

THE ATLAS CHALLENGE

on Fast-Food Chains

A Country Comparison



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 huge 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 humans¹. Despite some improvements in the animal agricultural sector, farm animals are still suffering at the hands of global food production.

One of the main meat-heavy sectors is the global fast-food chain industry. It is predicted that the sector will steadily grow and reach 931.7 billion USD by the end of 2026².

The alt-protein market will grow with an annual rate of 17% and thus be worth 155 billion USD by 2027⁴.

One reason for this growth is the rapid expansion in different regions like India, China, Asia-Pacific and North America, and another reason is the variety of foods available in each sector. Over decades, global fast-food giants like McDonald's, Burger King, Subway, and KFC fulfilled consumer demands in delivering animal-based meat and dairy, made

fast and cheap. But looking at the last few years, they started to make a concerted effort to add meat-free, plant-based, and fully vegan options to their menus. People's interest in plant-based foods is increasingly motivated by several reasons, the top being perceived health benefits, followed by environmental concerns³.

Considering the implications of intensive factory farming, various stakeholders within the food industry have indeed recognised the need to adapt their policies and strategies in relation to sustainable food offerings and to the overall reduction of meat from their portfolios. After ranking the fast-food chain sector in Germany, Austria, Switzerland (which together are referred to as the DACH region) and in the United Kingdom (UK), FOUR PAWS analysed the performance of some of the leading global players in both their headquarter countries – the US or South Africa – and where each chain has the highest number of stores outside their headquarters' countries.

The goal of this ranking was to find out whether the necessary steps to reduce the number of factory-farmed animals and mitigate climate change are being taken. Is meat reduction as well as the increase of plant-based food options a priority in their strategy?



Facts



Between one quarter and one third of global greenhouse gas emissions come from food production⁵.



It is estimated that beef and dairy production are responsible for more than two thirds of the food sector's greenhouse gas emissions⁶.



Meat products have larger carbon footprints per calorie than grain or vegetable products⁷.



Animal agriculture's global greenhouse gas emissions equal those from combustion of all transport fuels⁸.



The global production of meat, fish from aquaculture, eggs and dairy uses 83% of the world's agricultural land⁹.



Animal agriculture, especially beef production, is the biggest contributor to deforestation¹⁰.



More antibiotics are given to farm animals than to humans, accelerating antibiotic resistance in humans¹¹.



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 pandemics¹¹.



Fish makes up 17% of animal protein consumed globally, and demand is predicted to rise, according to the United Nations Food and Agriculture Organization¹².





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 according to their strategies towards an animal- and climate-friendly nutrition, focusing on meat and fish reduction and on the increase of plant-based and innovative food*.

The name Atlas was inspired by the Titan Atlas in Greek mythology, who was responsible for bearing the weight of the world on his shoulders and who personified endurance. As such, the Atlas Challenge ranking is one which ranks the companies in the various food industry sectors on their 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 farm animals, the climate, and the planet by implementing strategies towards meat and fish reduction and strategising a push for innovative plant-based foods. FOUR PAWS expects action and progress from industry players within the following categories:

Most Americans have consumed plant-based meat alternatives in the past year, with two in five eating them daily or weekly¹⁴.

- Including and implementing animal welfare statements in their policies
- Diversifying their product range to decrease their meat and fish** offerings
- Implementing marketing strategies that encourage increased consumption of plant-based 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

Approximately 80 billion farm animals and an estimated 300–770 billion fishes and crustaceans are slaughtered for human consumption each year¹³ 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.

* 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.

3. The international Fast-Food Chain Ranking

FOUR PAWS assessed eleven of the globally leading fast-food chains that were already part of the previously conducted Atlas Challenge ranking on fast-food chains in the DACH region and the UK. This latest ranking widened the focus to an international level and compares the performance of these chains in the country they

The cost of a US Big Mac would jump from 5 USD to 13 USD, if 38 billion USD in meat subsidies were eliminated¹⁵.

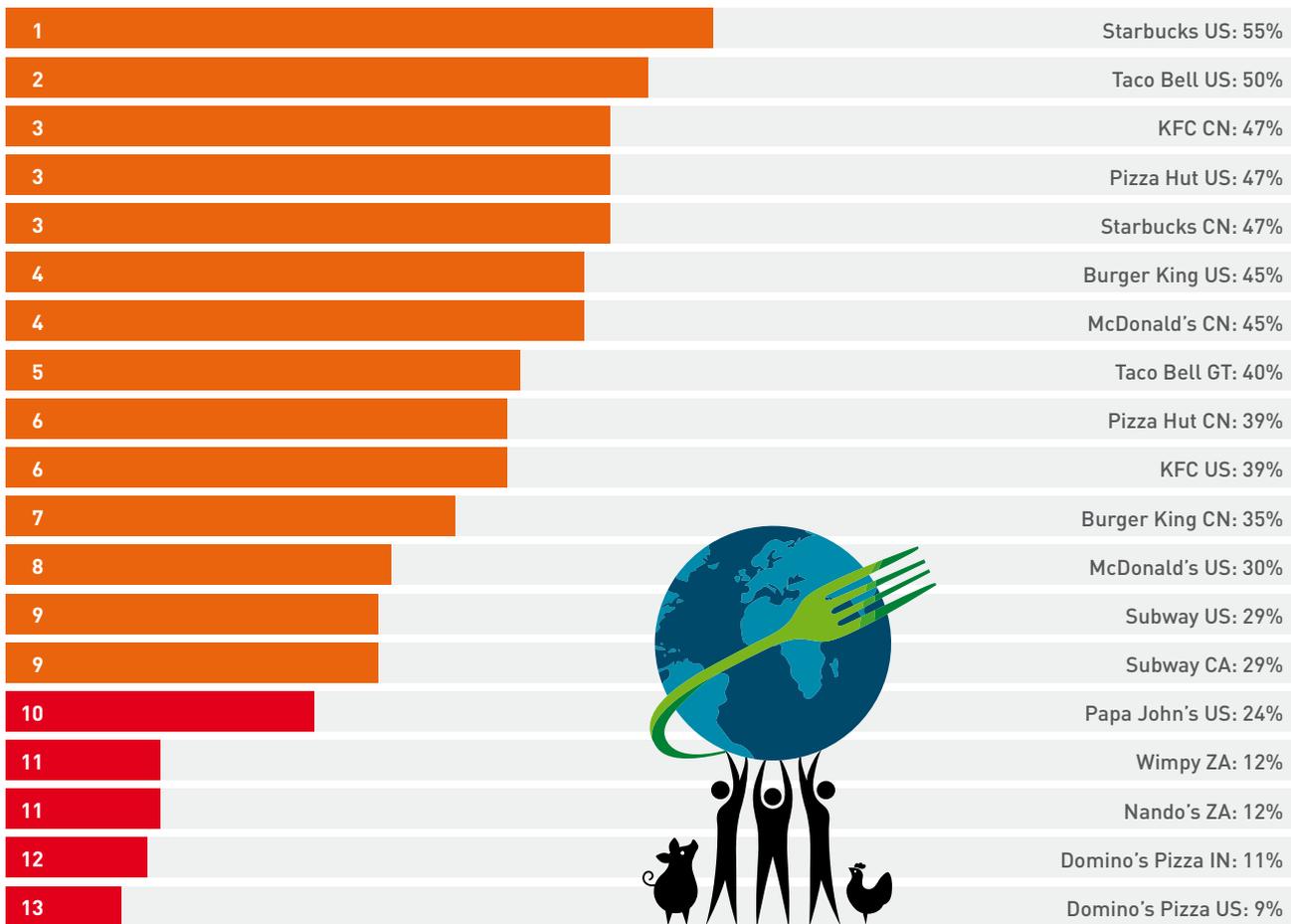
were headquartered in and additionally considered the country where the respective chain had the most outlets outside of the headquarter country. FOUR PAWS conducted the research and scoring of these chains between June and October 2021; changes regarding policies, product portfolio or marketing measures that occurred after October 2021 were not taken into consideration.

