LUXINNOVATION
#MakingInnovationHappen

MAPPING THE LUXEMBOURG AGRI-FOOD ECOSYSTEM

KEY INSIGHTS 2025

LUXINNOVATION
#MakingInnovationHappen

INDEX

1. INTRODUCTION
2. OVERVIEW
3. FOCUS

01 INTRODUCTION

1. CONTEXT AND SCOPE
2. METHODOLOGY
3. DASHBOARD

Context and scope

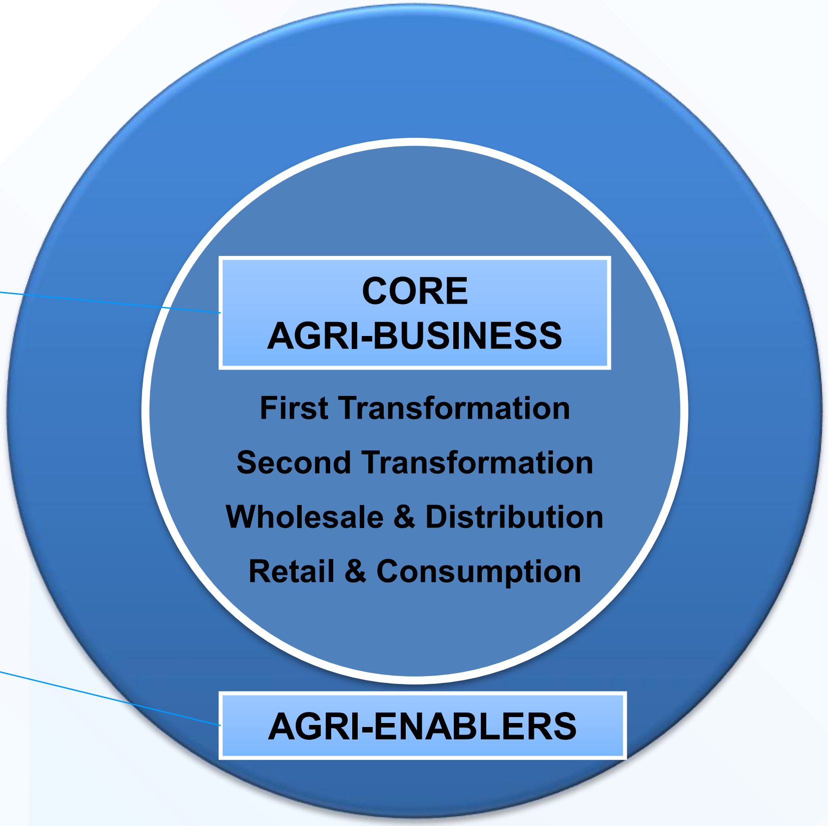
This report offers key insights from the first phase of the agri-food mapping, **focusing on core agri-business entities**. It is based on the agri-food ecosystem mapping process developed by the Market Intelligence department, as part of the partnership agreement signed between the Ministry of Agriculture, Food and Viticulture and Luxinnovation in 2023.

The entities belonging to the agri-food mapping are divided in two main categories :

Core agri-business include private and public entities active on the agri-food value chain : i.e. **Transformation**, **Wholesale & Distribution** and/or **Retail & Consumption** of agri-food products.

Agri-enablers are private and public entities that facilitate and support the efficient functioning and development of the agri-food ecosystem. They play a crucial role in enhancing productivity, sustainability and resilience within the agri-food ecosystem.

They are divided into 7 categories: **Product & Service providers, Technology Providers, Research & Testing, Certification Organizations, Advisors & Consultants, Investors & Finance** and **Accelerators & Institutional Enablers**.



LUXINNOVATION
#MakingInnovationHappen

Methodology

1- Source identification

The main sources used to collect relevant information were :

- Corporate databases (e.g. EditusData, Pitchbook, Dealroom)
- Specialised associations directories (e.g. FEDIL)
- Company websites
- Luxinnovation internal databases

2- Selection and classification of the relevant entities

Each company identified is included or excluded from the mapping based on the scope established.

Every entity is then classified, among others, according to their activities in the **Agri-food value chain** (First Transformation, Second Transformation, Wholesale & Distribution, Retail & Consumption) and its **food sector** (Livestock, Fruit & Vegetables, Dairy & Eggs, Beverages, Fish, Cereals & Grains, Other products, Food supplements).

Furthermore, every entity is tagged according to their main expertise or activities.

3- Experts' review

The data collected is then gathered into a review file that is submitted to experts for validation. This step is carried out jointly by market intelligence analysts and Luxinnovation's sector experts, with inputs from the Ministry of Agriculture, Food and Viticulture and their administrations.

