



Moving the Menu 2024

Ranking the Top Restaurant Chains on Plant-Based Offerings and Meat Reduction Policies



Table of Contents

- Introduction..... 3**
 - The Negative Impacts of Meat Consumption 3
 - Meat Reduction and Diversified Proteins 3
 - Plant-Based by Default 5
 - Impacts of Meaningful Change..... 5
- Individual Restaurant Rankings 6**
- Summary of Rankings 7**
 - Burger Breakdown 7
 - Chicken Choices 7
 - Coffee Critique..... 8
 - Sandwich Selections..... 8
 - Mexican-Inspired Match-up 8
- Conclusion and Recommendations..... 9**
- How You Can Get Involved..... 9**
- Appendix A: Scoring Approach and Methodology.....10**
 - Grades and Descriptors 10
 - Full Scoring Breakdown..... 11

Cover photo: Homemade plant-based burger on a whole wheat bun, resting on a wooden surface. Credit: Linda Hugues.



Introduction

Moving the Menu 2024 assesses the top five chain restaurants across five different cuisine categories in the United States on their inclusion of plant-based product offerings and efforts toward reducing animal-based foods in their businesses—critical steps to protecting our planet and building a resilient, sustainable, and kind food system.

Meaningfully increasing and promoting non-animal proteins while reducing the role of meat on restaurant menus must be a key component of a company's sustainability strategy. This shift is crucial for creating a more humane and sustainable food system that benefits animals, people, and the planet and for feeding future generations.

The Negative Impacts of Meat Consumption

The United States has one of the world's [highest meat production and consumption rates](#). Nine billion land animals are killed annually on factory farms. Factory farming is responsible for immense animal suffering and catastrophic environmental damage.

Factory farms prioritize profit above all else, resulting in billions of animals being forced to live in cramped, unsanitary conditions. Additionally, animals on factory farms are routinely subjected to painful mutilations without anesthesia and face a violent death. Animal agriculture is also a major contributor to greenhouse gas emissions, [contributing nearly 15% globally](#). Even if other industries become carbon-neutral in the next 25 years, emis-

sions from the food system alone would exceed the [1.5°C limit set by the Paris Agreement](#), and no restaurants in the report have set the necessary meat reduction goals to meet climate and sustainability commitments.

Factory farming also drives the production of [vast quantities of feed crops](#). Animal feed production has devastating environmental impacts, including habitat destruction for wild animals, declining biodiversity, water pollution, pesticide pollution, soil degradation, and increased greenhouse gas emissions. Shifting to plant-based menus and meals would significantly reduce antibiotic use in food production, addressing the overuse in animal farming where currently an estimated [70-80% of antibiotics sold in the US are consumed](#), and mitigating the growth

and spread of antibiotic-resistant superbugs.

If companies continue their current practices, by 2050, the number of chickens and pigs killed for meat will be three times that of cows. The mass production and slaughter of chickens and pigs for food has enormous planetary impacts and is not a viable or sustainable alternative protein. A [recent study](#) by World Animal Protection found that reducing US consumption of chickens and pigs by 50% by 2040 would be equivalent to taking 8 million cars off the road for a year.

Moving the Menu is a rallying cry for restaurants to adopt plant-based menu items and aggressive meat reduction targets to foster the much-needed shifts to protect what we have before it's too late.

Meat Reduction and Diversified Proteins

The protein landscape is evolving rapidly, with a growing emphasis on reducing meat intake and embracing innovative protein sources that do not require the raising or killing of animals. Many plant-based proteins from classic tofu and seitan to newer entries like Tindle, Daring, or Meati products are increasingly familiar to consumers.

Emerging proteins include fermentation-based products produced using microorganisms like bacteria, yeast, or algae and cell-cultivated meat produced directly from animal cells.

Plant-based protein consumption has surged in recent years, with [70% of US citizens now consuming such products, marking an increase from 66% in 2022](#). Projections indicate that the market for plant-based foods is set to reach [USD 22.3 billion by 2029](#). This growth is reflected across multiple segments. Plant-based milk comprises [15% of all milk sold in the US](#), while sales of plant-based meat, eggs, and other products have also shown consistent growth.

Approximately ten percent of US consumers purchased plant-based meat alternatives at food service locations—including restaurants – in 2022, with plant-based meat buyers making around [30 more trips to food service locations annually](#). As consumers become more conscious of their dietary choices, there is a growing demand for plant-based alternatives. By embracing fermentation proteins, cultivated meat, and plant-based options, restaurants can play a pivotal role in shaping the future of protein con-



sumption and support a more ethical and environmentally friendly food system.

