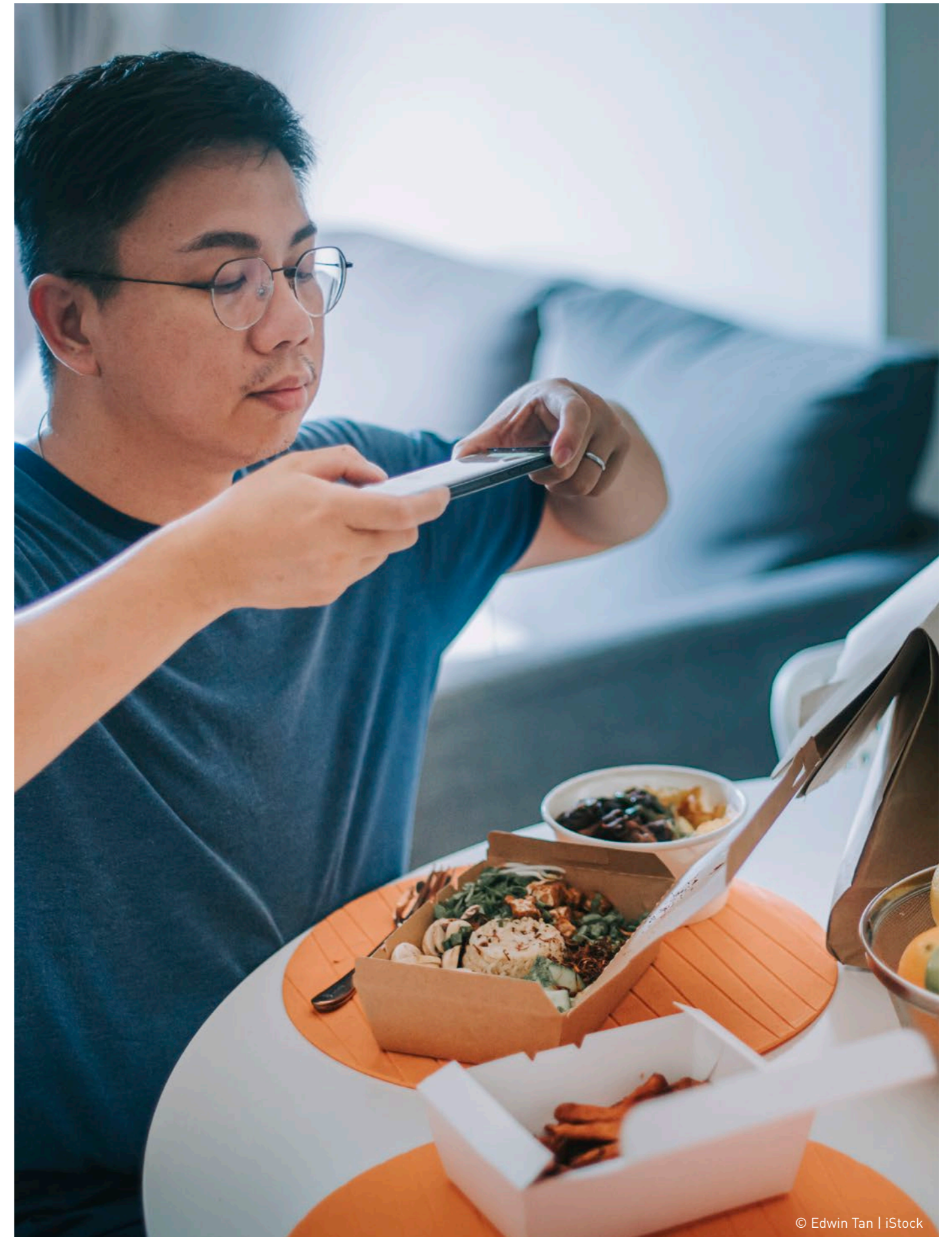
The food delivery services were the focus of the very first ranking in the Atlas series in 2020. In 2024, FOUR PAWS takes another look at this sector to see where it currently stands. As the food delivery landscape has changed substantially since 2020 and FOUR PAWS has further tightened its meat reduction demands within the Atlas Challenge due to the growing urgency to fight the climate crisis and abolish factory farming, the two rankings cannot be compared with each other directly but are to be looked at separately.

Between February and April 2024, FOUR PAWS assessed five internationally relevant food delivery service holding companies: Deliveroo, Delivery Hero, DoorDash, Just Eat Takeaway.com and Uber. Due to country differences in app design, digital communication and sometimes even policy, FOUR PAWS decided to rank 18 of the subsidiaries of the five chosen holdings with a presence in Austria (AT), Switzerland (CH), Germany (DE), the Netherlands (NL), the United Kingdom (UK), the United States of America (US), and South Africa (ZA) for a more differentiated result.

