

Europe Processed Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Europe Processed Meat Market Analysis

The European processed meat market size stands at USD 38.84 billion in 2025 and is forecast to reach USD 43.12 billion by 2030, reflecting a 2.11% CAGR through the period. In Europe, the processed meat market is experiencing slower growth, mirroring a shift in consumer values. Concerns over health, sustainability, and ethics increasingly challenge traditional meat preferences. While pork, with its deep cultural roots, continues to dominate, beef is carving out a niche, especially among those seeking premium, high-protein options. Chilled products are favored for their freshness and convenience, yet frozen items are gaining traction due to their longer shelf life and versatility. Innovations in packaging, particularly vacuum solutions, are on the rise, emphasizing shelf-life, hygiene, and sustainability. These advancements not only cater to consumer demand for longer-lasting products but also address environmental concerns by reducing food waste and incorporating eco-friendly materials. Supermarkets and retail outlets still lead in sales channels, but restaurants and hospitality venues are witnessing a significant rebound, fueled by a resurgence in tourism and a renewed dining-out culture.

Europe Processed Meat Market Trends and Insights

Increasing consumer demand for convenient and ready-to-eat meat products drives market growth

Surging consumer appetite for convenient, ready-to-eat meat products fuels market expansion. In Europe, the growing preference for processed meat products such as sausages, salami, bacon, ham, and pre-cooked chicken is a significant driver. For instance,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

the increasing adoption of ready-to-eat meals among working professionals and urban households highlights the demand for convenience. The working population, in particular, plays a crucial role in driving this demand, as busy schedules and long working hours leave limited time for meal preparation, making processed meat products an attractive option. According to the European Commission, approximately 65.4% of all parents in the EU were in active employment in 2023. Countries like Germany, Spain, and Italy have witnessed a notable rise in the consumption of processed meat due to their strong culinary traditions and the growing number of employed individuals seeking quick meal solutions. Additionally, the rise of retail chains and online platforms offering a wide variety of processed meat options further supports market growth. For example, supermarket chains such as Tesco, Carrefour, and Lidl have expanded their processed meat product ranges to cater to evolving consumer preferences.

Advancements in food processing technologies improve product quality and shelf life

Food processing technology advancements enhance product quality and extend shelf life, driving the growth of the Europe processed meat market. For instance, technologies like high-pressure processing (HPP) and vacuum packaging are widely adopted to preserve the freshness and nutritional value of processed meat products. HPP effectively eliminates pathogens without compromising the taste or texture, while vacuum packaging minimizes oxidation, thereby extending shelf life. Additionally, innovations such as automated slicing and portioning systems ensure consistent product quality, meeting consumer demand for convenience and reliability. Furthermore, the adoption of modified atmosphere packaging (MAP) has gained traction, as it helps maintain the color, flavor, and overall quality of processed meat for longer durations. Advanced freezing techniques, such as cryogenic freezing, are also being utilized to retain the texture and moisture content of meat products. These advancements not only improve product appeal but also support manufacturers in reducing waste, optimizing supply chain efficiency, and complying with stringent food safety regulations.

Health concerns related to high fat, salt, and preservative content limit consumer demand

Growing scientific evidence linking processed meat consumption to various health conditions is creating significant headwinds for market growth across Europe. Concerns about nitrites and nitrates, commonly used as preservatives in processed meats, have prompted regulatory responses, with the European Commission implementing stricter limits on these additives in animal-origin products. Denmark has pioneered more stringent national provisions, allowing for lower maximum added amounts of nitrites (60 mg/kg for many products) compared to broader EU standards (up to 150 mg/kg). Consumer awareness of these health implications is growing, with a study across multiple European countries revealing that many consumers view processed meats as unhealthy, associating them with high levels of harmful chemicals, fat, and salt. This perception challenge is particularly acute among health-conscious demographics, with women consistently demonstrating greater concern about processed meat consumption than men. The industry is responding with reformulation efforts to reduce salt, fat, and preservative content, though these modifications often present technical challenges for maintaining traditional flavor profiles and shelf stability.

Other drivers and restraints analyzed in the detailed report include:

Rising awareness about protein's role in health and fitness supports product demand / Growing tourism and hospitality sector boosts consumption in foodservice channels / Increasing shift towards vegetarian and vegan diets restrains market growth /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2024, pork solidified its position as the leading segment in Europe's processed meat market, capturing 44.12% of the market share. This dominance is deeply rooted in the strong culinary traditions of countries such as Germany, Spain, and Poland, where

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

pork-based products are a cornerstone of local diets. Products like sausages, ham, and bacon are not only staples in these regions but also enjoy widespread popularity across Europe due to their versatility and flavor.

Meanwhile, the beef segment is undergoing substantial growth, driven by the rising demand for premium and diverse meat options. Products such as premium burgers, pastrami, and bresaola are gaining traction among consumers who seek high-quality and gourmet processed meat offerings. This shift is fueled by changing dietary trends, including the growing preference for protein-rich diets and the increasing popularity of international cuisines that feature beef prominently. The segment is projected to grow at a CAGR of 4.65% through 2030, reflecting its expanding consumer base and the dynamic nature of the European processed meat market.