4- Data consolidation

At this stage, the reviewed information is consolidated in a final database, which is enriched with additional data, when available, coming from the following sources:

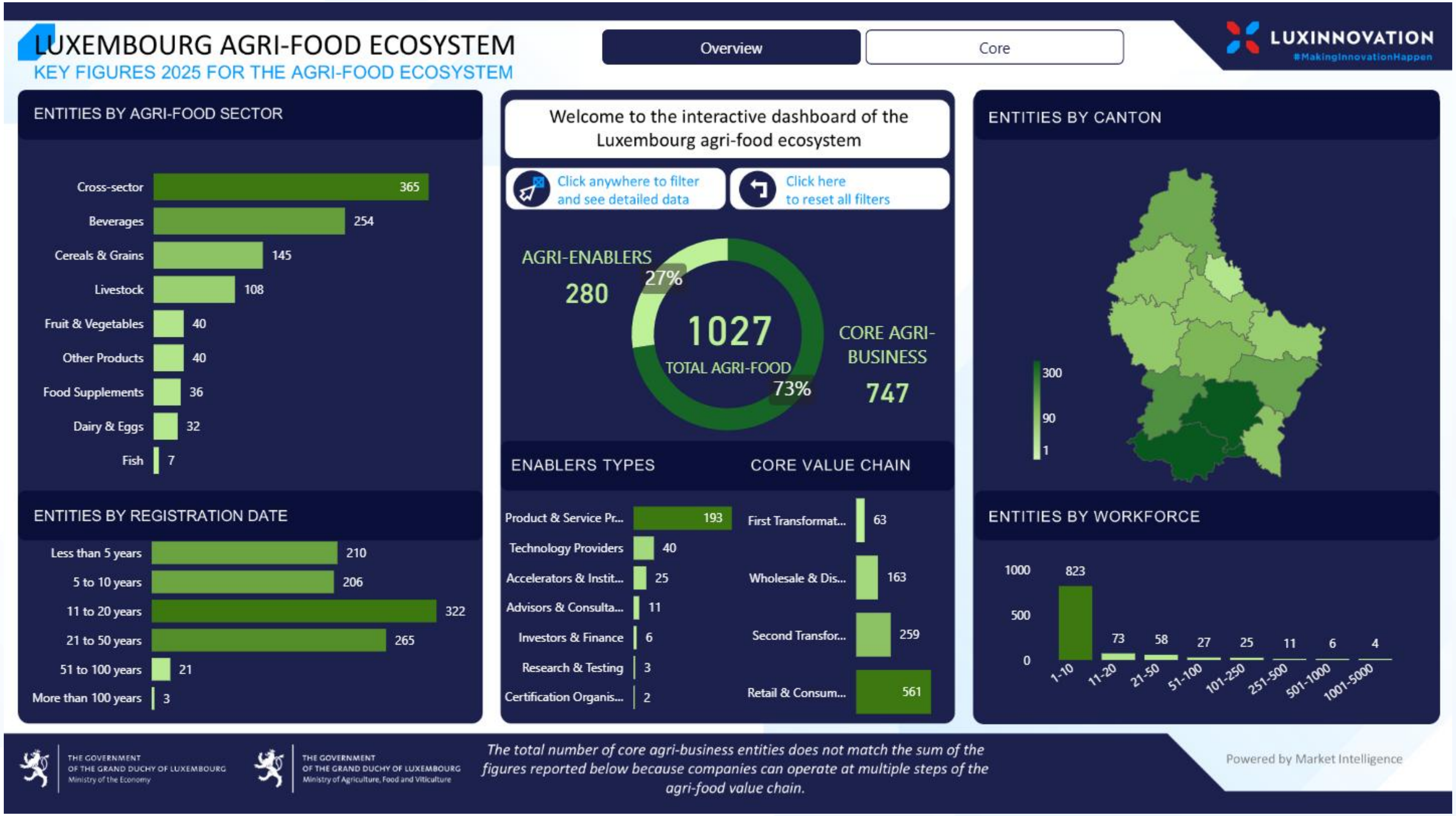
- Business description (Website, LinkedIn, Luxembourg Business Registers)
- National and global locations (EditusData, PitchBook)
- Entity and corporate group's workforce (EditusData, LinkedIn, LBR)
- Key financial figures (EditusData, LBR)
- Innovation metrics (Luxinnovation, Dealroom)

Finally, the database is transformed into an interactive dashboard tailored to the stakeholders' needs.

To access the mapping and consult the complete methodology, please refer to our Luxinnovation Knowledge Hub (here).

The cut-off date for the data contained in this analysis is 20/06/2025.