The assessment was based on the FOUR PAWS research of publicly available online information such as [CSR](#) and [ESG](#) policies, annual reports, ordering platform and digital communication between January 2022 and April 2024. None of the addressed companies contacted periodically between February and April 2024 contributed any additional information through the sent-out questionnaire, but Uber Eats UK requested an exchange with FOUR PAWS, which shows their willingness to cooperate.

Any information published or issued after the set research timeframe was not included in the ranking.

The [questionnaire](#) was composed of ten questions covering the three categories *Meat and dairy reduction and climate goals*, *Animal welfare*, and [Vegan food increase](#), the relevance of which has been laid out in the introduction. The questions were asked in a way to gather as much information as possible and served as the basis for developing the scoring criteria (see the [Overview of criteria and scores](#)) which were additionally shaped by the information found during the FOUR PAWS research. The maximum achievable score was 100 points, divided into the three categories *Meat and dairy reduction and climate goals* (40 points), *Animal welfare* (40 points) and *Vegan food increase* (20 points). The first two categories were weighted more heavily than the third as FOUR PAWS believes that reducing the number of farm animals and improving farm animal welfare is of the utmost importance and should not be put on equal footing with only making vegan options available, which, albeit important, is not the solution in and of itself. For each category, a set of criteria was identified that were weighted differently by scoring points in accordance with the level of ambition. Some criteria could either be met or not met, meaning all or no points were given. Other criteria could be met partially or fully and were scored according to the level of fulfilment. The full scoring system can be found in the [Overview of criteria and scores](#).



# 3. Results



Disclaimer: FOUR PAWS conducted its research between February and April 2024 based on publicly available online information such as CSR and ESG policies, annual reports, ordering platform and digital communication between January 2022 and April 2024. Any changes that were implemented by the selected food delivery services after this set time frame were not considered. As part of the research and analysis, FOUR PAWS sent a questionnaire to the selected companies for their input, which was not answered by any of them. Uber Eats UK was the only company to have an exchange with FOUR PAWS, which shows their willingness to cooperate.

## Main findings

Just Eat CH (32%) followed by Just Eat UK (27%) scored highest showing positive initiatives towards meat reduction, whereas the overall scores remained in the lower third (result category: poor). Differences in the companies' strategy and measures on the three main categories

covered in this ranking – *Meat and dairy reduction and climate goals, Animal welfare and Vegan food increase* – represent scoring differences of the individual companies at the national level.

### Meat and dairy reduction and climate goals

Seven of the global leading companies within the food delivery sector made references to the negative effects of animal-derived food on the climate either in their annual report or by developing concrete initiatives in certain countries to support their restaurants, employees and consumers making more sustainable choices.

**Just Eat Takeaway.com** clearly stated that “animal-based products have on average higher emissions per kg of product compared to plant-based products” in its Carbon

Disclosure Project Report 2022<sup>21</sup> and took the initiative to inform, educate and transform restaurants as well as consumers in certain countries:

- Just Eat UK<sup>22</sup> and Just Eat CH<sup>23</sup> worked with My Emissions<sup>24</sup> – a carbon labelling tool – to access carbon footprint of meals and thus the impact on our environment. Restaurants can better understand how sustainable their dishes are and at the same time support consumers in making more environmentally



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and animal-friendly food choices<sup>22</sup> with the aim, amongst others, to reduce their meat and dairy intake to avoid higher emissions. Restaurants can take action to reduce the footprint of dishes, e.g. by switching ingredients (for instance from meat to tofu).

- Just Eat UK supported its restaurant partners by providing a sustainability guide, which addressed the issues of animal-derived food emitting more carbon than plant-based alternatives and other topics such as sustainable packaging, green delivery and green operations<sup>25</sup>.
- Lieferando DE and AT as well as Thuisbezorgd NL highlighted the connection and negative effects of animal-based products on the climate either in their reports or on their websites<sup>26,27,28</sup>.

While the carbon labelling initiative as well as the restaurant sustainability guide were mentioned in the annual report of the holding Just Eat Takeaway.com, it was unclear whether these initiatives already were or will be transferred to other countries as well, because no specific

### Animal Welfare

Out of 18 companies, only three – Just Eat CH, Thuisbezorgd NL and Deliveroo – raised the topic of animals. Thuisbezorgd clearly mentioned animal welfare (“dierenwelzijn”) in one of its blog articles<sup>31</sup> in connection to the peoples' dietary change towards more plant-based food, whereas the others just broached the topic on the sidelines: Deliveroo mentioned animal health in the

### Vegan food increase

In this category, Just Eat CH reached the highest score of those ranked. In total, four out of 18 companies received more than half of the achievable points. All companies

information could be found on this. Therefore, it could not be scored.

