

MERCY FOR ANIMALS

Serving Up Change Report 2026

How Foodservice Providers Rank on the Better Chicken Commitment

Executive Summary

Building on the 2025 inaugural report, this second edition of Serving Up Change focuses on chicken welfare in the United States' foodservice provider (FSP) sector—an industry now valued at $78.5 billion and on track to top $110 billion by 2030. Operating behind the scenes in institutions like universities, hospitals, corporations, nursing homes, and K-12 schools, FSPs serve millions daily while largely evading public scrutiny—effectively shielding their heavy reliance on some of the cruelest factory farming practices from public view. Simultaneously, this sector wields vast purchasing power that, if directed responsibly, could drastically reshape supply chains and improve animal welfare. Adopting and implementing the Better Chicken Commitment (BCC), a set of science-backed welfare standards already embraced by more than 220 food companies, represents one of the most effective ways for companies to meaningfully reduce chicken suffering.

Mercy For Animals estimates that, collectively, the sourcing decisions of the FSPs in this report have the potential to impact the lives of over **180 million chickens**. This year, our report evaluates **27 FSPs** on their BCC policies, implementation, and transparency, providing a snapshot of the sector as a whole. While all featured companies have already committed to the BCC, year-over-year progress remains highly variable, with a mix of forward-thinking leaders and short-sighted laggards.

To reflect market dynamics, this report evaluates the "Big Three"—Compass Group USA, Aramark, and Sodexo—using dedicated narratives to account for their massive market share and heightened industry responsibility. The remaining 24 smaller companies receive numerical scores and are ranked across four tiers.

State of the FSP Sector—Progress & Challenges

State of the Foodservice Sector

Over 99% of the 9 billion chickens raised for meat in the U.S. each year come from factory farms. These operations rely on fast-growing breeds prone to severe physical deformities and muscle disorders, while raising them in overcrowded, high-stress environments that restrict natural behaviors and inflict immense suffering.

FSPs have highly centralized procurement systems that enable them to influence supplier and producer standards. By holding their suppliers accountable to BCC standards, FSPs can directly impact welfare outcomes for chickens in their supply chains and drive systemic change across the food system. Even seemingly small operational decisions—such as building culinary plans around higher-welfare products or offering educational resources at the institutions they serve—can help drive meaningful change for animals.

Despite having more limited resources and purchasing power, several smaller foodservice providers featured in this report demonstrate that significant progress toward the BCC is achievable.



Every company in the sector **has a responsibility to act on chicken welfare**, but the capacity to lead varies. **The Big Three**—with a combined revenue of $56 billion in North America—**bear the primary responsibility for driving systemic change**. Decisive action by these leaders would stimulate market supply, increase BCC-compliant availability, and lower costs, making it easier for smaller, less-resourced FSPs to fulfill their own commitments.

The Global Transition Toward Higher Chicken Welfare Standards



The U.S. chicken industry continues to lag behind Europe, where companies and entire national markets are demonstrating that higher-welfare production is achievable at scale. This year, one of Norway's largest food producers, Nortura SA, alongside the Norwegian Meat and Poultry Industry Association (KLF), committed to phasing out the use of fast-growing chickens by December 2027. **Once implemented, the transition will reduce suffering for more than 70 million chickens raised annually in Norway.**

According to reporting by the Open Wing Alliance, France provides another example of this progress. Companies representing 99% of the French retail market have committed to the European Chicken Commitment (ECC), and implementation is well underway. Carrefour, the country's largest retailer, reported that 46% of its chicken met ECC criteria in 2025.

These developments are part of a broader European movement toward higher-welfare chicken production. Since the ECC launched in 2017, at least 394 companies have committed to the standard, which will eventually impact an estimated 1.3 billion chickens. Each of the three largest European producers of chickens raised for meat has adopted the ECC, demonstrating that higher-welfare production is increasingly viable at scale.

Around the globe, the public, investors, and consumers are demanding that food companies act as responsible corporate stewards and reduce animal suffering in their supply chains. If FSPs choose not to respond to these shifts in consumer preferences, they risk falling behind in an evolving market.



