

DETERMINATION OF MERGER NOTIFICATION M/26/049 – SCANDINAVIAN STANDARD (MANOR FARM)/GLENHAVEN FOODS

Section 21 of the Competition Act 2002

Proposed acquisition by Scandinavian Standard Nordic AB, of sole control of Glenhaven Foods (Arklow) Unlimited Company

Dated 15 September 2026

Introduction

1. On 7 August 2026, in accordance with section 18(1)(a) of the Competition Act 2002, as amended (the “Act”), the Competition and Consumer Protection Commission (the “Commission”) received a notification of a proposed acquisition whereby Scandinavian Standard Nordic AB (“Scandinavian Standard”) would acquire the entire issued share capital, and thus sole control, of Glenhaven Foods (Arklow) Unlimited Company (“Glenhaven Foods”) (“Proposed Transaction”).¹

The Proposed Transaction

2. The Proposed Transaction is to be implemented by way of a share purchase agreement dated 30 July 2026 between Glenhaven Holdings Unlimited Company (“Glenhaven Holdings”), [REDACTED], [REDACTED], Scandinavian Standard and Scandi Standard AB (PUBL) (the “SPA”).² Pursuant to the SPA, Scandinavian Standard will acquire the entire allotted and issued share capital, and thus sole control, of Glenhaven Foods.

The Undertakings Involved

The Acquirer – Scandinavian Standard

3. Scandinavian Standard is a producer and supplier of chicken-based food products, active across several European markets, including Sweden, Lithuania, Denmark, Norway and

¹ Scandinavian Standard and Glenhaven Foods are collectively referred to as the “Parties” hereafter.

² Confidential Annex 1 of the Merger Notification Form.



Finland.³ Scandinavian Standard owns several entities active in these countries including UAB Scandi Standard Baltics (“Scandi Standard Baltics”)⁴ and Danpo A/S (“Danpo”).⁵ In the State, Scandinavian Standard operates through its subsidiary, Carton Bros Unlimited Company, which trades as Manor Farm⁶ (Scandinavian Standard Baltics, Danpo and Manor Farm together, are referred to herein as the “Scandinavian Standard Group”).

4. Scandinavian Standard Group operates an integrated poultry production facility encompassing the entire chicken supply chain, from feed production, parent bird and egg production, hatchery operations and poultry rearing through to slaughtering, processing, packaging, distribution, and sales.⁷
5. In the State, Manor Farm supplies primary chicken products to retailers,⁸ foodservice and industrial processor⁹ customers. While Manor Farm does not produce processed chicken food products, Scandinavian Standard supplies a limited amount of processed chicken within the State,¹⁰ primarily through Danpo and resales of Glenhaven-manufactured processed products.
6. For the financial year ending 31 December 2025, Scandinavian Standard’s worldwide turnover was approximately € [REDACTED], of which approximately € [REDACTED] was generated in the State.

The Target – Glenhaven Foods

³ Within these countries, Scandinavian Standard processes, markets and sells its primary and processed chicken food products under the following brands: “Kronfågel”, “Danpo”, “Den Stolte Hane” and “Naapurin Maalaiskana.”

⁴ UAB Scandi Standard Baltics (“Scandi Standard Baltics”) is a primary chicken food supplier which supplies directly to Glenhaven Foods from Scandinavian Standard's Lithuanian plant. Scandinavian Standard Baltics does not sell directly to end customers in the State.

⁵ Danpo is a processed chicken supplier which makes direct sales to foodservice and retailer customers in the State. Processed chicken are those chicken products which have additional ingredients and have undergone further manufacturing processes.

⁶ Scandinavian Standard purchased Manor Farm in 2017, with the objective of establishing a footprint in the Irish primary chicken food sector. (Merger Notification Form – Page 6, paragraph 2.6).

⁷ Scandinavian Standard Group operates two production facilities in the Netherlands in addition to a chicken production facility in Lithuania. Merger Notification Form, page 2.

⁸ Retailers refers to large supermarket chains including: Aldi Stores (Ireland) Limited, Dunnes Stores Unlimited Company, Lidl Ireland GMBH, Musgrave Limited (trading as Supervalu) and Tesco Ireland Limited.

⁹ Industrial processors process meat and/or poultry by applying additional ingredients and/or manufacturing processes to produce processed chicken products. Glenhaven Foods is an example of an industrial processor.