**Deliveroo** had a section on a hypothetical politically imposed meat tax in the climate-related risk assessment in its annual report 2023 that stated that beef is the highest-emitting food product per kg<sup>29</sup>. In this scenario, it would advise restaurants and grocers to attract new consumers with new plant-based products/dishes. Although this was only a risk mitigation strategy to avoid costs being passed on to the consumer rather than a self-motivated climate strategy, it is positive to see that Deliveroo was aware of the emissions problem of beef and saw plant-based dishes as a solution. Its annual report 2022<sup>30</sup> highlighted that it supported its merchants to be more sustainable by sharing with them a Meal Model that estimated the emissions from food sold via the Deliveroo platform to help them understand their own environmental footprint better. However, during the research period, FOUR PAWS could not detect whether this model had already been implemented and used by any of its restaurant partners, because it was not mentioned in its newest annual report of 2023 anymore.

materiality matrix of its Annual Report 2023<sup>29</sup> and Just Eat CH made a reference to animal husbandry (“Tierhaltung”) in their Food Trends Report 2022 in the context of a consumer survey<sup>32</sup>. No animal welfare policy nor concrete measures to phase out meat and dairy from factory farming could be found during the research phase.

received one point (or more) in this category, because all did provide a vegan filter or search option on their ordering platforms, showing that companies want to cater to

various consumer preferences since there is a demand for it. Of much greater interest were the companies' concrete plans and initiatives for a permanent increase in plant-based meals, either through their restaurant partners, consumers or other actions, which FOUR PAWS wanted to find out about. While 11 out of 18 companies broached the topic of increasing vegan offerings/orders, Deliveroo as well as Just Eat UK, Just Eat CH, Lieferando AT, Lieferando DE and Thuisbezorgd NL additionally had vague plans, meaning not concrete and time-bound, to increase vegan food on a temporary basis.

**Deliveroo UK** launched a range of limited-edition vegan special dishes during what it called Vegan-roo-ary, following a research that showed that over one third of British people did not know what being vegan means<sup>33</sup>. On its social media platforms and website, barely any to no postings/information on plant-based food were available, except for Veganuary and Earth Day.

**Delivery Hero** (the holding of Foodora) encouraged its business partners to make more sustainable choices by offering them support, education and incentives through environmental programmes and initiatives. "These programs address topics such as the availability of vegan or vegetarian options, the use of sustainable packaging, and the origin and environmental impact of ingredients in food recipes within restaurants."<sup>34</sup>

**Just Eat Takeaway.com**, whose subsidiaries Just Eat UK, Just Eat CH, Lieferando AT, Lieferando DE, Thuisbezorgd NL and Grubhub US are part of this ranking, developed a Veganuary initiative to inspire consumers about vegan and vegetarian dishes across 15 markets<sup>35</sup>. FOUR PAWS could not find any information on whether Grubhub was part of this initiative. Many other initiatives or single actions to support the increase of vegan dishes across consumers and restaurants have been established at national level:

- Just Eat Takeaway.com partnered with Unilever to offer The Vegetarian Butcher's plant-based products to its partner network in the UK, Germany and The

Netherlands<sup>36</sup> and invited restaurant partners for a cooking event to try their meat substitutes<sup>37</sup>.

- A Food Trend Report, released regularly in several countries (UK, CH, DE, AT, NL), highlighted topics such as veganism, vegan food, partnerships with vegan food producers and consumer choices for more plant-based dishes<sup>38</sup>.
- On its ordering platform for businesses that offer corporate benefits (Just Eat for business<sup>39</sup>), Just Eat UK provides dietary filters for various preferences (e.g. vegetarian, vegan, no dairy, etc.). Every dish is labelled according to the filters that apply.
- Just Eat CH had a cooperation with Planted and Garden Gourmet, both producers of meat substitutes, and sensitised its restaurant partners for plant-based alternatives. During Veganuary, it offered discounts of up to 20% on selected plant-based dishes to push plant-based eating. Moreover, Just Eat CH highlighted vegan eating and vegan restaurants on its sustainability landing page<sup>40</sup>.
- Lieferando DE and AT awarded the best vegetarian/vegan restaurant<sup>41,42</sup>. Lieferando AT supported Veganuary in 2023 and, in cooperation with Michi Buchinger (Austrian author and cabaret artist), motivated consumers to try out a purely plant-based diet<sup>43</sup>. Lieferando DE did an in-depth qualitative insight study throughout Veganuary to understand how it can support consumers who want to transition to more plant-based eating in the future<sup>21,38</sup>.
- Thuisbezorgd NL collaborated with Ron Gastrobar Streetfood (a restaurant in the Netherlands) on a special meal box in honour of Veganuary to draw more attention to plant-based food<sup>28</sup>.
- In its food trend article "8 restaurants trends for 2024", Grubhub US linked eating less meat to the current dietary food trend of consumers and points



