Moving the Menu:
How Top Fast-Food Chains Rank on Diversifying Protein for People and Planet
Introduction

The global animal protein industry is going through an unprecedented level of competition and disruption, driven largely by a shift toward more plant-based eating. Food businesses around the world have been investing in protein diversification to meet the demand of diners who are seeking individual meals or whole dietary changes that align with their core values, including better health, animal welfare, and sustainability. This growth in demand for plant-based proteins has benefited businesses with an increase in foot traffic, sales, new customer acquisition, and returning lapsed customers—all while lowering ingredient costs and providing valuable differentiation among stiff competition.¹

For the purposes of this report, “protein diversification” is defined as investing in and expanding plant-based, cell-cultured, fungal-based, and whole-plant proteins, shifting away from an over-reliance on conventional, resource-intensive animal proteins.

Plant-based foods are experiencing a surge in popularity as consumers seek healthier, more humane, and sustainable options. According to a 2019 Mintel report on dining out in the United States, more than one in five diners want restaurants to offer more plant-based entrees.²

Restaurant chains such as Burger King®, Starbucks®, Pizza Hut®, and White Castle® have added plant-based burgers, sausages, and breakfast patties from brands such as Impossible Foods® and Beyond Meat® to their menus with incredible financial success.

The global plant-based meat market size is expected to grow at a compounded annual growth rate (CAGR) of 19.4% from 2020 to 2027. Products that are driving this growth are plant-based burgers, sausages, and chicken. Plant-based burgers accounted for more than 29.0% of the global revenue share of all plant-based meats in 2019, while plant-based chicken accounted for more than 34.0%. However, it is the plant-based sausages segment that is estimated to register the fastest CAGR from 2020 to 2027 due to the rising demand for these products, specifically.³

Growth in the plant-based sector has primarily been driven by the mainstream emergence of the “flexitarian” — someone who still eats meat and dairy but actively seeks to reduce the levels they consume—as well as growing numbers of vegetarians and vegans. More and more consumers are responding to a combination of ethical, environmental, and health concerns. Concern for animal suffering and greenhouse gas (GHG) emissions created by the intensive animal farming industry, together with celebrity endorsements of plant-based eating, are projected to further boost the demand for plant-based meat products.⁴

The new Moving the Menu report grades America’s 50 largest fast-food chains on their efforts to diversify protein offerings, highlight the benefits of plant-based proteins in their corporate social responsibility (CSR) reporting, and make public commitments to reduce meat or increase plant-based menu items by a percentage. A full methodology is provided at the end of this report.

Entirely plant-based quick-service restaurants were not graded given that there weren’t any companies that make the list of Top 50 chains in the US. However, World Animal Protection applauds these chains for offering customers a wide range of humane and sustainable protein options. These plant-based chains include Veggie Grill®, HipCityVeg®, and by Chloe®.
Points and Tiers

The highest possible grade a company can receive is 130 points. Companies are awarded 1 - 5 stars depending on the points earned:

<table>
<thead>
<tr>
<th>POINT RANGE</th>
<th>STARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 59</td>
<td>★</td>
</tr>
<tr>
<td>60 - 69</td>
<td>★★</td>
</tr>
<tr>
<td>70 - 79</td>
<td>★★★</td>
</tr>
<tr>
<td>80 - 89</td>
<td>★★★★</td>
</tr>
<tr>
<td>90 - 130</td>
<td>★★★★★</td>
</tr>
</tbody>
</table>

The weighting of the scoring was designed to encourage companies to move beyond only adding plant-based menu items and toward highlighting the benefits of these products in their annual CSR or sustainability reporting and setting a public commitment to a plant-based percentage or a meat reduction target.

Company Rankings Overview

★★★★★ — Diversified protein options, benefits highlighted in reporting, strong commitment

★★★★ — Diversified protein options, moving along
Company Rankings Overview

★★★★ – Making progress, more is needed

★★★ – Lacking nationwide meatless options, failing to make progress

★ – Not meeting expectations when it comes to plant-based options and committing to meat reduction
Menu Movers and Dining Dawdlers

Given the varying degrees of progress within the industry, it is important to highlight the few “Menu Movers” that are taking meat reduction seriously and several “Dining Dawdlers” that are holding the industry back.