¹⁰ In 2025, Scandinavian Standard generated turnover of approximately € [REDACTED] from the sale of processed chicken food products in the State. (Merger Notification Form – Page 8, paragraph 3.3)



7. Glenhaven Foods, a wholly owned subsidiary of Glenhaven Holdings, is a producer of processed chicken food products based in Arklow, County Wicklow that supplies to both retailers and foodservice customers in the State and the United Kingdom. Glenhaven Foods does not supply primary chicken food products and is not active in any other levels of the poultry supply chain.
8. In the State, approximately █% of Glenhaven Foods' sales of processed chicken food products to retailers in the State comprise supermarket own-label products manufactured on behalf of retailers (e.g., █ etc.) with the remaining █% of sales of processed chicken food products to retailers in the State being the sale of Glenhaven Foods-branded products to retailers.¹¹ Further, Glenhaven Foods' total sales of processed chicken food products to retailers (encompassing supermarket own-label products and Glenhaven Foods'-branded products) in the State amounts to approximately █% of Glenhaven Foods' total sales of processed chicken food products in the State.¹² The remaining █% of processed chicken food product sales were to foodservice customers.¹³
9. For the financial year ending 31 December 2025, Glenhaven Foods' worldwide turnover was €█ of which €█ was generated in the State.

Rationale for the Proposed Transaction

10. In the merger notification form received by the Commission on 7 August 2026 (the "Merger Notification Form"), the Parties stated that:

*"By purchasing Manor Farm in 2017, which primarily focuses on the sale of primary chicken products to Irish retailers, [Scandinavian Standard] established a footprint in the Irish market. The Proposed Transaction would enable [Scandinavian Standard] to further develop its limited processed chicken business via [Glenhaven Foods'] successful franchise of convenience products."*¹⁴

¹¹ Glenhaven Foods' response to the Commissions additional questions dated 26 August 2026, Table C.

¹² Glenhaven Foods' response to the Commissions additional questions dated 26 August 2026, Table B and Table C.

¹³ Glenhaven Foods' response to the Commissions additional questions dated 26 August 2026, Table B and Table C.

¹⁴ Merger Notification Form, page 6, paragraph 2.6.



Third Party Submissions

11. No third-party submissions were received.

Market Enquiries

12. The Commission engaged with third parties in relation to its review of the likely competitive effects of the Proposed Transaction. The Commission's third party engagement involved issuing questionnaires¹⁵ or holding calls¹⁶ with competitors of the Parties.
13. The Commission further engaged with some of these third parties, where appropriate, to seek clarification or to further understand their responses to the Commission's questions.

Industry Background

Poultry Industry

14. The Parties stated that the poultry industry in the State is mature, relatively stable and highly regulated.¹⁷ For the purposes of assessing the Proposed Transaction, the Commission has provided an overview of the activities involved in: (i) the supply of primary chicken food products; and (ii) the supply of processed chicken food products.

The supply of primary chicken food products

15. Primary chicken food products are relatively homogeneous,¹⁸ and include whole birds, chicken portions and fillets, which have not undergone further processing and are ready to cook.¹⁹ Operating upstream in the value chain,²⁰ primary chicken food production encompasses feed production, parent bird and egg production, hatchery operations and poultry rearing through to slaughtering, packaging, distribution and sales.²¹

¹⁵ These were to: Grove Turkeys Limited ("Grove Turkeys") and Moy Park Limited ("Moy Park").

¹⁶ These were with: Western Brand Group Unlimited Company ("Western Brand"), Pan-Euro Foods Unlimited Company (trading as Diggers, and Farm Range) ("Pan Euro Foods"), Quality First Limited (trading as Rosie & Jim) ("Rosie & Jim") and Curran Foods Limited.

¹⁷ Merger Notification Form, page 12, paragraph 4.4(b).

¹⁸ Merger Notification Form, page 14, paragraph 4.4(c).

¹⁹ [M/10/018 - Moy Park/O'Kane](#), paragraph 12.

²⁰ [M.5705 - Marfrig Alimentos/Seara](#), paragraph 7.

²¹ Merger Notification Form – page 8, paragraph 3.3.

The supply of processed chicken food products

16. Operating downstream in the value chain, processed chicken food products have been supplemented with additional ingredients and further manufacturing processes (e.g., breading, coating, marinating or cooking).²² Processed chicken food products can be chilled or frozen. Examples of processed chicken products include goujons, kiev, nuggets and ready-to-eat ranges.
17. Distribution and supply systems typically involve vertically integrated producers selling directly to retailers and foodservice operations. As a result of the short shelf-life of primary chicken food products, supply chains are highly coordinated and emphasise efficient processing, cold chain management and just-in-time delivery. Moreover, suppliers of processed chicken products typically engage in spot-based procurement²³ of primary chicken products, rather than being contract-locked.²⁴ ¹²⁵

Competitive Analysis

Horizontal Overlap

18. There is a *de minimis* horizontal overlap between the Parties in the State as both Scandinavian Standard and Glenhaven Foods are active in the supply of processed chicken food products.

