

# THE ATLAS CHALLENGE

## on Fast-Food Chains



A business benchmark on the strategies  
towards animal and climate friendly nutrition



Animal Welfare.  
Worldwide.



# 1. Introduction

The intensification of animal farming, as well as the excessive consumption of meat and animal-based products, have grave impacts on factory farmed animals, the environment, climate, and our health. Animal agriculture is one of the leading contributors of the world's greenhouse gas emissions. But it is not only the impact on the climate that is of concern. The way in which animals are raised for human consumption can also affect our health, as a heavy reliance on antibiotics in industrial-scale animal agriculture is contributing to antibiotic resistance in humans.<sup>1</sup>

The plant-based meat market is currently estimated at € 10.2 billion and is projected to grow at a compound annual growth rate (CAGR) of 15 % in the next 5 years – nearly reaching € 24 billion.<sup>2</sup>

Currently, Europeans consume around twice as much meat as the global average, and almost three times as much dairy. This is expected to rise, even in countries like Austria which is currently one of the highest meat consuming countries in Europe.<sup>3</sup> However, in countries like Germany and the United Kingdom, a significant drop in meat consumption and an increase of meat alternative sales has been evident.<sup>4</sup> The need to reduce the demand for livestock products is now a scientifically mainstream view<sup>5</sup> and if we are to tackle factory farming's contribution to climate breakdown, meat consump-

tion in Europe should drop by 71 % by 2030, and by 81 % by 2050, and in the United Kingdom by 70 % in 2030 and by 80 % by 2050.<sup>6</sup>

Considering the implications of intensive factory farming, various stakeholders within the food industry have indeed recognized the need to adapt their policies and strategies in relation to sustainable food offerings. According to a recent McKinsey survey, in the United Kingdom 25 % of consumers say they have made changes to their diet over the past three years to align with their priorities around wellness and sustainability. The food industry is taking the hint: In 2019, nearly one in four new food-product launches in the United Kingdom was for a vegan product<sup>7</sup> and vegan food sales in Germany increased by 37 % during the first quarter of 2020<sup>8</sup>.

Several companies started addressing these challenges in the main way that they can help consumers change the way they eat by offering and promoting a growing range of innovative plant-based options. Fast-food chains play an influential role in consumers' food choices. In this report, you will see how some fast-food chains (within the quick service sector) in Germany, Austria, Switzerland – in short: within the DACH\* region – and within the United Kingdom (UK) are ahead of the game, whilst others are falling behind showing a lack of effort in implementing the changes that are required.



\* DACH: Germany (D), Austria (A) and Switzerland (CH)

1 <https://www.sciencedirect.com/science/article/pii/S004896972030718X>

2 <https://www.marketsandmarkets.com/Market-Reports/plant-based-meat-market-44922705.html>

3 <https://www.euomeatnews.com/Article-Spain-and-Austria-have-the-highest-rate-of-meat-consumption-in-Europe/2558>

4 <https://www.statista.com/statistics/679528/per-capita-meat-consumption-european-union-eu/>

5 [https://www.greenpeace.org/static/planet4-international-stateless/2018/03/698c4c4a-summary\\_greenpeace-livestock-vision-towards-2050.pdf](https://www.greenpeace.org/static/planet4-international-stateless/2018/03/698c4c4a-summary_greenpeace-livestock-vision-towards-2050.pdf)

6 <https://www.greenpeace.org/eu-unit/issues/nature-food/2664/eu-climate-diet-71-less-meat-by-2030/>

7 <https://www.mintel.com/press-centre/food-and-drink/plant-based-push-uk-sales-of-meat-free-foods-shoot-up-40-between-2014-19>

8 <https://www.livekindly.co/vegan-food-sales-germany-spike/>

# Facts



Between one quarter and one third of global greenhouse gas emissions come from food production.<sup>9</sup>



It is estimated that beef and dairy production are responsible for more than two thirds of the food sector's greenhouse gas emissions.<sup>10</sup>



Meat products have larger carbon footprints per calorie than grain or vegetable products.<sup>11</sup>



Animal agriculture's global greenhouse gas emissions equal those from combustion of all transport fuels.<sup>12</sup>



77 % of agricultural land is used for livestock to produce meat and dairy, including grazing land and arable land for feed production; only 23 % are used for crops.<sup>13</sup>



Animal agriculture, especially beef production, is the biggest contributor to deforestation.<sup>14</sup>



More antibiotics are given to farm animals than to humans, accelerating antibiotic resistance in humans.<sup>15</sup>



Intensive livestock farming can serve as a bridge for viruses to be passed from wild animals to farm animals to humans, thus promoting the spread of future diseases and pandemics.<sup>16</sup>



Fish makes up 17 % of animal protein consumed globally, and demand is predicted to rise, according to the United Nations Food and Agriculture Organization.<sup>17</sup>



<sup>9</sup> <https://ourworldindata.org/greenhouse-gas-emissions-food>

<sup>10</sup> <http://changingmarkets.org/wp-content/uploads/2018/10/Growing-the-Good-report-v3.pdf>

<sup>11</sup> <http://css.umich.edu/factsheets/carbon-footprint-factsheet>

<sup>12</sup> <https://www.chathamhouse.org/2014/12/livestock-climate-changes-forgotten-sector-global-public-opinion-meat-and-dairy-consumption>

<sup>13</sup> <https://ourworldindata.org/land-use>

<sup>14</sup> <https://ourworldindata.org/what-are-drivers-deforestation?country=>

<sup>15</sup> <https://www.unep.org/news-and-stories/story/10-things-you-should-know-about-industrial-farming>

<sup>16</sup> <https://www.unep.org/news-and-stories/story/10-things-you-should-know-about-industrial-farming>

<sup>17</sup> <http://www.fao.org/3/ca9231en/CA9231EN.pdf>

## 2. The FOUR PAWS Atlas Challenge

The Atlas Challenge by FOUR PAWS is a business benchmark, ranking the main players within the food industry sector with a primary focus on those operating within the DACH region and the UK on their sustainable business strategies, which push for meat and fish reduction and promote an increase of plant-based and innovative food.\* The name Atlas was inspired by the Atlas Titan in Greek mythology, who was responsible for bearing the weight of the world on his shoulders and who personified endurance.

Plant-based foods are a booming business. It is mainly flexitarians, who are driving the increase of meat substitutes.<sup>18</sup>



As such, the Atlas Challenge ranking is one which ranks the companies in the various food industry sectors on their current and future plans of being able to carry the responsibility towards a more sustainable world. What the Atlas Challenge entails is assessing the companies' Corporate Social Responsibility (CSR) report (and / or policies), their product range, their marketing and promotional tactics, and their commitment and progress towards making positive changes for factory-farmed animals, the environment, and the planet as a whole by implementing strategies towards meat and fish reduction and strategizing a push for innovative plant-based foods.