Dashboard



Click image to access Dashboard

LUXINNOVATION
#MakingInnovationHappen

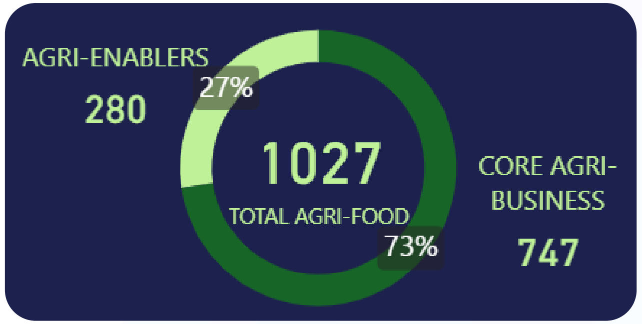
02 OVERVIEW

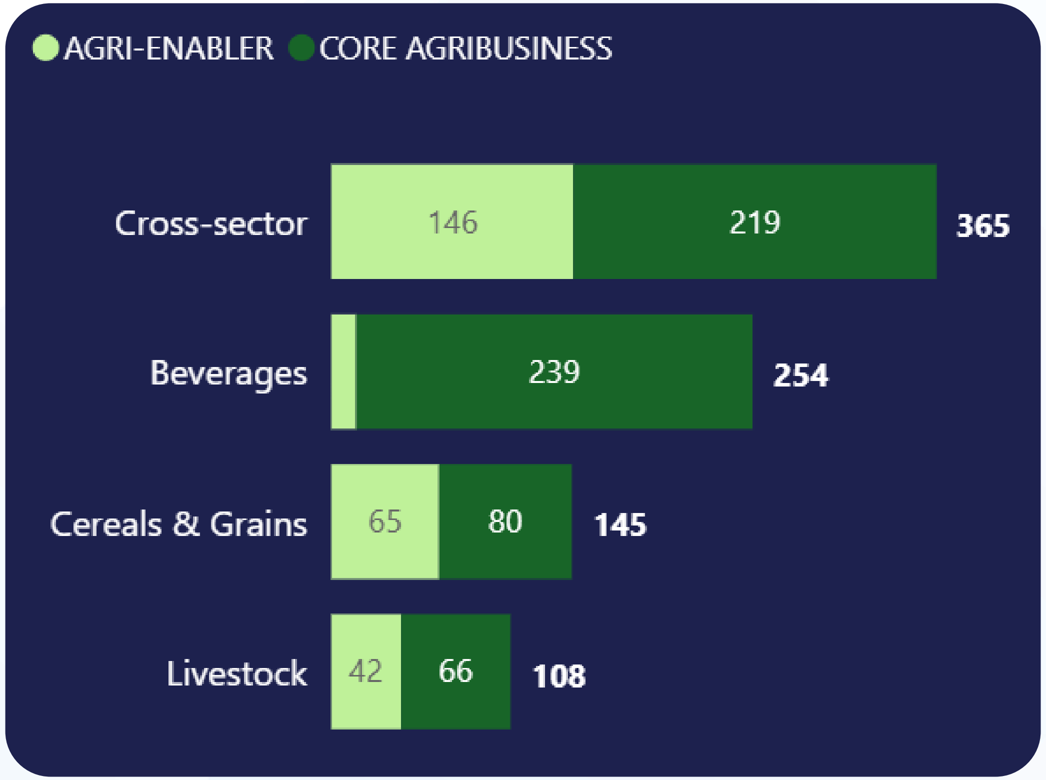
1. MAIN FIGURES
2. GEOGRAPHICAL DISTRIBUTION
3. WORKFORCE AND AGE DISTRIBUTION

Main figures

The agri-food mapping covers 1,027 entities, with over two-thirds (73%) active in the value chain (Core Agri-business) and the remaining 27% classified as Agri-enablers.

- As expected, the majority (365 entities, 36%) operate within the **Cross-sector**, spanning multiple food domains.
- The **Beverages** sector also shows strong representation, with 254 companies (25%), largely due to Luxembourg's wine industry and its many wine shops, beverage retailers, and distributors.
- The **Cereals & Grains** sector ranks third with 145 companies (14%), driven by 52 bakeries (2nd transformation bread) and 48 agricultural contractors (agricultural services) classified as Enablers in the Cereals & Grains sector.
- The **Livestock** sector includes 108 entities (11%), with 56 butcheries as Core Agri-businesses (2nd transformation meat). Over half of the 42 Enablers are involved in trading, breeding, or veterinary activities.





A company may operate multiple retail locations, so the figures presented do not necessarily correspond to individual stores.

Workforce and age distribution

The Agri-food ecosystem is largely made up of micro enterprises, with 823 entities (80%) employing fewer than 10 people. Notably, 200 of these businesses (24%) have been established within the last five years.

- While exact employee counts are not available for every company, current data allows for an estimated total workforce of approximately 30,000 people within the ecosystem. As a reminder, this mapping does not include the full HORECA sector.
- Despite the high numbers of small companies, around 80% of the workforce is concentrated in less than 10% of the companies.