Vertical Relationship

19. There are vertical relationships between the Parties in the State as:
- Scandinavian Standard Group²⁶ supplies primary chicken food products to Glenhaven Foods who use these products as an input into the production of processed chicken food products; and

²² [M/10/018 - Moy Park/O'Kane](#), paragraphs 13 and 14; [M.5705 - Marfrig Alimentos/Seara](#), paragraph 13; [M.5322 - Mafrig/OSI Group Companies](#), paragraph 15.

²³ Spot-based procurement is the ad hoc acquisition of goods or services on an immediate, one-time basis at current market prices without having a pre-existing contract or long-term commitment with the supplier.

²⁴ Contract-locked procurement entails the buyer and supplier establishing a formal, legally bound arrangement to purchase defined goods or services under fixed agreed terms, such as price, volume, delivery windows, quality, specifications and duration.

²⁵ Merger Notification Form – page 13, paragraph 4.4(b).

²⁶ Specifically, from Scandi Standard Baltics and Danpo. Glenhaven's response to the Commissions additional questions dated 26 August 2026, Table E.

- Glenhaven Foods supplies processed chicken food products to Manor Farm who resell these products.

Market Definition

Relevant Market

Product markets

20. As stated above, there is a horizontal overlap between the Parties in the State in the supply of processed chicken food products.

Views of the Parties

21. In the Merger Notification Form,²⁷ the Parties state that the Proposed Transaction will not give rise to any competition concerns under any market definition but nevertheless provided information by reference to the following potential relevant markets:

- the supply of primary chicken food products to foodservice and retail customers; and
- the supply of processed chicken food products to foodservice and retail customers.

Previous decisions of the Commission and the EC

(i) Segmentation based on the level of processing

22. The European Commission (“the EC”) has previously defined separate markets for different levels of the value chain for the processing of chicken for human consumption, i.e., primary chicken food products²⁸ and processed chicken food products.²⁹

23. The EC has also assessed transactions involving a vertical relationship between parties active in the supply of primary chicken food products and the processing of chicken food products.³⁰

²⁷ Merger Notification Form, paragraph 5.1.

²⁸ In M.5705 - *Marfrig Alimentos/Seara*, the EC considered primary chicken to include fresh and frozen meat that has not been processed in any way, acknowledging that chicken meat supplied frozen for transport and then defrosted prior to sale to be consumed as a fresh or frozen product to fall within the definition of primary chicken. See [M.5705 - Marfrig Alimentos/Seara](#) paragraphs 8 and 13.

²⁹ The EC previously considered processed chicken to involve the addition of external ingredients, and can be raw, dried, smoked or cooked. See [M.5322 - Mafrig/OSI Group Companies](#) paragraphs 10 and 14; and [M.3476 - Cargill/Seara](#) paragraphs 10 and 13.

³⁰ See, for example, [M.5322 - Mafrig/OSI Group Companies](#) and [M.3476 - Cargill/Seara](#).



In such transactions, the EC identified the supply of primary chicken as upstream to the supply of processed chicken.³¹ Further, while leaving the question open, the EC noted that the supply of processed poultry food products can be further segmented based on the type of processed poultry food product, such as raw cured products, processed meat for cold consumption, canned meat, ready prepared dishes, cooked sausages, pâté and pies.³²

24. The Commission's predecessor, the Competition Authority (the "Authority"), in M/10/018 – *Moy Park/O'Kane*,³³ considered the supply of primary chicken food products to be a separate product market from the supply of processed chicken food products. The parties in M/10/018 – *Moy Park/O'Kane* described primary chicken food products as including whole bird, chicken portions and fillets which have not undergone further processing, including frozen raw chicken product, and considered that processed chicken food products also involved the addition of ingredients and further manufacturing processes.³⁴

(ii) *Segmentation based on customer type*

25. The EC also considered further segmentation of the primary meat industry based on customer type. In M.1313 – *Danish Crown/Vestjyske Slagterier*,³⁵ the EC concluded that retail and foodservice constitute distinct product markets based on several considerations.³⁶ The EC considered that the retail sector, unlike the foodservice sector, always requires a full selection of cuts of meat whereas the foodservice industry only requires the cuts for the meals they offer.³⁷ The EC has consistently segmented the upstream and downstream markets according to customer type: (i) retailers; (ii) foodservice customers; and (iii) industrial processors.³⁸

26. In M/10/018 – *Moy Park/O'Kane*, the Authority also considered that both the market for the supply of primary chicken food products and the market for the supply of processed chicken

³¹ [M.5705 - Marfrig Alimentos/Seara](#) paragraph 7; [M.5322 - Mafrig/OSI Group Companies](#) paragraph 35.

³² [M.5322 - Mafrig/OSI Group Companies](#) paragraph 16, citing [M.3401 - Danish Crown/Flagship Foods](#) paragraph 13.