out that carnivores as well as vegans are making a conscious effort towards plant-based menus<sup>44</sup>. It also has a special blogpost for restaurants on how to create a plant-based menu<sup>45</sup>.

**Wolt AT** supported and celebrated Veganuary by highlighting it on social media. It also offered a 20% discount specifically for vegan meals. This type of strategic measure to increase vegan orders earned it points for this criterion.<sup>46</sup>

**Uber Eats DE** offered a 20% discount on vegan dishes on the occasion of Earth Day to motivate its customers to place more vegan orders for the benefit of the environment<sup>47</sup>. Compared to other countries Uber Eats operates

in, Uber Eats DE posted on social media platforms on vegan topics not only on special occasions, but regularly, which helps to draw attention to vegan dishes on a permanent basis.

Most food delivery service companies use external events such as Veganuary, Vegan Month, Earth Day, etc. to communicate vegan topics: Six companies had vegan-related social media or website posts on the occasions only, while eight posted throughout the year and four had none in the set two-year research timeframe.

# 4. Conclusion

## Meat reduction and climate goals

Amongst the selected companies as part of this ranking, none had concrete and time-bound meat and dairy reduction goals in place. FOUR PAWS acknowledges that seven companies broached the topic of meat and dairy reduction by linking it to the overall reduction of emissions from food in their policies and that two companies developed specific initiatives (e.g. carbon labelling) to lower these emissions and help consumers to make environmentally friendly choices, which are often vegan ones since they emit less carbon on average.

FOUR PAWS would like to see the food delivery service industry develop and implement meat and dairy reduction strategies as part of their animal welfare and climate action goals that contribute towards ending factory farming. Reducing animal protein will have the biggest impact on the sector's GHG emissions, because avoiding is more effective than compensating emissions. Food delivery service companies can support by implementing changes through incentives or educational measures. FOUR PAWS encourages carbon labelling across the sector. For the consumers, low-emission dishes can be highlighted and put higher on the menu.



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## Animal welfare

A consumer survey<sup>37</sup> showed that animal welfare is of interest to the consumers who are demanding products from better animal husbandry. It is an alarming signal that no animal welfare policy could be found during the FOUR PAWS research, which indicates that animal welfare seemingly has not played a noteworthy role in this industry sector despite the influencing power that food delivery services have through their ordering platforms.

Developing and implementing binding policies to phase out products from factory farms will set sustainable food delivery services apart from the rest. Working with restaurants directly enables companies to inform (e.g. via a restaurant sustainability guide) about animal welfare issues. In addition, FOUR PAWS recommends raising consumer awareness of the issue, e.g. across the companies' digital communication channels.

## Vegan food increase

The goal to reduce the number of farm animals and mitigate the climate crisis goes hand in hand with an increase of vegan food offerings. Although some companies were temporarily increasing their vegan offerings or providing restaurant guides on plant-based menu creations, none had concrete and time-bound goals for a permanent increase of vegan offerings. Consumers have been becoming more health-conscious and environmentally aware and are looking for food to meet various dietary and ethical preferences. The food delivery services have begun to react to this demand by offering more sustainable, healthy, organic and plant-based options, but there is still room for improvement<sup>1</sup>. In this context, various filter options are available, including "vegan", which do not always deliver reliable and suitable results and are not sufficient to influence consumer choice, but are merely supporting those who already want to eat more plant-based.

FOUR PAWS would like to see food delivery services developing concrete and time-bound strategies to consistently increase the share of vegan meals offered and sold as part of their sustainability goals. Restaurant partners can be supported by restaurant guides explaining the

importance of vegan alternatives and offer guidance on how to create attractive vegan menu options, accompanied by initiatives and events with vegan chefs on a regular basis and long-term cooperations with plant-based companies, which some of the evaluated companies already implemented. Food delivery services can use their growing influence on consumer choices to spread awareness about the importance of a more plant-rich diet and promote vegan dishes more visibly on their ordering platforms: Filters and search functions for vegan dishes delivering reliable results, clear and consistent labelling of vegan restaurants and meals – ideally across the whole ordering platform or even sector-wide – as well as strategic discounts on vegan meals or delivery which could effectively increase such orders. Consumers can be nudged towards choosing vegan dishes by menu re-positioning<sup>48</sup> and with plant-based options being the default in the ordering process, where animal-based protein can be added for a fee, instead of having to be removed upon request. Digital communication on vegan food does not need to be limited to externally dictated events like Veganuary or World Vegan Day but could occur regularly through self-initiated promotions.



