

# International IUL Meat Conference

Omaha Nebraska

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Hauptverwaltung



# Situation of the German slaughter industry



## Structure:

- Initial Situation
- Development in the last 10 years in pork – beef - poultry
- Situation of migrant workers
- Two Examples
- Work situation of permanent staff
- The impact within Europe
- Resistance to cooperation



# Production output in Germany



8.000.000 tons of meat  
in 2010

68 % pork  
17 % poultry  
15 % beef

The pig slaughtering industry in  
Germany ranks third behind  
China and the USA



PASSION FOR BETTER FOOD



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99 % of animals slaughtered in Germany come from intensive mass animal farming

To be slaughtered in 2011:

60 million pigs

4 million cattle

1 million sheep

900 million poultry



# Initial situation pork industry

In 10 years, Germany has changed from an importer to an exporter of pork meat



## Development in 10 years:

|                  |                                |
|------------------|--------------------------------|
| In the year 2000 | 80 % covered own requirements  |
| In the year 2010 | 120 % covered own requirements |



# Initial situation cattle

unchanged / stable

After a low due to the BSE crisis  
little change



# Initial situation poultry



rapid growth

inexpensive

"Healthy"



Optimized production systems



These 4 major companies dominate 60% of the pork market:

**B+C Tönnies**

**Vion Food**

**Westfleisch**

**Danish Crown (bis 1.1.2011 D+S)**



They will have slaughtered approx 40 million pigs in 2011

Their export rates are above 50%





Exports are global

Certification for the major 4 companies in China,  
Korea and Japan

Especially the growing meat consumption in China  
has substantially raised the German production



The major 4 companies employ only a few "own" employees

|              |      |
|--------------|------|
| B+C Tönnies  | 10 % |
| Vion Food    | 50 % |
| Westfleisch  | 15 % |
| Danish Crown | 10 % |

Central-East European workers (migrant workers) are used on the basis of temporary contracts



Situation of migrant workers:

Recruitment through bogus companies in the sending country

Accommodation in mass shelters - ghetto formation

No contact with locals

Subject to industrial law of their deployment country

No legislation for minimum wages



# Migrant worker



Demand for minimum wage

Niedriglohn macht Deutschland arm. Arm trotz Arbeit.

**DEUTSCHLAND BRAUCHT DEN MINDESTLOHN.**

**KEIN LOHN  
UNTER 8,50**  
Euro pro Stunde

**DGB**



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# Migrant Workers



Discussion at European level

due to the initiative of EFFAT with the Socialist Group in EU Parliament

Bilateral discussions between French Italian and Danish unions



FEDERAZIONE LAVORATORI AGROINDUSTRIA  
EMILIA ROMAGNA

fødevareforbundet 



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# Migrant Workers

The German trade unions are working together



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# Migrant Workers



local project  
in preparation

main  
Toennies and  
Westfleisch

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Kurzexposé für das Projekt

## ProGA

**Pro**phylaxe für **Gute Arbeit** und Fach-  
kräftesicherung in der  
nordrhein-westfälischen Fleischindustrie



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Two examples:

1) Tönnies slaughterhouse in Rheda-Wiedenbrück (NRW)

Slaughter capacity 25,000 pigs per day

4700 employees, 500 directly from Tönnies,  
500 at Tönnies subsidiary companies  
3700 workers, mainly from Romania

Hourly wages are known from 5.00 € (approx. \$ 7.00)

For the permanent staff no rate connection





## 2) Danish Crown in Essen (Niedersachsen)

Slaughter capacity 4 million pigs a year

1200 employees

100 directly at Danish Crown

1100 employees in contracts

for work and services

For permanent staff no wage rate connection

Hourly wages are known to be from 5.00 € (about \$7.00)



# Situation of the permanent staff

Job losses  
wage reductions  
Falling rate connection



No collective agreements at  
B + C. Tönnies  
Danish Crown  
Limited at Vion Food

Complete wage rate connection only for Westfleisch  
Always related to the permanent staff  
No national regulation for contract workers

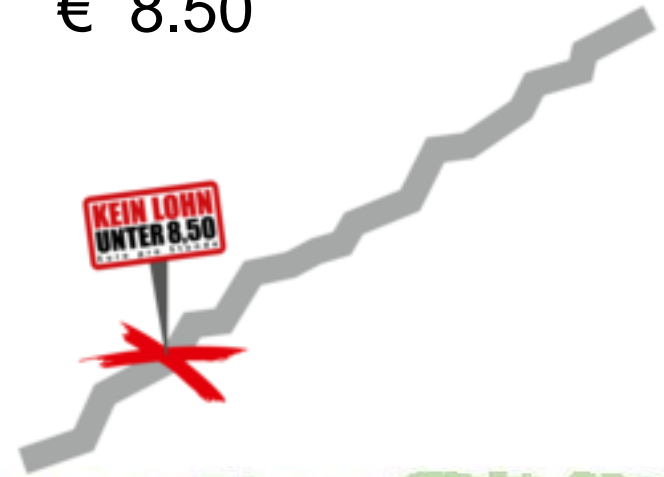


Conclusion for NGG:



Contract workers need **binding verifiable minimum wages**,  
focus is clearly on wages of permanent employees  
with wage rate connection

That means skilled workers wages of €15.00  
For unskilled work € 8.50



Consequences:

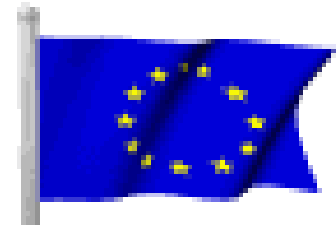
Massive job losses  
in other European countries

Declining incomes of permanent staff

Meat is sold off to become a bulk good

Migrant workers are exploited

Degradation of workers' rights



Consequences:

Meat mass production has many aspects

discussion about

Plate (Teller) ----- World Food

Trough (Trog) ----- animal feed production for factory farming

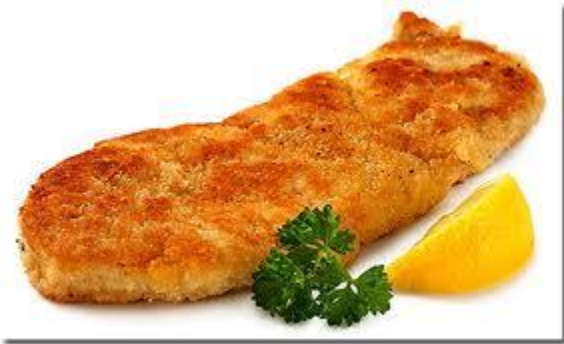
Tank (Tank) ----- bio-ethanol as an energy source



Consequences:

The total feeding of a growing world population will come to the fore

The meat consumption in Germany is at about 65 kg per year



# The ten major companies of German meat industry

| Rang | Rang Top 150 | Company           | transaction volume in Mio. Eur |
|------|--------------|-------------------|--------------------------------|
| 1    | 1            | Tönnies           | 4300,0                         |
| 2    | 2            | Vion Food Germany | 3700,0                         |
| 3    | 3            | PHW-Gruppe        | 2095,8                         |
| 4    | 4            | Westfleisch       | 1930,0                         |
| 5    | 7            | Heristo           | 1538,0                         |
| 6    | 9            | Zur-Mühlen-Gruppe | 825,0                          |
| 7    | 10           | Sprehe-Gruppe     | 720,0                          |
| 8    | 11           | Müller-Gruppe     | 717,0                          |
| 9    | 12           | Stolle            | k.A.                           |
| 10   | 13           | Rothkötter-Gruppe | 670,0                          |



# The ten major pork slaughtering companies

| Rang | Rang Top 150 | Company           | slaughter in 2010 |
|------|--------------|-------------------|-------------------|
| 1    | 1            | Tönnies           | 15 300 000        |
| 2    | 2            | Vion Food Germany | 10 700 000        |
| 3    | 4            | Westfleisch       | 6 580 000         |
| 4    | 16           | D & S Fleisch     | 3 580 000         |
| 5    | 29           | Vogler-Fleisch    | 1 950 000         |
| 6    | 45           | Böseler           | 1 850 000         |
| 7    | 247          | BMR Schlachthof   | 1 365 000         |
| 8    | 56           | Tummel            | 1 346 000         |
| 9    | 19           | Gausepohl         | 1 335 000         |
| 10   | 11           | Müller-Gruppe     | 1 100 000         |





# The ten major cattle slaughtering companies



| Rang | Rang Top 150 | Company             | slaughter in 2009 |
|------|--------------|---------------------|-------------------|
| 1    | 2            | Vion Food Germany   | 953 000           |
| 2    | 1            | Tönnies             | 400 000           |
| 3    | 4            | Westfleisch         | 319 400           |
| 4    | 11           | Müller-Gruppe       | 315 000           |
| 5    | 19           | Gausepohl           | 312 000           |
| 6    | 31           | Färber              | 158 000           |
| 7    | 74           | Teterower Fleisch   | 100 000           |
| 8    | 69           | Danish Crown, Husum | 100 000           |
| 9    | 92           | Attenberger         | 80 000            |
| 10   | 82           | Unifleisch          | 66 000            |



# The ten major poultry slaughtering companies



Sales volume in Mio.  
Euro

| Rang | Rang Top 150 | Company            | Sales volume in Mio.<br>Euro |
|------|--------------|--------------------|------------------------------|
| 1    | 3            | PHW-Gruppe         | 2095,8                       |
| 2    | 10           | Sprehe-Gruppe      | 720,0                        |
| 3    | 12           | Stolle             | 705,0                        |
| 4    | 13           | Rothkötter-Gruppe  | 670,0                        |
| 5    | 20           | Heidemark          | 500,0                        |
| 6    | 41           | Velisco            | 250,0                        |
| 7    | 44           | Nölke-Gruppe       | 231,0                        |
| 8    | 77           | Frikifrisch GmbH   | 135,0                        |
| 9    | 81           | Vosko Tiefkühlkost | 120,0                        |
| 10   | 96           | Borgmeier          | 92,0                         |



Conclusion:

Improve cooperation

Strengthen position of  
EFFAT and IUF

Thank you  
for your attention



*There is lot to do,  
Let's tackle it!*