In 2024, chilled offerings emerged as the leading segment in the market, accounting for 61.21% of the market share. Consumers increasingly associate chilled products with freshness and artisanal quality, driving their popularity. This segment includes deli counters, sliced charcuterie, and grab-and-go ham sandwiches, which have become staples in supermarkets. These products cater to the growing consumer demand for convenience and premium options, making them a preferred choice for quick meals and high-quality ingredients.

The frozen segment, on the other hand, is experiencing significant growth, with a strong CAGR of 5.62%. This growth is primarily driven by advancements in flash-freezing technology, which effectively preserves the texture and quality of frozen products while extending their shelf life. These innovations have made frozen processed meat products highly attractive to budget-conscious consumers seeking cost-effective solutions without compromising on quality. Furthermore, the extended storage life of frozen products has positioned them as a practical choice for export buyers and households aiming to reduce food waste.

The Europe Processed Meat Market is Segmented by Meat Type (Poultry, Beef, Pork, Mutton, Other Types), by Product Type (Chilled Processed Meat, and More), by Distribution Channel (On Trade and Off Trade), by Packaging (Vacuum-Pack, Trays and More) and by Geography (Germany, United Kingdom, Italy, Spain and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Tonnes).

List of Companies Covered in this Report:

WH Group Limited / JBS S.A. / Premium Food Group ApS & Co. KG / Tyson Foods Inc. / BRF S.A. / Vion Holding N.V. / Hormel Foods Corporation / Conagra Brands, inc. / Plukon Food Group / Dawn Meats Group Ltd. / Cranswick PLC / Sigma Alimentos, S.A. de C.V. / Sysco Corporation / Leverandselskabet Danish Crown AmbA / Cargill, Incorporated / Seaboard Corporation / Mafriq Global Foods SA / The Bigard Group / Cherkizovo Group / Lambert Dodard Chancereul Group /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing consumer demand for convenient and ready-to-eat meat products drives market growth

4.2.2 Advancements in food processing technologies improve product quality and shelf life

4.2.3 Rising awareness about proteins role in health and fitness supports product demand

4.2.4 Increasing demand for ethnic and flavored processed meat varieties stimulates market innovation

4.2.5 Growing tourism and hospitality sector boosts consumption in foodservice channels

4.2.6 Growing popularity of international cuisines increases demand for diverse processed meat products

4.3 Market Restraints

4.3.1 Health Concerns related to high fat, salt, and preservative content limit consumer demand

4.3.2 Increasing shift towards vegetarian and vegan diets restrains market growth

4.3.3 Strict regulations on food safety and additives increase production costs and complexity

4.3.4 Rising raw material costs increase production expenses and affect pricing

4.4 Value and Supply-Chain Analysis

4.5 Regulatory Outlook

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitutes

4.7.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE, VOLUME)

5.1 By Meat Type

5.1.1 Poultry

5.1.2 Beef

5.1.3 Pork

5.1.4 Mutton

5.1.5 Other Types

5.2 By Product Type

5.2.1 Chilled

5.2.2 Frozen

5.2.3 Canned/Preserved

5.3 By Packaging

5.3.1 Vacuum-Pack

5.3.2 Trays

5.3.3 Cartons

5.3.4 Others

5.4 By Distribution Channel

5.4.1 Off-Trade

5.4.1.1 Supermarkets & Hypermarkets

5.4.1.2 Convenience Stores

5.4.1.3 Specialty Stores

5.4.1.4 Online Retail Stores

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.4.1.5 Other Distribution Channels

5.4.2 On-Trade

5.5 By Geography

5.5.1 Germany

5.5.2 United Kingdom

5.5.3 France

5.5.4 Spain

5.5.5 Italy

5.5.6 Denmark

5.5.7 Netherlands

5.5.8 Sweden

5.5.9 Belgium

5.5.10 Russia

5.5.11 Rest of Europe

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Ranking

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)

6.4.1 WH Group Limited

6.4.2 JBS S.A.

6.4.3 Premium Food Group ApS & Co. KG

6.4.4 Tyson Foods Inc.

6.4.5 BRF S.A.

6.4.6 Vion Holding N.V.

6.4.7 Hormel Foods Corporation

6.4.8 Conagra Brands, inc.

6.4.9 Plukon Food Group

6.4.10 Dawn Meats Group Ltd.

6.4.11 Cranswick PLC

6.4.12 Sigma Alimentos, S.A. de C.V.

6.4.13 Sysco Corporation

6.4.14 Leverandselskabet Danish Crown AmbA

6.4.15 Cargill, Incorporated

6.4.16 Seaboard Corporation

6.4.17 Mafvig Global Foods SA

6.4.18 The Bigard Group

6.4.19 Cherkizovo Group

6.4.20 Lambert Dodard Chancereul Group

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Europe Processed Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