³³ [M/10/018 - Moy Park/O'Kane, paragraph 11 and 18-19.](#)

³⁴ [M/10/018 - Moy Park/O'Kane](#) paragraphs 12 and 13.

³⁵ [M.1313- Danish Crown/Vestjyske Slagterier](#), paragraphs 34-42

³⁶ The EC considered many factors including that customer preferences regarding the origin of meat is less important for foodservice customers compared to retailers as the former typically use the meat as an input into a final product, i.e., a ready meal.

³⁷ [M.1313- Danish Crown/Vestjyske Slagterier](#) paragraphs 37-40.

³⁸ See, for example, [M.1313- Danish Crown/Vestjyske Slagterier](#), paragraph 38, [M.5705- Marfrig Alimentos/Seara](#) paragraph 14; [M.5204 - Vion/Grampian](#), paragraphs 10 and 12; and [M.5322 - Mafrig/OSI Group Companies](#) paragraph 11.

food products could be segmented further by type of customer (i.e., retail, foodservice and industrial processing).³⁹ Therefore, the Authority ultimately assessed the competitive effects of that transaction by reference to: the supply of primary chicken food products to retailers in the State; and the supply of processed chicken food products to retailers in the State.⁴⁰

Views of the Commission

27. The Commission defines markets to the extent necessary depending on the particular circumstances of a given case. In this instance, it is not necessary for the Commission to reach a definitive view on the precise relevant product markets, since its conclusion on the competitive effects of the Proposed Transaction will be unaffected irrespective of whether the product markets are defined more narrowly i.e. the supply of primary chicken food products and the supply of processed chicken food products or more broadly i.e. the supply of chicken food products.

28. Therefore, out of an abundance of caution and having regard to the Parties' specific horizontal and vertical overlaps, the Commission has assessed the Proposed Transaction by reference to the following potential relevant product markets:

- (i) the supply of primary chicken food products;
- (ii) the supply of processed chicken food products;
- (iii) the supply of processed chicken food products to retailers; and
- (iv) the supply of processed chicken food products to foodservice customers.

Geographic market

Views of the Parties

29. In the Merger Notification Form,⁴¹ the Parties provided information by reference to the potential relevant markets within the State, noting that this is the narrowest possible geographic market. However, the Parties consider that the relevant geographic market is at

³⁹ [M/10/018- Moy Park/O'Kane](#), paragraph 19.

⁴⁰ [M/10/018- Moy Park/O'Kane](#), paragraph 26.

⁴¹ Merger Notification Form, section 5.2.

least State-wide and may be broader, potentially encompassing: (i) the island of Ireland, the State, and the United Kingdom; or (ii) a wider EEA market.⁴² The Parties also note that the commercial realities of the Parties' business activities support consideration of at least an all-island geographic market.⁴³

Previous decisions of the Commission and the EC

30. In M/10/018 – *Moy Park/O'Kane*, the Authority considered that the relevant geographic market for both the supply of primary chicken food products and the supply of processed chicken food products could extend beyond the State, to include Northern Ireland and the entire European Union ("EU").⁴⁴ More recently, in M/18/082 – *Goldreed Holdings/Greene Farm*, the Commission assessed the competitive effects of a potential market for the production and wholesale supply of bulk and pre-pack poultry cooked meats by reference to the State.⁴⁵

31. In M.5705 – *Marfrig Alimentos/Seara*, the EC left the relevant geographic market open between national and an EEA-wide scope.⁴⁶ The EC has also previously noted that the geographic market scope could depend on the customer type.⁴⁷ In M.5322 – *Marfrig / OSI Group Companies*, the EC noted that the supply of primary meat including primary poultry to retailers was generally national in scope, whereas supplies to caterers and industrial processors was potentially broader, encompassing regional and EEA-wide markets due to intra-EEA trade.⁴⁸

Views of the Commission

32. The Commission defines markets to the extent necessary depending on the particular circumstances of a given case. In this instance, it is not necessary for the Commission to reach

⁴² Merger Notification Form, section 5.1.

⁴³ Merger Notification Form, section 5.1.

⁴⁴ [M/10/018- Moy Park/O'Kane](#), paragraph 19.

⁴⁵ [M/18/082 - Goldreed Holdings/Green Farm](#) paragraph 18.

⁴⁶ [M.5705 - Marfrig Alimentos/Seara](#) paragraphs 16-18. See also [M.4257 - Smithfield Oaktree/Sara Lee Foods Europe](#) paragraphs 38-42.

⁴⁷ See, for example, [M.5705 - Marfrig Alimentos/Seara](#) paragraph 16.