Figure 1: Distribution by workforce Range

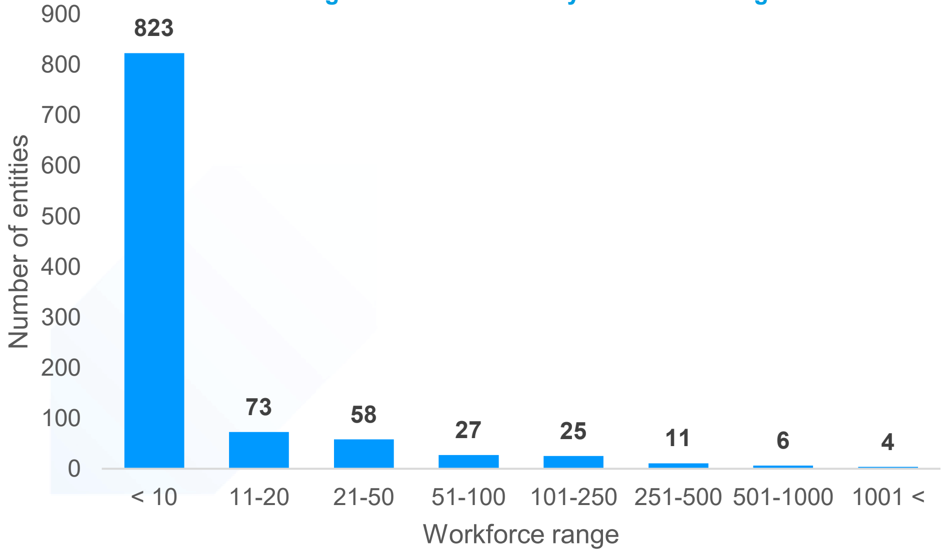
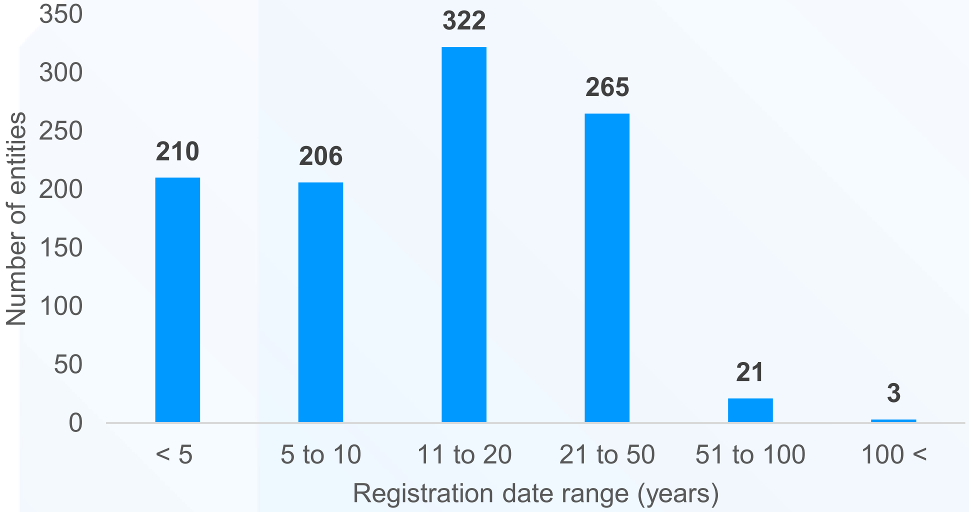