ECC vs. BCC: A snapshot of Regional Progress

More than 650 food companies have adopted the BCC or its equivalent, including many major multinational brands. In Europe, the standard is known as the European Chicken Commitment (ECC), while the BCC name is used in North America, the UK, Australia/New Zealand, and Brazil. **Although the name varies by region, the core welfare requirements are equivalent.**

More than 230 U.S. companies have adopted the BCC, but only one of the four largest U.S. chicken producers, Perdue, currently offers a line approaching BCC compliance. Tyson Foods, Pilgrim's Pride, and Wayne-Sanderson Farms—the other three largest producers—have thus far opted to maximize profits rather than adopt BCC standards. See page 13 for a list of BCC-aligned producers.

All Big Three FSPs have committed to both the BCC and ECC, yet they have made greater progress on higher-welfare breeds (HWB) in their European operations. While this may reflect the greater availability of higher-welfare chicken in European markets, it also demonstrates that these companies are capable of advancing breed transitions within their own supply chains. Rather than waiting for the market to develop, the Big Three can use their purchasing power in the U.S. to signal sustained demand for BCC-compliant chicken and push producers to invest in higher-welfare production.

Public opinion also supports this shift: surveys show strong backing for companies to improve animal welfare within their supply chains in both the U.S. and Europe. Companies should respond to these expectations by raising the bar for chicken welfare in the U.S. and matching the progress already underway in other regions.

Every Piece Matters: Advancing Chicken Welfare and the BCC

The BCC is the recognized gold standard for reducing suffering among chickens raised for meat. Because full compliance often requires an incremental shift over time rather than an overnight switch, every FSP can make measurable year-over-year progress across multiple BCC components—regardless of its size, geography, or specific market.

About the BCC

The BCC includes higher-welfare management practices, such as lower stocking density, improved litter and lighting conditions, environmental enrichment provisions (e.g. perches, hay bales), ending the use of fast-growing breeds, and eliminating live-shackle slaughter.

However, the most critical, highest-impact component is transitioning to higher-welfare breeds. Fast-growing breeds suffer from lameness, heart disease, and organ failure due to their rapid growth rate—meaning environmental improvements offer little relief to birds trapped in bodies built for suffering.

Transitioning to higher-welfare breed (HWB) sourcing can present real supply-chain challenges, but companies in this report show that progress on other BCC components doesn't have to wait. To navigate these challenges, FSPs can deploy several strategies demonstrated by industry leaders:

Increase Percentage of BCC-Compliant Chicken Sourced: Start by sourcing a smaller percentage of BCC-compliant, or mostly BCC-compliant chicken, then scale purchasing toward 100 percent over time.

Proactive Supplier Engagement: Begin negotiations early to accommodate supply contract adjustments and advocate for integration of BCC standards with producers.

Strategic Roadmaps: Coordinate with suppliers and gather data to establish transparent, annual incremental targets that inform realistic, achievable sourcing strategies.

Market Trials: Trial BCC products in select regional markets or with interested clientele first. Pair these trials with client education that explains the value of higher-welfare sourcing to drive demand.

Private-Label Priority: Transition house-brand chicken lines to full BCC compliance, utilizing direct supply-chain oversight to streamline implementation.

Whole-Bird Utilization: If sourcing whole birds, companies can independently identify buyers in other industries—such as pet food, export, or food service—for cuts that fall outside their primary use (e.g., thighs or wings), improving supply chain economics and reducing waste.

Culinary Innovation: Leverage culinary teams to adapt and reinvent menus using BCC-compliant chicken, using menu changes as an opportunity to educate clients and customers about chicken welfare.

