M&A WORLDWIDE

Automation & Technology in the Food Sector

INDUSTRY REPORT – Q1 2026

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1. Executive summary

The food sector is entering a pivotal phase of transformation, driven by accelerating advancements in automation, robotics, artificial intelligence, and digital technologies. These innovations are reshaping core operational activities, from primary processing and quality inspection to packaging, logistics, and supply-chain coordination.

Automation is enabling higher throughput, improved product uniformity, and enhanced food safety, while digital tools provide real-time visibility, predictive insights, and data-driven decision-making across facilities. As the industry responds to rising consumer expectations, regulatory pressures, labour shortages, and the demand for scalable production capabilities, technology adoption has become a strategic imperative rather than an optional upgrade.

Mid-cap companies hold a unique position in this landscape: they are under increasing pressure to modernise while also being agile enough to adopt and integrate new technologies at a faster pace than larger incumbents. For these firms, automation and digitalisation offer clear pathways to operational efficiency, cost reduction, waste minimisation, and greater competitiveness.

This report explores the technologies driving sector-wide change, examines the forces enabling and constraining adoption, and identifies the opportunities, risks, and strategic priorities for mid-cap players navigating this evolving ecosystem. Through this lens, the study aims to provide a focused understanding of how automation and technology are redefining the future of the global food sector.

2. Introduction

This report examines how automation, robotics, AI, and digital technologies are transforming the global food sector, with a focus on mid-cap companies. It explores how these firms leverage technology to enhance efficiency, ensure product quality and safety, reduce waste, and address evolving consumer and regulatory demands, highlighting the opportunities and challenges of adopting modern food automation solutions.

2.1 Purpose and scope

The purpose of this report is to analyze how automation and technology are driving operational improvements within the food sector. It aims to identify the benefits, challenges, and strategic opportunities associated with adopting automated systems, robotics, data-driven processes, and smart manufacturing tools. The report also evaluates the competitive positioning of mid-cap companies and highlights how their technological investments influence productivity, quality control, food safety, and long-term industry resilience.

The scope of this report covers automation and technological developments across the food production and processing cycle, including manufacturing, packaging, logistics, and distribution. It includes an examination of digital solutions such as AI-enabled monitoring, robotics, IoT systems, and supply-chain automation. A strong focus is placed on mid-cap market players, exploring their role in accelerating adoption, scaling practical innovations, and shaping future trends in the global food sector.

2.2 Mid cap focus

The global food sector is rapidly transforming through automation, robotics, and advanced digital technologies, reshaping processing, packaging, and supply-chain management. While large corporations have traditionally led technology adoption, mid-cap companies are emerging as key players due to their unique combination of agility and capital. These firms are increasingly implementing AI-driven systems, robotics, and digital traceability tools to enhance efficiency, reduce waste, ensure compliance, and meet sustainability goals. Focusing on mid-cap companies highlights a critical segment that embodies both the opportunities and challenges of adopting automation in the food and agriculture sectors, offering valuable insights into growth, operational transformation, and strategic investment potential.

3. Market Overview

The global food sector in 2025 is undergoing transformative growth, driven by consumer demand for health, convenience, and sustainability, as well as rapid advances in technology and supply chain innovation. Despite macroeconomic headwinds such as inflation, supply chain disruptions, and geopolitical risk, the sector is proving resilient, with robust investment, innovation, and evolving consumption habits worldwide.

Sources: Capital IQ Pro, IMARC, Statista, M&A Worldwide analysis

3.1 Food Sector Outlook

The Food processing automation market size was valued at USD 27.95 billion in 2025 and is forecast to reach USD 40.12 billion by 2030, reflecting a 7.49% CAGR. This expansion stemmed from escalating labour shortages, tighter global food-safety rules, and the push for lean, energy-efficient production. Roughly 48% of capital spending by large food manufacturers in 2025 flowed toward new or upgraded automation projects, signifying a decisive move from isolated machinery toward connected, data-driven lines.

The boom in food-grade robotics, real-time performance dashboards, and cloud adoption is accelerating automation demand, especially for turnkey solutions combining hardware, software, and compliance services. Industrial robotics leads the market with 29.4% of 2024 revenue and a projected 13.8% CAGR. Hardware holds 67.3% of the market, while software and services are the fastest-growing segment. Packaging remains the largest application, and palletizing is the fastest-growing. Semi-automatic lines dominate, with Asia-Pacific leading the market and South America showing the strongest growth outlook.

