



“European Meat Companies Panorama 2025”

European Top 100 Slaughter Companies
5th edition

Brochure

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Scope:

Products Companies

Pigmeat, Poultrymeat, Beef & Sheepmeat based: slaughter capacity, utilisation, location and their other operations along the value chain.
Profiles of the top 100 firms by slaughter volume: regardless of where in the EU27+UK they are based, and what species they are focused on.

Countries

Short country profiles: The 12 key EU27+UK countries, covering the consolidation of the slaughter industry by species in each, and how the industry is developing.

Timeline

2024 data where available and using Gira's previous Top 100 from 2020 as a reference point for development.

Content:

Synthesis Report (30 pages approx.)

- ◆ **League tables + analysis of the Top 100 meat companies in the EU27+UK (Red and Poultry meat).**
 - Pan-European view of consolidation and structure; what next for the European slaughter industry?
 - Strategic insight on the structure & dynamics of EU slaughtering, similarities between species and crucially, what is changing: ownership, scale, integration, multi-species or international diversification, what could it all mean for future production?

Country Profiles (~5 pages per country)

- ◆ **The 12 key EU27+UK countries for slaughtering.** Short country profiles showing the overall market share of the leading slaughter companies in these markets by species and key trends.

Company Profiles (~5 pages per company)

- ◆ **The top 100 EU27+UK companies** by slaughter capacity. Short, insightful and informative profiles covering:
 - Species breakdown & estimated kill volume.
 - Structure: number of plants, capacities, utilisation for key slaughterhouses and locations. Other activities upstream (e.g. feed mills) or downstream (e.g. further processing)
 - Key financial indicators, employee numbers and ownership.

Gira's Slaughter Plant Directory



- ◆ **EU Slaughter Plants with key data:** for ~300 of the main companies
 - Extensive searchable list of ~ 800 registered abattoirs and ~700 meat cutting plants (Excel format)
 - EU slaughter plants, location, plant ID numbers, species – with more detail on the Top 100 companies.

Webinar

- ◆ **Publication webinar** (live & recorded) highlighting the study's key research conclusions and insights
 - Enables clients to maximise value from the research and disseminate insights to key staff.

Deliverables & Cost:

Report	Electronic, printable & searchable PDF files. The report are in English.
Company directory	Excel-based complete searchable Gira directory for European slaughter and cutting plants.
Cost	14,000 EUR (before any applicable tax).

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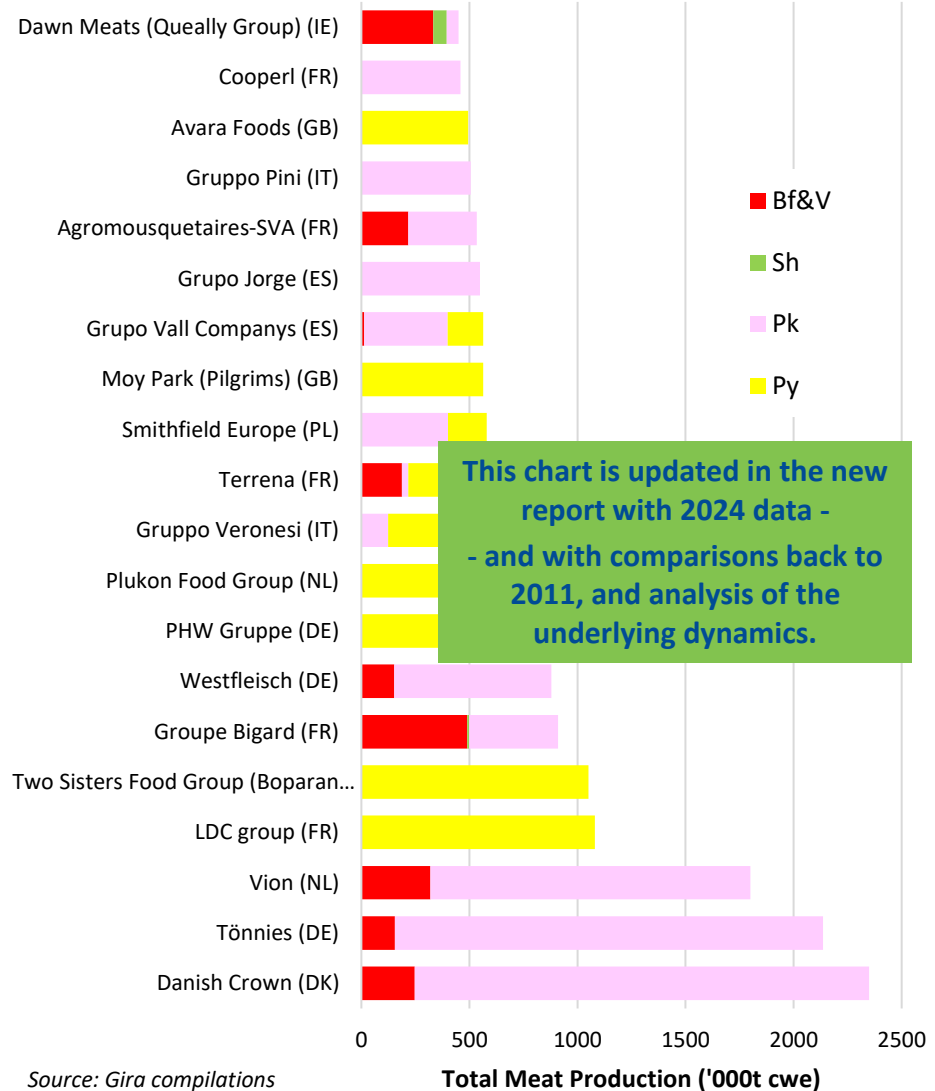
1. Introduction: Why buy this study?