Ultimately, there are many proven paths forward, allowing each company to select the approach that suits its unique situation. However, companies must make continuous, year-over-year progress across multiple components. To accelerate progress, many companies have begun by replacing a percentage (e.g., 10–20%) of noncompliant chicken with BCC-compliant or mostly BCC-compliant chicken, then gradually increasing the percentage purchased across supply chains. Meaningful BCC implementation requires FSPs to move beyond policy statements and demonstrate real accountability to the public. *(Our inaugural report addressed common BCC myths and misconceptions; see page 4 of last year's report to learn more.)*

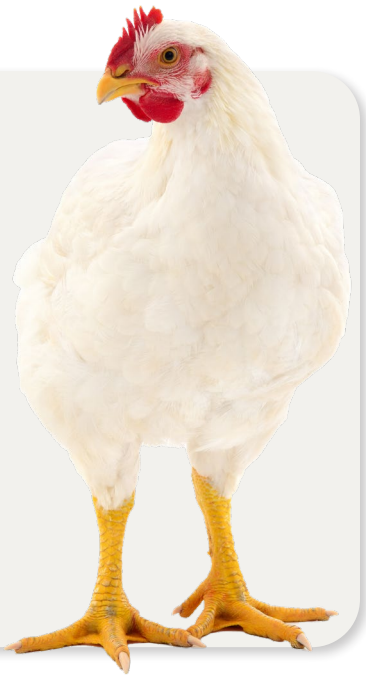


FSP Sector Progress & Transparency

Progress toward the BCC varies widely across the 27 evaluated FSPs. Some smaller, more resource-limited FSPs have made notable strides and continue to report annual progress. Meanwhile, despite having substantial resources and purchasing power, several larger companies have stalled or made little headway.

Regardless of the company profile, BCC compliance is entirely achievable. However, it requires a company to make an intentional, realistic commitment while maintaining transparency. To demonstrate progress and maintain accountability, FSPs can keep their clients and the public informed by:

- Ensuring that the BCC policy is time-bound, comprehensive, and publicly available.
- Including a detailed roadmap with clear, incremental milestones for full BCC implementation. *(See Appendix for a roadmap template.)*
- Committing to publishing annual progress updates towards BCC fulfillment.
- Disclosing implementation challenges in public updates, including concrete steps being taken to overcome them.



Full implementation of the commitments in this report would spare an estimated 180 million chickens annually from some of the cruelest practices of modern factory farming.



The following section ranks FSPs according to their BCC progress, highlighting leaders and calling out laggards.

Scoring is determined by three fundamental criteria: the publication of a comprehensive BCC policy, the existence of a BCC roadmap, and annual reporting on implementation progress. The three largest FSPs are evaluated narratively. The remaining companies are placed into one of four tiers based on their scores.

See the appendix for the full scoring methodology.

Company Evaluations & Rankings

The Big Three: An Outsized Responsibility to Chickens

Compass Group USA, Aramark, and Sodexo are the three largest U.S. FSPs and wield outsized influence over chicken sourcing. Because of their scale, they are evaluated separately from the remaining FSPs, which are scored and ranked numerically.

Rather than assigning the Big Three numerical scores, this report assesses whether they are demonstrating **industry leadership** in fulfilling their BCC commitments. All three companies have comprehensive, time-bound BCC policies, but meaningful leadership requires more than making a commitment. Given their size and influence—and the nearly decade-long history of their commitments—these companies should be demonstrating substantial implementation and communicating a credible strategy for transitioning to higher-welfare breeds, the BCC's highest-impact component.

Big Three Leadership Assessment Criteria

Leadership Demonstrated: The company has made substantial progress toward fulfilling its BCC commitment, including meaningful action toward higher-welfare breed sourcing, and is using its market influence to accelerate broader industry change.

Leadership Not Demonstrated: The company has significant gaps between its commitments and implementation and has not demonstrated meaningful progress or a credible strategy for transitioning to higher-welfare breeds.



Compass Group USA

Leadership Assessment: **Not Demonstrated**

As the largest foodservice provider in the United States, Compass Group has the greatest power—and the greatest responsibility—to significantly reduce suffering for chickens in its supply chain and across the industry. Generating over $31 billion in North America alone last year, the company has more than enough financial resources to drive this change. In 2016, Compass became the first major FSP to commit to the BCC, pledging to eliminate the use of fast-growing breeds. Nearly a decade later, that promise remains largely unmet. After missing its original 2024 deadline, Compass pushed its target to 2028 and published an incremental roadmap. However, extended timelines are meaningless without tangible procurement plans to meet them.