### Menu Movers

World Animal Protection applauds the following companies as Menu Movers. They are among the 50 largest fast-food chains in the US in terms of number of locations and are leaders in the industry when it comes to meat reduction and protein diversification. Our Menu Movers include:

**In 2020, Starbucks added the Impossible™ Breakfast Sandwich to its menu nationwide. In doing so, the company upheld its commitment to expanding plant-based meat offerings. The announcement followed several meetings with World Animal Protection. World Animal Protection also regularly shared resources on plant-based innovation with the coffee chain and the importance of animal welfare and meat reduction to sustainability. The company’s sustainability reporting clearly highlights the benefits of plant-based proteins, saying, “Expanding Starbucks plant-based menu globally is one of the ways we are pursuing our carbon reduction goal.” Finally, the company’s 2020 Global Environmental and Social Impact Report states, “To meet our 2030 goals, we set five key strategies, rooted in science, grounded in Starbucks Mission and Values, and informed by comprehensive market research and trials: Expand plant-based menu options.”**

**Yum! (Taco Bell®, KFC®, Pizza Hut®, The Habit Burger®)**

Over the last few years Yum! Brands, the parent company for Taco Bell, KFC, Pizza Hut, and The Habit Burger, has made a clear investment in more humane and sustainable proteins. From plant-based chicken trials at KFC, to global expansion of permanent plant-based meats at Taco Bell, and most recently, trials of plant-based pepperoni at Pizza Hut, Yum! has stepped up to the plate and is on track to hit a home run when it comes to meat reduction. The company’s 2020 Global Citizenship & Sustainability Report clearly highlights the benefits of offering planet-based proteins, stating, “An additional source of emissions reduction will be the continued expansion of plant-based protein on our menus. We expect significant growth for Taco Bell’s plant-based beef alternative products in the US, Pizza Hut’s plant-based pepperoni and KFC’s chicken substitutes globally between now and 2030. As customers continue to choose these options over meat-based proteins, fewer animals will need to be raised for food, and their associated emissions will be avoided.”

In 2021, Taco Bell trialed two proprietary plant-based proteins at select US locations. The announcements followed ongoing conversations with World Animal Protection and marked the first time in the US that the company tested plant-based proteins. Additionally, Yum! Brands has committed to expanding plant-based options globally, even developing a strategic partnership with Beyond Meat.
An industry leader, Burger King was one of the first to offer a nationwide plant-based option with its Impossible™ Whopper. The chain has continued to test and innovate, with select locations offering meatless breakfast sausages. In the company’s most recent CSR report, Restaurant Brands International (RBI)®, Burger King’s parent company, stated, “Burger King US guests who chose the Impossible™ Whopper in 2020 avoided the equivalent greenhouse gas emissions of driving about 520 million miles in an average passenger vehicle.” Furthermore, the company said in the report, “Burger King continues to expand options for guests looking for plant-based menu items.”

It should come as no surprise that Chipotle ranked as a Menu Mover. The company has long been a proponent of sustainability and higher animal welfare. With its seasoned tofu sofritas and strong commitment to expanding plant-based options, Chipotle has earned its place as an industry leader. The company’s most recent sustainability report highlighted its Real Foodprint in partnership with HowGood®, which shows the carbon footprint of its ingredients. This directly shows the low carbon emissions associated with plant-based foods and showcases the importance of diversifying protein options.

Panera’s transparency and deep commitment to animal welfare and sustainability are behind the chain’s 5-star ranking. From investing in the development of plant-based meats, to publicly calling for a plant-based item in each of its menu categories, Panera is investing in the future. The company’s most recent sustainability report states, “In the coming years, our long-term aspiration is to have a menu where half of our entrees are plant-based, starting with one new option in every menu category. While some menu innovation was put on hold during the pandemic, we are currently moving forward with plans to test several new plant-based dishes in 2021.”
While 39 out of 50 of the companies scored received only a single star, World Animal Protection is calling on the largest of those chains to commit to meat reduction and invest in protein diversification to make the greatest impact for animals.

World Animal Protection urges the following Dining Dawdlers to take swift action to incorporate plant-based meat into their business strategies:

**SUBWAY**

While select Subway locations offer a plant-based meat option, the chain is failing to provide a nationwide item. Furthermore, the company’s sustainability report fails to highlight the benefits of plant-based options and the company does not have any public commitment to expanding options or reducing meat consumption.

**McDonald’s**

As one of the largest and most iconic fast-food chains in the US and around the world, as well as one of the largest purchasers of chicken and beef, McDonald’s has a responsibility to meet consumer demand, be more sustainable, and improve animal welfare. Sadly, the company is failing on all three fronts. While the company has a strategic partnership with Beyond Meat, no product has been tested in the US. Furthermore, the company has made no public commitment to expanding plant-based options.