~$27.9B
Global food processing automation valued in 2024

~7.49%
Expected CAGR of Food processing market (2024-30)

$40B
Global Food processing market forecasted value (2030)

3.2 Drivers of Market

Rising Demand for Processed and Packaged Foods

Urbanisation, rising incomes, and busier lifestyles are increasing demand for convenience and packaged foods, pushing processors to scale production and adopt automation for consistency and throughput.

Labor Shortages and Rising Labor Costs

Ongoing labor shortages and higher wages are driving automation adoption to reduce manual dependence, lower costs, and maintain continuous operation in labor-intensive tasks.

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

Stringent Food Safety and Regulatory Compliance

Stricter global food safety standards require enhanced hygiene and traceability. Automation reduces contamination risks and standardises processes to support regulatory compliance.

Technological Advancements in Automation

Innovations in robotics, AI, IoT, and sensors are enabling more precise, adaptable, and intelligent automation, supporting real-time monitoring, predictive maintenance, and flexible multi-SKU production.

Operational Efficiency, Consistency, and Scalability

Automation improves throughput, reduces waste, and ensures consistent quality, offering scalable and repeatable operations that adapt quickly to demand and product variation.

Supply Chain Transparency and Traceability

Growing consumer and regulatory expectations for transparency are accelerating adoption of automated traceability tools that enhance visibility and reduce recall risks.

Cost Optimisation and Profitability Pressures

Rising input, labor, and compliance costs are pushing processors toward automation to lower unit costs, improve yields, and strengthen competitive positioning.

Adoption by Small and Mid-Size Processors

Scalable, modular automation solutions are increasingly accessible to smaller processors, reducing capital barriers and accelerating global adoption.

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

3.3 Challenges of Market

High Capital Expenditure
Adopting advanced automation requires substantial upfront investment in machinery, sensors, AI platforms, and system integration. For small and mid-sized processors, these costs can be prohibitive despite the long-term efficiency benefits.

Integration Complexity with Existing Operations
Food processing plants often use legacy equipment, making automation integration technically challenging. Misalignment between old and new systems can cause disruptions, inefficiencies, and added transition costs

Skilled Workforce and Talent Shortages
Automation requires specialised skills in robotics, AI, IoT, and data analytics. A limited talent pool in the food sector restricts companies from fully utilising automation and achieving expected returns.

Maintenance, Downtime, and Technical Risks
Automated systems need regular maintenance and are vulnerable to technical faults. Any downtime can cause major financial losses and supply chain delays, making robust risk management essential.

Rapid Technological Changes and Regulatory Complexity
Fast-evolving automation technologies risk making equipment obsolete quickly. At the same time, changing food safety regulations require continuous system updates, adding to compliance and operational challenges.

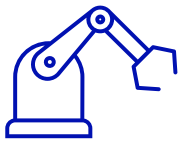
Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

4. Technology Trends

4.1 Automation & robotics

Adoption of Food-Grade and Hygiene-Ready Robotics

Robots designed specifically for food processing, with food-safe materials, corrosion resistance, and wash-down capability, are increasingly deployed across production lines. These systems reduce contamination risk, improve hygiene compliance, and enable automation even in wet or sanitary environments such as meat, dairy, and seafood processing.



Growth of Collaborative Robots (Cobots) and Flexible Automation

Cobots, which can safely work alongside humans, are gaining traction in small- and mid-scale processing plants. Their flexibility allows rapid reprogramming for different products, supports multi-SKU production, and lowers the barrier to adoption of automation without requiring full line redesign.

Integration of AI, Computer Vision, and Sensor-Enabled Smart Automation

Food processing robots are increasingly equipped with AI, vision systems, and sensors to handle variability in product size, shape, and quality. These systems enable automated inspection, sorting, grading, and predictive maintenance, ensuring consistent product quality, higher throughput, and reduced operational downtime.

4.2 AI and Data traceability

AI-IoT-Blockchain "Farm-to-Fork" Traceability

AI is increasingly combined with IoT sensors and blockchain to create end-to-end, tamper-resistant traceability systems that track products from farm to table, improving food fraud detection, recall speed, and regulatory compliance. These AI-IoT-blockchain architectures are becoming a core pillar of the "Food Industry", enabling real-time monitoring, anomaly detection, and secure data sharing across stakeholders.

Predictive Food Safety and Shelf-Life Analytics

AI models now analyse large volumes of supply-chain and product data (temperature, handling, composition) to predict shelf life, quality degradation, and contamination risk in advance, shifting food safety from reactive to predictive. This reduces waste and improves inventory management, with real-time alerts that help manufacturers and retailers intervene earlier.