As of August 2026, Compass reports a dismal **1% progress on breed transition**, completely missing its 2025 target of 10%. Furthermore, the company has failed to share a public plan for reaching 100% breed compliance by 2028. Drawing out timelines without executing concrete supply contracts renders its extended deadline entirely unrealistic.

Compass Group's massive scale makes its inaction indefensible. Generating $31 billion annually across North America, serving over 13 million meals daily, and operating 28 sub-brands across all 50 states, the company single-handedly shapes market dynamics. When adopting its BCC policy, Compass stated it would positively impact **60 million chickens annually**. Today, virtually all 60 million birds in its supply chain remain fast-growing breeds prone to immense physical suffering. With major producers ready to supply higher-welfare birds and Compass possessing ample financial and market power, its failure to act is a deliberate choice.



MFA Action

Mercy For Animals is running an active public awareness campaign urging Compass Group to secure supplier contracts for HWB chicken or to immediately accelerate the implementation of other components for which supply is readily available. While Mercy For Animals works extensively behind the scenes to help companies map out viable paths forward, we also recognize the importance of holding organizations accountable to their timelines.

Through our Compass Cruelty campaign, we are highlighting the company's failure to act—educating consumers at Compass-catered institutions through public demonstrations, digital advertising, and out-of-home campaigns.

Recommendations

Compass Group USA must immediately execute signed contracts with producers for HWB chicken and/or aggressively accelerate progress across all other commitment components. Because breed genetics drive the most severe suffering, Compass cannot claim true progress while stalled on this front. It must accelerate improvements in stocking density, lighting, and environmental enrichment, and slaughter methods, while actively developing a real plan for a breed transition.

Aramark

Leadership Assessment: **Not Demonstrated**

As the second-largest foodservice provider in the United States, generating over $13.2 billion from its U.S. segment in fiscal year 2025 alone, Aramark has the market power and financial resources to drive higher-welfare chicken sourcing—yet meaningful progress remains elusive. Aramark committed to the BCC in 2017, aiming for full implementation by 2024. After missing that deadline, the company published an updated roadmap in July 2024, pushing full compliance to **2027**.

Aramark reports its progress more transparently than many peers, but transparency does not reduce suffering. Progress on the BCC's highest-impact components, including higher-welfare breeds and controlled atmosphere stunning (CAS), remains minimal. With its 2027 deadline fast approaching, Aramark has little room left to close the gap.

Recommendations

Aramark should immediately sign supplier contracts for HWB chicken and prioritize the components where it has made the least progress. To meet its 2027 commitment, the company must work closely with suppliers to hit annual milestones while maintaining transparent, granular reporting against clear targets.

Sodexo

Leadership Assessment: **Not Demonstrated**

As one of the largest foodservice providers in the United States, generating over $12.1 billion in the North American region in fiscal year 2025 alone, Sodexo has the financial resources to drive higher-welfare chicken sourcing. The company was among the first to commit to the BCC in 2016, but after a full decade to lead the industry, meaningful progress remains minimal. As of its most recent public update, the company reports 0% progress on higher-welfare breeds and just 1% on CAS, the BCC's two most critical components.

Rather than setting clear annual targets, Sodexo's roadmap relies on multi-year ranges—for example, targeting "2–80%" CAS progress between 2025 and 2027—a structure that would allow the company to claim compliance with its roadmap targets by achieving just 2% progress by 2027. While Sodexo aims for full implementation by 2028, its history of missed deadlines and an opaque roadmap raises serious concerns about its feasibility. Furthermore, while many peer FSPs have already disclosed progress against their 2025 targets, Sodexo has yet to do so.