# 5. Commitment

FOUR PAWS sent the selected eighteen food delivery services a commitment letter to sign, with goals in all three categories to be reached within four years from now, by 2028. FOUR PAWS urges the food delivery services to consider signing the pledge to show their willingness to play a leading role in the industry and drive a positive change.

FOUR PAWS expects action and progress from the food delivery services committing to the following goals and measures by 2028 in a binding public document such as a CSR or ESG report:

- Defines and reports on a concrete and time-bound **meat and dairy reduction<sup>c</sup> goal** (“Reduce X% of non-vegan dishes offered/ordered by Y year”) and implements measures to reach it, both towards its partnering restaurants and towards its ordering platform users (e.g. carbon labelling on app).
- Within this reduction goal, **meat and dairy should not be compensated** for with an increase of other animal proteins.
- Includes a statement highlighting the **beneficial impacts of meat and dairy reduction for animal welfare and the climate**.
- Supports its partnering restaurants in **phasing out meat and dairy from factory farming** and moving towards products from farms with **at least good and eventually excellent animal welfare**, and its consumers in choosing dishes containing those.
- Defines a concrete and time-bound goal and implements measures for **increasing the vegan offering** of its partnering restaurants and the **vegan orders** of its consumers such as app features, marketing and partnerships with vegan companies.

FOUR PAWS is looking forward to a positive exchange with the food delivery services that were part of this ranking to support and integrate more sustainable food strategies to reduce their amount of meat and dairy and push for more vegan options as part of their animal welfare and climate crisis mitigation goals.

## Contact details:

For more information about the FOUR PAWS Hotel Challenge as part of the Atlas Challenge series, please get in touch at: [TheAtlasChallenge@four-paws.org](mailto:TheAtlasChallenge@four-paws.org)

<sup>c</sup> An overall reduction of all meat (including fish and seafood) and dairy.



## 6. Glossary

■ **Corporate Social Responsibility (CSR):** CSR is a business approach that integrates social and environmental concerns into a company's operations and interactions with stakeholders. The goal of CSR is to create a positive impact on society and the environment while also achieving business success. CSR activities may include philanthropic initiatives, environmental sustainability practices, ethical business operations, and social impact programmes that benefit employees, consumers, communities, and the environment. CSR is increasingly important for companies that want to demonstrate their commitment to social and environmental issues and build long-term relationships with stakeholders.

■ **Environmental, Social, and Governance (ESG):** An ESG report is a document that provides information on a company's performance in relation to Environmental, Social, and Governance (ESG) factors. It typically includes an overview of the company's ESG strategy and policies, key performance indicators, and targets for improving ESG performance. ESG reports are used by investors and other stakeholders to assess a company's ESG performance and to make informed investment or business decisions.

■ **Excellent-welfare husbandry systems:** Keeping animals in a way that ensures the physical and mental wellbeing of animals and the possibility to express natural behaviours. Apart from the fulfilment of basic requirements like clean water, adequate food, outdoor access, and contact to conspecifics, the environment needs to be appropriate to the animal's intrinsic/species-specific needs.

■ **Factory farming:** Factory farming is an industrial method of raising farm animals. On factory farms, animals are raised under conditions intended to maximise production at minimal cost. The animals in these systems regularly suffer from most cruel practices and their basic needs are not met. On factory farms, animals are confined in small spaces and the animals are kept indoors and/or in cages for their entire life.

■ **Flexitarian diet:** A flexitarian diet is one that is primarily plant-based with the occasional inclusion of animal products.

■ **Five Domains Model:** The Five Domains Model is a modern tool for guiding animal welfare assessments. The Five Domains Model framework recognises that animals have complex emotional and cognitive lives, and that their welfare is influenced by factors beyond their physical health. It also emphasises the importance of promoting positive emotional states in animals, rather than simply preventing negative states. The Five Domains are as follows:

- Nutrition: the provision of food and water to meet the animal's physiological needs;
- Environment: the provision of a suitable physical and social environment to meet the animal's behavioural and social needs;
- Health: the prevention and treatment of disease and injury to maintain the animal's physical health;
- Behaviour: the provision of opportunities for the animal to perform normal behaviours and express natural instincts;
- Mental state: the provision of conditions that promote positive emotional states and minimise negative emotional states.