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

Radical Transparency for Consumers and Regulators

AI-enhanced traceability platforms feed into smart labels, QR codes, and digital passports that let consumers see origin, processing, and sustainability data instantly. Retailers and brands increasingly use these tools as a competitive differentiator, responding to rising expectations for transparency on provenance, ESG performance, and authenticity

AI-Enhanced Authenticity and Fraud Detection

AI is being applied to spectroscopy, imaging, and sensor data to verify geographic origin, detect adulteration, and identify species, strengthening authenticity controls in complex global supply chains. These systems improve detection accuracy and speed for high-risk or high-value categories (e.g., organic, seafood, premium ingredients), tightening overall traceability and brand protection

4.3 Sustainability innovations

Regenerative, Data-Driven Agriculture

Regenerative agriculture is shifting from niche to mainstream, supported by AI-driven soil analysis, precision input management, and carbon-monitoring platforms that verify improvements in soil health, biodiversity, and water use. Corporations use these quantified outcomes to meet 2030 climate targets and substantiate sustainability claims in supply chains

Precision Fermentation and Novel Proteins

Biotechnology and precision fermentation enable low-impact alternatives to animal protein, producing ingredients, flavours, and functional components with significantly reduced land and water footprints. These technologies support both climate goals and consumer demand for sustainable, high-protein, "clean label" foods

Circular and Low-Waste Systems

Companies are valorising side-streams (e.g., by-products, food waste) into new ingredients, animal feed, bio-based materials, and energy, turning waste into revenue streams. Coupled with renewable energy adoption on farms and in processing, this circular approach lowers emissions intensity and improves overall resource efficiency across the value chain

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

5. Opportunities & Risks

5.1 Growth potential for mid-cap players

Macro Market Context & Tailwinds

Global demand growth: Global agricultural commodity consumption is projected to grow by ~13% by 2034 from 2025 levels, driven by rising populations, income growth, and urbanization
Production growth: Agricultural output value (crop, livestock, aquaculture) is expected to grow by ~14% by 2034
Adjacent markets: Agri-tech and digital farming markets are expanding rapidly, providing opportunities for technology adoption and innovation

Implication: Mid-cap firms have a large and growing addressable market, particularly in emerging markets, for staples, processed foods, and technology-enabled solutions

Tech-Enabled Growth Opportunities

Precision agriculture & automation: High adoption of smart farming, IoT, AI, and robotics enhances productivity and cost efficiency
Consumer-driven trends: Shifts toward convenience, health-focused, premium, and sustainable foods create new market niches.
M&A potential: Mid-cap players can acquire divested assets or smaller brands from larger companies to expand capabilities or geographic reach.

Implication: Agile mid-cap players that adopt technology and align with consumer trends are well-positioned to outperform both smaller players and global conglomerates.

Strategic Opportunities for Mid-Cap Firms

Opportunity / Strategy	Benefit for Mid-Caps
Vertical integration & value-added processing	Captures value along the supply chain, protects margins from commodity price swings
Adopting AgTech / automation	Increases yields, reduces costs, and improves scalability
Niche/premium products	Access higher-margin segments aligned with emerging consumer trends
M&A & consolidation	Acquiring established brands, plants, or supply-chain assets to accelerate growth.
Emerging-market expansion	Tap into high-demand regions (Asia, Africa, Latin America) for accelerated revenue growth.

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

5.2 Key risks and adoption barriers

Capital Constraints
- High upfront costs for automation, AgTech, and modern processing
- Limited access to financing and risk of over-leverage

Regulatory & Compliance Challenges
- Meeting food safety, traceability, and environmental standards is resource-intensive

Market & Operational Risks
Commodity price volatility and supply chain disruptions.
Competition from both agile startups and large corporations

Technology Adoption Barriers
Talent gaps and lack of in-house expertise.
Integration complexity with legacy systems.
Uncertain short-term ROI slows adoption.

Organizational & Strategic Barriers
Resistance to operational changes or automation.
Limited strategic bandwidth to scale or execute initiatives

6. Outlook & Recommendations

6.1 Market Forecast

The adoption of automation, robotics, and digital technologies in food and agriculture processing is reshaping the global food system. These technologies cover:

- Food processing automation (robotics, packaging, smart lines)
- Farm automation (agricultural robots, precision farming, IoT)
- Agritech platforms (farm management software, sensors, AI-driven analytics)

The market is expanding rapidly due to rising food demand, labour cost pressures, efficiency needs, and regulatory requirements.