Plant-Based by Default

“Plant-based by default” refers to offering plant-based dishes as the primary or default option, with animal-based products presented as alternatives. Amid shifting consumer preferences and growing environmental concerns, the inclusion of plant-based by default options has become a core focus in menu development.

Consumers tend to choose a plant-based option when it is offered as a default choice. Recent studies have shown that vegetarian default interventions significantly decrease consumers’ choice of meat dishes, with between [53% and 87% fewer meat options chosen](#). Studies conducted in university dining halls found that [81% of students](#) chose plant-based entrées when they were available as the default option. Gen-Z students are not only receptive to plant-centered dining but also express satisfaction with establishments that prioritize plant-based meals.



“Consumers tend to choose a plant-based option when it is offered as a default choice.”

81%

of students chose plant-based options when they were available as the default option.

Impacts of Meaningful Change

When restaurants adopt meaningful meat reduction policies and integrate plant-based options into their menus, they play a crucial role in alleviating the immense suffering endured by billions of animals in factory farms, decreasing food-related emissions, and protecting the environment.

In previous iterations of the Moving the Menu report, World Animal Protection has assessed companies on their implementation of commitments to removing cruel gestation crates and improving conditions for chickens. While these efforts are important, increasing the sourcing of innovative animal-free products is the most effective way to reduce cruelty in their supply chains. By focusing on plant-based and other alternative proteins, companies can make significant strides in creating a more humane and sustainable food system. While public commitments are a positive step, restaurants must also report measurable progress in implementing these commitments.

Individual Restaurant Rankings

Category	Restaurant	Score	Grade
 Burger Breakdown	McDonald's	0	F
	Burger King (RBI)	65	C
	Wendy's	0	F
	Sonic Drive-In (Inspire)	0	F
	Carl's Jr./Hardee's	20	F
 Chicken Check	KFC (Yum!)	10	F
	Popeyes (RBI)	30	F
	Chick-fil-A	0	F
	Wingstop	0	F
	Raising Cane's	0	F
 Coffee Critique	Starbucks	90	C
	Dunkin' (Inspire)	25	F
	Tim Hortons	50	D
	Dutch Bros	20	F
	Peet's	120	B
 Sandwich Scrutiny	Subway	40	D
	Arby's (Inspire)	0	F
	Jimmy John's	5	F
	Jersey Mike's	5	F
	Panera Bread	5	F
 Mexican-Inspired Matchup	Taco Bell	35	D
	Chipotle	145	B
	Moe's Southwest Grill	40	D
	Del Taco	5	F
	Qdoba	40	D

Summary of Rankings

This report ranks 25 of the top US restaurant chains, organized into five popular categories: burgers, chicken, sandwich, coffee/beverage, and Latin/Mexican-inspired. Evaluating restaurants in this manner enables companies to easily see how they compare to their most direct competitors.

Burger Breakdown



Chicken Check



Coffee Critique



Sandwich Scrutiny



Mexican-Inspired Matchup



Restaurant Summary (cont.)

Burger Breakdown

Burger King is the only burger chain not to receive an **F (very poor progress)** and gets a **C (making progress)**. Burger King makes some progress with plant-based options like the Impossible Whopper, which it has continuously promoted and committed to keeping on their menu. Its parent company, RBI (Restaurant Brands International), acknowledges the benefits of plant-based options in its reporting, however, there is still significant room for improvement. Burger King needs to increase the variety and number of plant-based menu items, commit more meaningfully to meat reduction in its supply chain, and enhance its promotion of the benefits of plant-based foods.

McDonald's, Wendy's, Sonic Drive-In, and Hardee's/Carl's Jr. show little to no progress in plant-based option availability or meat reduction commitments, receiving an **F grade (very poor progress)**. While Burger King stands out slightly, the burger restaurant sector has substantial room for growth in increasing plant-based options and reducing meat purchasing.

Chicken Check

All chicken restaurants receive an **F (very poor progress)**, showing little to no action in promoting plant-based options or committing to meat reduction. There is an urgent need for improvement within the chicken restaurant sector, given that billions of individual chickens are killed each year for conventional meat products. These establishments have a clear opportunity to align with evolving consumer preferences and promote sustainability in their operations.