FOUR PAWS expects action and progress from industry players within the following categories:

- Diversifying their product range to decrease their meat and fish\*\* offerings
- Implementing marketing strategies that encourage increased consumption of plant-based and innovative foods

- Setting concrete commitments towards reducing meat as part of their Corporate Social Responsibility, where the reduction of meat is not replaced with an increase of fish
- Including and implementing animal welfare statements in their policies

Approximately 80 billion farm animals and an estimated 300 – 770 billion fishes and crustaceans are slaughtered for human consumption each year<sup>19</sup> which leads to immense animal suffering and damage to the environment. By assessing the level of effort of industry players compared to their competitors, FOUR PAWS would show companies where they stand and encourage them to reassess their policies.

In the first round of published rankings, the FOUR PAWS Atlas Challenge compared the leading food delivery services within the DACH region and the UK. The second ranking included some of the well-known national and international food producers which offer convenience foods, and the current, and third ranking is on the national fast-food chains (within the quick-service sector) many of which operate on a global level.

\* Innovative food such as the Beyond Meat, Just Egg or cultivated meat products once they hit the market.

\*\* Fish: includes all types of fish, shellfish and seafood.

<sup>18</sup> <https://www.businessinsider.com/plant-based-meats-flexitarians-vegetarians-vegans-market-revolution-2020-9?r=DE&IR=T>

<sup>19</sup> <http://fishcount.org.uk/fish-count-estimates-2>



### 3. The Fast-Food Chain Ranking

FOUR PAWS asked a total of 43 fast-food chains (within the quick-service sector) in 2020 and early 2021 in the DACH region and the UK to take part in the Atlas Challenge by filling in a detailed questionnaire on their sustainable food strategies, which was analysed and scored through a point system.

Beyond Meat is known for its high-profile partnerships with well-known fast-food chains like KFC, Subway and Tim Hortons in the United States, but it has entered the European market and partnered with many restaurants, which makes them likely to collaborate with even more fast-food chains in the region.

Most of the fast-food chains included in the ranking are franchises, whereas others are independently owned and run. The selection of fast-food chains in the Atlas Challenge was based on their market share and sales in the country, the influencing impact they could have within their region and the range of foods that are being sold, which includes – but is not limited to – meat and fish. FOUR PAWS assessed the publicly available information on

these fast-food chains, such as their CSR reports, website content, product portfolio and marketing tactics, particularly for those who declined to take part in the Atlas Challenge or for those who did not respond to FOUR PAWS request for contact.

The questionnaire was divided into four sections evaluating the following:

- How is meat and fish reduction involved in their CSR report or part of their corporate identity and strategy?
- How animal-friendly is their portfolio regarding the availability of vegan food, meat and fish substitutes as well as innovative plant-based food options?
- What marketing tactics do they carry out to promote and highlight plant-based products and meat / fish substitutes?
- Are there clear statements and proactive objectives to push for / and be the driver of a meat reduction movement?

An increase of plant-based products does not automatically equate to a reduction of meat products and vice versa, nor does reducing one type of animal meat to increase another (e. g. less pork, but more poultry or fish) constitute change towards helping farmed animals. Hence, the questions included in the questionnaire were focused on assessing their level of meat and fish reduction (if applicable to their product portfolio,) as well as the status and planned increase of plant-based and innovative meat and fish substitutes.

All the targeted fast-food chains offer products containing meat as the main ingredient or sub-ingredient, except for NORDSEE, who only offers fish. Most of the assessed chains offer fish products in addition to their meat products (with the exception of BURGERISTA, Holy Cow!, KFC and Taco Bell).

Out of the 43 contacted companies, 13 responded cooperatively, 5 let us know they did not want to participate,

and the rest did not respond at all. For the non-responsive fast-food chains, FOUR PAWS evaluated them through a research and analysis based on publicly accessible information online, which took place between June 2020 to January 2021 within a set number of allocated research hours.

*(Please refer to the indicators overview on page 17 for more information).*

Each of the questions in the questionnaire was scored with allocated points between one to ten, (with the highest points awarded to the key questions that supported the tactics towards meat and / or fish reduction and the strategies involved to create and promote sustainable diets by offering innovative plant-based and meat / fish alternatives). Additional points were given for open cooperation and transparency. The total points were then converted into a final percentage.



dean & david

## Best Practice

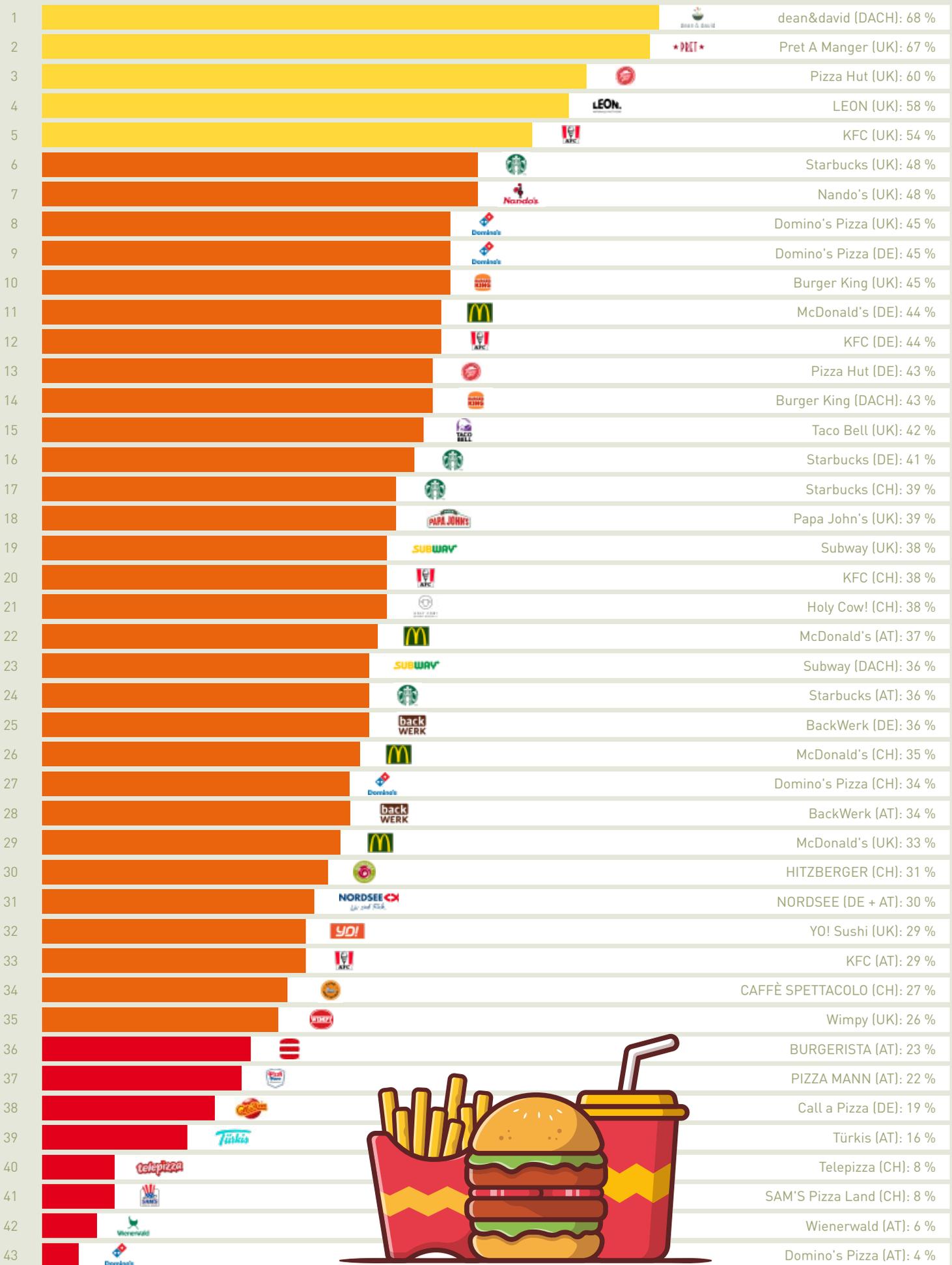
dean&david is a company based in Germany with branches also in Austria and Switzerland. dean&david has specialized on healthy fast-food with fresh and natural ingredients, that are free from flavour enhancers, animal gelatine, colourings and preservatives. They want to stand for quality and sustainable consumption.