Nine of the eleven chains were headquartered in the US and the remaining two were in South Africa. Five of the chains had the most outlets (apart from the country they are headquartered in) in China. For Subway, most outlets outside the US existed in Canada, while Domino's had the most outlets in India, and Taco Bell in Guatemala. US-based Papa John's and the two chains headquartered in South Africa – Nando's and Wimpy – had the strongest presence in the UK, which was already looked at in the previous ranking. For these three chains, the UK results will be used for the country comparison but are not displayed in the current ranking. Altogether, we are looking at the results for eleven chains in nineteen countries, using the three chains in the UK from the previous ranking as a reference only.

Fast-food chain	Headquarter Country	Country with most outlets
 Burger King	US	China
 Domino's	US	India
 KFC	US	China
 McDonald's	US	China
 Nando's	South Africa	United Kingdom
 Papa John's	US	United Kingdom
 Pizza Hut	US	China
 Starbucks	US	China
 Subway	US	Canada
 Taco Bell	US	Guatemala
 Wimpy	South Africa	United Kingdom



The Fast-Food Chain Ranking



Country abbreviations: Canada = CA, China = CN, Guatemala = GT, India = IN, United States of America = US, South Africa = ZA

■ very good: 76–100%
 ■ good: 51–75%
 ■ average: 26–50%
 ■ low: 0–25%

Best Practice

Starbucks US was the only fast-food chain in the ranking to achieve the **Good** category. In its Global Environmental and Social Impact Report 2020¹⁶, Starbucks stated: “Our vision for the future is to become resource positive – giving back more than we take from the planet.” By 2030, Starbucks wants to cut carbon emissions, water withdrawal, and waste sent to landfill by 50%. Among the five scientifically backed key strategies set to meet these goals, the first one mentioned is the expansion of plant-based menu options. According to Starbucks CEO

Kevin Johnson, alternative milks will play a crucial role here¹⁷. As elaborated on in their Environmental Baseline Report¹⁸, most of the emission reductions to reach a 1.5° C target will have to be made in the sourcing, particularly of fluid dairy, which accounts for a striking 22% of Starbucks’ greenhouse gas (GHG) emissions. This is why Starbucks has started broadening its plant-based milk portfolio, aiming at pushing consumers to choose one of the environmentally friendlier milk alterna-

tives over dairy¹⁹, which 15–20% of American Starbucks customers already do.

Regarding the expansion of plant-based food menu options, Starbucks partnered up with Impossible Foods to introduce the Impossible Breakfast Sandwich. In the ranking, Starbucks received the best results for establishing vegetarian and vegan options as well as milk and meat substitutes on their menu permanently. It is also the only chain in the U.S. that at least piloted vegan cream cheese²⁰ as well as an all-vegan version of its Impossible Breakfast Sandwich containing plant-based egg and cheese²¹.

Additionally, Starbucks had 2,300 Greener Stores in the US and Canada to test solutions for scale to help the company realise its Planet Positive goals. The first Greener Store outside the US was opened in Shanghai, where 50% of the menu is plant-based, including various meat substitutes and oat milk as the default choice. By 2025, Starbucks aims to open 10,000 Greener Stores worldwide.





4. Results

The results of the ranking were first summed up by four different sections: CSR, Product Portfolio, Marketing and Future Commitment. The chains' headquartered country and the country with the highest number of outlets were then directly compared to each other. In addition, the key findings of the previous ranking (conducted in the DACH region and the UK in early 2021) were also included.

4.1 CSR

Looking at the core demands of the Atlas Challenge – the results which focused on meat and fish reduction and the increase of plant-based alternatives – was sobering: Regarding animal-protein reduction, only Starbucks had a statement aiming at the reduction of cow's milk to minimise its environmental impact. While climate policies were omni-present, not a single chain named the reduction of meat as a measure to reduce their carbon footprint.

Beyond Meat is expanding its international reach with an end-to-end manufacturing facility in China, its first such facility outside the US²³.

None of the chains offered products that were high animal welfare-certified; in China, independent high animal welfare certification did not even exist. Only McDonald's US offered MSC-certified Filet-o-Fish (although MSC is more about sustainability than animal welfare; unfortunately, fish welfare is a very neglected topic in general).

The worst results could be seen for Domino's US and India, who failed to publicly elaborate on the topics assessed in their CSR.

4.2 Product Portfolio

The second section takes a closer look at the product portfolio of the fast-food chains. Starbucks achieved the best results, offering not only vegetarian but also plant-based main dishes as well as milk and meat substitutes, of which all the other chains were lacking in one or the other. McDonald's US and KFC US were the only two chains offering neither vegetarian nor vegan main dishes during the set research timeframe. All other chains did at least have vegetarian main dishes on the menu and some – Burger King US, Subway US and Canada, Taco Bell US, and Guatemala, and Nando's – additionally provided vegan choices.

Some of the companies like KFC US or Domino's India piloted plant-based meat substitutes before the research period; however, they did not make these items permanent and thus, were not awarded any points here.

When it comes to plant-based milk substitutes, Starbucks is leading the way with a variety to choose from in the US and China. While fast-food giants McDonald's, Burger King, and KFC were failing miserably in this respect in the US, their Chinese branches were further ahead and offered soya milk.

None of the chains replaced animal-derived ingredients with plant-based ones to ultimately create a vegan product. Additionally, no plant-based fish substitutes could be found among the assessed chains.

4.3 Marketing

Looking at the various marketing tactics in the third section of the indicator overview, it's most obvious that none of the chains emphasised the positive effects of meat and fish reduction, which is mirrored in their CSRs. However, when plant-based meat substitutes were offered, there was always

India has a particularly high growth potential for plant-based foods, with a third of Indians being vegetarian and the other 70% regularly consuming plant proteins²⁴.

special promotion for their launch. (Note: Ticks in the indicator overview can also relate to promotional activities in the past when plant-based meat substitutes were available, as they did not necessarily have to be available during the

research timeframe.) Most of the chains offered their plant-based dishes and meat substitutes for around the same price as their animal-based equivalents. But not all did: Burger King US sold their meat substitutes at a higher price than their meat products, and at Subway US a plant-based sub cost more than one with animal-based cold cuts.

4.4 Future Commitment

Unfortunately, none of the assessed chains answered the FOUR PAWS Atlas Challenge questionnaire. Therefore, only limited information on the companies' commitment was available. For six out of the eleven chains assessed, a statement on the increase of innovative plant-based meat substitutes, such as long-term cooperation announcements with Impossible Foods or Beyond Meat, was found.

