AI ADOPTION · MEAT

AI in the meat trade.

Where it works, where it stalls, and where to start. A look at adoption from the pig barn to the trading desk, built on public data and the companies doing it.

MAKEBETTER READ THE NUMBERS

2025 DATA

43.4 Mt

of meat traded across borders in 2025, up 3.4%

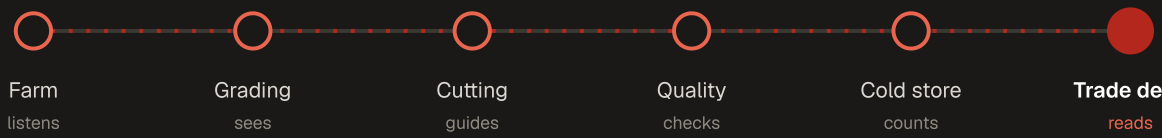
12%

of EU food, drink and tobacco makers use AI. Wholesalers: 23%

10%

of manufacturers have taken AI to scale, though 72% say they use it

The tools are ready sooner than the teams are. AI moves fastest where meat is read, not where it is cut.



01 IN SHORT

Six things to know.

Meat is one of the world's largest physical trades and one of its thinnest-margin ones. AI is arriving unevenly: fast where the work is reading and typing, slowly where the work is cutting a soft, irregular carcass. The tools are ready sooner than the teams are.

FINDING · 01

12%

The plant trails the desk

Of EU food, drink and tobacco makers, 12% used AI in 2025. Wholesalers were at 23%, the all-business average at 20%.

FINDING · 02

72% → 10%

Wide, but shallow

72% of manufacturers say they have adopted AI. Only 10% have done it at scale. Pilots are easy; the second site is hard.

FINDING · 03

1%

In the plant, yield is the prize

Cargill's CEO puts a 1% yield gain across the industry at over 200 million pounds of food. Its AI cameras show cutters the meat left on the bone.

FINDING · 04

5 days

On the farm, AI listens

Barn microphones that classify pig coughs flag respiratory disease up to five days earlier than traditional checks.

FINDING · 05

3 h → <1 h

On the desk, AI reads

A Chicago meat distributor cut order entry from up to three hours a night to under one hour a day once AI read its emails and voicemails.

FINDING · 06

69%

Skills, not money, hold it back

69% of food makers that weighed AI and passed cite a lack of expertise. Cost as a reason fell from 55% to 41% in two years.

Sources: Eurostat isoc_eb_ain2 (2025 data); Parsec manufacturing survey, July 2026; Bloomberg via Beef Magazine, Oct 2025; SoundTalks via AgTech Navigator, Jul 2025; Choco case study, Oct 2025. Full sources on each page.

02 THE TRADE

A huge trade on a thin margin.

The world produced about 387 million tonnes of meat in 2025 and shipped 43.4 million tonnes across borders. Prices are high and moving: beef and sheep meat hit record highs on the FAO index in 2025. Margins are not. That is why small gains matter so much here.

Global meat trade, 2025

Million tonnes, carcass weight equivalent. Total 43.4 Mt, up 3.4% on 2024.



Bovine 13.9 Mt
up 7.4%, the fastest-growing

Pig 10.0 Mt
up 2.3%

Poultry, sheep & other 19.5 Mt
remainder of the 43.4 Mt total

~2%

EBIT margin of European red meat processors in 2019, a record low. Margins fell 33% from 2010 to 2017.

10–15%

of a meat processor's costs are labour, with wages rising and turnover high.

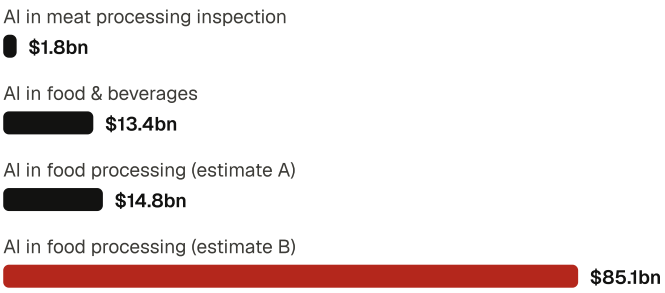
99.5%

accuracy an automated cutting machine needs before it beats people. Waste costs more than wages.