dean&david commits itself to constantly increase the amount of vegetarian and vegan dishes, with the stronger focus being on vegan ones. Therefore, dean&david swaps one dish containing meat or fish for a vegan or vegetarian one with every product range changeover, thus factually reducing meat and fish and is the only fast-food chain within the Atlas Challenge ranking that already implements these reduction goals.

Every meal containing meat or fish can be customized to be made vegetarian or vegan. In Switzerland, customers have the additional choice to replace meat and fish by vegan soya strips in any meal without extra-charge. It is planned to extend this Make it Veggie or Vegan promotion to Austria and Germany after the successful testing phase. On top of that, they already opened one Veggie Store in Munich and also veganized a lot of their products in their regular stores, e. g. on their breakfast menu by replacing honey and dairy products. They are currently working on a plant-based shrimp-substitute and are also planning for a vegan tuna replacement.

dean&david not only scored the highest in the Atlas Challenge ranking, but was also the first fast-food chain to sign the FOUR PAWS commitment letter to further incorporate sustainable strategies supporting meat and fish reduction and an increase of plant-based options.

# The Fast-Food Chain Ranking



very good  
 good  
 average  
 low  
 UK = United Kingdom  
 DACH: Abbreviation for (Germany [DE], Austria [A], Switzerland [CH])





## 4. Results

The ranking results have indicated that positive initiatives for the environment are implemented by some of the national and globally leading fast-food chains, where some are more transparent than others, but none except dean&david had a clear statement on meat reduction.

Some of the assessed fast-food chains are present in all three countries of the DACH region. For Burger King, dean&david and Subway, the results are displayed and assessed as one chain, since they are organised under one management, have the same policies in place, offer the same product range, carry out similar marketing strategies and have a unanimous outlook on future commitments. The same applies to NORDSEE, whose results are valid for Germany and Austria. For the other chains, each country is displayed separately, because there are differences in certain aspects of the ranking. The branches located in the United Kingdom (UK) are always looked at separately because they differ from the DACH region in various aspects.

The country abbreviation is added in brackets next to the chain's name. If no country abbreviation is mentioned, the statement refers to the chain in general.

Out of the 43 fast-food chains assessed, 5 were ranked in the **Good category**; dean&david (DACH) (which scored the highest) were very closely followed by Pret (Pret A Manger) (UK). Pizza Hut (UK), LEON (UK) and KFC (UK) also ranked in the **Good category**. 30 companies fell into the **Average category** and 8 scored in the **Low category**.

The results are due to various factors. Those who fell in the low category either did not respond or hardly provided any information (for example Telepizza (CH)) and whatever information was publicly obtained, was quite limited regarding their business practices, CSR reports and policies, and / or because the information that was available did not meet the criteria used to assess their effort and performance.

## 4.1 CSR / Policy / Annual report

Under the first section of the indicator overview which focuses on the CSR / Policy and / or annual report, Pizza Hut (DE + UK) and KFC (DE, CH + UK) received the best results by having all policies in place with the exception for a statement about animal protein reduction, which no one has except for Starbucks (DACH + UK) due to their aim to stepwise reduce cow's milk by replacing it with plant-based milk options; Starbucks also published a detailed environmental baseline report. Although Pizza Hut and KFC follow their mother company's (YUM!) CSR policies, they additionally implement their own extended guidelines. No information was found for Call a Pizza (DE), Domino's Pizza (AT), PIZZAMANN (AT), SAM'S Pizza Land (CH) and Wienerwald (AT), who all range in the low category. Whether or not this information is available internally, FOUR PAWS based its assessment on what was publicly available or what was shared through answering the questionnaire.



Although dean&david (DACH) achieved the highest score, they do not publish an annual report, nor does Telepizza (CH). No CSR-information was found for Call A Pizza (DE), Domino's Pizza (AT), Holy Cow! (CH), PIZZAMANN (AT), SAM'S Pizza Land (CH), Türkis (AT), Wienerwald (AT) and Wimpy (UK).

12 out of the 43 fast-food chains do not have an animal welfare policy in place. Out of the 31 who do, only 16 have an additional policy on live animal transport, which often only mirrors the legal requirements. Only McDonald's (AT) states that the transport time for cows normally does not exceed 3-4 hours, because they are only sourced in Austria.

None of the assessed chains address the transport of genetic material or meat as an alternative to live transports.

From the assessed chains within the Atlas Challenge, dean&david (DACH), Domino's Pizza (DE), KFC (DE, CH + UK), LEON (UK), Nando's (UK), Papa John's (UK), Pizza Hut (DE + UK), Pret (UK), Wimpy (UK) and YO! Sushi (UK), signed the Better Chicken Commitment (BCC)<sup>20</sup> between 2018 and 2020 and have until 2026 to comply with the BCC higher welfare practices<sup>21</sup> (refer to #4 in the Indicator Overview p.17, High animal welfare standards > chicken).