**Dunkin’**

Dunkin’ was one of the first to offer a plant-based breakfast sausage, and even touted the financial benefits of its Beyond Breakfast Sandwich. However, in 2021 the company pulled the item from its nationwide menu. World Animal Protection has reached out asking for it to be reintroduced but sadly the company has failed to act. Dunkin’ has an opportunity to improve its score with reinvestment in a permanent, nationwide plant-based item and a public commitment to expanding plant-based offerings.

**Domino’s**

In 2020, Domino’s tested a plant-based meat at select locations in the US. Unfortunately, the company has been slow to innovate and is failing to commit to expanding the menu and highlighting the benefits of plant-based proteins in its CSR reporting.

**Wendy’s**

While Wendy’s recently announced a Spicy Black Bean Burger at select US locations, the company has been slow to embrace plant-based meats that appeal more directly to meat-eaters. This is crucial to reducing meat consumption. Furthermore, Wendy’s is failing to highlight the benefits of plant-based proteins in its 2020 Corporate Responsibility Report or commit to further expanding meatless options.
Scoring Breakdown

(Companies listed according to number of locations)

1. **Subway** - ★

2. **Starbucks** - ★★★★★

3. **McDonald's** - ★

4. **Dunkin'** - ★★★

5. **Pizza Hut** - ★★★★★

6. **Burger King** - ★★★★★

7. **Taco Bell** - ★★★★★

8. - ★

9. - ★

10. - ★
Scoring Breakdown

(Companies listed according to number of locations)

11. Little Caesars - ★
12. KFC - ★★★★★
13. SONIC - ★
14. Arby’s - ★
15. Papa John’s - ★
16. JJ - ★
17. CHIPOTLE - ★★★★★
18. bush’s Baking - ★★★★
19. Chick-fil-A - ★
20. Popeyes - ★
### Scoring Breakdown

(Companies listed according to number of locations)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Jack in the box</td>
<td>★</td>
</tr>
<tr>
<td>22</td>
<td>Panera</td>
<td>★★★★★</td>
</tr>
<tr>
<td>23</td>
<td>Panda Express</td>
<td>★</td>
</tr>
<tr>
<td>24</td>
<td>Hardee's</td>
<td>★</td>
</tr>
<tr>
<td>25</td>
<td>Jimmy's</td>
<td>★</td>
</tr>
<tr>
<td>26</td>
<td>Papa Murphy's</td>
<td>★</td>
</tr>
<tr>
<td>27</td>
<td>Five Guys</td>
<td>★</td>
</tr>
<tr>
<td>28</td>
<td>Wingstop</td>
<td>★</td>
</tr>
<tr>
<td>29</td>
<td>Auntie Anne's</td>
<td>★</td>
</tr>
<tr>
<td>30</td>
<td>Firehouse Subs</td>
<td>★</td>
</tr>
</tbody>
</table>
Scoring Breakdown

(Companies listed according to number of locations)

31  Carl's Jr.
32  🌶
33  🍕
34  Zaxby's
35  🍔
36  🌴 cafe
37  🍔
38  🍔
39  🍔
40  QDOBA

World Animal Protection
Scoring Breakdown

(Companies listed according to number of locations)

1. Moe’s - ★★★
2. Tim Hortons - ★
3. Del Taco - ★
4. Steak ’n Shake - ★
5. Pollo Loco - ★★★
6. McAlister’s Deli - ★
7. Cane’s - ★
8. In-N-Out - ★
9. Jason’s Deli - ★
10. Shake Shack - ★
World Animal Protection acknowledges Just Salad® as a leader in the fast-dining industry for its efforts in protein diversification and meat reduction. Since inclusion in this ranking is limited to the 50 largest chains by number of locations, Just Salad doesn’t qualify. However, the company has long used innovation to push the envelope regarding meat reduction, animal welfare, and sustainability. In 2019, Just Salad announced it would replace all grass-fed beef with plant-based Beyond Beef® meatballs to reduce meat consumption and improve sustainability. Additionally, the company has helped improve the lives of chickens by committing to Global Animal Partnership (GAP) standards, including meeting minimum space requirements and enrichment.

In 2020, the company made significant progress despite a challenging year with COVID-19. Just Salad relaunched its smoothie menu using only plant-based milks and yogurts rather than the traditional dairy options. The company also introduced its Climatarian Menu, with “climatarian eating” defined as choosing foods with planetary health as well as an individuals’ personal wellness in mind. “A climatarian eater might decide between two salads that both look appetizing by choosing the one with the lower carbon footprint,” says Sandra Noonan, chief sustainability officer with Just Salad. Furthermore, following several meetings with and product recommendations from World Animal Protection, Just Salad introduced Daring Foods® chicken to its menu in November 2020. The plant-based chicken item joins the chain’s two other meatless options, Beyond Beef® and tofu.