READ WITH CARE

The market forecasts disagree by a factor of six.

Analyst reports size "AI in food" for 2025 anywhere from $13 billion to $85 billion. Same year, similar labels. Use them as a sign of interest, not as a budget. Your own hours and kilos are the better number.



> In a business that keeps about two cents of every euro, AI has to pay in kilos, hours or days to cash. Not in dashboards.

Sources: FAO Meat Market Review 2025 (via Farmers Journal, BusinessWorld); FAO Food Outlook, Nov 2025; McKinsey, "Achieving optimal yields and efficiency in European meat processing", Jan 2020. Market sizes for 2025: Marketintelo (meat inspection AI); Mordor Intelligence (F&B); Towards FnB (A); 360iResearch via GII (B).

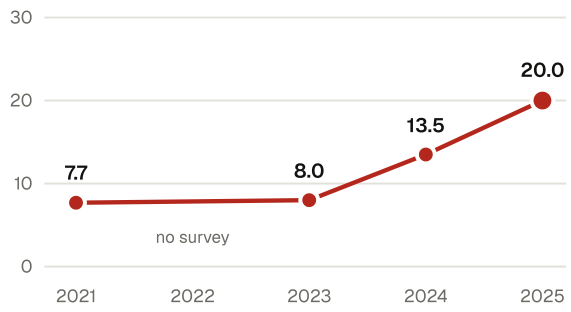
03 ADOPTION

Everyone is trying. Few have scaled.

The official count is climbing fast: one in five EU businesses now uses AI, up from one in thirteen in 2021. Food makers sit well below that line. The traders who buy from them sit above it, because most of their work is text, and text is where today's AI is strongest.

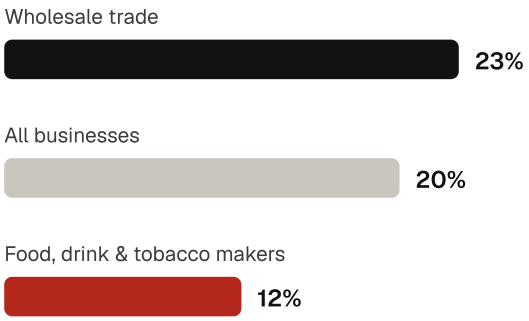
EU businesses using AI

% of enterprises with 10+ staff



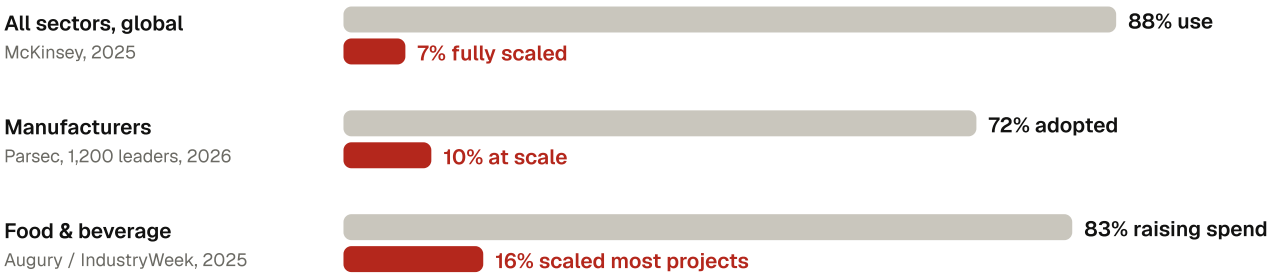
Who uses AI, EU 2025

% of enterprises with 10+ staff



The pilot gap

Share of firms using or investing in AI, against the share that has scaled it. Three different surveys, one pattern.



11.8%
of EU firms, 2025

Why the desk leads

Analysing written language was the most common AI use in EU business in 2025, and the fastest-growing, up 4.9 points in one year. Offers, orders, specs and certificates are all written language.

Sources: Eurostat, "20% of EU enterprises use AI technologies", Dec 2025 (isoc_eb_ai); Eurostat isoc_eb_ain2 via Wikifarmer, Oct 2026; McKinsey State of AI 2025 and Augury/IndustryWeek 2025 via Food Industry Executive; Parsec survey via Food Industry Executive, Jul 2026; Brussels Times, Dec 2025.

04 THE CHAIN

Where AI works, link by link.