There are only five companies, who claim to have high animal welfare standards for all their animal-based products: LEON (UK), McDonald's (CH), Pizza Hut (DE + UK) and Pret (UK). Those with higher standards for meat are normally referring to national labels like the Red Tractor (UK) or AMA (AT), which do not necessarily exceed the minimum legal requirements. If fish is mentioned here, it normally refers to MSC<sup>22</sup> or ASC<sup>23</sup> certification.

There are eight fast-food chains, who do not have high animal welfare standards for any of their products: Call a Pizza (DE) (who claims to be looking into the BCC though), Domino's (AT), KFC (AT), PIZZAMANN (AT), SAM'S Pizza Land (CH), Taco Bell (UK), Telepizza (CH) and Türkis (AT).

As far as traceability of animal-based products goes, all products can be traced back to the farm where they were produced at BackWerk (DE + AT), Holy Cow! (CH), KFC (DE, CH + UK), LEON (UK), McDonald's (DE + AT), NORDSEE (DE + AT), Pizza Hut (DE + UK) and Pret (UK).

Looking at the core demands of the Atlas Challenge – meat and fish reduction and the increase of plant-based alternatives – it is obvious, that the reduction of animal protein is not in the centre of the fast-food chains' attention: Not one of the assessed fast-food chains within the Atlas Challenge has a policy in place that focusses on the reduction of meat or fish. Looking at animal protein altogether, Starbucks is the only company aiming at reducing cow's milk due to the environmental impact of dairy production. Starbucks' long-term goal is to substitute cow's milk altogether and encourages their customers to choose plant-based milks. If they offered these alternatives without surcharge, they might not be suspected of only aiming for profit and could convincingly show that they want to improve their carbon footprint. As a negative example, the YUM! brands KFC, Pizza Hut and Taco Bell give a contradictory statement to reduction by stating that they "partner with suppliers that are dedicated to producing safe and more animal proteins over the long term"<sup>24</sup>, which is not a sustainable approach.

<sup>20</sup> <https://betterchickencommitment.com/>

<sup>21</sup> <https://chickenwatch.org/progress-tracker/>

<sup>22</sup> <https://www.msc.org/>

<sup>23</sup> <https://www.asc-aqua.org/de/>

<sup>24</sup> <http://citizenship.yum.com/planet/animal-protein.asp>

The increase of plant-based alternatives on the other hand, is part of the policies of 25 of the fast-food chains: BackWerk for instance states that “an attractive vegan and vegetarian selection would reduce the value chain’s ecological footprint to the largest extent”.<sup>25</sup> In a statement on the Atlas Challenge, Domino’s (DE) says that they highlight their plant-based products with the aim to encourage their customers to reduce meat as an important step to reduce carbon emissions and contribute to animal husbandry without suffering – for the sake of the environment and the animals. Nando’s claims “it will add more plant-based offerings to its menu in an effort to combat climate change”.<sup>26</sup> And Starbucks “identified key areas in which it can make big impacts by 2030, including expanding plant-based and environmentally friendly menu options”<sup>27</sup>, looking for opportunities to transform.

It is a first step in the right direction, that fast-food chains anchor the increase of plant-based options in their policies. If they do not only want to profit from the ever-growing plant-based market though, but also contribute to a more sustainable future, less animal suffering as well as human health, the need to reduce animal protein and source from high animal welfare standards at the same time is imperative.

24 fast-food chains also address the impact of nutrition and / or have a One Welfare concept in place that takes the welfare of the planet, humans, and animals into consideration in a holistic approach: Burger King (DACH) for instance wants to tackle the climate impact of the food produced and explains why consuming beef is one of the main contributors to greenhouse gas emissions through food. Nando’s (UK) is getting more concrete: “Building on a 40 percent reduction in its carbon footprint since 2015, Nando’s [also] commits to achieving absolute zero direct emissions and reducing the carbon footprint of a Nando’s meal by a further 50 percent by 2030”.<sup>28</sup> KFC’s, Pizza Hut’s and Taco Bell’s mother company YUM! claims to have a holistic, science-based approach to continuously improve sustainable food production systems that protect human, animal and environmental health.<sup>29</sup> Starbucks states they “understand the interdependency of the health of humanity and the health of the planet”<sup>30</sup> and also Subway mentions that “strong animal welfare standards serve to ensure the health and welfare of the farm animals and therefore contribute to the health and well-being of our guests, society, and environment”<sup>31</sup>.

Although the self-imposed goals of the individual companies hold out the prospect of some improvements in terms of climate protection and animal welfare, the topic of meat reduction has so far been completely left out. To achieve these goals, however, a reduction of meat is unavoidable. In future, this must also be reflected in the companies’ own guidelines.

## 4.2 Product Portfolio

Regarding the product portfolio, Pret (UK) got the best results by ticking all the boxes, followed by dean&david (DACH), who, in comparison, are just lacking plant-based fish substitutes, which they are currently working on. So far, fish substitutes are only being offered by NORDSEE (DE + AT) and Pret (UK). Still good results were received by Call a Pizza (DE), Domino’s Pizza (DE, CH + UK), KFC (UK), LEON (UK), Nando’s (UK), Papa John’s (UK), Pizza Hut (UK), PIZZAMANN (AT), Starbucks (CH), Subway (DACH + UK) and Wimpy (UK), who, apart from the fish substitutes, are lacking the replacement of animal-based ingredients by plant-based ones to veganize a product.



Out of the 43 fast-food chains, 33 offer plant-based main dishes, but only 20 of these also sell plant-based meat-substitutes and another 2 offer fish-substitutes. Pret is the only chain offering both types at present.

There are some promising developments to be witnessed in the fast-food sector: Vegan burgers are now outselling “normal” burgers at LEON (UK). Meat alternative products now make up nearly 60 % of total sales across LEON’s 75+ restaurants in the UK, with vegan burger sales surging from 41.3 % to 56.8 % in 2020. LEON’s most popular vegan product is its LOVE burger, which is made from a beetroot soya patty that is topped with smoked gouda-style vegan cheese, tomatoes, and pickles.<sup>32</sup>

Nando’s (UK) introduced The Great Imitator which tastes just like their conventional chicken but is made from pea

<sup>25</sup> <https://valora.com/annualreport/2019/de>

<sup>26</sup> <https://www.livekindly.co/nandos-vegan-options-climate>

<sup>27</sup> <https://stories.starbucks.com/emea/stories/2020/5-things-to-know-about-starbucks-new-environmental-sustainability-commitment/>

<sup>28</sup> <https://plantbasednews.org/lifestyle/food/nandos-to-launch-vegan-burger-reports-insider/>