Recommendations

Sodexo must replace its multi-year target ranges with clear, annual incremental milestones. The company should immediately begin sourcing HWB chicken, expedite CAS implementation, and ensure executive leadership fully resources this decade-old commitment.

Delaware North: One Step Forward, One Step Back



Delaware North may sit outside the "Big Three," but as the fourth-largest foodservice provider in the nation, its massive scale carries similar responsibility to deliver on its animal welfare commitments. Delaware North made incremental BCC progress in 2025 and has published a formal roadmap for its chicken welfare goals. However, its corporate environmental program, GreenPath, remains behind the curve on animal welfare. Unlike its industry peers, the company has yet to integrate a formal plant-based initiative into its sustainability strategy. As highlighted in Mercy For Animals' campaign, Delaware North owes it to both its clients and the animals in its supply chain to adopt a holistic strategy—turning corporate promises into lasting, meaningful progress.

See page 10 for a breakdown of Delaware North's animal welfare ranking.

Honorable Mentions

Quest Food Management Services: Published a partial BCC policy and roadmap, with a commitment to release its first progress update by the end of 2026.

HHS: Improved transparency by publishing a timebound roadmap with annual milestones.

Lessing's Hospitality Group: Reported major progress in 2025, surpassing the majority of its BCC targets.

Rankings and Scores—for all non-Big Three companies

		Policy	Roadmap	Progress	Earned Points	
1	Delaware North	30	30	25	85	
1	HHS	30	30	25	85	
1	Whitsons Culinary Group	30	30	25	85	
1	Lessing's Hospitality Group	30	30	25	85	
1	SFE	30	30	25	85	
2	Café Services	30	30	0	60	
2	elior	30	30	0	60	
2	Parkhurst Dining	30	30	0	60	
2	Metz Culinary Management Environmental Services	30	30	0	60	
2	Quest Food Management Services	15	15	0	35	+5 BONUS
3	Nexdine Hospitality	30	0	0	30	
3	Pomptonian	30	0	0	30	

	Policy	Roadmap	Progress	Earned Points
3 Sebastians Catering	30	0	0	30
3 Epicurean Feast	30	0	0	30
3 Creative Dining Services	25*	0	0	25
3 Healthcare Services Group	25*	0	0	25
3 OPAA!	15	0	0	15
4 Southern	0	0	0	0
4 Guckenheimer	0	0	0	0
4 Thomas cuisine	0	0	0	0
4 Genuine	0	0	0	0
4 OVG Oak View Group	0	0	0	0
4 AVI Foodsystems	0	0	0	0
4 Zest Culinary Services	0	0	0	0

*5 point deduction for out of date policy

Recommendations & Call to Action



The momentum behind broiler welfare directly mirrors the transition toward cage-free eggs. While the transition to 100% cage-free sourcing is ongoing, cage-free supply has already established a dominant foothold across the food system. The number of cage-free hens in the U.S. has surged from 37.3 million in 2015 to 129.2 million today—comprising 44.8% of the total flock. This progress did not happen in a vacuum; it is the result of sustained corporate commitment driven by consumer demand for higher welfare standards—a demand that continues to build as momentum for the BCC grows.

Ongoing inaction on the BCC is indefensible. Adopting these standards does require time and some upfront investment, but forward-thinking FSPs stand to bolster their brand reputation and earn public trust. FSPs must actively engage suppliers to ensure compliance with the BCC and prioritize procurement from vendors that offer compliant products. Major FSPs, particularly the Big Three, can leverage their massive purchasing power to pave the way for smaller operators to improve welfare standards, helping to drive meaningful improvements in the quality of life of billions of chickens.

Producers have demonstrated that supplying FSPs to meet BCC compliance is both feasible and scalable. Major poultry producers like Perdue, alongside specialized suppliers such as LaBelle Patrimoine, Pitman Family Farms, Joyce Farms, and Greener Pastures Chicken, already offer or have the capacity to produce BCC-compliant chicken. Conversely, several of the nation's largest poultry producers, Tyson Foods and Pilgrim's Pride, have yet to commit to supplying BCC-compliant chicken and continue to fall behind industry expectations.