■ **Greenhouse gas (GHG) emissions:** GHG emissions are the release of gases into the atmosphere that contribute to global warming and the climate crisis. The main GHGs are carbon dioxide (CO<sub>2</sub>), methane (CH<sub>4</sub>), and nitrous oxide (N<sub>2</sub>O), which are released through human activities such as transportation, energy production, and agriculture. In agriculture, methane (primarily ruminant digestion processes) and nitrous oxide (from nitrogen fertilisation) play the main role, whereas CO<sub>2</sub> plays a minor role. GHG emissions are usually expressed in terms of CO<sub>2</sub> equivalent (CO<sub>2</sub>e). GHG emissions are an important measure of a country's, organisation's, or individual's contribution to the climate crisis. In the Paris Agreement, the signing countries agreed to limit global warming to 1.5°C, meaning that greenhouse gas emissions must peak before 2025 at the latest and decline by 43% by 2030<sup>49</sup>.

■ **Paris (Climate) Agreement:** The Paris Agreement was adopted at COP21, the 21st UN Climate Change Conference. In December 2015, the Paris Agreement became a milestone in international climate policy; a historic, international treaty to combat climate change. Under the Paris Agreement, participating nations committed to reducing greenhouse gas emissions to limit global warming to well below 2°C of pre-industrial levels, with a target of limiting it to 1.5°C. The agreement also includes provisions for financial support for countries in the Global South and regular review mechanisms to assess and strengthen climate action.

■ **Planetary Health Diet:** The Planetary Health Diet is a reference diet established by the renowned EAT-Lancet Commission. Its purpose is to give guidance for a healthy and sustainable diet which is in line with the planetary boundaries while considering human health aspects, too.

■ **Plant-based/vegan:** free from all animal-derived products/ingredients (none of the following: meat, fish, eggs, dairy, honey, gelatine).



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# Annex

## Table 1: Result Categories

Points	Result category	Fulfilment of criteria
0-20	■ <b>Very poor</b> ■	No/barely any criteria fulfilled
21-40	■ <b>Poor</b> ■	Few criteria fulfilled
41-60	■ <b>Average</b> ■	Some criteria fulfilled
61-80	■ <b>Good</b> ■	Most criteria fulfilled
81-100	■ <b>Very good</b> ■	(Nearly) all criteria fulfilled

Table 1 also shows the result categories and the corresponding level of criteria fulfilment.

**Table 2** provides information on the criteria and scoring system of the FOUR PAWS Delivery Services Challenge ranking. The criteria were grouped into three thematic categories, the first two with maximum 40 points and the third 20, with a total of 100 possible points. Merged cells next to the displayed achievable points indicate that only one of these scores could be achieved according to the level of ambition.

Disclaimer: FOUR PAWS conducted its research between February and April 2024 based on publicly available online information such as CSR and ESG policies, annual reports, ordering platform and digital communication between January 2022 and April 2024. Any changes that were implemented by the selected food delivery services after this set time frame were not considered. As part of the research and analysis, FOUR PAWS sent a questionnaire to the selected companies for their input, which was not answered by any of them. Uber Eats UK was the only company to have an exchange with FOUR PAWS, which shows their willingness to cooperate.