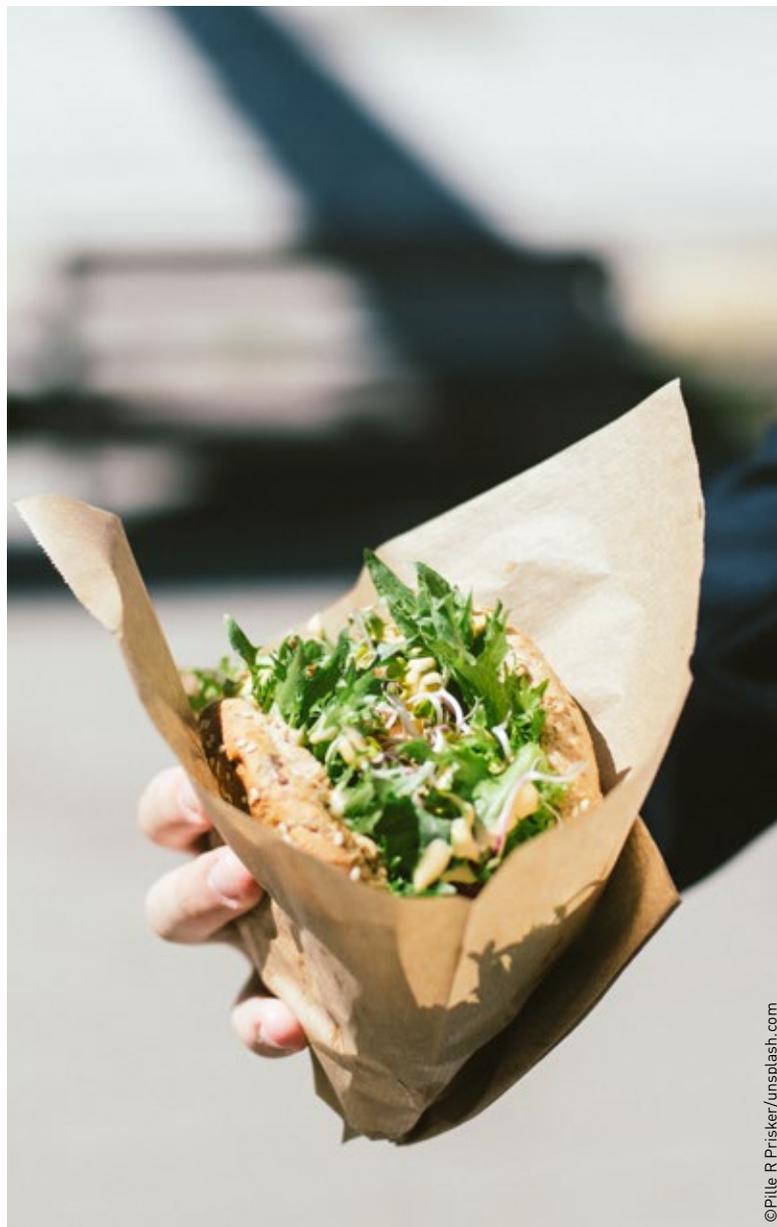
Only three chains were part of initiatives promoting meat reduction: In the US, Taco Bell's menu was approved by the American Vegetarian Association; Starbucks US and Papa John's promoted Meatless Mondays.

4.5 Country Comparisons: Key Findings

The comparisons between the two countries of each chain are listed from the highest to the lowest rank from the perspective of the headquartered country.

In the wake of the pandemic, the presence of alt-meat on US restaurant menus has surged by 1320%, according to a study by Tastewise²⁵.

Each visual shows the two assessed countries of one chain and their respective score (in %) as well as the rank.



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The results are listed as bullet points: for the headquartered country on the left and for the country with the most outlets on the right. Shared features that the two countries have in common are listed in the lower part of the graphic. The results are additionally divided into a positive results' section (thumbs up) and a negative one (thumbs down).

The traffic light-coloured tables summarise the status of each chain regarding:

- the plant-based product portfolio,
- a statement on the increase of plant-based alternatives,
- a statement on meat reduction.

It was noted that there are global differences in the availability of plant-based food options across the assessed countries. The questions arising from the described differences between the compared countries of each fast-food chain are recommendations by FOUR PAWS for how each chain could promote a more animal- and climate-friendly nutrition. The questions were sent to the fast-food chains, but not answered up until now.



Fast-Food Chain

Country *

McDonald's		Burger King		Starbucks		Subway		KFC (YUM!)		Taco Bell (YUM!)		Pizza Hut (YUM!)		Domino's Pizza		Papa John's	Nando's	Wimpy
US	CN	US	CN	US	CN	US	CA	US	CN	US	GT	US	CN	US	IN	US	ZA	ZA

CSR / Policy / Annual report

1. Annual report / CSR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓
2. Sustainable Development Goals (SDGs)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓
3. Animal welfare	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	
4. High animal welfare standards / certification	fish	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
5. Live animal transport	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	✓	✓	✓	✗	✗	✗	✗	✗	✗
6. Traceability of animal products	meat fish	meat fish milk eggs	meat	✗	meat	✗	meat eggs	poultry	✓	✓	✓	✓	✓	✓	✗	cheese	✓	chicken eggs	✗
7. Reduction of animal protein	✗	✗	✗	✗	milk	milk	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
8. Increase of plant-based alternatives	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✓
9. One welfare / impact of nutrition	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✗	✓

Product Portfolio

10. Offer plant-based main dishes	✗	✗	✓	?	✓	✓	✓	✓	✗	✗	✓	✓	✗	✗	✗	✗	✗	✓	✗
11. Offer vegetarian main dishes	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
12. Offer plant-based dairy / egg substitutes	✗	milk	✗	milk	milk	milk	✗	✗	✗	✗	milk ice cream	✗	milk mayo	✗	✗	✗	✗	✗	✗
13. Offer plant-based meat substitutes	✗	✓	✓	?	✓	✓	✗	✗	✗	✓	✓	✗	✓	✗	✗	✗	✗	✗	✗
14. Offer plant-based fish substitutes	✗	✗	✗	✗	-	✗	✗	✗	-	✗	-	-	-	✗	-	-	✗	-	-
15. Replaced animal-based with plant-based ingredient / products	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗



Fast-Food Chain

Country *

McDonald's	Burger King	Starbucks	Subway	KFC (YUM!)	Taco Bell (YUM!)	Pizza Hut (YUM!)	Domino's Pizza	Papa John's	Nando's	Wimpy
US CN	US CN	US CN	US CA	US CN	US GT	US CN	US IN	US	ZA	ZA

Marketing

16. Highlight plant-based foods' positive effects	✗	✓	✓	✓	✓	✓	✓	✗	✓	✓	✗	✗	✓	✓	✗	✗	✓	✗	✗
17. Highlight meat / fish reduction's positive effects	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
18. Special promotion for meat / fish substitutes	—	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	—	✓	—	✗	—	
19. Pricing of meat / fish substitutes & plant-based dishes in same range as animal-based	—	✓	✗	?	✓	✓	✗	✓	—	✓	✓	✓	✓	—	—	—	—	✓	—

Future Commitment

20. Initiatives & programs that promote meat / fish reduction (e. g. Veganuary)	?	?	?	?	✓	?	?	?	?	?	✓	?	?	?	?	?	✓	?	?
21. Increase of innovative plant-based meat / fish substitutes	✓	✓	✓	✓	✓	✓	?	?	✓	✓	✓	✓	✓	✓	?	?	?	?	?
22. Open to offering cultivated meat / fish	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?
23. Goals & strategies for meat / fish reduction	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?