Successful slaughter firms are crucial to the future of the European meat chain and those who depend on it. The ownership, strategies, and reach of the top players are **changing dramatically** as they face a powerful combination of shifting consumer markets, declining livestock numbers, sharply rising operating costs, and increased competition in 3rd-country markets.

- There are **vast differences** in the structure & integration, ownership, size, species mix and geographic coverage of the leading European meat companies, but everywhere the industry is concentrating on fewer companies.
 - Where is their labour cost advantage? Will automation change this?
 - What are the scale and integration benefits?
- Excess capacity, low profitability, surging labour costs, and regulatory pressures are already forcing a **significant restructuring** of European slaughtering, with plant closures and M&A in the last 2-3 years. These involve all the main players, but scale and even securing long-term ownership are no guarantee of success, as recent news shows.
 - Who are the likely winners and losers, and why?
- Declining livestock numbers** across Europe exacerbate pressure on processors.
 - Low producer profitability and the rising cost of ever more demanding environmental and AW programmes dampen farmer confidence and demotivate succession.
 - What impact of the surging livestock prices? Can this trend continue, or will prices rise further ... or fall?
- Increasing diversification** from their core slaughtering activity, especially up and down their meat chains. However, red meat companies tend to avoid poultry and vice versa, although there are a few notable exceptions. Is this changing? why?
- Changing meat demand in Europe** favours convenience and chicken: what opportunities and threats for primary processors?
- There is also **no truly pan-European operator** in slaughtering, although several of the leading companies do have operations in multiple markets, and most would sell across Europe. Is the industry's maturity likely to lead to international expansion within Europe, or even at a wider global level?
- The **size, sophistication and protected nature of the EU market** from lower-cost imports from 3rd countries continue to attract inward investment, with CPF and JBS amongst the global leaders investing in European processing.

This is the 5th edition of Gira's unique European Meat Company Panorama. It describes the current situation and explores the future, which is helpful for everyone in the supply chain.

Top 20 European meat companies by meat production volume 2019



Source: Gira compilations

Total Meat Production ('000t cwe)

The key objective is to explain the future structure and strategic position of the European slaughter industry and its key players. To do this, we profiled the top 100 companies, assessed their capacity and throughput, examined how they are organised upstream and downstream of their slaughtering operations, and determined whether they are collectively expanding or contracting. The slaughtering sector is the pivotal link in the meat supply chain; the pressure it is now under is driving changes across the entire European meat sector that will have medium-term ramifications.

To address this, Gira draws on its existing database of the EU slaughter industry and updates and expands it to reflect the new reality, in the process developing a database of Europe's slaughterhouses (big and small). This has then been put against the wider industry issues to provide a view of companies against the sector's broader background.

For this, the following sub-analyses have been carried out:

- Focus on the **Top 100+** firms in the context of their local competition.
- **Factual profiles** of the core activities of the major meat processors:
 - What do they kill, how much, in which countries and through how many plants?
 - The aim is to provide information on capacity and plant utilisation.
 - Do they have an integrated structure, forward and backward? How is their value chain organised?
 - How do they operate, financially and physically?
- **Country perspective:** Using Gira's existing datasets on slaughtering in the EU: define how consolidated is the slaughter industry in each sector. What are the main drivers behind recent and future developments?
- **Strategic European Overview:** What is the strategic situation and outlook for slaughtering in the EU27 + UK?
 - Segmentation by species. Who are the major operators in each of the Pigs, Poultry, Cattle, and Sheep slaughtering?
 - What has changed in the last 5 years? Recent winners and losers, and why.
 - Where is the EU slaughter sector under pressure today, and why?
 - What is the outcome going to be over the next 5 years?

The research is documented in a PowerPoint-based report of 3 main parts:

- 1) Profiles of the leading 100 companies and the key information behind them.
- 2) Country overviews for the 12 Key European countries.
- 3) Pan-European Synthesis Report.



Synthesis report

Overview of the dynamics shaping the EU+UK slaughter industry:

- How is the EU+UK slaughter industry structured, and what is driving its evolution?
- Key differences by country and macro-regions.

Gira's unique Top 100 league table of slaughtering in the EU+UK

- Subsets by species, which sector is the most concentrated and/or integrated, and where in Europe is it centred.

Country profiles

Short profiles detailing the structure and context of the slaughter industry in the key EU27+UK meat markets.