Sources: Capital IQ Pro, Fortune Business Insight, Statista, M&A Worldwide analysis

Segment / Market	Market Size (2024–2025)	Forecast / Future Size	CAGR	Key Components
Food Processing Automation	USD 27.95 Bn (2025)	USD 40.12 Bn by 2030	7.5%	Robotics, machinery, smart production lines
Food Industry Automation (Processing + Packaging)	USD 13.85 Bn (2024)	USD 27.53 Bn by 2032	8.5%	Automated processing, packaging, and smart lines
Food Robotics	USD 2.77 Bn (2024)	USD 12.73 Bn by 2033	18–20%	Picking, sorting, and packaging robots
Agricultural Robots / Farm Automation	USD 5.66 Bn (2024)	USD 30.9 Bn by 2034	18.5%	Cultivation, harvesting, soil & crop management robots
Agritech Platforms	USD 32.83 Bn (2025)	USD 63.82 Bn by 2030	14.2%	Digital farm management, IoT, AI solutions

6.2 Strategic insights for investors and companies

Key Recommendations for Investors

Prioritise High-Growth Technology Segments
Focus capital on automation, food-processing robotics, agritech platforms, traceability systems, and AI-driven optimisation—segments delivering the strongest CAGR and long-term scalability.

Use Mid-Cap Firms as Growth Platforms
Mid-cap players offer agility, attractive valuations, and strong regional expansion potential. Ideal for platform-building and buy-and-build strategies.

Accelerate Consolidation Through Strategic M&A
Target bolt-on acquisitions in robotics, food safety tech, data platforms, and processing equipment. Vertical integration across farm → processing → distribution enhances margins and competitiveness.

Back Companies with Strong Digital & Data Foundations
Invest in firms developing AI, IoT, cloud-based traceability, and predictive analytics. Digital infrastructure is becoming mandatory for compliance and market access.

Prioritise ESG-Positive and Resilience-Oriented Investments
Support companies enhancing sustainability, reducing waste, improving energy efficiency, and building climate resilience—these assets will outperform under rising regulatory scrutiny.

Key Recommendations for Companies

Invest Early in Automation and Digital Transformation
Adopt robotics, smart processing lines, AI-driven analytics, and digital traceability to drive efficiency, reduce costs, and improve quality.

Strengthen Workforce Capabilities for a Tech-Driven Operating Model
Upskill employees in automation, data analytics, digital quality systems, and robotics operations to ensure technology delivers full ROI.

Build Technology Partnerships to Overcome Adoption Barriers
Collaborate with automation vendors, agritech platforms, and AI providers. Partnerships reduce CAPEX pressures and accelerate implementation.

Embed Sustainability and Compliance Into Core Strategy
Prioritise food safety, ESG requirements, low-carbon production, waste reduction, and climate resilience to stay competitive in global markets.

Enhance Supply-Chain Resilience and Visibility
Invest in digital supply-chain tools, predictive systems, diversified sourcing, and real-time monitoring to protect operations against volatility.

Sources: Capital IQ Pro, Forbes, M&A Worldwide analysis

7. Regional Highlights

7.1 France

Market Overview

The French food processing automation market is valued at EUR 1.9 billion in 2023 and is projected to grow at 6–8% annually through 2030. The sector accounts for 23% of total industrial robotics investments in France, with more than 5,500 robots currently deployed in food processing plants, increasing at a rate of 10% per year. This growth is driven by the need to improve productivity (with 20–30% gains from automated production lines), comply with increasingly stringent food safety regulations, and offset labour shortages (over 56,000 vacancies in 2024). Supported by the France 2030 initiative, which dedicates EUR 2.3 billion to automation and digital transformation, the French food industry is positioning automation as a strategic pillar to enhance competitiveness and secure national food sovereignty

Market Trends (France)

- Increased Automation Adoption: The French food industry invests heavily in robotics to address productivity needs and labor shortages.
- Focus on Hygienic and Wash-Down Robotics: Compliance with strict EU food safety standards accelerates deployment of sanitary automation solutions.
- Government Support (France 2030): Over EUR 2.3 billion allocated to industrial automation, boosting modernization across food processing plants.
- Rise of Collaborative Robots: SMEs increasingly adopt flexible, low-footprint robots for packaging and handling tasks.
- Digital Traceability Requirements: Strong demand for IoT and data-driven systems to meet HACCP and European traceability mandates.