Ultimately, FSPs occupy a unique position in the food economy. By embracing the BCC, these companies can insulate their supply chains against long-term risks, satisfy growing consumer demand for responsible sourcing, and drive large-scale welfare improvements for millions of chickens.



Typical Factory Farm

Producer Snapshot

The following Producers have BCC compliant or nearly compliant chicken available:

Perdue

- Offers chicken lines raised in compliance with most BCC standards, including litter, lighting, enrichments, stocking density, CAS, and third-party auditing.
- Requires contracts for BCC-compliant high-welfare breed orders to be signed up to 12 months in advance.

Pitman Family Farms (Mary's Chicken brand)

- Raises Legacy and Heirloom lines that meet all components of the BCC, including higher-welfare breed requirements.

LaBelle Patrimoine

- Meets all components of the BCC, including higher-welfare breed requirements, with the exception of CAS.
- Committed to transitioning to controlled atmosphere stunning (CAS) by 2027.

Joyce Farms

- Raises BCC-compliant heritage breeds (Poulet Rouge Fermier) that meet all BCC principles except for controlled-atmosphere stunning (CAS).

Greener Pastures Chicken

- Meets all components of the BCC, including higher-welfare breed requirements, with the exception of CAS.
- Committed to transitioning to CAS when it is commercially available.

Pilgrim's

Tyson Foods

Wayne Sanderson Farms

Chicken producers are critical to advancing BCC standards and offerings. Of the four largest U.S. producers—Perdue Farms, Pilgrim's Pride, Tyson Foods, and Wayne-Sanderson Farms—only Perdue has committed to providing BCC-compliant chicken.

Appendix: Methodology and Ranking

Foodservice Provider Report
Scoring Criteria & Pre-Publication Score

Score Tiers	
Top Tier	61–100
Second Tier	31–60
Third Tier	15–30
Fourth Tier	0–15

Scoring Methodology

Policy		
Criteria	**Points Possible**	**Points Earned**
None, policy removed	0 pts	
Partial, weakened language, not time-bound	15 pts	
Full, time-bound	30 pts	
Roadmap		
Criteria	**Points Possible**	**Points Earned**
No roadmap, removed	0 pts	
Partial, annual milestones for some BCC components or percentage of overall supply	15 pts	
Full, annual milestones for each BCC component until 100% fulfillment	30 pts	
Roadmap		
Criteria	**Points Possible**	**Points Earned**
No progress reported	0 pts	
Partial, progress on some BCC components	20 pts	
Outdated, full progress on each BCC component	30 pts	
Full, progress on each BCC component	40 pts	
Companies earned five bonus points by publicly committing to a target date for publishing their progress.		

*5 point deduction for out of date policy

Better Chicken Commitment Roadmap Template

This Better Chicken Commitment (BCC) roadmap template provides a structured framework for companies to outline their strategy and timeline for fulfilling their commitment to sourcing 100% of their chicken supply in accordance with BCC standards. By providing year-over-year targets, the template enables companies to set clear milestones toward fulfilling their BCC promises. The customizable nature of this template enables companies to input percentage points based on their specific supply data, ensuring a tailored approach for meeting their commitments. This template facilitates transparency, accountability, and progress tracking in advancing animal welfare standards.

BCC Component	2025 progress	2026 progress to date	2027	2028
Stocking Density (6.0 lb./sq. ft.)	X%	X%	**100%**	
Litter Requirements	X%	**100%**		
Lighting Requirements	X%	**100%**		
Environmental Enrichments	X%	**100%**		
CAS Processing	X%	X%	X%	**100%**
Higher-Welfare Breeds	X%	X%	X%	**100%**
Third-Party Auditing	X%	X%	**100%**	

If you are a food provider who wants to learn more about the BCC, visit the Better Chicken Commitment website. Additionally, if you are a company interested in working with Mercy For Animals to receive guidance or support in adopting your own BCC policy, please reach out to corp-us-ca@mercyforanimals.org.