Coffee Critique

Peet's was one of the highest-ranking companies across all sectors, receiving a **B (good progress)** and demonstrating significant progress compared to its peers. Peet's stood out for its plant-based by default options on both its food and drink menus, as well as comprehensive policies supporting plant-based offerings with firm commitments to continue offering them. Peet's could further improve by setting public meat reduction commitments, decreasing animal protein purchasing, and acknowledging the benefits of reducing meat and dairy consumption through marketing and resources.

Starbucks also stood out with a **C (making progress)** but showed the need for continued improvement. While Starbucks offers a variety of plant-based by default beverages, it lacks plant-based food options. It must implement more comprehensive commitments to plant-based options and adopt a policy to reduce its animal protein purchasing.

Tim Hortons receives a grade of **D (little progress)** and reflects their limited availability of plant-based by default food options and the minimal language from their parent company, RBI, that supports a shift towards a plant-based diet. Dutch Bros and Dunkin both receive an **F (very poor progress)** due to their failure to demonstrate meaningful progress in integrating plant-based options into their menus or adopting policies that advocate for plant-based diets.

Ranking Summary (cont.)

Sandwich Scrutiny

Like burger and chicken restaurants, sandwich restaurants scored poorly across the board. All restaurants received an **F (very poor progress)** except for Subway which got a **D (little progress)**. Subway's limited progress in offering select plant-based food items contributed to its modestly higher score. Subway has not advocated for plant-based options in its reporting and does not have any commitments or promote plant-based products.

The other sandwich restaurants, Arby's, Jimmy John's, Jersey Mike's, and Panera Bread have made minimal to no progress in embracing plant-based by default options or making sustainability commitments.

Mexican-Inspired Matchup

Chipotle stands out, scoring a **B (good progress)**, higher than all other restaurants in this category. Chipotle offers a large selection of plant-based by default dining options and has extensive language in their reporting advocating the benefits of plant-based options. Additionally, Chipotle has more transparent reporting about their supply chain than other restaurants assessed. Chipotle could further improve by implementing commitments to decreasing animal protein purchasing and publicizing meat and dairy reduction commitments.

Moe's and Qdoba both received a **D (little progress)** due to some availability of plant-based options, but both lack commitments toward decreased meat purchasing and advocating plant-based options to their customers. Taco Bell also scored in **D (little progress)**. While they have language supporting plant-based options and many items can be easily modified to be plant-based, their lack of fully plant-based by default options prevented them from scoring higher.

Reviving Plant-Based Success: Keeping Innovation on the Menu

Many restaurants evaluated in this report have conducted successful trials of plant-based options but later discontinued them. Notably, McDonald's trialed the "McPlant," KFC tested the Beyond Chicken Sandwich, and Taco Bell introduced an all-vegan Crunchwrap Supreme and nacho cheese. Despite indications that these items would achieve similar success with nationwide rollout, many companies have demonstrated a lack of meaningful investment in this space. It's crucial for these establishments to keep plant-based options on their menus and speak to their customers about their benefits, not only to promote meat reduction but also to offer a diversified protein menu that meets the growing consumer demand for sustainable and compassionate food choices.

Conclusion

Shifting to a plant-based and cell-cultivated food system is critical for protecting the planet's resources and equitably feeding a growing global population. Sadly, most of the largest restaurant chains in the US are falling far short in their efforts to invest in a humane and sustainable food system. Few have taken meaningful steps to diversify the protein offerings on their menus, and none have set the clear meat reduction goals necessary to meet climate and other sustainability commitments.

The plant-based sector presents an opportunity for restaurants to create innovative menus that resonate with their customers while promoting sustainability and moving the world away from cruelty. However, most companies are failing to embrace the benefits of a plant-based by default food system. Despite some chains testing new plant-based menu items on a limited basis, few restaurant chains are fully investing in heavily plant-based menus. As the plant-based sector continues to grow and other innovations emerge, restaurants must make these products available and promote their benefits to customers. It is time for restaurants to step up and lead the way towards a more compassionate and sustainable future in the food industry.

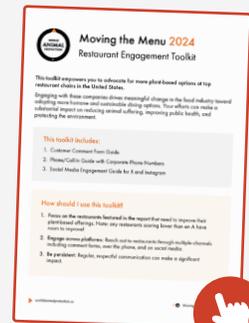
Recommendations

To advance on all issues evaluated, companies must:

- Position plant-based proteins as integral to achieving their broader sustainability goals;
- Invest in creating, adding, and promoting new plant-based by default menu items; ensure that these options are permanent and widely available.
- Set a public commitment to reduce the amount of animal products purchased by 25% by 2030, using 2020 volumes as a baseline;
- Adopt benchmarks for measuring progress and report annually on progress toward meeting sourcing and sustainability commitments.
- Identify opportunities to incorporate additional animal-free innovations into their supply chain, including emerging fermentation and cell-cultivated products.