⁴⁸ [M.5322 – Marfrig / OSI Group Companies](#), paragraph 20. EC further noted this in [M.1313- Danish Crown/Vestjyske Slagterier](#) paragraphs 88 and 94; and [M.3337 - Best Agrifund/Nordfleisch](#) paragraph 37-38.



a definitive view on the precise relevant geographic market since its conclusion on the competitive impact of the Proposed Transaction will be unaffected irrespective of whether the geographic markets are defined more narrowly (i.e., the State) or more broadly (i.e., EEA-wide).

33. The Commission considers that the evidence suggests that the geographic market for the potential relevant product markets listed in paragraph 28 above may be wider than the State given the volume of imports of primary chicken from the United Kingdom, EU and further.⁴⁹ For example, approximately █% of Glenhaven Foods purchases of primary chicken for input to its processed chicken food products comes from primary chicken suppliers based outside the Island of Ireland.⁵⁰ Furthermore, two processed chicken suppliers, Pan Euro Foods (trading as *Diggers*, and *Farm Range*) and Rosie & Jim, stated that all the primary chicken they use as inputs to their processed chicken food products are imports.⁵¹
34. Despite strong evidence suggesting a wider geographic market as evidenced above, the Commission, for the purposes of assessing the likely competitive effects of the Proposed Transaction, will assess the potential relevant product markets on a conservative basis by reference to the narrowest plausible market i.e. the State.

Commission's Conclusion on Relevant Markets

35. For the purposes of carrying out its competitive assessment of the Proposed Transaction, the Commission has assessed the Proposed Transaction by reference to the following potential relevant markets:

- (i) the supply of primary chicken food products in the State;

⁴⁹ The Parties and some third parties contacted by the Commission noted that a significant portion of primary chicken is imported from Brazil and Asia. Further, in the Merger Notification Form, the Parties cite an Agriland article which states that €571 million worth of chicken was imported to the State between January and November 2025, equating to 137,871 tonnes. Available here: [€571m worth of chicken imported to Ireland in first 11 months of 2025 - Agriland.ie](#). According to the Parties estimates, total imports equate to 43% of the total size of the supply of primary chicken in the State. Merger Notification Form, page 22, Table 2 and footnote 29.

⁵⁰ In 2025, Glenhaven Foods procured approximately █% of its inputs of primary chicken from suppliers of primary chicken food products located on the Island of Ireland (█). Similarly, in 2024, Glenhaven Foods procured approximately █% of its inputs of primary chicken from suppliers of primary chicken food products located on the Island of Ireland. Glenhaven Foods' response to the Commissions further questions dated 26 August 2026.

⁵¹ Pan Euro Foods call with the CCPC on 27 August 2026, and Rosie & Jim call with the CCPC on 1 September 2026.

- (ii) the supply of processed chicken food products in the State;
- (iii) the supply of processed chicken food products to retailers in the State; and
- (iv) the supply of processed chicken food products to foodservice customers in the State.

Competitive Assessment

Horizontal Effects

36. Scandinavian Standard and Glenhaven Foods both supply processed chicken food products in the State.

The supply of processed chicken food products in the State

37. Table 1 below shows estimated shares of the Parties and their competitors in the supply of processed chicken food products in the State in 2025. The Parties calculated the total market size for the supply of processed chicken food products to retailers and foodservice customers in the State based on data contained in: (a) a report by An Bord Bia (the “Bord Bia Report”) which estimates the total value of purchases of poultry products to foodservice customers in the State in 2025;⁵² and (b) a report by Euromonitor International which estimates total sales of processed poultry to retailers in the State in 2025 (the “Euromonitor Report”).⁵³
38. Using this data, the Parties estimated total sales of processed chicken food products to retailers in the State and total sales of processed chicken food products to foodservice customers in the State as discussed below in paragraphs 43 and 49. However, the Commission notes that the Parties did not estimate the total sales of processed chicken food products (encompassing retail, foodservice and industrial sales etc.) in the State. For the purposes of calculating the total turnover in the supply of processed chicken food products in the State (encompassing both retail and foodservice sales) the Commission has used the sum of the total figures in Table 2 (the supply of processed chicken food products to retailers) and Table 3 (the supply of processed chicken food products to foodservice customers) below. The Commission considers that the total estimate as outlined in Table 1 below is the smallest total value of the market for processed chicken food products given that it only relates to turnover

⁵² Bord Bia, *Irish Foodservice Market Insights Report 2025*, page 33.

⁵³ Euromonitor International, *Processed Meat, Seafood and Alternatives to Meat in Ireland November 2025*, page 5.

from the supply of processed chicken products to retailers and foodservice customers. The Commission considers that the total value of the supply of processed chicken food products may be larger with the inclusion of other customers such as industrial processors.