Six places in the chain, what AI does there today, and one company doing it. The dots are our read of how ready each use is to deploy, not a survey.

01 **Farm**	Microphones classify coughs; cameras estimate pig weight; sensors steer feed and climate.	**SoundTalks** (Belgium), **Eco-Pork** (Japan)	●●●○○
02 **Grading**	Cameras at the rib-eye or on the line score marbling, fat and yield, the same way every time.	**Frontmatec Q-FOM**, trialled at Australian Country Choice	●●●●○
03 **Cutting**	Vision guides robots and shows people the meat left on the bone. Pork is further along than beef.	**Cargill** yield cameras; **JBS** robotics trials	●●○○○
04 **Quality**	AI on X-ray and camera images finds bone, foreign material and bad trim at line speed.	**Anritsu**, **Ishida** X-ray inspection	●●●●○
05 **Cold store & planning**	Cameras count packs instead of people with clipboards; models forecast demand for short-dated product.	**Tyson** inventory vision; **Steinemann** forecasting	●●●○○
06 **Trade desk**	Language models turn emails, WhatsApps and voice notes into orders, offers and papers. The fastest-moving link.	**Choco** OrderAgent; **GrubMarket** order agents	●●●○○

● ready to deploy ○ still maturing · Readiness is makebetter's assessment.

Sources: AgTech Navigator, Jul 2025; MAFF smart livestock study group, Jun 2026; Beef Central, Apr 2025 and Apr 2026; Beef Magazine/Bloomberg, Oct 2025; Anritsu via J.L. Lennard; Ishida Europe; WSJ via Manufacturing.net, Feb 2020; Qlik case study (Steinemann); Choco; GrubMarket.

05 THE FARM

On the farm, AI listens and weighs.

Precision livestock farming has been around for twenty years. What changed is that the models got good enough to run on a cheap microphone or camera, and the farms got short enough of people to need them.

CASE · BELGIUM

A microphone in every barn

SoundTalks hangs smart microphones in pig barns. Each covers a 10-metre radius and sends audio to the cloud, where models trained on years of farm sound pick out coughs. The result: early signs of respiratory disease **up to five days sooner**, which can mean earlier treatment and fewer antibiotics.

5 days earlier warning

CASE · JAPAN

Cameras that weigh pigs

Tokyo's Eco-Pork pairs its Porker farm-management system with AI cameras that estimate weight, plus climate and feed control. The company reports these results:

+7% pigs weaned

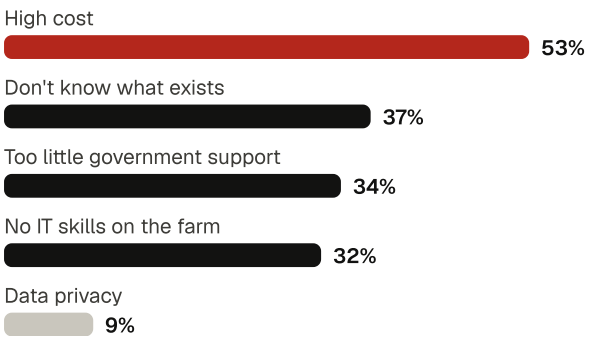
~11% better feed conversion

14.7% of Japan's market

Company-reported figures; populations differ per metric.

What stops farms adopting digital tools

% of 1,444 EU farms naming each barrier (JRC survey, 2024)



Farmers name cost before skills. Processors and traders do the opposite.

Privacy looks like a small barrier until farms start sharing data. Since September 2025 the EU Data Act gives farmers the right to the data their own machines generate.

AMONG FARMS THAT ALREADY SHARE DATA ELECTRONICALLY

66% worry about privacy and security

47% worry about how the data will be used

37% worry about who owns the data

Sources: AgTech Navigator, "SoundTalks plots growth…", Jul 2025; Boehringer Ingelheim UK, 2024; Eco-Pork presentation to MAFF smart livestock study group, Jun 2026 (company Impact Report figures); JRC, "The state of digitalisation in EU agriculture" (JRC141259) via Wikifarmer, Oct 2026.