<sup>29</sup> <https://www.yum.com/wps/wcm/connect/yumbrands/bb0179a3-6ede-4d1c-b682-85f0fd6c4ad3/Sustainable-Animal-Protein-Principles.pdf?MOD=AJPERES&CVID=n80-2CL>

<sup>30</sup> <https://globalassets.starbucks.com/assets/38b8ab8576d24aa78170e46fd2a51acc.pdf>

<sup>31</sup> [https://www.subway.com/-/media/\\_SubwayV2/ResponsibilityPage/Docs/Subway-Animal-Welfare-Policy.pdf](https://www.subway.com/-/media/_SubwayV2/ResponsibilityPage/Docs/Subway-Animal-Welfare-Policy.pdf)

<sup>32</sup> <https://www.independent.co.uk/life-style/food-and-drink/vegan-burgers-leon-veganuary-plant-based-meal-food-a9294046.html>



protein. Just like Burger King (DACH's) Plant-Based Whopper –former Rebel Whopper – though, whose patty comes from the Vegetarian Butcher, The Great Imitator is rather aimed at flexitarians, because cross-contamination through contact with animal-based products cannot be ruled out due to the preparation on the same grill. Other than that, the product itself is completely vegan.<sup>34</sup> The Plant-Based Whopper in comparison is offered with conventional mayonnaise, which could easily be changed, because Unilever, whom the Vegetarian Butcher belongs to, also sells vegan mayonnaise. In the Netherlands and the United Kingdom, Burger King

According to the Smart Protein report on the market of plant-based foods Europe, plant-based fish shows the highest growth rate among all plant-based categories in Germany, with 623 % over the past two years. It is one of the most lucrative plant-based food categories of the future.<sup>33</sup>

already offers vegan mayonnaise, but the Plant-Based Whopper is still not available on a permanent basis in the United Kingdom. Nando's and Burger King were criticised for offering a plant-based burger, but not ensuring it to be suitable for vegans, too. One could argue, that aiming at

flexitarians has a lot going for itself: Every time a flexitarian chooses a plant-based option over meat, it helps the animals and the planet.

Pret (UK) has been offering its Vegan Classics range since 2019 by veganizing their most popular conventional sandwiches: Instead of egg mayonnaise, there was eggless mayonnaise; vegan Chuna replaced tuna; BLT became a mushroom based VLT, and the hoisin duck was swapped for a hoisin mushroom version.<sup>35</sup>

One of the most recent plant-based launches in the fast-food sector was accomplished by NORDSEE (DE + AT), who does not sell meat, but only fish: In partnering up with Dutch company Novish, they have launched two vegan versions of their bestsellers – Visch & Chips and Back-Visch baguette – which is especially worth mentioning, because they did not even offer vegetarian options before and because plant-based fish is still a lot less common than meat substitutes.

Only NORDSEE (DE + AT) and Pret (UK) have already launched plant-based fish products, realizing that this is a growing public demand. dean&david are currently working on a plant-based shrimp substitute and are also planning for a tuna replacement.

But there is still also a lot of room for improvement: Domino's (AT), KFC (DACH), McDonald's (AT + CH), Pizza Hut (DE), Starbucks (AT), Telepizza (CH) and Wienerwald (AT) do not offer any vegan main dishes at all.

For some fast-food chains, the ranking paints a very different picture depending on the country you are looking at:

- Domino's in Austria does not offer vegan main dishes nor meat substitutes, which can both be found in Germany and the United Kingdom.
- KFC in the DACH region achieved one of the worst results in the product section, while KFC in the UK offers plant-based main dishes, meat substitutes and vegan mayonnaise.
- About the same goes for Pizza Hut, where the UK menu is a lot more progressive than it is in Germany.
- Starbucks in the UK already offers plant-based meat substitutes by Beyond Meat, while this is not the case for the DACH region.
- McDonald's in Austria and Switzerland lay behind McDonald's in Germany where plant-based options and the meat substitute Big Vegan TS are available; McDonald's costumers in the UK have also been waiting for McDonald's vegan burger for quite a while now.<sup>36</sup> The wait might be over soon though: McDonald's has announced it will introduce a line of plant-based meat alternatives called McPlant in 2021<sup>37</sup> – about time, as McDonald's UK is late to the game compared to other leading fast-food chains. Wimpy for instance, introduced a vegan burger for Veganuary 2021 on a promotional basis, which was extended due to its success.

33 <https://smartproteinproject.eu/wp-content/uploads/Smart-Protein-Plant-based-Food-Sector-Report.pdf>

34 <https://www.independent.co.uk/life-style/food-and-drink/vegan-burgers-leon-veganuary-plant-based-meal-food-a9294046.html>

35 <https://plantbasednews.org/lifestyle/food/nandos-vegan-friendly-chicken/>

36 <http://flickingthevs.blogspot.com/2019/12/i-ate-all-of-pret-s-new-vegan-classics.html>

37 <https://www.wired.co.uk/article/mcvegan-burger>

38 <https://www.bbc.com/news/business-54883140>

- After a promotional phase early in 2020, Burger King in the UK still has not put the former Rebel Whopper on their menu for good, in comparison to Burger King in the DACH region, where the renamed Plant-Based Whopper is permanently available.
- Spanish fast-food chain Telepizza launched its first fully vegan product line Las Veguis in February 2021, using ingredients from Unilever’s plant-based subsidiary The Vegetarian Butcher and vegan cheese brand Violife. Looking at Telepizza’s rather poor performance in Switzerland with only 8 %, it would be worth expanding the positive initiative from Spain to the other countries where it operates.

Vegetarian options are offered by most fast-food chains; dean&david (DACH) and Pret (UK) even run Veggie Stores. At McDonald’s (CH), customers can order all three chicken burger variations as a vegetarian option. For their Make it Veggie promotion, McDonald’s (CH) teamed up with Vales, whose meat substitutes are made with milk protein. Taco Bell (UK) reminds its customers on the menu that it is possible to make most items vegetarian.

McDonald’s (DE) and NORDSEE (DE + AT) do not have any vegetarian mains additionally to their plant-based options. Carrying the red lantern, KFC (DACH) is the only fast-food chain in the ranking that does not offer vegan nor vegetarian dishes.

Looking at the availability of dairy and egg substitutes, it is a positive sign that 27 fast-food chains offer at least one plant-based alternative like milk, cheese, yoghurt, or mayonnaise. Egg substitutes are a lot less common and can only be found at Pret (UK) and Starbucks (UK).

Although plant-based milk alternatives are usually widely available wherever you can buy coffee, Burger King (DACH + UK) does not offer its customers this choice at all and neither does McDonald’s (CH + UK), KFC (DACH + UK), nor Pizza Hut (DE + UK).