39. The Commission calculated shares in the potential market for the supply of processed chicken food products in the State based on information gathered from the Parties and their competitors.

Table 1: The supply of processed chicken food products in the State in 2025.

Competitor	Turnover (€ million)	Market share (%)
Scandinavian Standard	■ ⁵⁴	[0-5]
Glenhaven Foods	■ ⁵⁵	[5-10]
Merged entity	■ ⁵⁶	[5-10]
Shannon Vale Foods Unlimited Company ("Shannon Vale")	■	[5-10]
Rosie & Jim	■ ⁵⁷	[5-10]
Western Brand	■	[5-10]

⁵⁴ In volume, this equates to approximately ■ tonnes.

⁵⁵ In volume, this equates to approximately ■ tonnes.

⁵⁶ In volume, this equates to approximately ■ tonnes.

⁵⁷ In volume, this equates to approximately ■ tonnes.

Moy Park Limited (Moy Park)	■ ⁵⁸	[0-5]
Grove Turkeys Limited (“Grove Turkeys”)	■ ⁵⁹	[0-5]
Nomad Foods	■ ⁶⁰	[0-5]
Total	■	■

Source: The Parties and Third Parties.

40. The Commission considers that the Proposed Transaction does not give rise to any horizontal competition concerns in the supply of processed chicken food products in the State for the reasons set out below.

41. **First, the Proposed Transaction does not materially alter the market structure in the supply of processed chicken food products in the State.** As shown above, the merged entity will have a share of [5-10]% in the supply of processed chicken food products following the implementation of the Proposed Transaction. As outlined above, Scandinavian Standard is only active in the supply of processed chicken food products in the State because of its reselling of Glenhaven Foods-branded processed chicken products and sales of processed chicken food products from its subsidiary, Danpo, in the State. These sales by Scandinavian Standard amount to a negligible share in the supply of processed chicken food products in the State. Scandinavian Standard does not have any production facilities in the State to produce processed chicken food products. The Proposed Transaction will not result in any increase in the merged entity’s market power in the supply of processed chicken food products in the State.

⁵⁸ In volume, this equates to approximately ■ tonnes.

⁵⁹ In volume, this equates to approximately ■ tonnes.

⁶⁰ In volume, this equates to approximately ■ tonnes.

42. **Second, the Parties are not close competitors.** As described above, Scandinavian Standard, through Manor Farm, is primarily active in the supply of primary chicken food products in the State except for minimal resales of processed chicken food products. In contrast, Glenhaven Foods is active in the supply of processed chicken food products in the State, specifically frozen breaded chicken food products.⁶¹ The Commission therefore considers that the Parties are not close competitors in the supply of processed chicken food products in the State since their business activities in the poultry sector in the State are highly differentiated.

43. **Third, a range of similarly sized suppliers will continue to exert a competitive constraint on the merged entity.** Following the implementation of the Proposed Transaction, other undertakings of scale such as Shannon Vale, Western Brand and Rosie & Jim will continue to exert a competitive constraint on the merged entity in the supply of processed chicken food products in the State. The Commission is also aware of several additional suppliers of processed chicken food products in the State including; Pan Euro Foods (*Diggers* and *Farm Range*), Vista Foods (including *Chicken with Attitude*), Nomad Foods Ltd (including *Birds Eye*) and Kepak (including *Rustlers*, *Goldstar* and *Big Al's*).

The supply of processed chicken food products to retailers in the State

44. Table 2 below shows estimated shares of the Parties and their competitors in the supply of processed chicken food products to retailers in the State. The Parties calculated the total market size for the supply of processed chicken food products to retailers based on data contained in the Euromonitor Report which estimates the total retail sales of chilled processed poultry, the total retail sales of frozen processed poultry and the total retail sales of frozen processed turkey food products in the State in 2025.⁶² The Parties used the figure for total retail sales of frozen turkey food products (approximately 20%) to estimate the total retail sales of frozen chicken products i.e. non-turkey products (i.e. 80%).⁶³ The Parties note that there was no species breakdown for chilled processed poultry figure and as such the Parties applied the

⁶¹ For completeness, Glenhaven also supplies coated cheese to retailers. Merger Notification Form – page 10.

⁶² Euromonitor International, *Processed Meat, Seafood and Alternatives to Meat in Ireland November 2025*, page 5 and 7.

⁶³ The Parties state that the 'other poultry' category as listed on page 7 of the Euromonitor Report is undefined and may include duck or other poultry, but the Parties have assumed that it relates primarily to chicken products for the purposes of calculating total market size. See Glenhaven Foods' response to the Case Teams addition questions dated 26 August 2026, page 2.

same non-turkey proportion (approximately 80%) to estimate the figure for chilled processed chicken food products.⁶⁴

45. The Commission has calculated shares in the potential market for the supply of processed chicken food products to retailers in the State based on information gathered from the Parties and their competitors.