Additional

i Response	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
ii Transparency	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗

✓ = Yes ✗ = No ? = No (clear) information given / could be publicly found within the allocated research time — = Not applicable / Not part of product portfolio

* Country abbreviations: Canada = CA, China = CN, Guatemala = GT, India = IN, United States of America = US, South Africa = ZA

The present table provides an overview of the indicators for each fast-food chain that the ranking is based on. For the assessment, the indicators were divided into four different sections. Please note that although a company could fulfill the majority of the criteria, it does not deem them as the highest scoring company due to the specific scoring system of the questionnaire.

Disclaimer: May 2021 till October 2021 reflects the careful research effort of FOUR PAWS, based on publicly accessible information online. Any changes in the assessed companies, which took place after October 2021 and which may affect the ranking results, have not been taken into account. For more information, please don't hesitate to contact us: TheAtlasChallenge@four-paws.org



Starbucks

Starbucks was the only company addressing the reduction of animal protein as part of their efforts to reduce the company's carbon footprint to which milk is the biggest contributor with 22% of Starbucks' GHG emissions. The chain wants to reduce the use of cow's milk and persuade its customers to choose from one of the growing plant-based alternatives. Starbucks itself does not categorise milk as animal protein, under which they class only eggs and meat. These items add another 3% to the total GHG output of the company¹⁸. The identified key areas in which Starbucks can make big impacts by 2030 include expanding plant-based and environment-friendly menu options globally. These statements could be found in Starbucks' CSR that is applicable globally.

Looking at the product portfolio in the US and China, Starbucks received the best results for establishing vegetarian and vegan options as well as milk and meat substitutes on their menu permanently. Starbucks in Europe has some catching up to do: Locations in Austria lacked plant-based main dishes on their menu, and in the whole DACH region, no plant-based meat substitutes could be found on the Starbucks menu.

FOUR PAWS WOULD LIKE TO KNOW

When will headquarters unify the Starbucks menu so that customers in Europe and worldwide will have the choice to opt for animal- and climate-friendly alternatives?

Starbucks had 2,300 Greener Stores in the US and Canada to test solutions for scale to help the company realise its Planet Positive goals to reduce carbon emissions, water usage, and landfill waste by 50%. The first Greener Store outside the US was recently opened in Shanghai, where 50% of the menu is plant-based including various meat substitutes. By 2025, Starbucks aims to open 10,000 Greener Stores worldwide. While all these steps, including the cooperation with Impossible Foods in the US and Beyond Meat in China, contribute to a more sustainable future, Starbucks lacks a binding commitment towards a proactive meat reduction strategy in their CSR.

FOUR PAWS WOULD LIKE TO KNOW

Would Starbucks consider broadening its commitment approach to include the reduction of meat?

HQ country vs non-HQ country with most outlets

HQ US Result: 55% → Rank 1					Most outlets outside HQ country: China Result: 47% → Rank 3				
	<ul style="list-style-type: none"> 2,300 Greener Stores to develop sustainable solutions One of only two ranked chains with initiatives to promote meat reduction: Meatless Monday Piloting of vegan cheese Cooperation with Impossible Foods to make the global food system sustainable 		<ul style="list-style-type: none"> 1st Greener Store outside the US focussing on plant-based food and beverages with a 50% plant-based menu and oat milk as a default Cooperation with Beyond Meat to expand the plant-based menu, which piloted a lot of different dishes with plant-based meat 						
	<ul style="list-style-type: none"> Impossible Breakfast sandwich not vegan: contains egg 		<ul style="list-style-type: none"> No traceability of animal products 						

INDICATORS					INDICATORS				
Permanent vegan and vegetarian options & meat substitutes					Permanent vegan and vegetarian options & meat substitutes				
Greener Stores and cooperation w/ Impossible Foods					Greener Stores and cooperation w/ Beyond Meat				
Statement on meat reduction					Statement on meat reduction				

Shared features	
	<ul style="list-style-type: none"> Acknowledge that 22% of Starbucks' GHG emissions is caused by dairy (in comparison: only 4% from direct emissions and emissions from electricity purchased) Only chain with statement on reduction of animal protein (> milk) Permanent vegan and vegetarian options as well as meat substitutes



Taco Bell

Taco Bell is one of the big three chains belonging to mother company YUM!, whose CSR applies to all three: KFC, Pizza Hut, and Taco Bell. YUM! emphasised the ongoing expansion of plant-based protein options – powered by the global strategic partnership with Beyond Meat – to reduce emissions. YUM! claims that if customers continued to choose these over meat-based proteins, fewer animals would need to be raised for food. While FOUR PAWS acknowledges this approach, YUM! will also have to make a move and actively reduce their meat offerings to reach this goal.

Taco Bell had permanent vegan and vegetarian options. In the US, the menu was approved by the American Vegetarian Association. To make it easier for their vegan and vegetarian customers, Taco Bell introduced The Veggie Mode menu in the US and the UK, which is a great idea to assist customers in choosing plant-based alternatives. Whether this feature was also available in Guatemala, where Taco Bell has the most outlets outside the US, could not be found out. Regarding their very cheese-heavy menu, it would be interesting to know, not only for vegan customers, but also as a contribution to emission reduction through dairy cows.

FOUR PAWS WOULD LIKE TO KNOW

Does Taco Bell plan to introduce plant-based dairy substitutes?

YUM! expected significant growth for Taco Bell's plant-based beef alternatives in the US. While Taco Bell repeatedly piloted its plant-based meat substitutes in the US and the UK as well, these still have not found their way onto the menu on a permanent basis.

FOUR PAWS WOULD LIKE TO KNOW

When will the announced continued global expansion of plant-based beef substitutes be visible permanently on the Taco Bell menus of the world?

HQ country vs non-HQ country with most outlets

HQ US
Result: 50% → Rank 2



- Expect significant growth for Taco Bell's plant-based beef alternative products in the US
- Menu has a vegetarian filter: Veggie Mode
- Menu certified by American Vegetarian Association

Most outlets outside HQ country: Guatemala
Result : 40% → Rank 5

					INDICATORS					
		Permanent vegan and vegetarian options + promo meat substitutes			Current status of plant-based product portfolio			Permanent vegan and vegetarian options		
	Strategic partnership w/ Beyond Meat				Statement on the increase of plant-based alternatives				Strategic partnership w/ Beyond Meat	
				X	Statement on meat reduction	X				X

Shared features



- Mention continued expansion of plant-based protein as source of emissions reduction: If customers continue to choose these options over meat-based proteins, fewer animals will need to be raised for food and their emissions will be avoided.
- Global strategic partnership with Beyond Meat



- Still no plant-based meat substitutes on a permanent basis
- No plant-based dairy and egg substitutes



Pizza Hut

The third YUM! brand Pizza Hut was doing slightly better than KFC in the US. Pizza Hut at least offered vegetarian options and their vegan pepperoni in a few US cities for limited piloting phases. As no plant-based cheese was available, Pizza Hut was excluding customers preferring vegan pizza. In comparison, Pizza Hut UK did not only offer plant-based main dishes that came with free and unlimited salad, but also vegan cheese since 2017, and offered plant-based "pepperphoni" as well as Quorn nuggets on a permanent basis. They even had vegan cheesecake, which kicked the conventional one off the menu. The only downturn here is that the vegan pizzas were more expensive through a surcharge for vegan cheese.