Major Market Players (France)

Actemium (VINCI Energies): Leading integrator in industrial automation.
Clauger: Specialist in process optimisation and hygienic production environments.
Serac Group: Key player in automated filling and packaging equipment.
Bühler Group: Major supplier of food processing and robotics solutions

7.2 Germany

Market Overview

The food processing and packaging machinery sector in Germany achieved in 2024 revenue of EUR 16,1 billion, a decrease of 2% vs the Previous year. Packaging machinery represents approx 50% of the total production is followed by process technology for meat and protein. Exports counted for Eur 10.6 billion and increased by 6%, approx. 47% was sold in Europe, North America counted for 18%, ahead of Asia with 15%. Due to its high level of specialisation, performance, and innovative strength, the food processing and packaging machinery industry is one of the most successful export sectors in German and European mechanical engineering. Besides some key players like GEA or Krones, the market for food processing machinery in Germany is very fragmented and specialised. Demand for convenience food and sustainability-driven innovations are major driving force. Automation, Industry 4.0 and AI-enabled systems, hygiene standards compliance and energy efficiency are transforming production lines.

International M&A Activities related to the German market

- **Krones AG**, an international leading supplier of machinery and systems for bottling and beverage production, acquired 90% of Ampco Pumps Company LLC (USA), a manufacturer of sanitary pumps and mixing equipment, in 4/2023. Ampco Pumps turnover is about USD 50 million. Acquired in 9/2025 CSW based in the Netherlands (Can Systems Worldwide Holding B.V. (approx. EUR 20 million revenue).

- **GEA Group AG,** one of the world's largest systems suppliers for the food, beverage and pharmaceutical sectors, acquired Centrifuges Unlimited Inc. (CUI, Canada) from Appulse Corporation 11/2023. CUI is an industrial centrifuge and separation equipment provider.

- Middleby Corporation (USA), a leading global manufacturer of equipment solutions for commercial foodservice, food service and residential kitchens: Acquired German Bakery Technology GmbH (GBT) in 2/2024. GBT manufactures high-performance, large volume product systems for artisan and flat breads, sweet pastries, pizzas and other baked goods. GBT turnover is EUR 10 million.
- Acquired Oka-Spezialmaschinenfabrik GmbH & Co.KG in 8/2025

- In 1/2025, Sormac (NED), a leading specialist in the development and manufacturing of machinery for the vegetable processing industry, acquired a majority stake in Foodcons GmbH & Co. KG to strengthen its presence in German-speaking markets and to enhance its production capabilities and optimise service delivery

- Fortifi Food Processing Solutions (USA): 6/2024 completed its acquisition of REICH Thermoprozesstechnik GmbH, a leader in thermoprocessing systems for red meat, fish, poultry, pet food, cheese, vegan and vegetarian products and other food markets. 11/2024 acquired intellectual property, customer relationships, selected inventories and fixed assets of JWE-BANSS GmbH. BANSS is a manufacturer and provider of primary protein processing systems, equipment and related parts. The company filed for insolvency during the summer of 2024.

7.3 New Zealand

Market Overview

The New Zealand food manufacturing sector underpins much of the country's economic output, accounting for approximately 59% of total manufacturing revenue and generating NZD 55 billion annually. As global demand for traceable, sustainable, and high-quality food continues to rise, New Zealand producers are increasingly turning to automation and robotics to maintain competitiveness and meet these evolving standards.
While around 65% of food manufacturers now employ some form of automated equipment or digital technologies in primary processing, the fastest growth is occurring in robotics, digital traceability, and predictive maintenance systems, particularly across high-volume dairy, meat, and horticulture operations. From paddock to plate, these innovations are redefining productivity, efficiency, precision, safety, and traceability across the nation's agri-food value chain.

At the Farmgate

Since the adoption of robotics and automation, New Zealand's agriculture and horticulture sectors have enjoyed productivity gains and a reduction in operational errors. A data-driven approach has rapidly become central to farm management, with technology delivering enhanced efficiency and measurable improvements at the farm gate. For example, LeaderBrand, responsible for supplying over 30% of the country's bagged salads, uses a Laser Weeder to target and eliminate weeds with remarkable accuracy. This system covers between 0.16 and 0.28 hectares per hour, achieving a weed kill rate of 99% which not only boosts productivity but also minimises the need for chemical inputs and manual labour.
Meanwhile, Robotics Plus, an innovative New Zealand company, has developed unmanned ground vehicles equipped with intelligent, targeted spraying technology. These vehicles use advanced sensors and AI to precisely apply sprays only where needed, significantly reducing chemical usage and waste.
By leveraging such precision tools, both companies are improving operational efficiency, lowering costs associated with over-application, and promoting more sustainable farming practices across the sector.