In Just Salad’s March 2021 sustainability report, the company highlighted the environmental advantages of its plant-based protein options. According to the report, US diet-related emissions would immediately drop by 35% if Americans replaced half of all animal-based food with plant-based alternatives.

World Animal Protection applauds Just Salad for its efforts and hopes the company will continue to diversify protein offerings and commit to a public meat reduction target.
Conclusion

Through World Animal Protection’s scoring, it is clear that the majority of America’s largest fast-food chains are failing to invest in protein diversification and set clear meat reduction targets. This is deeply troubling given the fact that the Centers for Disease Control and Prevention estimates that about 85 million Americans eat fast food on any given day.38

Furthermore, many of the companies scored in the Moving the Menu report are among the largest purchasers of meat on the planet and have an obligation to do better when it comes to improving both animal welfare and sustainability. As an industry, fast-food companies are failing by and large when it comes to driving a reduction in meat consumption. In doing so, they are missing a key opportunity to make meaningful advancements towards their commitments to animal welfare and environmental sustainability. What’s more, expanding protein options makes good business sense, bringing in new customers, driving foot traffic, and increasing profits.

World Animal Protection applauds the Menu Movers and other high-ranking companies for their commitment to offering customers a sustainable and kinder plant-based dining experience. In doing so, they are helping to make plant-based eating easier and more accessible. Eating less meat has the potential to put an end to cruel factory farming, including practices such as extreme confinement, the overuse of antibiotics, and brutal mutilations.

Through our original research that was published at end of 2020 on the animal impacts of food chains offering plant-based options, we were able to estimate that nearly one million animals will exit the food system each year thanks to fast-food companies currently offering plant-based products from Beyond Meat and Impossible Foods. As companies continue to expand plant-based options and offer a variety of meatless brands, the number of animals saved will continue to increase.

And Here’s Where You Come In.

You can help us move menus. Tell the companies you buy from that diversifying protein options is important to you and your continued loyalty:

✔️ Ask companies that received ★ and ★★ to add plant-based meats to the menu;

✔️ Tell companies that received ★★★ and ★★★★★ to highlight the benefits of humane and sustainable proteins in their CSR reporting, and commit to reducing the amount of meat, dairy, and eggs on their menus;

✔️ Support the companies that received ★★★★★ and have invested in protein diversification, highlight the benefits of plant-based proteins in their CSR reporting, and are committed to reducing meat consumption.
Methodology

The companies graded were selected based on the total number of locations in 2019, as provided by QSR Magazine. The total number of locations includes both franchised and company-owned units. All of the information used for scoring was publicly sourced and available. This included reviewing annual sustainability and corporate social responsibility reports, as well as public statements, press releases, and menus. Additionally, World Animal Protection contacted each company scored to ensure accuracy and to provide an opportunity for feedback.

For the sake of this scorecard, we define a plant-based meat product as a manufactured food item that does not contain any animal ingredients and has been produced to be a direct replacement for an animal-based food item. This includes manufactured food products from brands such as Beyond Meat®, Impossible Foods®, Gardein®, Daring Foods®, and JUST®. Excluded from this are whole food plant-based items such as salads, French fries, vegetable side dishes, and black bean, sweet potato, or quinoa burgers. An exception is made for soy-based products, like seasoned tofu sofritas.

Furthermore, while cultivated and fermented meat and dairy products have yet to hit the market, it’s our hope that future iterations of this report will include these foods.

The following methodology was used for scoring:

1. **Number of permanent plant-based products on the company’s menu (30 points available)**
   - 0 plant-based products = 0 points
   - Currently testing plant-based product, limited-time offer, or available in select stores = 10 points
   - 1 permanent plant-based product = 20 points
   - 2+ permanent plant-based products = 30 points

2. **The company highlights the benefits of plant-based meat products in annual CSR or sustainability reporting (50 points available)**
   - Any mention of the environmental, animal welfare, or social benefits of plant-based offerings included in annual CSR or sustainability report = 50 points.
   - No mention of any environmental, animal welfare, or social benefits of plant-based offerings in their annual CSR or sustainability report = 0 points.