FOUR PAWS WOULD LIKE TO KNOW

When will the announced continued global expansion of plant-based protein like the plant-based pepperoni or vegan cheese be visible permanently on the Pizza Hut-menus of the world?

Pizza Hut UK took part in Veganuary.

FOUR PAWS WOULD LIKE TO KNOW

When will Pizza Hut US as headquarters set an example and join Veganuary and encourage other Pizza Hut countries to do the same?

HQ country vs non-HQ country with most outlets

HQ US
Result: 47% → Rank 3

Most outlets outside HQ country: China
Result: 39% → Rank 6

HQ US					Most outlets outside HQ country: China					
Result: 47% → Rank 3					Result: 39% → Rank 6					
Green	Light Green	Yellow	Orange	Red	INDICATORS	Red	Orange	Yellow	Light Green	Green
			Vegetarian mains and promo meat substitutes		Current status of plant-based product portfolio		Only vegetarian mains			
	Expand plant-based pepperoni & cooperation w/ Beyond Meat				Statement on the increase of plant-based alternatives				Expand plant-based pepperoni & cooperation w/ Beyond Meat	
				X	Statement on meat reduction	X				X

Shared features



- Mention continued expansion of plant-based protein as source of emissions reduction: If customers continue to choose these options over meat-based proteins, fewer animals will need to be raised for food and their emissions will be avoided.
- Expect significant growth for Pizza Hut's plant-based pepperoni globally
- Global strategic partnership with Beyond Meat



- No vegan main dishes
- No plant-based dairy or egg substitutes
- Still no plant-based meat substitutes on a permanent basis



Burger King

In its CSR, Burger King acknowledged that animal protein is the main source of the company's GHG emissions and highlights the environmental benefits of plant-based substitutes. Burger King's portfolio in the US comprised permanent vegan and vegetarian options as well as plant-based meat substitutes by Impossible Foods.

Shortly after the launch of the first European-focused fast-food ranking by FOUR PAWS, Burger King UK's CEO announced their goal to have a 50% plant-based menu by 2030.

FOUR PAWS WOULD LIKE TO KNOW

Would Burger King headquarters consider adapting this target globally?

In the DACH region as well as the UK, Burger King extended its plant-based range significantly already. Also, in various cities across Europe, plant-based pop-up stores opened for a limited time recently.

FOUR PAWS WOULD LIKE TO KNOW

Will Burger King US follow Europe's lead and expand its plant-based portfolio accordingly in the US and worldwide?

Only Burger King China offered plant-based milk substitutes, while vegan mayo was available only in the UK and Germany.

FOUR PAWS WOULD LIKE TO KNOW

When will this become standard across Burger King globally?

Unfortunately, in the US, the Impossible Whopper was more expensive than the conventional Whopper, which may prohibit people from trying it.

FOUR PAWS WOULD LIKE TO KNOW

Would you consider selling plant-based items for at least the same price or cheaper to promote plant-based eating as a contribution to climate, environment, and the reduction of industrialised livestock farming?

HQ country vs non-HQ country with most outlets

HQ US Result: 45% → Rank 4	Most outlets outside HQ country: China Result: 35% → Rank 6
<ul style="list-style-type: none"> Cooperation with Impossible Foods to expand plant-based options Permanent vegan and vegetarian options as well as plant-based meat substitutes 	<ul style="list-style-type: none"> Cooperation with Unilever (Vegetarian Butcher) to be expanded (planned for 2nd quarter of 2021) Offer plant-based milk
<ul style="list-style-type: none"> No meat reduction goals, instead carbon mitigation: <ul style="list-style-type: none"> - Grass land restoration with the help of cattle to bind carbon - Reducing methane emissions through feed adaption Impossible Whopper more expensive (6.59 USD) than the 'normal' Whopper (5.49 USD) 	<ul style="list-style-type: none"> No traceability of animal-based products Unclear whether plant-based meat substitutes are still available One of the two ranked chains that were not rewarded points for transparency

					INDICATORS					
	Permanent vegan & vegetarian options & meat substitutes				Current status of plant-based product portfolio			1 vegetarian option & soy milk		
	Cooperation w/ Impossible Foods → expand plant-based options				Statement on the increase of plant-based alternatives				Expand cooperation w/ Vegetarian Butcher	
				X	Statement on meat reduction	X				

Shared features

<ul style="list-style-type: none"> Address that key proteins beef, chicken and dairy are responsible for 67% of emissions in the purchased goods and services category Acknowledge that costumers avoided the equivalent of driving about 520 million miles in an average passenger vehicle by choosing the Impossible Whopper in 2020 Point out the plant-based burgers use 96% less land and generate 89% fewer GHG emissions
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KFC

Despite the announced expansion of plant-based protein in the YUM! CSR, KFC US received the worst results in the product portfolio section: No vegetarian nor vegan main dishes and no plant-based substitutes at all were offered. The same applied to the whole DACH region. KFC UK was the only country that offered the plant-based Quorn-burger on a permanent basis. The vegan burger was only piloted in the US and Germany several times, but still not rolled out for good. KFC China offered a range of vegan mains in cooperation with Beyond Meat and other partners, but only on a promotional basis, too.

FOUR PAWS WOULD LIKE TO KNOW

When will the continued global expansion of plant-based chicken substitutes mentioned in YUM's CSR be visible through permanently available vegan items on the KFC-menus of the world?

In the YUM! CSR of headquarters, KFC Western Europe was appointed leading geography in adopting environmental enrichments. With its first annual chicken welfare report from 2020, KFC UK again lead by example, revealing that a third of the chickens suffer painful inflammations. The data would be used to track future progress in tackling various welfare measures, including mortality rates, antibiotic use, and stocking density.

FOUR PAWS WOULD LIKE TO KNOW

When will chicken welfare reports also become standard in the US and worldwide to improve keeping conditions for the chickens bred for KFC products?

KFC China has announced a partnership with a Russian 3D bioprinting company to develop printed chicken.

FOUR PAWS WOULD LIKE TO KNOW

Is anything alike planned by headquarters to be rolled out globally?