Figure 2: Distribution by registration date

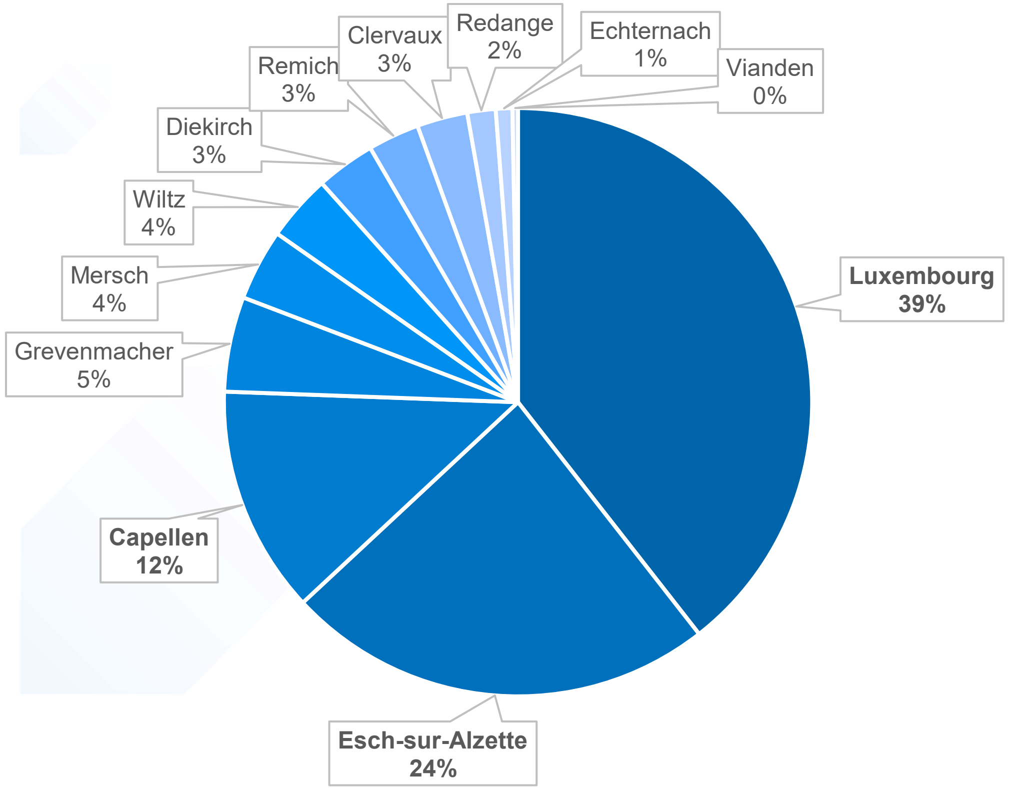


LUXINNOVATION
#MakingInnovationHappen

Geographical distribution

Almost two thirds (59%) of the legal entities are concentrated in three cantons in southern Luxembourg. This is of course also reflected in the distribution of the workforce within the ecosystem covered by the mapping.

Figure 3 Workforce estimates by Canton



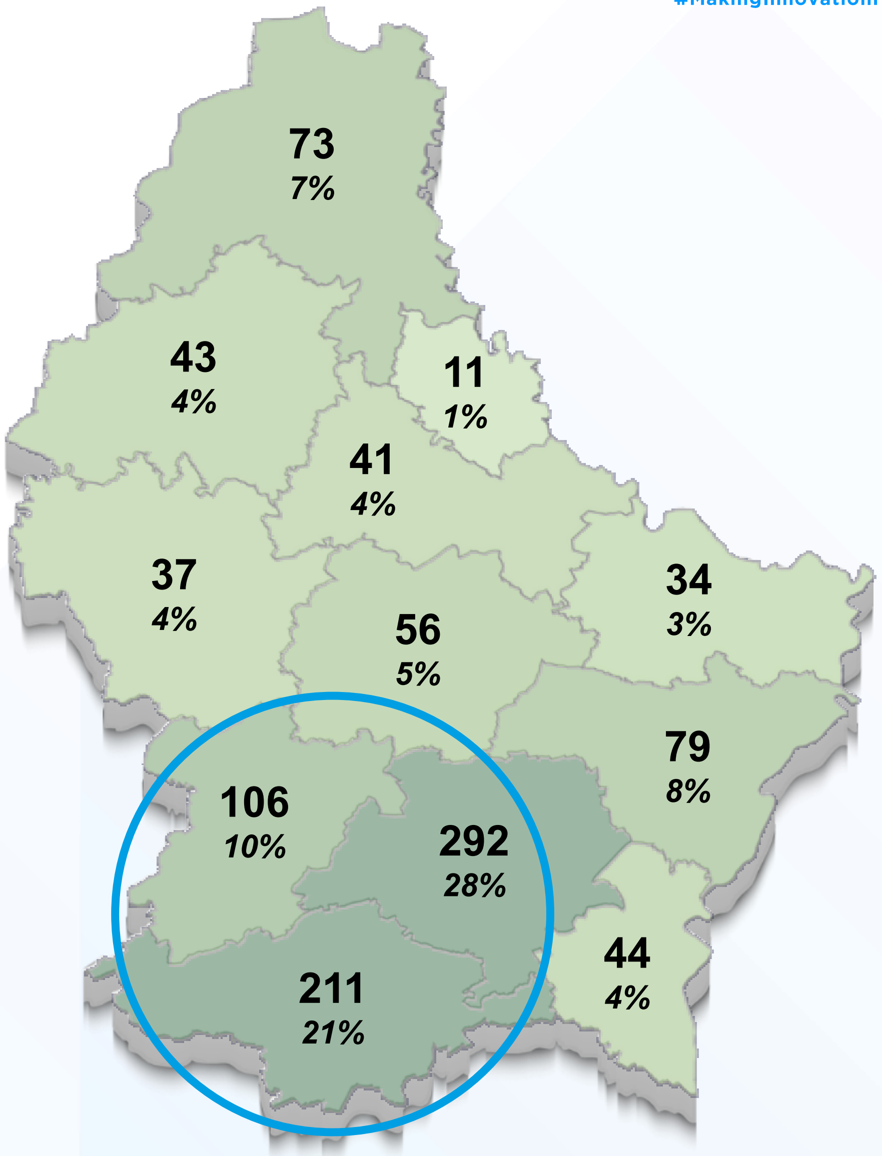


Figure 4: Number of entities by Canton

LUXINNOVATION
#MakingInnovationHappen

03 FOCUS

1. TYPE OF AGRI-ENABLERS
2. CORE ACTORS ALONG VALUE CHAIN
3. BEVERAGE SECTOR
4. CEREALS & GRAINS
5. LIVESTOCK
6. DAIRY & EGGS