### Table 2: Overview of criteria and scores

Thematic category	Criterion	Level of ambition	Maximum points achievable	Deliveroo UK	Foodora AT	DoorDash US	Wol DE	Wolt AT	Just Eat UK	Just Eat CH	Lieferando DE	Lieferando AT	
				Deliveroo	Delivery Hero	DoorDash	DoorDash	DoorDash	Just Eat Takeaway.com	Just Eat Takeaway.com	Just Eat Takeaway.com	Just Eat Takeaway.com	
Meat and dairy reduction and climate goals	A) The company's policies include a statement on the connection between meat consumption/production and the climate crisis.		4	4	0	0	0	0	4	4	4	4	
	B) The company supports restaurants in the reduction of meat and dairy through concrete measures (e.g. climate-related requirements for restaurant partners).	Measures are still in development.	3	3	0	0	0	0	0	6	6	0	0
		Measures are already in place.	6										
	C) The company has a concrete and timebound goal to reduce the offer of animal-based dishes offered by their restaurants (e.g. "Reduce X% of non-vegan dishes offered by year Y").		12	0	0	0	0	0	0	0	0	0	0
	D) The company supports their consumers in ordering less meat and dairy through concrete measures (e.g. carbon labelling on app).		6	0	0	0	0	0	0	6	6	0	0
	E) The company has a concrete and timebound goal to reduce the number of animal-based dishes ordered by their consumers (e.g. "Reduce X% of non-vegan dishes ordered by year Y").		12	0	0	0	0	0	0	0	0	0	0
	Total points in category		40	7	0	0	0	0	0	16	16	4	4
Percentage score per category		100%	18%	0%	0%	0%	0%	0%	40%	40%	10%	10%	
Animal Welfare	F) The company's policies mention animal welfare to the extent of...	merely broaching the topic of "animals".	2	2	0	0	0	0	0	2	0	0	
		making the connection between meat and dairy reduction and animal welfare.	4										
	G) The company requires or actively supports its restaurant partners to phase out meat and dairy from factory farming and instead move towards farms with good or excellent animal welfare.		18	0	0	0	0	0	0	0	0	0	0
	H) The company actively supports its consumers to order dishes where the meat and dairy do not stem from factory farming but instead from farms with good or excellent animal welfare.		18	0	0	0	0	0	0	0	0	0	0
	Total points in category		40	2	0	0	0	0	0	0	2	0	0
Percentage score per category		100%	5%	0%	0%	0%	0%	0%	0%	5%	0%	0%	
Vegan food increase	I) The company's policies or other public documents mention an increase of vegan offering/orders to the extent of...	merely broaching the topic.	2	4	2	0	0	0	4	4	4	4	
		having vague plans to (temporarily) increase t (e.g. special editions for Veganuary).	4										
		having a concrete and timebound goal for a permanent increase.	8										
	J) The company supports its restaurants to increase vegan options.	Initiatives / events (e.g. restaurant guides, cooking workshops, events with chefs...)	2	0	2	0	0	0	0	2	2	2	2
		Partnership with vegan companies	2	0	0	0	0	0	0	2	2	2	0
	K) The company supports its consumers to order more vegan dishes through ordering platform (app + website).	Search button/filter for vegan dishes/restaurants	1	1	1	1	1	1	1	1	1	1	1
		Strategic discounts for vegan dishes and/or their delivery with the intention to increase vegan orders	3	0	0	0	0	0	3	0	3	0	0
		Algorithm that favours vegan dishes	2	0	0	0	0	0	0	0	0	0	0
	L) The company supports its consumers to order more vegan dishes through digital communication...	just on special occasions like Veganuary, World Vegan Day, Earth Day etc.	1	1	1	2	1	1	1	2	2	2	2
		permanently throughout the year / by creating their own occasions.	2										
Total points in category		20	6	6	3	2	5	5	11	14	11	9	
Percentage score per category		100%	30%	30%	15%	10%	25%	55%	70%	55%	45%		
<b>Overall points</b>			<b>100</b>	<b>15</b>	<b>6</b>	<b>3</b>	<b>2</b>	<b>5</b>	<b>27</b>	<b>32</b>	<b>15</b>	<b>13</b>	