Get involved with our free toolkit!

Your voice matters in the movement toward a more humane and sustainable food system. Use [our advocacy toolkit](#) to make a difference for animals and help drive meaningful change in the food industry. This toolkit empowers you to engage directly with the top US restaurant chains included in this report and provides resources such as customer comment forms, corporate phone numbers, and messaging templates for posting on social media.



Appendix A: Scoring Approach and Methodology

We assessed each company using publicly available information published by the company, such as websites, policy statements, annual reports, and press releases. Companies were notified via email of the full scoring methodology and the results of our initial assessments and were given the opportunity to respond. Companies were given grades ranging from A (leading on progress) to F (very poor progress).

For the purposes of this scorecard, we define a plant-based product as a manufactured food item that does not contain any animal ingredients and is promoted as a suitable, direct replacement for a main menu item that would conventionally contain animal products.

A maximum of 220 points were available across different criteria focused on the availability of plant-based options, the percentage of the menu that was plant-based by default, the price parity of plant-based options, plant-based commitments made by the company, and advocacy for a shift towards plant-based diets.

Grades and Descriptors

Criteria	Plant-Based Menu	Public Plant-Based Commitments	Advocacy
Grade A (Leading on Progress)	5+ plant-based items. 40% of the menu or more is plant-based by default. Price parity in plant-based items.	Public time-bound commitment to increasing plant-based proteins by specific percentages. Commitment to decrease animal protein.	Public facing materials (social media, marketing, reports) advocate for plant-based products. Benefits of plant-based diet acknowledged in CSR/ESG reporting. Participation in external events centered around plant-based diet.
Grade B (Good Progress)	3-4 plant-based items. ~25% of menu is plant-based by default. Plant-based options have a small price difference.	Meaningful public commitment to procurement of animal/plant-based products. Mention of animal protein purchasing.	Benefits of plant-based products and impacts of existing plant-based products acknowledged in CSR/ESG reporting. Promote plant-based products on social media/public materials.
Grade C (Making Progress)	1-2 plant-based items. Some percentage of menu plant-based by default. Plant-based options have a large price difference.	Express interest in increasing plant-based products without timeline or a clear percentage. No mention of animal protein purchasing.	Have promoted plant-based products. Acknowledge consumer interest in plant-based
Grade D (Little Progress)	Some plant-based items that must be modified, not plant-based by default.	Language in parent company reporting acknowledges benefits of plant-based products but without any clear commitment.	Some language refers to the benefits of plant-based products or environmental impact of animal protein.
Grade F (Very Poor Progress)	No plant-based items.	No time-bound commitments to increasing plant-based products or meat reduction. Fails to commit to plant-based product increase or meat reduction.	No acknowledgment of plant-based diets or products in any materials.

Appendix A (cont.)

Full Scoring Breakdown

Category	Criteria	Points Available
Number of Plant-Based Menu Items	5 or more plant-based items	20
	3-4 plant-based items	15
	1-2 plant-based items	10
	Some items can be fully plant-based with simple modification	5
	0 plant-based items	0
Percentage of Menu Plant-Based	50% or more plant-based by default	20
	25-40% plant-based by default	15
	Less than 25% plant-based by default	5
	None	0
Price Parity in Plant-Based Items	No upcharge for plant-based substitutions or items	25
	Upcharge in price for plant-based substitutions or items	0
Public meat/dairy reduction commitment	Timebound commitment to reduce meat/dairy by 50% or more	25
	Timebound commitment to reduce meat/dairy by 25% or more	15
	Public statement made in support of meat/dairy reduction	5
	Limited or no public commitment	0
Animal protein purchasing decreased 2020-2022	Company has indicated publicly that total animal protein purchases have declined since 2020	25
	No indication of decrease in protein purchasing	0
Public commitment to plant-based offering	Commitment exists	25
	Limited or no public commitment	0
Company advocates for plant-based diets	Public advocacy for plant-based diets through participation/sponsorship in plant-based events	20
	Public-facing materials, info, and social media posts support plant-based diets	20
	Public acknowledgment of the benefits of reducing meat/dairy consumption through marketing, resources, etc.	20
	Public acknowledgment of the benefits of plant-based eating through marketing, resources, etc.	20
Total Available		220