We also assessed whether animal-based ingredients were ever eliminated or exchanged for with plant-based ones to veganize a product that replaces the previous one (at least temporarily), and only found examples in 3 out of 43 chains:

- BackWerk (DE + AT) left the egg out of their Börek.
- dean&david (DACH) replaced honey with agave syrup or simply skipped it to veganize part of their breakfast menu. They also replaced milk powder with natural spices.
- Pizza Hut (UK) completely replaced their regular cheesecake with a vegan version instead.



### 4.3 Marketing

When it comes to marketing, dean&david (DACH) is leading the field once more together with HITZBERGER (CH), who market their vegetarian and plant-based products very well, also explaining the consequences of nutritional choices for animal, human and / or planetary health, whilst highlighting the benefit of animal protein reduction. Still good, but without taking into consideration this reduction, are BackWerk (DE), BURGERISTA (AT), LEON (UK), McDonald’s (DE) and Starbucks (UK).

BackWerk (DE + AT), BURGERISTA (AT), dean&david (DACH), HITZBERGER (CH), LEON (UK), McDonald’s (DE + AT), Starbucks (DE + UK) and Türkis (AT) all highlight plant-based foods’ positive effects on the climate, animals, health, and / or the planet mainly through their websites and social media channels. Some focus primarily on the human health aspect (BackWerk, McDonald’s (AT), Türkis), while others also take into consideration the connection between food choices and their impact on the climate (dean&david, Starbucks), animal welfare (HITZBERGER) and the planet as a whole (LEON). Taking it further, dean&david also address the benefits of meat reduction.

Most of the chains offering plant-based alternatives also promote these products, especially for the launch, on their social media channels and by placing them prominently on their website. Pret (UK) also promotes Veggie Pret on their Instagram page and their core Pret site. LEON (UK) came up with the Vegan Subscription, which means customers can enjoy 30 % off all vegan items all month for just six pounds per month, which is an idea worth emulating. dean&david have their Make it Veggie promotion in Switzerland, where chicken, beef or prawns can be replaced by vegan soya strips without extra charge.



## 4.4 Future Commitment

In the final section of the assessment, which is connected to Future Commitment, we only gave a no, if the company responded and clearly stated so; all unanswered questions were given a question mark because this very specific information was rarely to be found in publicly accessible sources, except for the statements on the increase of plant-based alternatives.

Our champion dean&david (DACH) performed the highest in this category as they are the only ones with clearly formulated goals towards meat and fish reduction, although they are not sure yet whether they would include cultivated meat once it hits the market. Holy Cow! (CH) in comparison, would be open to offer cultivated meat but does not have a reduction statement in place. The clearest noes came from McDonald's (CH + AT), who do not take part in any initiatives or programs that promote meat and fish reduction such as Veganuary,

Some companies offer meat substitutes on a promotional basis like BackWerk, who teamed up with Rügenwalder Mühle in spring 2020 for a vegetarian hotdog, which was available only in Germany, or Wimpy (UK), who offered its Beyond Meat burger during Veganuary 2021 for a limited time.

The pricing of meat substitutes and plant-based options differ from chain to chain and country to country. Though not entirely in the hands of the fast-food chains per se, as VAT can vary, but pricing can be an indicator of urging consumers to opt for these products. Pizza Hut (UK) and PIZZAMANN (AT), sell their plant-based pizzas including meat and cheese

**95 % of the people who bought a plant-based burger in 2019 were meat eaters.<sup>38</sup>**

alternatives at a higher price. Starbucks (DE + UK) charges between 45 and 90 cents extra for its plant-based milk alternatives (with the exception of soy milk in the UK, which is available without surcharge) while communicating it wants to persuade its customers to ditch dairy. If Starbucks wants to refute the suspicion to make even more profit under the guise of environmental protection, it could regain credibility by offering these alternatives free of charge – or even for less for the greater good. Looking at the plant-based food options on the other hand, Starbucks (DE), together with YO! Sushi, is leading by example: Their plant-based dishes cost less than their conventional counterparts. The majority of the other fast-food chains assessed offer their plant-based options for around the same price as comparable meals with animal-based ingredients.

**In late 2020, Singapore gave regulatory approval for the world's first "clean meat" nuggets that do not come from slaughtered animals, which has paved the way for San Francisco-based startup Eat Just to sell lab-grown chicken meat.<sup>40</sup>**

are not open to offering cultivated meat and fish and do not have any meat and fish reduction goals in place either. Burger King (DACH) and KFC (DE + UK) are only slightly better by stating to increase innovative plant-based substitutes for meat and fish. As

stated earlier, these are the companies who participated in the assessment, but we were not able to evaluate the future commitment of the fast-food chains which did not answer the questionnaire and where no information could be found regarding these future commitments.

22 of the 43 fast-food chains take part in initiatives to promote meat reduction. The most common initiative with a constantly growing number of participants is Veganuary where in 2021's campaign, it was the most successful one to date.<sup>39</sup>

A lot of fast-food chains in the Atlas Challenge ranking used Veganuary as an incentive to launch new plant-based items:

- Burger King (UK) made its Veggie Bean Burger vegan.
- CAFFÈ SPETTACOLO (CH) introduced two new vegan croissants.
- Call a Pizza (DE) offered a vegan burger with a Gold&Green patty especially during Veganuary.

<sup>38</sup> [https://www.huffpost.com/entry/eat-less-meat-environmental-effect\\_l\\_5d39d84fe4b020cd99501f2d](https://www.huffpost.com/entry/eat-less-meat-environmental-effect_l_5d39d84fe4b020cd99501f2d)

<sup>39</sup> <https://www.bbc.com/news/business-55155741>

<sup>40</sup> <https://vegconomist.com/fairs-and-events/veganuary-2021-vegan-deliveroo-146-ms-vegan-beef-sells-every-30-seconds-vegan-meatballs-fastest-best-sellers-in-prets-history/?fbclid=IwAR1GLksqywUVH2pethgh-GzYyKFPPkzxd-MxB0JDEkK5H4eeMNVpoSEBA3c>