Post Farmgate

New Zealand has a reputation for innovation, with companies like Scott Technology leading advancements in automated meat processing. The 'BladeStop" bandsaw, internationally acclaimed for its rapid response, halts within 10 milliseconds when it senses a human arm, significantly reducing the risk of injury.
Silver Fern Farms, a major sheep and beef processor, invested NZD 11.2 million in a fully automated lamb processing facility from Scott that employs X-ray grading to boost precision, yield, and throughput (handling 10-12 carcasses per minute), all while cutting down on waste and enhancing safety.
Another New Zealand processor, ANZCO, recently implemented the first Lamb Lion Boning machine for NZD 10 million; this system uses X-ray technology paired with automated cutters to deliver "an extra 5mm on French racks or an additional $1.50 per rack.
As of January 2025, Scott holds NZD 18 million in global (meat processing) contracts, including projects with JBS Australia for a Lamb Primal System, a Loin Deboner for Silver Fern Farms, and several BladeStop units destined for Cargill's meat processing operations across North America.
Veritide is a Christchurch-based technology company at the forefront of food sector automation, specialising in optical devices that detect microorganisms and contaminants in supply chains. Their non-invasive, non-contact scanners are already deployed by major meat processors, providing real-time contamination detection in carcasses and helping to meet increasingly stringent safety and traceability standards. The company's flagship product, BluMax, has been validated in partnership with industry leaders such as AMPC in Australia, demonstrating measurable operational efficiency gains, regulatory risk reduction, and improved yields for both low- and high-volume plants.

Post-Harvest Sector

Wyma Solutions is a leading provider in the post-harvest sector, offering an extensive portfolio of automation and robotic machinery for processes including peeling, tipping, sorting, polishing, cutting, and palletising produce.
The company's latest innovation, the Roto-cut Vegetable Trimmer Line, is described as "a unique, fully automated trimming system designed to remove foliage, crowns, and tails from carrots and parsnips before packing or processing".

In 2023, Wyma was acquired by MHM Automation, which itself was subsequently acquired by the Fortifi Group. The wider MHM group was purchased by Fortifi Group for $1.70 per share. As a result, Wyma now operates under the larger Fortifi umbrella, establishing a platform for export-led automation.

Fonterra – Robotics / Automation

Fonterra, a farmer-owned co-operative based in New Zealand and among the world's largest dairy companies, is at the forefront of advancements in food automation and robotics.
The organisation has made significant investments in artificial intelligence and automation technologies across its processing plants, supply chain, and business operations to optimise efficiency, quality, and safety. These initiatives include the deployment of Automated Guided Vehicles (AGVs) and sophisticated robots for palletising, transport, and other routine tasks, thereby contributing to enhanced workplace safety.

In addition, AI-driven image recognition systems inspect every bag on 56 packing lines for damage, automatically rejecting those that fail to meet quality standards; each bag is also time-stamped to ensure traceability. This rigorous process encompasses approximately 66 million bags annually.

M&A Activity & implications

The sequential acquisition of Wyma, then MHM Automation, highlights the growing appetite among PE firms and strategic buyers to pay a premium for companies with proven technologies and scalable automation platforms, driving higher valuations for businesses with strong intellectual property.
Yamaha Motor's 2025 acquisition of Tauranga-based Robotics Plus allowed the company to retain high-value jobs and intellectual property in New Zealand while leveraging Yamaha's global scale to accelerate R&D and international expansion. This deal highlights how global buyers value NZ's proprietary robotics solutions and established presence in local agri-food supply chains, recognising the strategic potential of scalable, automated technology platforms.
Continued investment in automation and robotics remains a hallmark of New Zealand's food processing and manufacturing sector, with industry leaders like Fonterra, Silver Fern Farms, and ANZCO at the forefront. Fonterra has channelled significant resources into integrating AI-driven inspection systems and automated guided vehicles, optimising both quality control and operational efficiency. Silver Fern Farms' $11.2 million upgrade to a fully automated lamb processing facility and ANZCO's recent investment in advanced boning technology underscore how these companies are leveraging automation to boost throughput, precision, and workplace safety. Collectively, these strategic investments not only improve production efficiency but also contribute to stronger financial performance and global competitiveness.

Conclusion

New Zealand's food automation and robotics landscape is evolving rapidly, transforming both primary production and processing operations into intelligent, data-driven systems.
From automated meat processing lines and precision agriculture equipment to AI-enabled inspection and post-harvest innovations, the sector's technological integration underscores a broader shift toward smart, sustainable, and globally competitive food manufacturing.
As leading firms like Fonterra, Silver Fern Farms, ANZCO, and Robotics Plus continue to scale these systems, the convergence of automation, AI, and robotics is setting a new benchmark for productivity, safety, and traceability. With increasing merger and acquisition activity driving global capital into high-value agri-tech and automation ventures, New Zealand is well-positioned to take advantage of this new wave.