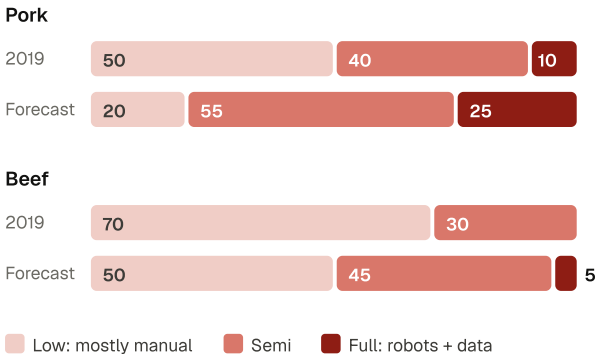
06 THE PLANT

In the plant, the prize is yield.

Meat is soft and changes shape as you cut it, so robots arrived late. AI changes that in two ways: it gives machines eyes, and it gives people feedback. The second is cheaper and is already paying.

How automated European red meat lines are

% of lines by automation level, 2019 and McKinsey's forecast for the most advanced regions



CASE · CARGILL, UNITED STATES

Cameras that show the meat left behind

With the US cattle herd at a seven-decade low, Cargill built AI cameras that give cutting teams real-time feedback on the meat left on the bone. Tested at Friona, Texas, now rolling out wider.

"If we can improve yields across the industries 1 percent, that's over 200 million pounds of food."

Brian Sikes, Cargill CEO

CASE · TYSON FOODS

Uses cameras and edge models instead of hand counts of chicken packs at its tray-pack plants, rolled out from 2020. Part of over $215 million put into robotics and automation in five years.

€25–50m

to build one fully automated pork line, by McKinsey's estimate.

70%

of primal-cut picking could be automated, trials with Intelligent Robotics and JBS suggest.

Repeatable

Grading cameras showed very high repeatability across all traits in an Australian plant trial.

Sources: McKinsey, Jan 2020 (automation levels, line cost); Bloomberg via Beef Magazine, Oct 2025; Star Tribune, Nov 2025; WSJ via Manufacturing.net and WATTPoultry, Feb 2020; Beef Central, Apr 2025 (Q-FOM trial) and Apr 2026 (primal picking).

07 THE TRADE DESK

On the desk, AI reads the trade.

A meat trader's day is messages: offers on WhatsApp, orders by email, specs in a spreadsheet, a health certificate as a scan. For years nothing could read them. Language models can, and this is where meat companies see the fastest return.

EMAIL 07:42

Re: shoulder for December

Hi, as discussed: we can take 2 loads of pork shoulder 4D, frozen, for week 50 into Busan. Same spec as last time, CIF, payment 30 days. Can you hold it at €2.65? Need the health cert draft before loading.

AI READ THE ORDER

PRODUCT	Pork shoulder 4D, frozen
QTY	2 × 40' reefer
DELIVERY	Busan · wk 50 · CIF
PRICE	€2.65/kg · 30 days
PAPERS	Health cert draft

Order drafted, stock matched, certificate started. A trader approves it.

Illustration of the pattern. Not a real customer message.

CASE · CHICAGO

North West Meat Company

A family meat distributor with over 1,300 SKUs. Orders came by phone, voicemail and email, and were typed in by hand at night. Since adopting an AI order agent in 2024:

3 h → <1 h
order entry per day

~$22k
labour saved a year

Vendor-reported (Choco).

What the desk hands to AI first

01 **Orders in, not typed.** Email, WhatsApp and voice into the order system.

02 **One meaning per spec.** Each buyer's name for a cut, mapped to one product.

03 **Papers right first time.** Certificates and CMRs filled once, then checked.

04 **Stock sold before the date.** Old stock found early, with a buyer for it.

05 **Paid on time.** Late payers flagged before the truck leaves.

21,000
food distributors on one AI ordering platform, with 100,000 buyers.

23%
of EU wholesalers used AI in 2025, the trading end of the chain.

1 approval
The pattern that works: AI drafts, a trader checks and sends.

Sources: Choco, "North West Meat Company: Saving Hours Daily with Choco's AI", Oct 2025; OpenAI customer story (Choco), Apr 2026; GrubMarket, 2026; Eurostat, Dec 2025.