- Domino's Pizza (DE) extended its vegan pizza range by adding pizza bread with vegan cheese and offered a discount on its vegan products. Domino's stated that Veganuary is a great initiative to raise awareness for the consequences of our food choices regarding humans, animals, and the environment.<sup>41</sup>
- Domino's Pizza (UK) launched their first two plant-based meat options: The Chick-Ain't plant-based stripes and vegan nuggets, after it had seen a very encouraging response to its vegan pizzas in October 2020, and finally follows its rivals Papa John's (UK) and Pizza Hut (UK) who were a lot quicker to realize this.
- LEON (UK) released its Vegan Sweet Carolina BBQ Burger, which was its bestseller within just one week.
- Nando's (UK) launched the Vegan Flavour Box, a meal kit, including ingredients, recipe cards, utensils, Nando's Vegan PERinaise and a Nando's apron.<sup>42</sup> Apart from taking part in Veganuary, Nando's partners up with the Sustainable Restaurant Association, Future Planet, and others to use its position on the UK Round Table on Sustainable Soy to reduce deforestation.<sup>43</sup>
- Papa John's (UK) has added three additional vegan options for Veganuary, including Not-Chicken Vegan Bites.<sup>44</sup>
- Pret's (UK) new Meatless Meatball Hot Wrap was its first new product to become a top-five bestseller in launch week in the company's history.<sup>45</sup> For Veganuary, they had even taken the original Swedish Meatball Hot Wrap off the menu for the entire month to encourage customers to try out the new vegan option, convinced that they could win people over with it.<sup>46</sup>
- Starbucks (UK) launched a row of new plant-based products, e. g. the Beyond Meat Breakfast Sandwich and the Chick'n & BBQ Bean Hot Wrap, which are their first plant-based meat substitutes.<sup>47</sup> At Starbucks (DACH) however, these items are not available.
- Subway (DACH) brought its Meatless Chicken Teriyaki Sub back for good and Subway (UK) is following by adding the vegan T.L.C. (Tastes Like Chicken) Sub to its menu, now offering a second meat substitute additionally to its Meatless Meatball Marinara Sub.<sup>48</sup>

- Taco Bell (UK) chose Veganuary to launch its first plant-based meat alternative, the Pulled Oats taco filling.
- Wimpy (UK) launched its first vegan meat substitute with the Beyond Meat Vegan Burger for Veganuary for a limited time only but has extended the availability due to its success.



Looking at the big fast-food chains, unlike Burger King (UK), Burger King (DACH) does not take part in any initiatives like Veganuary, neither does McDonald's (CH + AT) nor Pizza Hut (DE).

KFC does not take part in any initiatives that we are aware of. In January 2021, KFC (UK) reintroduced its vegan chicken burger until the end of February 2021, although not officially taking part in Veganuary. At the same time though, KFC (DACH + UK) offered the Double Down, which consists of two pieces of chicken instead of the bun plus bacon and cheese, thus thwarting Veganuary.

22 of our 43 assessed fast-food chains have set future goals to increase their plant-based portfolio, partly also by tapping into new markets:

- Burger King is launching its Plant-Based Whopper in Latin America, the Caribbean and China.<sup>50</sup>

<sup>41</sup> <https://www.dominos.de/%C3%BCber-domino-s/presse/januar-21-jetzt-wird-s-vegan-domino-s-unterstuetzt-den-veganuary>

<sup>42</sup> <https://veconomist.com/fairs-and-events/veganuary-2021-vegan-deliveroo-146-ms-vegan-beef-sells-every-30-seconds-vegan-meatballs-fastest-best-sellers-in-pret-history/?fbclid=IwAR1GLksqyUjVHZpethgh-GzYyKFPkzxd-MxB0JDEkK5H4eeMNVpoSEBA3c>

<sup>43</sup> <https://www.totallyveganbuzz.com/news/nandos-vegan-meal-kits/>

<sup>44</sup> <https://www.foodingredientsfirst.com/news/nandos-expands-eco-credentials-with-more-plant-based-offerings-and-improved-chicken-welfare.html>

<sup>45</sup> <https://plantbasednews.org/lifestyle/food/papa-johns-vegan-stuffed-crust-pizza/>

<sup>46</sup> <https://veconomist.com/fairs-and-events/veganuary-2021-vegan-deliveroo-146-ms-vegan-beef-sells-every-30-seconds-vegan-meatballs-fastest-best-sellers-in-pret-history/?fbclid=IwAR1GLksqyUjVHZpethgh-GzYyKFPkzxd-MxB0JDEkK5H4eeMNVpoSEBA3c>

<sup>47</sup> <https://www.meatlessfarm.com/2021/01/05/thats-a-wrap-pret-meatballs-get-a-meatless-makeover/>

<sup>48</sup> <https://www.veganfoodandliving.com/news/starbucks-uk-launch-beyond-meat-sandwich-veganuary>

<sup>49</sup> <https://www.onegreenplanet.org/vegan-food/subway-launches-vegan-sub-in-uk-for-veganuary/>

<sup>50</sup> <https://www.reuters.com/article/us-unilever-burgerking/unilever-expands-burger-king-tie-up-to-launch-plant-based-whopper-in-latin-america-china-idUKKBN28X00B>

- dean&david (DACH) will cooperate with Lufthansa as from summer 2021 to offer a choice of healthy fast-food on short- and medium-haul flights.<sup>51</sup>
- Domino's (DE, CH + UK) will add new vegan pizzas with plant-based meat to their menu in 2021 due to the positive customer feedback on their first vegan offerings.<sup>52</sup>
- McDonald's (AT) announced it would widen its portfolio by adding plant-based alternatives for burgers, Chicken McNuggets and breakfast sandwiches to its menu in 2021.<sup>53</sup>
- Nando's (UK) says that its food team, which tests and develops the menu, is committed to and actively working on increasing the group's plant-based offerings.<sup>54</sup>
- Papa John's (UK) stated: "With recipe innovation at the core of the brand, and more people than ever adopting a vegan lifestyle, the latest launches are only just the beginning, with lots more exciting and innovative dishes launching later in the year".<sup>55</sup> Papa John's also opened its first store in Germany at the end of February 2021.<sup>56</sup>

Holy Cow! (CH), LEON (UK), Nando's (UK), Pret (UK), Starbucks and YUM! (mother company of KFC, Pizza Hut and Taco Bell) also set goals to increase their plant-based options.

Other chains do not take that clear of a stand, but are open to consider an increase of plant-based meat / fish substitutes:

- McDonald's (AT + DE) would consider an increase. McDonald's (DE), has been offering a vegan burger since 2019 and answered that an increase would depend on whether the demand is high enough. McDonald's (DE) does acknowledge though that there is a growing demand for plant-based meat substitutes, quoting from the Nutrition Report 2020 of the Ministry for Agriculture and Nutrition.<sup>56</sup> Just recently, McDonald's announced it will test the new product line McPlant worldwide in 2021. In this context, it was announced that Beyond Meat signed a three-year contract with McDonald's and YUM!.<sup>57</sup>
- NORDSEE (DE + AT) only just joined the plant-based market with the launch of their first two plant-based fish alternatives in cooperation with Novish, who

announced that they are aiming at adding new, innovative, and alternative products to invest into sustainability.<sup>58</sup>

We also assessed the fast-food chains on their readiness to include products from cultivated meat and / or fish once they would be available to the mass market. Only Holy Cow! (CH) and NORDSEE (DE + AT), both specialized on only meat respectively fish, answered they would be interested in offering cultivated meat, also known as 'cell-based', 'cultured' or slaughter-free meat / fish. McDonald's (AT + CH) stated they would not take this into consideration, whilst Pret (UK) was still undecided.