Table 2: The supply of processed chicken food products to retailers in the State in 2025.

Competitor	Turnover (€ million)	Market share (%)
Scandinavian Standard	██████ ⁶⁵	[0-5]
Glenhaven Foods	██████ ⁶⁶	[5-10]
Merged entity	██████ ⁶⁷	[5-10]
Shannon Vale	██████	[0-5]
Rosie & Jim	███	[0-5]
Western Brand	██████	[10-15]
Moy Park	██████ ⁶⁸	[5-10]

⁶⁴ Glenhaven Foods' response to the Commissions additional questions dated 26 August 2026, paragraph 2.6.

⁶⁵ This is made up of €██████ of direct sales from Danpo and €██████ of Manor Farm resales of Glenhaven Foods' products. In volume, this equates to approximately █████ tonnes.

⁶⁶ In volume, this equates to approximately █████ tonnes.

⁶⁷ In volume, this equates to approximately █████ tonnes.

⁶⁸ In volume, this equates to approximately █████ tonnes.

Grove Turkeys	■ ⁶⁹	[0-5]
Nomad Foods	■ ⁷⁰	[0-5]
Total	■	■

Source: The Parties and Third Parties.

46. The Commission considers that the Proposed Transaction does not give rise to any horizontal competition concerns in the supply of processed chicken food products to retailers in the State for the reasons set out below.

47. **First, the Proposed Transaction does not materially alter the market structure in the supply of processed chicken food products to retailers in the State.** As outlined above, the merged entity will have a share of [5-10]% in the supply of processed chicken food products to retailers following the implementation of the Proposed Transaction. Moreover, as outlined above, Scandinavian Standard is only active in the supply of processed chicken food products to retailers in the State because of its reselling of Glenhaven Foods-branded processed chicken products and sales of processed chicken food products from its subsidiary, Danpo, in the State. These sales by Scandinavian Standard amount to a negligible share in the supply of processed chicken food products to retailers in the State. Scandinavian Standard does not have any production facilities in the State to produce processed chicken food products. The Proposed Transaction will not result in any increase in the merged entity's market power in the supply of processed chicken food products to retailers in the State.

48. **Second, the Parties' primary areas of activity in the State are different.** As described above, the majority (€■) of Scandinavian Standard's sales of processed chicken food products to retailers in the State is generated from the reselling of Glenhaven Foods-branded processed chicken food products. Similarly, the remaining sales (€■) of processed chicken food products to retailers in the State by Scandinavian Standard is generated from its Danish-based subsidiary, Danpo. The Commission therefore considers that the Proposed Transaction has a

⁶⁹ In volume, this equates to approximately ■ tonnes.

⁷⁰ In volume, this equates to approximately ■ tonnes.

minimal impact on the supply of processed chicken food products to retailers in the State given Scandinavian Standard's limited presence in this potential market.

49. **Third, a range of similarly sized suppliers will continue to exert a competitive constraint on the merged entity.** Following the implementation of the Proposed Transaction, other undertakings of scale such as Western Brand and Moy Park will continue to exert a competitive constraint on the merged entity in the supply of processed chicken food products to retailers in the State. The Commission is also aware of several additional suppliers of processed chicken food products in the State as listed above in paragraph 42.

The supply of processed chicken food products to foodservice customers in the State

50. Table 3 below shows estimated shares of the Parties and their competitors in the supply of processed chicken food products to foodservice customers in the State. The Parties calculated the total market size for the supply of processed chicken food products to foodservice customers in the State based on data contained in the Bord Bia Report which estimates the total value of foodservice purchases of poultry products in the State in 2025. The Parties were unable to identify a reliable independent third-party source that measures the total supply of processed chicken food products to foodservice customers in the State.

51. Therefore, the Parties considered quantitative and qualitative evidence from France and the United Kingdom as reference points, as well as the Parties' own knowledge, and estimated that processed chicken products account for approximately 40% to 50% of total poultry purchases (i.e., primary and processed chicken food products) by foodservice operators in the State. This estimate was then applied to the figure listed in the Bord Bia report as mentioned above and the Parties estimated a total market size of between €[REDACTED] and €[REDACTED].⁷¹ For the purposes of estimating market shares below in Table 3, the Commission has applied the smaller total figure of €[REDACTED].

52. The Commission has calculated shares in the potential market for the supply of processed chicken food products to foodservice customers in the State based on information gathered from the Parties and their competitors.

Table 3: The supply of processed chicken food products to foodservice customers in the State in 2025

⁷¹ Glenhaven Foods' response to the Commission's further questions dated 26 August 2026, page 2.