LUXINNOVATION
#MakingInnovationHappen

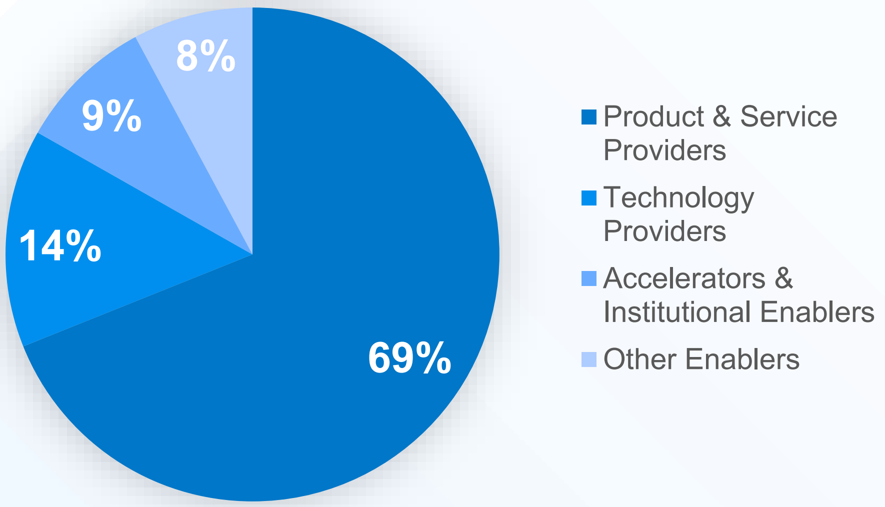
Type of Agri-enablers

280 legal entities were identified that facilitate and support the efficient functioning and development of the agri-food ecosystem in Luxembourg, divided into seven categories: Product & Service Providers, Technology Providers, Accelerators & Institutional Enablers, Advisors & Consultants, Investors & Finance, Research & Testing and Certification Organisations.

- Nearly two-thirds of these Agri-enablers **provide services or goods**: 61 have as activity the manufacturing or sales of manufactured goods while 113 offer any type of service; 19 companies provide both, goods and services.
  - Of the 113 service providers, **90 serve the agricultural sector** – nearly half of these are farmer-founded companies offering services to peers. The remaining 23 support the agri-food value chain, including several companies providing workforce for meat processing and B2B2C food delivery companies.
  - Among the 61 goods suppliers, **45 sell equipment or inputs to farmers** with 2 producing locally.
  - And of the 19 companies, **17 sell equipment and related services to farmers**.

- **40 technology providers** develop and supply digital tools, automation systems, and precision agriculture technologies to the ecosystem. These companies range from engineering services and custom equipment developers to earth observation or data-processing solution providers, and biotech start-ups.

Figure 5: Number of Enablers by Type



Numbers do not necessarily sum up since entities can have multiple activities and tags.

LUXINNOVATION
#MakingInnovationHappen

Core Agri-business actors along value chain

First Transformation

The initial processing of raw agricultural products, including both plant-based and animal-based products, into forms that can either be consumed directly (e.g. grapes into wine) or used as inputs for further processing (e.g. grains into flour, slaughtering).

63 *(8%)*
legal entities

Second Transformation

All activities that involve further processing of the products obtained from the first transformation into more complex or finished goods ready for consumer use (e.g. flour into bread or pastry).

259 *(35%)*
legal entities

747
Core Agri-business

163 *(22%)*
legal entities

Wholesale & Distribution

All B2B activities related to the process of storage, trade and transport from Transformation to Retail & Consumption of food products.

561 *(75%)*
legal entities

Retail & Consumption

All activities that target final consumers or providing ready-to-eat products (e.g. supermarkets, collective catering, selling point of bakeries, butcheries or winemakers). Restaurants, hotels or other small food services are not included in the numbers.

**Numbers do not necessarily sum up since entities can have multiple activities and tags.*

LUXINNOVATION
#MakingInnovationHappen

Focus on main food sectors: Beverage

Core Agri-business only

Within the Core Agri-businesses, the "Beverage" sector is the largest, with 239 entities exclusively engaged in activities related to this sector.

- Focusing on **Wine**, 32 registered businesses are engaged in wine making, which constitutes a first transformation. In contrast, the majority, **118 companies**, are involved in the distribution and commercialisation of wine, including the **32 producers** themselves.
- **Spirit** comes second with **52 companies** tagged accordingly, among which **19 producers**, considered second transformation, have been identified.
- Also noteworthy are the **12 breweries** and **9 coffee roasters**, most of them micro-enterprises. This production is also considered to be second transformation.