7.4 Greece

Overview

Food manufacturing is undergoing a profound transformation globally, driven by automation technologies such as robotics, AI, IoT, and digital twins. These innovations promise efficiency, cost reduction, and enhanced food safety. In Greece, the food industry—one of the country's largest manufacturing sectors with a turnover exceeding EUR 15 billion—has embraced automation as a strategic lever for competitiveness and resilience. This report explores automation trends, their impact on Greek food manufacturing, and the role of mergers and acquisitions in shaping the sector's future.

In Greece, automation adoption accelerated post-2019, with a 47% increase in industrial automation penetration across sectors. Food and beverage manufacturing is among the leading adopters, integrating robotic case packing, palletising systems, and AI-driven quality control. These technologies reduce downtime, improve traceability, and ensure compliance with EU food safety standards.

Automation in Greek Food Manufacturing

Greek food manufacturers have historically lagged behind Northern Europe in automation density (17 robots per 10,000 employees in 2016), but recent investments have narrowed the gap. End-of-line automation—robotic case packing and palletising—has become widespread, offering depreciation periods of less than two years for factories operating three shifts.

Sector Spotlight: Greek Olive Oil and Table Olives Processing Sector

Greece, a global leader in olive oil and table olive production, is rapidly integrating Industry 4.0 technologies to modernise its traditional processes. Automation enhances efficiency, quality, and sustainability while reducing labour costs and ensuring compliance with international standards.

Sources: : VDMA - association for the machinery and equipment manufacturing industry in Europe and Germany, M&A Worldwide analysis

Olive Oil Processing Automation

Modern mills employ continuous extraction systems, AI-driven monitoring, and robotic handling. Technologies include:

- AI-powered yield optimisation for centrifugation
- Machine vision sorting for ripeness and defect detection
- IoT sensors for temperature and malaxation control
- Predictive maintenance and digital twins to minimise downtime

Table Olives Processing Automation

The sector uses:

- IoT fermentation control for pH and salinity.
- Machine vision grading for size and color.
- Process Analytical Technology (PAT) for real-time quality assurance.

Five Major Companies and Their Automation Investments

- **Latzimas SA** was recently acquired under a €10M investment plan by SMERemediumCap and Inspiring Earth. Focus: automated packaging lines, digital supply chain systems, and energy-efficient processing for export growth
- **Sitia Oils-Lasitia SA** is Part of the same consolidation strategy. Investments include robotic bottling systems and AI-driven quality control to meet EU and North American market standards
- **Olympian Green International SA** Upgrading facilities with IoT-enabled storage tanks and automated blending systems for premium olive oil lines
- **PVG Hellas** is implementing two new automated retail packaging lines, digital production management, and solar-powered facilities as part of its 2025-2027 modernisation plan
- **Georgoudis SA** (Parthenon brand) is investing in high-speed sorting and curing automation and leveraging a strategic alliance with AG Olives to integrate advanced logistics and processing technologies

Conclusion

Automation is reshaping Greek food manufacturing, enhancing competitiveness and resilience in a volatile global market. While large players lead the charge, SMEs must overcome barriers to digital transformation. M&A activity complements this evolution, enabling scale, innovation, and international reach. For investors and industry stakeholders, the intersection of automation and consolidation offers compelling opportunities—provided they navigate challenges around skills, financing, and sustainability.

7.5 Ireland

Introduction

The Irish food processing and manufacturing sector is increasingly recognised as a key enabler of attractiveness within agri-food and food processing, a sector that underpins the national economy with exports exceeding EUR 17 billion. As global competition intensifies and labour shortages persist, automation and robotics are central to improving productivity, quality, resilience, and sustainability. Yet adoption across Ireland remains uneven, some processors are advancing rapidly, while others remain cautious. Recent years have shown a shift from isolated machine upgrades toward end-to-end automation, process monitoring, and robotics.

Background

Irish food processors and manufacturers have traditionally taken a cautious approach to investment, favouring small equipment upgrades and maximising existing assets rather than adopting full-scale automation. This was driven by the sector's fragmented structure, the limited scale of many SMEs, thin profit margins, and a lack of technical expertise to support complex systems. External pressures—rising costs, labour shortages, Brexit uncertainty, and volatile supply chains—further discouraged major capital spending, with the 2025 IFAC Food & Agribusiness Report noting that 44% of firms deferred planned investment, even though 29% now see automation as a growth opportunity. While adoption has been slow, momentum is building in 2024. Enterprise Ireland invested €166 million in R&D, and more companies are beginning to pilot technologies such as sensors, process automation, and robotics.