Thematic category	Criterion	Level of ambition	Maximum points achievable	Thuisbezorgd NL	Grubhub US	Uber Eats CH	Uber Eats DE	Uber Eats NL	Uber Eats UK	Uber Eats US	Uber Eats ZA	Postmates US	
				Just Eat Takeaway.com	Just Eat Takeaway.com	Uber	Uber	Uber	Uber	Uber	Uber	Uber	
Meat and dairy reduction and climate goals	A) The company's policies include a statement on the connection between meat consumption/production and the climate crisis.		4	4	4	0	0	0	0	0	0	0	
	B) The company supports restaurants in the reduction of meat and dairy through concrete measures (e.g. climate-related requirements for restaurant partners).	Measures are still in development.	3	0	0	0	0	0	0	0	0	0	0
		Measures are already in place.	6										
	C) The company has a concrete and timebound goal to reduce the offer of animal-based dishes offered by their restaurants (e.g. "Reduce X% of non-vegan dishes offered by year Y").		12	0	0	0	0	0	0	0	0	0	0
	D) The company supports their consumers in ordering less meat and dairy through concrete measures (e.g. carbon labelling on app).		6	0	0	0	0	0	0	0	0	0	0
	E) The company has a concrete and timebound goal to reduce the number of animal-based dishes ordered by their consumers (e.g. "Reduce X% of non-vegan dishes ordered by year Y").		12	0	0	0	0	0	0	0	0	0	0
	Total points in category		40	4	4	0	0	0	0	0	0	0	0
Percentage score per category		100%	10%	10%	0%	0%	0%	0%	0%	0%	0%	0%	
Animal Welfare	F) The company's policies mention animal welfare to the extent of...	merely broaching the topic of "animals".	2	4	0	0	0	0	0	0	0	0	
		making the connection between meat and dairy reduction and animal welfare.	4										
	G) The company requires or actively supports its restaurant partners to phase out meat and dairy from factory farming and instead move towards farms with good or excellent animal welfare.		18	0	0	0	0	0	0	0	0	0	
	H) The company actively supports its consumers to order dishes where the meat and dairy do not stem from factory farming but instead from farms with good or excellent animal welfare.		18	0	0	0	0	0	0	0	0	0	
	Total points in category		40	4	0	0	0	0	0	0	0	0	0
Percentage score per category		100%	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Vegan food increase	I) The company's policies or other public documents mention an increase of vegan offering/orders to the extent of...	merely broaching the topic.	2	4	2	2	2	0	0	0	2	0	
		having vague plans to (temporarily) increase t (e.g. special editions for Veganuary).	4										
		having a concrete and timebound goal for a permanent increase.	8										
	J) The company supports its restaurants to increase vegan options.	Initiatives / events (e.g. restaurant guides, cooking workshops, events with chefs...)	2	2	2	0	0	0	0	0	0	0	
		Partnership with vegan companies	2	2	0	0	0	0	0	0	0	0	
	K) The company supports its consumers to order more vegan dishes through ordering platform (app + website).	Search button/filter for vegan dishes/restaurants	1	1	1	1	1	1	1	1	1	1	
		Strategic discounts for vegan dishes and/or their delivery with the intention to increase vegan orders	3	0	0	0	3	0	0	0	0	0	
		Algorithm that favours vegan dishes	2	0	0	0	0	0	0	0	0	0	
	L) The company supports its consumers to order more vegan dishes through digital communication...	just on special occasions like Veganuary, World Vegan Day, Earth Day etc.	1	2	0	1	2	0	1	2	0	0	
		permanently throughout the year / by creating their own occasions.	2										
Total points in category		20	11	5	4	8	1	2	3	3	1		
Percentage score per category		100%	55%	25%	20%	40%	5%	10%	15%	15%	5%		
<b>Overall points</b>			<b>100</b>	<b>19</b>	<b>9</b>	<b>4</b>	<b>8</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>1</b>	

# The FOUR PAWS Food Delivery Services Questionnaire

When answering yes to a question, please give examples, attach or link to references such as ESG or CSR policies, other public documents, internal documents, website pages or social media posts.

1. In any of your policies or other public documents, do you make the connection between meat and dairy and emissions or the climate crisis?
 

No       Yes, *please specify:*
2. Do you support, encourage or require your partnering restaurants to reduce their use of meat and dairy and if so, how?
 

No       Yes, *please specify:*
3. Do you raise the topic of plant-based foods in your CSR, other policy, or any public statements?
 

No       Yes, *please specify:*
4. In any of your policies or other public documents, do you broach the topic of animal welfare?
 

No       Yes, *please specify:*
5. Do you support, encourage or require your partnering restaurants to phase out meat and dairy from factory farming and instead move towards farms with good or excellent animal welfare and if so, how?
 

No       Yes, *please specify:*
6. Do you encourage your consumers to order food where the meat and dairy does not stem from factory farming, but instead from farms with good or excellent animal welfare?
 

No       Yes, *please specify:*
7. In any of your policies or other public documents, do you mention increasing the vegan offering of your delivery service?
 

No       Yes, *please specify:*
8. Do you support, encourage or require your partnering restaurants to increase their vegan options and if so, how?
 

No       Yes, *please specify:*
9. Do you support your consumers in ordering more vegan dishes through app features, discounts, campaigns, or other such as digital communication on your social media or website, and if so, which?
 

No       Yes, *please specify:*
10. Does the algorithm of your ordering platform/app take into account sustainability and push vegan dishes more than meat or dairy-based dishes?
 

No       Yes, *please specify:*



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## About FOUR PAWS

FOUR PAWS is the global animal welfare organisation for animals under direct human influence, which reveals suffering, rescues animals in need and protects them. Founded in 1988 in Vienna by Heli Dungler and friends, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. The sustainable campaigns and projects of FOUR PAWS focus on companion animals including stray dogs and cats, farm animals and wild animals – such as bears, big cats and orangutans – kept in inappropriate conditions as well as in disaster and conflict zones. With offices in Australia, Austria, Belgium, Bulgaria, France, Germany, Kosovo, the Netherlands, Switzerland, South Africa, Thailand, Ukraine, the UK, the USA and Vietnam as well as sanctuaries for rescued animals in eleven countries, FOUR PAWS provides rapid help and long-term solutions.



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