Figure 6: Activities of all "Beverage* sector companies

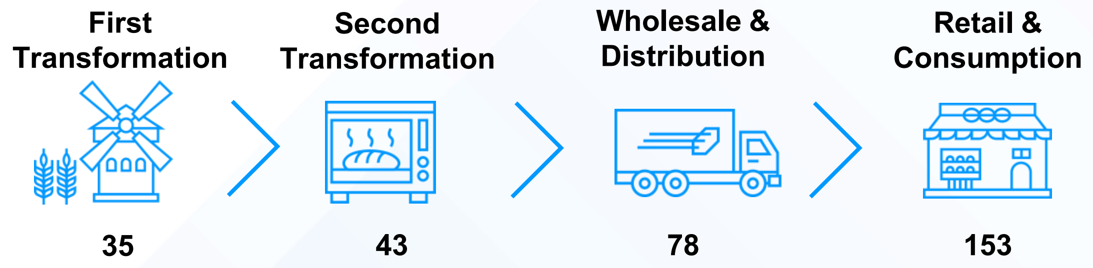
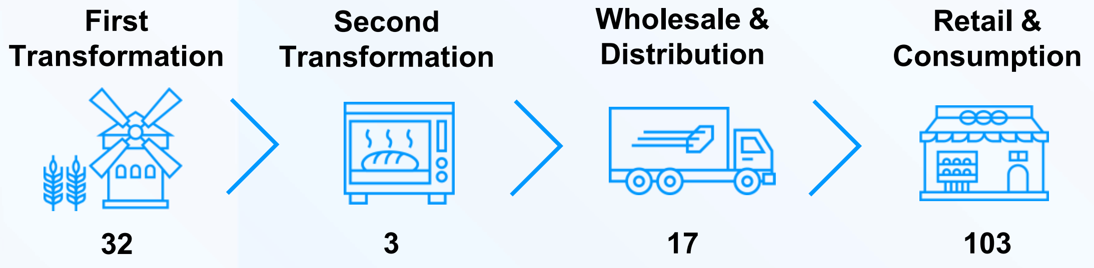


Figure 7: Activities of "Beverage" companies tagged "Wine"



Numbers do not necessarily sum up since entities can have multiple activities and tags.

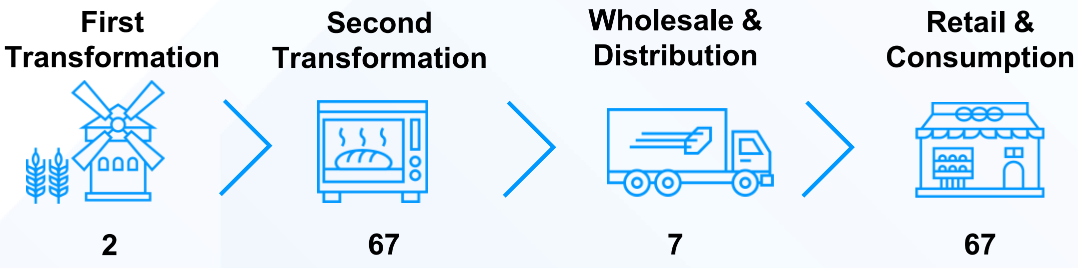
Focus on main food sectors: Cereals & Grains

Core Agri-business only

Within the Core Agri-businesses, 80 entities operate in the "Cereals & Grains" sector

- There is a relationship between companies involved in secondary processing and those operating in retail. This becomes evident in the case of the **52 bakeries**, which not only produce baked goods but also sell them directly to consumers, effectively combining manufacturing and retail functions.
- The number of companies solely focused on wholesale and distribution is limited in this sector.
- There is 1 large well-known producer of flour in Luxembourg, but another small company was identified that transforms grains.

Figure 8: Activities of all "Cereals & Grains" sector companies



Numbers do not necessarily sum up since entities can have multiple activities and tags.

LUXINNOVATION
#MakingInnovationHappen

Focus on main food sectors: Livestock

Core Agri-business only

The food sector "Livestock" comprises a total of 66 legal entities, with the large majority being involved in Second Transformation and Retail & Consumption.

However, the focus here is on all companies tagged with "Meat".

- A total of **68 companies** are tagged "**Meat**". Two are indeed involved beyond the "Livestock" sector.
- Despite only 1 slaughterhouse remaining in Luxembourg, **3 companies** do **First Transformation**, since this also includes primal cutting.
- **58 companies** do **Second Transformation**, the vast majority being butcher shops.
- It is also interesting to highlight that **6** companies do **direct farm sales**.