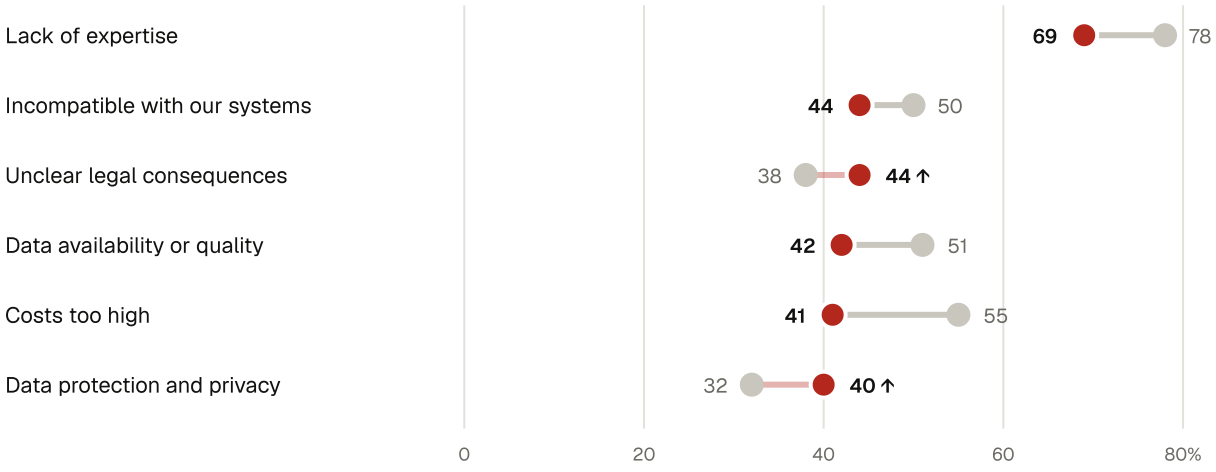
08 WHAT HOLDS IT BACK

Not the money. The know-how.

Among EU food makers that looked at AI and decided against it, the reasons shifted between 2023 and 2025. Cost, data and integration worries fell. Legal and privacy worries grew. Lack of expertise stayed on top.

Why food makers that considered AI did not use it

% of EU food, drink and tobacco makers that considered AI, by reason



2023 2025 · Only 11.6% of food makers without AI had considered it at all (5.4% in 2023).

37%

of manufacturers have a unified data strategy. Almost 70% still run a mix of old and new equipment.

82%

of food and agri firms rate domain expertise in a partner as critical. 47% say their partners lack it.

2027–28

The EU moved high-risk AI Act obligations to December 2027 or August 2028. Firms using AI are already asked to build staff AI literacy.

> Cost was the barrier that fell most. The one left standing is people who understand both the meat and the model.

Sources: Eurostat isoc_eb_ain2 and JRC policy brief JRC147371 via Wikifarmer, Oct 2026; Parsec survey via Food Industry Executive, Jul 2026; HFS Research with Mindsprint (101 leaders); Regulation (EU) 2026/1744.

09 WHERE TO START

Start with the people, not the software.

The firms that get past the pilot do the same few things. They pick one piece of work that hurts, measure it before they touch it, and build the change into the tools their team already opens every morning.

01

Listen

Sit with the people doing the work. The real process is never the one in the manual.

02

Map the work

Every step of one order, with who does it, in which system, and how long it takes.

03

Set the goals

Hours, kilos, days to cash. Numbers you can check in a month, not a vision.

04

Build it in

Into email, WhatsApp, the ERP. A new app nobody opens saves nothing.

05

Measure again

Same map, same clock. Keep what saved time; drop what did not.

06

Then the next one

Scale comes from the second and third win, once the team trusts the first.

Five questions before you buy any AI tool

Who checks it? Someone on the team must use it, check its output and correct it.

What data leaves? Customer and supplier records: where they go and where they are processed.

What does a month cost? Price it against hours on your own map, not a market report.

Who answers for it? A price it quotes or a booking it makes needs an owner and an approval rule.

Does it read what we have? A tool that can't read your records adds work instead of saving it.

ABOUT MAKEBETTER

Let's make it better.

makebetter is the AI transformation partner for the food trade, built by people who trade food themselves. Tell us how your business runs today, and we will tell you where AI would help first.

hello@makebetter.ai

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Method: this report combines public statistics (Eurostat, FAO, JRC), industry surveys and company case studies, read in November 2026. Vendor and company figures are self-reported and marked as such. Readiness ratings are makebetter's own assessment.