3. **Company has set a public commitment to permanently offer plant-based menu items or a public target to reduce meat products offered (50 points available)**
   - Any public commitment around permanently offering plant-based meat options or meat reduction target = 50 points.
   - No public commitment to permanently offer plant-based menu items or a meat reduction target = 0 points.
## Scoreboard

<table>
<thead>
<tr>
<th>Company</th>
<th>Total # of locations (2020)</th>
<th>Total number of qualifying plant-based items on menu (0, 10, 20, or 30 points given)</th>
<th>Are plant-based protein benefits mentioned in CSR reporting? (0 or 50 points given)</th>
<th>Is there a public meat reduction or plant-based commitment? (0 or 50 points given)</th>
<th>Total Score</th>
<th>Stars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burger King</td>
<td>7,346</td>
<td>30</td>
<td>50</td>
<td>50</td>
<td>130</td>
<td>★★★★★</td>
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<td>Starbucks</td>
<td>15,041</td>
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<td>50</td>
<td>50</td>
<td>120</td>
<td>★★★★★</td>
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<td>50</td>
<td>120</td>
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<td>50</td>
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<tr>
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<td>50</td>
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<td>110</td>
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<td>50</td>
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<td>50</td>
<td>80</td>
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<td>0</td>
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<td>★</td>
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<td>23,802</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>★</td>
</tr>
<tr>
<td>Domino’s</td>
<td>6,157</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>★</td>
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</tbody>
</table>
## Scoreboard

<table>
<thead>
<tr>
<th>Company</th>
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<th>Total Score</th>
<th>Stars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Little Caesars</td>
<td>4,213</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>★</td>
</tr>
<tr>
<td>Panda Express</td>
<td>2,184</td>
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<td>0</td>
<td>0</td>
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<tr>
<td>Hardee’s</td>
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<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
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<td>Carl's Jr.</td>
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<td>0</td>
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<td>Tropical Smoothie Café</td>
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<td>0</td>
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<td>Wendy’s</td>
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<td>0</td>
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<td>★</td>
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<td>Sonic Drive-in</td>
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<td>0</td>
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<td>★</td>
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<td>Arby’s</td>
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<td>0</td>
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<td>★</td>
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<td>Papa John’s</td>
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<td>★</td>
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<td>Chick-fil-a</td>
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<td>0</td>
<td>0</td>
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<td>★</td>
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<td>Popeyes Louisiana Kitchen</td>
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<td>Jack In The Box</td>
<td>2,243</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>★</td>
</tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Jersey Mike’s</td>
<td>1,667</td>
<td>0</td>
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## Scoreboard

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<tr>
<th>Company</th>
<th>Total # of locations (2020)</th>
<th>Total number of qualifying plant-based items on menu (0, 10, 20, or 30 points given)</th>
<th>Are plant-based protein benefits mentioned in CSR reporting? (0 or 50 points given)</th>
<th>Is there a public meat reduction or plant-based commitment? (0 or 50 points given)</th>
<th>Total Score</th>
<th>Stars</th>
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Endnotes


17. https://dominos.gcs-web.com/static-files/69cb4ce7-09a4-4a1f-a9c7-ac6642e2ee9e

Endnotes

20 https://impact.inspirebrands.com/sustainability/
21 https://impact.inspirebrands.com/sustainability/
23 https://impact.inspirebrands.com/sustainability/
24 https://www.chipotle.com/about-us/sustainability
26 https://www.chickfil-a.com/about/-/media/c1344a0bfa1f4b31a1a589e71d71a572.ashx
28 https://www.jackintheboxinc.com/responsibility/food-safety
30 https://www.focusbrands.com/about/
31 https://www.moes.com/about/food
34 https://globalanimalpartnership.org/
35 https://sentientmedia.org/how-carbon-labels-are-getting-people-to-eat-less-meat/
36 https://www.worldanimalprotection.us/blogs/just-salad-just-got-even-better-thanks-new-daring-chicken
38 https://www.cdc.gov/nchs/products/dbriefs/db322.htm
Endnotes

47 https://dominos.gcs-web.com/static/files/692b4ccee-0f9a-41af-9c7-ac6642e2ee9e
50 https://impact.inspirebrands.com/sustainability/
51 https://impact.inspirebrands.com/sustainability/
53 https://impact.inspirebrands.com/sustainability/
54 https://www.chipotle.com/about-us/sustainability
56 https://www.chick-fil-a.com/about/-/media/c1344a0bfa14b31a1a589e71d71a572.ashx
58 https://www.jackintheboxinc.com/responsibility/food-safety
60 https://www.focusbrands.com/about/
61 https://www.moes.com/about/food
We are World Animal Protection.
We end the needless suffering of animals.
We influence decision makers to put animals on the global agenda.
We help the world see how important animals are to all of us.
We inspire people to change animals’ lives for the better.
We move the world to protect animals.
We strive to end injustice.