Figure 9: Activities of all "Livestock" sector companies

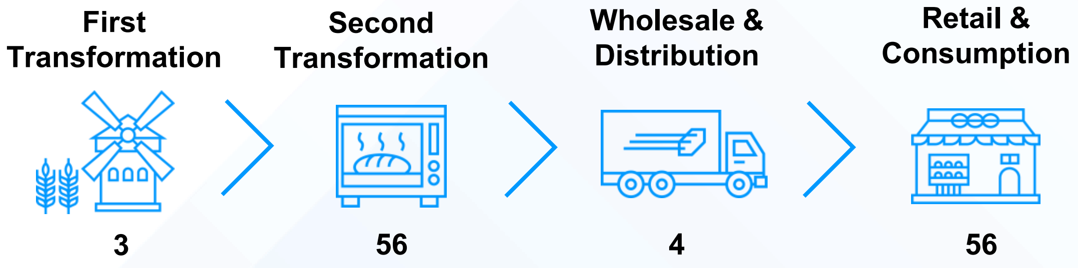
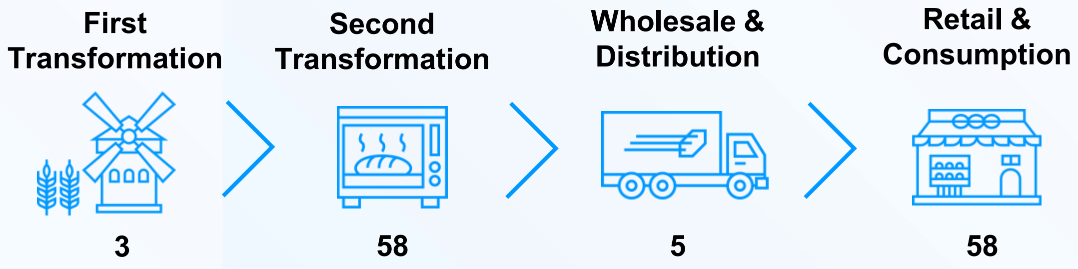


Figure 10: Activities of companies tagged "Meat"



Numbers do not necessarily sum up since entities can have multiple activities and tags.

Focus on main food sectors: Dairy & Eggs

Core Agri-business only

The "Dairy and Eggs" sector is composed of 27 legal entities.

- **18 companies** have transformation and commercialization of **dairy products** as their core activity.
- This includes, for instance, **8 companies** producing milk, cheese, ice cream or yoghurt, and **3** companies that do **direct farm sales**.
- **7 companies** have been identified to be operating within the value chain, with a primary focus on "eggs".

Figure 11: Activities of all "Dairy & Eggs" sector companies

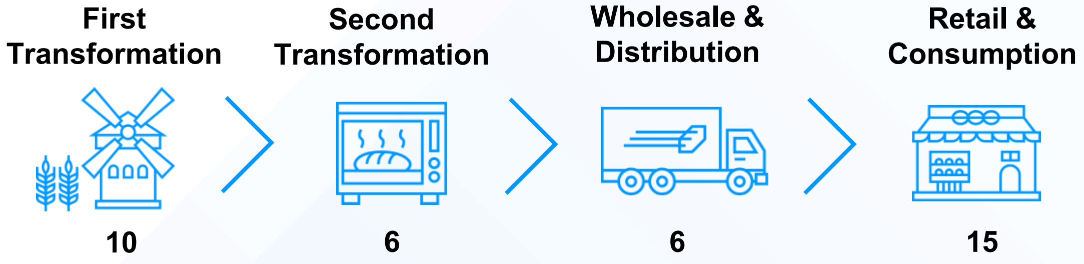
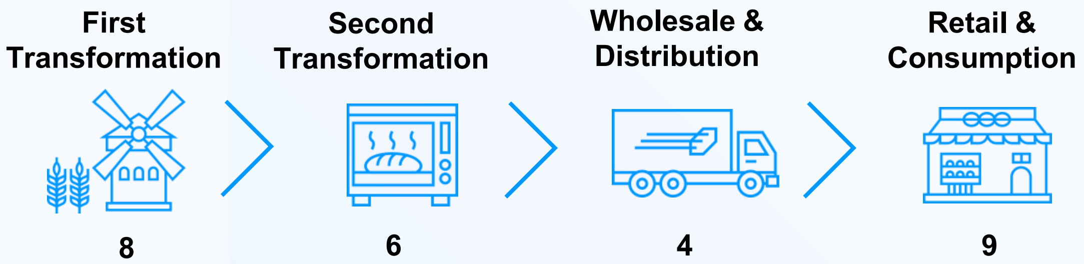


Figure 12: Activities of companies tagged "Milk", "Cheese", "Yoghurt", "Ice-Cream"



Numbers do not necessarily sum up since entities can have multiple activities and tags.

LUXINNOVATION
#MakingInnovationHappen

Luxinnovation Market Intelligence
5, avenue des Hauts-Fourneaux L-4362 Esch-sur-Alzette
Discover more insightful content at www.luxinnovation.lu/knowledge-hub