HQ country vs non-HQ country with most outlets

HQ US Result: 39% → Rank 6					Most outlets outside HQ country: China Result: 35% → Rank 6				
	• Worst chain in product portfolio: One of the two ranked chains with neither vegetarian nor vegan mains					• Plant-based milk and ice cream substitutes • Announced partnership with Russian 3D bioprinting company to develop printed chicken			
	• No live animal transport policy • No vegan main dishes					• No live animal transport policy • No vegan main dishes			
INDICATORS					INDICATORS				
				No vegetarian or vegan main dishes				1 vegetarian option; dairy substitute & promo meat substitute	
	Expand chicken substitutes & cooperation w/ Beyond Meat							Expand chicken substitutes & cooperation w/ Beyond Meat	
				Statement on meat reduction					

Shared features	
	<ul style="list-style-type: none"> Mention continued expansion of plant-based protein as source of emissions reduction: If customers continue to choose these options over meat-based proteins, fewer animals will need to be raised for food and their emissions will be avoided. Expect significant growth for KFC's chicken substitutes globally Global strategic partnership with Beyond Meat
	<ul style="list-style-type: none"> Still no plant-based meat substitutes on a permanent basis



McDonald's

While McDonald's claimed to evaluate the impact of its use of animal protein on the planet, people, and animals, it was rather unfortunate to see that McDonald's US had one of the worst results in the plant-based product portfolio section: The headquarter country offered neither vegan nor vegetarian main dishes (such as sandwiches, wraps, or breakfast items) and no plant-based substitutes either. The McPlant was only available temporarily in eight locations across the US after the research and ranking was published, so it is not reflected in the results. McDonald's China offered promotional meat substitutes, which was a good start; however, the products were not vegan because they contained eggs. McDonald's Germany has been offering vegan burgers on a permanent basis in all its restaurants for quite some time now. McDonald's Austria and UK finally introduced the McPlant after the previous fast-food ranking was launched. However, in the UK, it was only available in select restaurants.

The strategic partnership with Beyond Meat to develop new alternatives to pork, chicken, and eggs was announced early 2021.

FOUR PAWS WOULD LIKE TO KNOW

When will the US headquarters lead by example and make plant-based meat substitutes and other vegan and vegetarian main dishes permanent menu items globally?

Plant-based milk was only available at McDonald's China, Germany, and Austria locations.

FOUR PAWS WOULD LIKE TO KNOW

When will McDonald's start to offer dairy alternatives globally?

In Germany and the UK, McDonald's took part in initiatives like World Vegan Day, Veganuary, and Meat Free Monday.

FOUR PAWS WOULD LIKE TO KNOW

FOUR PAWS would like to know: Why does McDonald's US, as the headquarters, not participate in comparable programmes?

HQ country vs non-HQ country with most outlets

HQ US Result: 30% → Rank 8	Most outlets outside HQ country: China Result: 45% → Rank 4
<ul style="list-style-type: none"> Offering MSC-certified fish only (Filet-o-Fish) Announced first piloting of McPlant for 3 Nov 2021 in eight locations across the US for a limited time (after the launch of our ranking) 	<ul style="list-style-type: none"> Offer plant-based milk Offered plant-based meat substitutes on a promotional basis before McDonald's US
<ul style="list-style-type: none"> Currently worst chain regarding product portfolio: One of the two ranked chains offering neither vegetarian nor vegan main dishes No meat reduction goals, instead carbon mitigation 	<ul style="list-style-type: none"> No traceability of animal products

					INDICATORS					
				No vegeta- rian / vegan main dishes	Current status of plant-based product portfolio			Vegetarian dishes, soy milk & promo meat substitutes		
	Develop new meat alternatives in cooperation w/ Beyond Meat				Statement on the increase of plant-based alternatives				Develop new meat alternatives in cooperation w/ Beyond Meat	
				X	Statement on meat reduction	X				

Shared features	
<ul style="list-style-type: none"> One Welfare policy: evaluate their impact on planet, people and animals, focusing on fish, beef and chicken 3-year strategic partnership with Beyond Meat: develop new alternatives to pork, chicken and eggs 	
<ul style="list-style-type: none"> No plant-based meat substitutes on a permanent basis 	

Subway

Looking at the CSR section, FOUR PAWS positively noted that Subway supported the elimination of gestation crates globally: In Subway's European supply chain, gestation crates were already phased out completely and, in the US, Subway aimed to achieve this goal by 2022.

Unfortunately, in comparison to many other fast-food chains, Subway had no policy in place for increasing their plant-based alternatives.

It is surprising that there were huge differences in the product portfolio between the US, Canada, and the European market: While vegan subs were offered in all the countries assessed, plant-based meat and cheese substitutes were only available in the UK and DACH region (e.g. the Meatless Meatball Marinara or T.L.C. sub in the UK or the Meatless Chicken Teriyaki in Germany.)

FOUR PAWS WOULD LIKE TO KNOW

When will Subway headquarters make these choices available on a permanent basis in the US, Canada, and further countries as well to meet the growing demand for plant-based and innovative alternatives?

At Subway US, plant-based dishes were comparably more expensive: There were subs containing meat that were cheaper than the plant-based option, which would not support flexitarian customers in opting for something other than meat.

FOUR PAWS WOULD LIKE TO KNOW

Would Subway consider offering plant-based subs and future meat substitutes for at least the same price as the conventional counterparts or even for less to promote meat reduction?

HQ country vs non-HQ country with most outlets

HQ US
Result: 29% → Rank 9

- Expecting to phase out pork from gestation crates in the US by 2022
- Plant-based dishes comparably more expensive

Most outlets outside HQ country: Canada
Result: 29% → Rank 9

- Only chain where plant-based dishes are comparably less expensive

					INDICATORS					
		Permanent vegan & vegetarian options			Current status of plant-based product portfolio			Permanent vegan & vegetarian options		
				X	Statement on the increase of plant-based alternatives	X				
				X	Statement on meat reduction	X				

Shared features

- Statement on live animal transport
- Support the elimination of gestation crates and transition toward group housing
- Permanent vegan and vegetarian options
- One of the six ranked chains without statement on increase of plant-based alternatives
- Do not offer plant-based dairy and cheese substitutes
- Do not offer plant-based meat substitutes on a permanent basis



Papa John's

Unfortunately, in comparison to many other fast-food chains, Papa John's US did not mention the increase of plant-based alternatives as a goal in its CSR. However, this could support their overall goal in taking steps to reduce the impact on the environment and should be seen as a priority in the CSR.

FOUR PAWS WOULD LIKE TO KNOW

Would Papa John's US be willing to put a stronger emphasis on the increase of plant-based alternatives and the reduction of meat and other animal protein in its CSR?

In comparison to the UK's portfolio, Papa John's US has a lot of catching up to do: Customers in the UK could choose from a range of vegan pizzas and different meat substitutes as well as plant-based cheese, dip and ice cream, while Papa John's US did not offer a single vegan main dish nor meat substitutes for their costumers, even while speaking about the benefits and positive effects of plant-based foods for our planet on their media platforms. On social media, potential customers already complained to Papa John's headquarters because the US portfolio has drastic deficits when compared globally.

FOUR PAWS WOULD LIKE TO KNOW

When will Papa John's headquarters fulfill the growing demand for plant-based alternatives globally?