Automation and Robotics Trends in Ireland's Food Manufacturing Industry

Automation in Ireland's food sector is entering a strong growth phase, with firms moving from pilots to wider adoption. Smaller processors are using cobots for simple, repetitive tasks, while larger plants are investing in end-of-line systems like palletising, sorting, and inspection. Digital tools such as OEE monitoring, predictive maintenance, and sensor-driven control are helping companies boost performance before committing to full robotics. On farms, robotic milking and automated feeding systems are transforming dairy operations. Technology providers are also expanding locally, with ABB Robotics opening an Irish office in 2024 to meet rising demand.

Key Technological Advancements in Irish Food Manufacturing

- **End-of-Line Automation**: Palletising, sorting, and inspection systems have become the most common entry point for automation, helping processors increase throughput and reduce reliance on manual handling.

- **Digital Process Optimisation**: The adoption of sensors, predictive maintenance, and OEE monitoring is enabling companies to enhance efficiency and traceability, often extending the life of existing equipment.

- **Collaborative and Hygienic Robotics**: Cobots are allowing SMEs to automate repetitive tasks, while advanced robotics is increasingly deployed for portioning and high-care environments where hygiene is critical.

- **On-Farm Automation**: Robotics in milking, feeding, and cleaning are transforming dairy supply chains, reducing labour intensity and improving consistency in output.

Sources: : VDMA - association for the machinery and equipment manufacturing industry in Europe and Germany, M&A Worldwide analysis

Sector Spotlight: Dairy Processing

Dairy is Ireland's largest processing sector and a key driver of automation, with processors such as Carbery, Lakeland, and Glanbia investing in packaging, palletising, utilities optimisation, and advanced data capture to boost efficiency and traceability. On farms, robotic milking and automated cleaning are transforming production, delivering a more consistent and traceable milk supply. Irish-owned Dairymaster has become a global leader in dairy automation, providing robotic milking, smart feeding, and AI-driven herd management solutions that cut labour, improve herd health, and lift output. Its technologies can increase milk yields by up to 5% and significantly reduce milking time, generating meaningful productivity and profitability gains for dairy farms at scale.

Recent investment in automation by Irish Companies

Company	Activity
Golden Bake	Golden Bake, a Irish producer of frozen bakery products, recently invested €10m in a modern Coolock facility. The upgrade features automated mixing, lamination and packing lines.
Lakeland Dairies	Lakeland Dairies, an Irish Dairy co-op, installed two robotic palletisers on high volume butter lines, improving safety, stabilising output and reducing manual heavy lifting while processing over 2 billion litres of milk annually.
Mackle Food Company	The Mackle Food Company, a Northern Irish private label snack manufacturer, recently invested £6.3m in robotics and real-time production monitoring.
panelto Foods	Panelto, a speciality bread manufacturer invested €7m in a new bread line for its Longford facility. Panelto has invested in "emerging robotic technologies" in the bakery.
Dundalk Bay Seafoods	Dundalk Bay Seafoods have implemented an AI-powered shellfish grader. This new system uses AI plus laser vision technology to sort and grade shellfish.
Ballycotton Seafood Est. 1985	Ballycotton Seafood have invested c.€1.1m in production facilities, improving automation and efficiency at its Cork headquarters.

Future in Ireland

Robotics and automation are becoming increasingly important for Ireland's food sector as processors respond to labour shortages, rising costs, and sustainability pressures. Many smaller firms are focusing on simple, cost-effective technologies such as cobots, vision systems, and digital monitoring, while larger plants are adopting more advanced solutions like automated vehicles and hygienic robotics. Continued progress will depend on skills development and government support, but automation is now essential to improving efficiency, traceability, and long-term competitiveness across the industry.

Sources: : VDMA - association for the machinery and equipment manufacturing industry in Europe and Germany, M&A Worldwide analysis

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9 Other transactions in the sector – M&A Worldwide

France 05/2025

has acquired

Sell-side

New Zealand 06/2025

has acquired

Buy-side

New Zealand 05/2025

has acquired

Sell-side

Brazil 04/2025

has acquired

Sell-side

Greece 01/2025

has acquired

Sell-side

Ireland 06/2024

has acquired

Sell-side

Ecuador 10/2024

has acquired

Buy-side

New Zealand 01/2024

has acquired

Sell-side

New Zealand 05/2023

has acquired

Sell-side

Automation & Technology in the Food Sector

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