- 12 country profiles: DE, FR, UK, ES, IE, DK, NL, PL, IT, BE, HU, RO
- Meat production and demand context and dynamics.
- Meat processing industry structure & dynamics.
- Concentration by species (key companies): pork, poultry and beef.

Product: Species coverage

Slaughter industry for cattle, pigs and poultry in all of the EU27+UK;

- The main operators in the EU+UK by slaughter volume (cwe).

Sheep slaughtering in the UK, Ireland and France only.

- The study does not cover sheep in other EU+UK markets.

Top 100 EU Company Profiles

The Top 100 slaughter companies in the EU27+UK;

- Short, factual profiles on each of the Top 100 companies: the length of which reflects their size, complexity and importance
- Volume estimates of slaughtering capacity and activity by species and country.
- Summary description of ownership, financials & business development.
- Summary description of other activities directly related to the meat value chain (e.g. feed mills, further processing, etc.)

Not covered in this report:

The focus of this report is the EU27+UK slaughter companies and their alignment. Therefore, the following are not be covered:

- Companies involved only in further processing and without kill capacities.
- Detail of activity outside of Europe, other than its relevance in the overall group strategy.
- Country profiles on: AT, BG, CY, CZ, EE, FI, GR, HR, LT, LU, LV, MT, PT, SE, SL, SK.

NEW

feature

Gira's Slaughter Plant Directory - complete list of the top ~300 companies and their slaughter assets plus outlying slaughter plants by species (Excel)

Webinar – on publication

The key facts & figures, drivers & brakes, and the sector outlook – as described in the report.

- Key drivers for change: what areas are thriving, and why?
- What are the implications for the EU+UK meat sector's medium-term prospects?

Timing:

The reports and the Slaughter Plant Directory (Excel) were published in January 2026.

The webinar is scheduled for March 2026.

Subscription:

The subscription price to the complete study is **14,000 EUR** (before any tax). The price includes:

- The Synthesis volume in PDF format - including the league tables.
- 12 Country Profiles in PDF format.
- 100 Company Profiles in PDF format.
- Gira's Slaughter Plant Directory (Excel format)
- Webinar, after publication.

100% of the fee is invoiced on signing the contract

Buy-alone Option: Gira's Slaughter Plant Directory (in a searchable Excel format):

Gira directory of ~300 EU + UK slaughter firms: their ~800 abattoirs and ~700 cutting plants. **6,000 EUR** for the searchable Excel.

- This option does not include the reports or webinar

Reasonable endeavours:

The Gira team worked on this project on a reasonable-endeavours basis, with standard hold-harmless protection.

We are aware that our role is to give clear, professional, focused, commercial opinions and advice.

Client	Country
Abbott Laboratories	Intl.
ABF	UK
ABP	IE/UK
Agri Ranch	US
Agrifirm	NL
Agroeco	RU
AHDB	UK
Alic	JP
AMIC	AU
Animex (Smithfield)	PL & Intl.
Asoporcicultores	CO
Australian Pork Ltd.	AU
AVEC (European Poultry Association)	EU
Aviagen	Intl.
Bain	Intl.
Bemis	Intl.
Bounty	PH
BRF	BR - Intl.
Bunge	Intl.
Canada Beef	CA
Canada Pork	CA
Canadian Cattleman's Assoc	CA
Cargill Inc	US
Cargill Meats Europe	EU
Cobb	Intl.
CP Foods	Intl.
CFG (Campofrio Food Group)	EU
COV	NL
Crédit Agricole	FR
Danish Crown	DK

Client	Country
Danish Farmers Abroad	DK
Dawn Meats	IE/UK
Devro	UK
DSM Nutritional Products	Intl.
DuPont	Intl.
EFFAT	EU
Elanco	EU/Intl.
European Commission	EU
FAO	Intl.
FECIC (Catalan Meat Industry Association)	ES
Fedegan	CO
Fenavi	CO
Foss	DK
Fulton Market Group	USA
Handtmann	DE
HCC	UK (Wales)
Hilton Food Group	UK/EU
IFC (World Bank)	Intl.
I.M.S.	Intl.
INAC	UY
Inalca/Cremonini	IT
Inaporc	FR
Ingredion	DE
Interbev	FR
Irish Food Board (Bord Bia)	IE
JAPFA	Asia
JBS	BR - Intl.
Kemin	Intl.
Landbrug & Fødevarer	DK
LMC	UK

Client	Country
Mars	USA
McDonald's	EU
Meat & Livestock Australia	AU
Meat Industry Association NZ	NZ
Minerva	BR
Multivac	Intl.
National Pork Board	US
Nutreco	NL - Intl.
O.E.C.D.	Intl.
Pfizer	Intl.
Rabobank	Intl.
Rusagro	RU
Sainsbury's	UK
Scottish Assoc'n of Meat Wholesalers	UK
Sealed Air	Intl.
Silver Fern Farms	NZ
Smithfield (WH Group)	US/CN
Teagasc	IE
TVI	DE
USB	US
UECBV	EU
Unic	IT
Unigrains	FR
United Soybean Board	US
USMEF	US
Vion	NL/DE
Virbac	FR
Visocfan	ES
VLAM	BE
Westbridge Foods (CP Foods)	UK

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