HQ country vs non-HQ country with most outlets

HQ US
Result: 29% → Rank 9

	<ul style="list-style-type: none"> • One of six ranked chains without statement on increase of plant-based alternatives • No vegan main dishes • Do not offer plant-based dairy and cheese substitutes • Do not offer any plant-based meat substitutes
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Most outlets outside HQ country: UK
Result: (former ranking*) 39%

	<ul style="list-style-type: none"> • Taking part in Veganuary • Vegetarian and vegan main dishes permanently available • Plant-based substitutes for meat, cheese and icecream are fixed menu items
<p>* The displayed reference score of 39% originates from the previous ranking of 43 assessed fast-food chains in the DACH region and the UK (published in early 2021). With its 39%, Papa John's came in on rank 12 of 30.</p>	

					INDICATORS					
			Vegetarian main dishes		Current status of plant-based product portfolio				Permanent vegan & vegetarian options & meat substitutes	
				✘	Statement on the increase of plant-based alternatives			Hired vegan chef to expand plant-based menu		
				✘	Statement on meat reduction	✘				

Shared features

	<ul style="list-style-type: none"> • Participating in Meatless Mondays
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Wimpy

No animal welfare policy or statement could be found for Wimpy South Africa. Wimpy UK in comparison has adopted the Better Chicken Commitment²⁶ to acknowledge the importance of higher welfare standards for chickens and to underline their desire to source food sustainably.

FOUR PAWS WOULD LIKE TO KNOW

When will Wimpy South Africa develop a strong global animal welfare policy to keep up with its international counterparts?

Looking at the product portfolio, South Africa was lagging again: In the UK, customers could choose between vegetarian and plant-based mains with meat substitutes, which Wimpy UK promoted throughout its social media platforms as well as on its website. South African customers could only fall back on two vegetarian options: a veggie burger and a cheese sandwich.

Wimpy's South African mother company, Famous Brands, stated they are aiming to "offer vegetarian and/or vegan options" with their customers' health in mind; increasing plant-based alternatives would also reduce their carbon footprint.

FOUR PAWS WOULD LIKE TO KNOW

When will Wimpy South Africa take responsibility as headquarters to act more sustainably and increase its healthier animal- and climate-friendly menu options by adding a variety of plant-based alternatives while reducing its meat offerings?

HQ country vs non-HQ country with most outlets

HQ South Africa
Result: 12% → Rank 11

	<ul style="list-style-type: none"> • One of three ranked chains without an animal welfare policy • No vegan main dishes • Do not offer any plant-based meat substitutes
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Most outlets outside HQ country: UK
Result: (former ranking*) 26%

	<ul style="list-style-type: none"> • Taking part in Veganuary • Recently added a plant-based burger to its menu
<p>* The displayed reference score of 26% originates from the previous ranking of 43 assessed fast-food chains in the DACH region and the UK (published in early 2021). With its 26%, Wimpy came in on rank 23 of 30.</p>	

					INDICATORS					
			Vegetarian main dishes		Current status of plant-based product portfolio				Permanent vegan & vegetarian options & meat substitutes	
				✘	Statement on the increase of plant-based alternatives	✘				
				✘	Statement on meat reduction	✘				



Nando's

No CSR or sustainability statement could be found on Nando's South African website. This made it the only company in the Atlas Challenge ranking that had no publicly available CSR. However, Nando's UK talked about sustainability on its website and about increasing plant-based offerings to combat climate change and drastically reduce its carbon footprint.

FOUR PAWS WOULD LIKE TO KNOW

When will Nando's headquarters catch up and develop a sustainable CSR policy to lead Nando's restaurants worldwide in the right direction?

Looking at the portfolio, the results show that despite Nando's headquarters being in South Africa, they were far from being progressive when it comes to clear labelling of vegan food options and the availability of plant-based meat substitutes. Nando's UK took the lead here again: In the UK, the Great Imitator was offered as a meat substitute which tastes just like their famous PERi-PERi chicken breast fillet but is made from pea protein; the dishes are clearly labelled either as vegetarian or plant-based. Some dishes in South Africa seem to be vegan, but, unfortunately, the labelling on the menu is not very transparent: They use one symbol only for vegetarian and vegan dishes and the exact ingredients can only be looked up in the allergen booklet which is exclusively available in the restaurants.

FOUR PAWS WOULD LIKE TO KNOW

When will Nando's South Africa match its UK restaurants and offer consumers the same choice of animal- and climate-friendly products and more transparency regarding the ingredients?

HQ country vs non-HQ country with most outlets

HQ South Africa
Result: 12% → Rank 11



- Only company without a CSR
- One of six ranked chains without statement on increase of plant-based alternatives
- Do not offer any plant-based meat substitute

Most outlets outside HQ country: UK
Result: (former ranking*) 48%



- Statement on the increase of plant-based alternatives as an effort to combat climate change: aims to reduce the carbon footprint of its meals by 50% by 2030
- Plant-based meat substitutes permanently available
- Participating in Veganuary and Meat Free Monday

* The displayed reference score of 48% originates from the previous ranking of 43 assessed fast-food chains in the DACH region and the UK (published in early 2021). With its 48%, Nando's came in on rank 6 of 30.

					INDICATORS					
			Vegetarian main dishes		Current status of plant-based product portfolio				Permanent vegan & vegetarian options & meat substitutes	
				X	Statement on the increase of plant-based alternatives			Hired vegan chef to expand plant-based menu		
				X	Statement on meat reduction	X				

Shared features



- Offer various permanent vegan and vegetarian main dishes



- Do not offer plant-based dairy and cheese substitutes (except mayonnaise in the UK)



Domino's

Domino's US (9%) ranked significantly worse than Domino's UK and Germany (both 45%). Domino's US received the worst results in the CSR section in the overall ranking. Furthermore, FOUR PAWS could not find an animal welfare policy for Domino's in the US, India, and Austria. In its CSR, Domino's US stated that it only considers itself a small participant in the market for meat. Even behind these low percentages they were referring to, a very high number of animals still suffer under factory farming. Domino's is very much able to exercise meaningful influence and control by purchasing animals' parts and processed meats only from certified high animal welfare standards. Domino's Germany for instance took responsibility and signed the Better Chicken Commitment²⁷ in December 2020.

Domino's Germany stated they want to expand their vegan menu, encourage customers to try plant-based and thus also reduce greenhouse gas emissions and contribute to animals being kept without suffering. Domino's UK and Switzerland also wanted to further develop their vegan offerings.

FOUR PAWS WOULD LIKE TO KNOW

When will Domino's US as the headquarter start leading by example and put more emphasis on animal welfare in sourcing and implement an overall animal welfare policy that applies to all franchises globally?

FOUR PAWS WOULD LIKE TO KNOW

When will Domino's headquarters make this a global policy for all franchises?

While the UK and Germany showed the best results in the product portfolio section (vegan and vegetarian main dishes, vegan cheese, and permanent plant-based meat substitutes), Domino's US and Austria did not offer any plant-based main dishes nor meat-substitutes. Domino's India had the Unthinkable Pizza, the first pizza in India with a plant-based meat substitute on its menu temporarily. Headquarters were lagging big time: Other countries like Australia or Indonesia did offer meat substitutes.

FOUR PAWS WOULD LIKE TO KNOW

When will Domino's headquarters catch up and put plant-based meat and cheese substitutes on the menu on a global scale?