When it comes to goals and strategies for meat and fish reduction – which is the core of the Atlas Challenge – the only fast-food chain to have a concrete reduction strategy in place is dean&david (DACH): It commits itself to constantly increase the amount of vegetarian and vegan dishes, with a stronger focus being on vegan ones. Therefore, dean&david swaps one dish containing meat or fish for a vegan or vegetarian one with every product range changeover.

The big fast-food chains that responded – Burger King (DACH + UK), KFC (DE + UK) and McDonald's (AT + CH) – answered that they do not have any goals or strategies for meat / fish reduction and for all the others, no answer was given, or publicly available information found.

McDonald's (DE) claimed to be considering future goals to reduce meat and fish, but at the same time cannot see itself moving towards a meatless future<sup>60</sup>, further promoting to keep eating meat, as their reasoning stated that "Meat is a by-product"<sup>61</sup>, which it is not.

Additional points were given for response and transparency which can be seen at the very bottom of the indicator overview. The 13 fast-food chains that answered the questionnaire were rewarded additional points for their cooperation and transparency. The only exception was Telepizza (CH), whom FOUR PAWS corresponded with, but barely received information, neither through the questionnaire nor from what was publicly available. Another 14 out of the 43 chains did not receive extra points for transparency, because information was either nowhere to be found, very sparse or not relevant to answer our questions.

51 [https://deananddavid.com/wp-content/uploads/2021/04/2021-01-dd-Pressetext-Lufthansa\\_Intranet.pdf](https://deananddavid.com/wp-content/uploads/2021/04/2021-01-dd-Pressetext-Lufthansa_Intranet.pdf)

52 <https://static1.squarespace.com/static/5bd052c7c46f6d0e23b11afb/t/5f4db3240484a173f05a2eb2/1598927727428/FY20-Annual-Report.pdf>

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58 <https://www.derstandard.de/story/200012449742/beyond-meat-schliesst-partnerschaften-mit-mcdonalds-und-kfc>

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61 <https://www.change-m.de/2020/12/03/drei-gute-gruende-fleisch-zu-essen/>

62 <https://www.ift.org/news-and-publications/food-technology-magazine/issues/2018/august/features/sustainability-at-food-companies>



## 5. Conclusion

In summary, the results show that there is much needed room for improvement. It is clear some fast-food chains have positive initiatives in place, dependent on varying factors such as being affiliated with innovation or factor in consumer trends and demands, whilst others are falling behind. While some rely on marketing their plant-based meat and fish substitutes, others focus heavily on their meat and fish products without signs of promoting reduction, sometimes fuelling meat consumption by extending the meat contents in their products. With some very promising business strategies that the higher ranked fast-food chains have in place, it is evident that positive change is not only feasible, but also measurable and profitable in a fast paced and ever-changing world. Consumers are becoming more conscious of not only ingredients, but also the animal welfare implications and sustainable production

systems of the products they buy, particularly in relation to fast-food or food-on-the-go. Transparency and being open about sustainability are becoming the currency of trust for consumers<sup>62</sup> and it is fair to state, that those who are meeting consumers' demand for an expansion of more and better plant-based foods are ahead of the game.

If the food industry continues to offer a narrow selection of food products consisting primarily of meat, the amount of intensive factory farms will continue to increase along with its negative implications associated to global natural disasters (Amazon fires, floods, heat waves, droughts, biodiversity loss, decline in insects and the mistreatment of billions of farm animals). It is imperative for key players in the food industry to take action and be part of the progressive change that is needed.

<sup>62</sup> <https://www.ift.org/news-and-publications/food-technology-magazine/issues/2018/august/features/sustainability-at-food-companies>







## 5. What's next?

FOUR PAWS is hopeful that with the already existing positive initiatives in place by some fast-food chains – most evidently like dean&david – others will follow suit such as Domino's (DE) who have also signed the Atlas Challenge commitment letter and that more fast-food chains commit to a reduction of meat and fish, an increase of plant-based products and implement animal welfare practices for a better planet. Still, there is much room for improvement and fast action needed

Redefine Meat™ is an example of breaking boundaries. With their technology, they are able to produce animal-free meat with the same appearance, texture and flavour of animal meat, from natural and sustainable ingredients through 3D printing.<sup>63</sup>

if the fast-food industry wants to catch up with the needed changes to help save the planet.

FOUR PAWS is looking forward to a positive exchange with the fast-food chains within the quick-service sector who are willing to support

the integration of more sustainable food strategies to reduce the amount of meat and fish and increase innovative plant-based products by signing the Atlas Challenge commitment letter along the following scopes by 2024:

- Implementing concrete measures on promoting meat and fish reduction in the CSR or separate policy, which includes a clear statement highlighting the environmental and animal welfare benefits of meat and fish reduction.\*

- Making sure that one kind of meat or fish is not increased as compensation for reducing another.
- Diversifying the product range with plant-based meat and fish substitutes and / or vegetarian alternatives and vegan products .
- Working on innovative, plant-based products, which will replace or remove current meat and fish products and / or ingredients.
- Promoting plant-based meat and fish alternatives and plant-based products / dishes amongst consumers to highlight animal- and environmentally-friendly food through platform specific marketing.\*\*
- Spreading awareness on the importance of meat and fish reduction, which benefits the planet, through at least two health / environmental / animal welfare initiatives per year.\*\*\*

### CONTACT DETAILS:

For further information about The Atlas Challenge or if you wish to be one of the pioneers in the food industry by reducing meat and fish and increasing innovative plant-based offerings, please get in touch at: [TheAtlasChallenge@vier-pfoten.org](mailto:TheAtlasChallenge@vier-pfoten.org)

\* For Example: Reduction of total meat and fish content of all ingredients of products by 20% by 2022.

\*\* Depending on existing marketing tools the company utilizes, plant-based / meat substitutes are highlighted using different marketing tools (website, advertisement, Social Media etc.)

\*\*\* Initiatives such as Meatless Mondays, Health / Green week, Veganuary, participating on Earth Day, climate awareness etc.

<sup>63</sup> <https://www.redefinemeat.com/what-we-do>

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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, 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.

The work of FOUR PAWS is based on substantiated research and scientific expertise, as well as intensive national and international lobbying. The goal of FOUR PAWS' campaigns, projects and educational work is to inform the general public about animal suffering and to bring about long-term improvements enshrined in legislation.



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