HQ country vs non-HQ country with most outlets

HQ US
Result: 9% → Rank 13

- Worst result in CSR section
- See themselves as a small participant in the US meat market and thus in no position to influence the meat supply chain
- Lag behind India, UK, Australia and Indonesia, who all offer meat substitutes (or at least did at some point)

Most outlets outside HQ country: India
Result: 11% → Rank 12

- Traceability of cheese through collaboration with 10,000 dairy farmers
- Used to sell the Unthinkable Pizza, the 1st pizza in India with a plant-based meat substitute (only temporarily), which was heavily promoted, when available

					INDICATORS					
			Only vegetarian options		Current status of plant-based product portfolio		Only vegetarian options			
				✘	Statement on the increase of plant-based alternatives	✘				
				✘	Statement on meat reduction	✘				

The results show that, while some of the chosen international fast-food chains were on the right track in upping their plant-based game, there was a lot of room for much needed improvement. None of the assessed fast-food chains had any meat reduction goals in place and none were ranked as **Very good**.

The only chain which ranked as **Good** was Starbucks US with a score of 55%, who offered vegan and vegetarian options as well as plant-based meat substitutes on a permanent basis, highlighted that plant-based foods are better for the climate and announced the roll-out of their Greener Stores, aiming to develop more sustainable business strategies. Starbucks China also happened to be the best chain of the five Chinese branches assessed; in Shanghai, the first Greener Store opened just recently with a 50% plant-based menu to impress.

The majority of chains fell in the **Average** category: 50% did not offer any plant-based main dishes or meat substitutes at all and McDonald's US and KFC US even failed to offer any vegetarian mains. The meat substitutes at Burger King US and plant-based options at Subway US were more expensive than their meat options, which would not motivate meat-eaters to give the plant-based version a shot.

While the majority announced that they wanted to expand their plant-based menu in the future, these options were

often only available temporarily or in only selected few stores and choice was limited. FOUR PAWS sees it as a good sign though that more and more chains have partnered up with manufacturers of plant-based meat substitutes on a long-term basis. The chains should also consider further replacing animal-based products: The market for fish²⁸, cheese²⁹ and egg³⁰ substitutes has huge potential and should not be forgotten when extending the plant-based portfolio.

Papa John's, Wimpy, Nando's, and Domino's were categorised as **Low**: Their CSRs – if publicly available at all – did not consider important topics like animal welfare, climate action, or the increase of plant-based alternatives. Apart from Nando's, none of the other chains offered plant-based main dishes and none put any substitutes for animal-based products on their menus.

66% of South Africans are "highly interested" in plant-based protein and cultured meat.³¹

Looking at the scores of the big international chains across all countries assessed, in the case of Starbucks and Taco Bell in the US, the two best companies of this ranking, did headquarters receive better results than any other country. All other chains performed best in the UK except for McDonald's in China, which received the highest score.

Fast-food Chain	US	ZA	CN	CA	GT	IN	UK	DE	AT	CH
Starbucks	55		47				48	41	36	39
Taco Bell	50				40		42			
KFC	39		47				54	44	29	38
Pizza Hut	47		39				60	43		
Burger King	45		35				45		43	
McDonald's	30		45				33	44	37	35
Subway	29			29			38		36	
Papa John's	24						39			
Wimpy		12					26			
Nando's		12					48			
Domino's Pizza	9					11	45	45	4	34

Country abbreviations: Canada = CA, China = CN, Guatemala = GT, India = IN, United States of America = US, South Africa = ZA



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This outcome is mainly down to the considerably wider choice of plant-based menu-options in the respective country: While, in their headquarter country, McDonald's, KFC, Papa John's, Domino's, Subway, Nando's and Wimpy did not offer any meat substitutes, their UK branches did, as did the German branches of Subway, Domino's, and Burger King as well as the Chinese branches of McDonald's and KFC.

In a test run, KFC Canada sold a month's worth of Lightlife-based chicken sandwiches in six hours and thus made it a permanent menu item³².

Also, when it comes to plant-based dairy substitutes, Europe and China are a step ahead: One can find dairy alternatives at McDonald's in Germany, Austria, and China, and at Burger King and KFC China, and cheese substitutes at Domino's in Germany, Switzerland, and the UK, but none in the US.

By now, most of the big fast-food chains acknowledge the crucial role of how animal protein and particularly meat contributes towards climate change. So far, not a single chain has taken responsibility and drawn the conclusion that the pro-active reduction of meat is key – not only to reduce the number of suffering animals in factory farms, but also to slow down global warming.

Prior to the publication of this report, a lot of the big companies had announced huge sustainability initiatives, often talking about the reduction of emissions of restaurants and offices, which only play a minor role though. Experts reviewing McDonald's plans and data for example found that the one step needed to slash emissions has been dodged until now: dramatically reducing the amount of beef. McDonald's buys 1.9 billion pounds of beef every year for which roughly 7 million cattle need to be slaughtered. The GHG emissions of McDonald's – more than 53 million tons in 2019 – exceed several European nations' emissions.

5. What's next?

The necessity for a paradigm shift has never been more pressing: We need to cut GHG emissions drastically to prevent climate collapse. Billions of animals are not only suffering immensely under factory farming conditions, but also pose a serious risk as potential breeding ground for future pandemics. Therefore, one of the most important steps towards a sustainable food system to be undertaken by the food industry – one they should not miss – is the reduction of meat, fish and other animal-based products and the substantial increase of plant-based offerings.

FOUR PAWS welcomes the first steps some of the global fast-food players have taken towards a more climate- and animal-friendly nutrition, for example Starbucks' environmentally conscious Greener Stores with a 50% plant-based menu in Shanghai and Burger King UK's announcement to have a 50% plant-based menu by 2030. While some fast-food giants are taking necessary steps, there is still much room for improvement to minimise the carbon footprint within this meat-focused sector, especially by optimising their product portfolio. Up until now, not a single chain named the reduction of meat as a measure to reduce their carbon footprint.

With the growth of the global population in mind, the ask for meat dishes including fast-food is bound to explode. The fast-food industry is rapidly expanding in China and India, the

two countries with the biggest population on Earth. In China, the demand for animal protein could increase by up to 30% by 2050³³, claiming enormous land and water resources as well as increasing GHG emissions, making

satisfying China's food demand without harming the environment one of the greatest sustainability challenges for the coming decades³⁴.

Companies need to understand that they do not only meet demand – they actually drive it. Huge marketing budgets are used to sell low-cost beef products, thus increasing consumption instead of doing the much-needed opposite³⁶. Adding to

this problem, a study by the University of Boston found that sizes of fast-food portions increased significantly over the last decades³⁷. Strategic steps towards a meat reduction approach need to be taken and manifested in companies' corporate sustainability plans straight away. The reduction of meat as well as dairy products and other animal-derived proteins needs to be moved to the centre of the companies' interest and across all the countries they are operating in.

FOUR PAWS is looking forward to a positive exchange with the fast-food chains 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:

- 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 among 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.***

A new analysis shows a 90% acceptance rate for environmentally sustainable cultivated meat across Chinese customers³⁵.

Contact details: For further information about The Atlas Challenge, or if you wish to be a pioneer in the food industry by reducing meat and fish and increasing innovative plant-based offerings, please get in touch at: TheAtlasChallenge@four-paws.org

* e.g. reduction of total meat and fish content of all ingredients of products by 20% by 2023.

** Depending on existing marketing tools the company utilises, 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.

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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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