Competitor	Turnover (€ million)	Market share (%)
Scandinavian Standard	■ ⁷²	[0-5]
Glenhaven Foods	■ ⁷³	[5-10]
Merged entity	■ ⁷⁴	[5-10]
Shannon Vale	■	[5-10]
Rosie & Jim	■	[10-15]
Western Brand	■	[0-5]
Moy Park	■ ⁷⁵	[0-5]
Grove Turkeys	■ ⁷⁶	[0-5]
Nomad Foods	■	[0-5]
Total	■	■

Source: The Commission based on Parties estimates.

⁷² This is made up of €■ of Manor Farm resales of Glenhaven Foods' products. In volume, this equates to approximately ■ tonnes.

⁷³ In volume, this equates to approximately ■ tonnes.

⁷⁴ In volume, this equates to approximately ■ tonnes.

⁷⁵ In volume, this equates to approximately ■ tonnes.

⁷⁶ In volume, this equates to approximately ■ tonnes.

53. The Commission considers that the Proposed Transaction does not give rise to any horizontal competition concerns in the supply of processed chicken food products to foodservice customers in the State for the reasons set out below.

54. **First, the Proposed Transaction does not materially alter the market structure in the supply of processed chicken food products to foodservice customers in the State.** As shown in Table 3 above, the merged entity will have a share of [5-10]% in the supply of processed chicken food products to foodservice customers in the State following the implementation of the Proposed Transaction. Moreover, as outlined above, Scandinavian Standard is only active in the supply of processed chicken food products to foodservice customers in the State to a very limited extent, approximately € [REDACTED] worth of sales in 2025, because of its reselling of Glenhaven Foods-branded processed chicken products and sales of processed chicken food products from its subsidiary, Danpo, in the State. These sales by Scandinavian Standard amount to a negligible share in the supply of processed chicken food products to foodservice customers in the State. The Proposed Transaction will not result in any increase of the merged entity's market power in the supply of processed chicken food products to foodservice customers in the State.

55. **Second, a range of larger suppliers will continue to exert a competitive constraint on the merged entity.** As shown in Table 3 above, the merged entity will face a competitive constraint from approximately six other suppliers of processed chicken food products to foodservice customers, following the implementation of the Proposed Transaction, of which at least two are larger than the merged entity.⁷⁷

Conclusion on horizontal effects

56. For the reasons set out above, the Commission considers that the Proposed Transaction does not raise any horizontal competition concerns in the State.

Vertical Overlap

57. As stated above, the following vertical relationships arise between the Parties regarding the identified potential relevant markets:

⁷⁷ Rosie & Jim and Shannon Vale.

- (b) the supply of primary chicken food products by Scandinavian Standard to Glenhaven Foods; and
- (c) the supply of processed chicken food products by Glenhaven Foods to Manor Farm.

58. Glenhaven Foods purchased €[REDACTED] worth of primary chicken food products from Scandinavian Standard in 2025.⁷⁸ Manor Farm purchased approximately €[REDACTED] worth of processed chicken food products from Glenhaven Foods in 2025 which it then resold to customers⁷⁹ in the State.⁸⁰

Input Foreclosure

59. The Commission considers that the Proposed Transaction will not provide Scandinavian Standard with the ability or incentive to engage in an input foreclosure strategy in relation to the supply of primary chicken food products in the State for the following reasons:

60. **Scandinavian Standard will not have market power in the upstream supply of primary chicken food products in the State following the implementation of the Proposed Transaction.** Input foreclosure concerns are only likely to arise when the merged entity has market power in the upstream market.⁸¹

61. According to the Parties estimated shares, Manor Farm will have a [20-25]% share in the supply of primary chicken food products in the State.⁸² The Proposed Transaction will not have any impact on the merged entity's share in the supply of primary chicken food products in the State as Glenhaven Foods is not active in this potential market.

62. The Commission also notes that Glenhaven Foods [REDACTED] the amount of primary chicken food products it purchased from [REDACTED]⁸³ [REDACTED]

⁷⁸ Glenhaven Foods' response to the Commission's further questions dated 26 August 2026, Table E.

⁷⁹ Of the approximate €[REDACTED] in processed chicken sales to customers in 2025, €[REDACTED] relates to sales to retailers, €[REDACTED] relates to sales to foodservice customers and €[REDACTED] relates to sales to industrial processors. Merger Notification Form, page 8, footnote 7.

⁸⁰ Merger Notification Form, page 8.

⁸¹ [CCPC Guidelines for Merger Analysis](#), paragraph 5.10.

⁸² Merger Notification Form, page 22, table 2.

⁸³ Glenhaven Foods purchased €[REDACTED] of primary chicken food products from Scandinavian Standard in 2024 and €[REDACTED] from Scandinavian Standard in 2023.

[REDACTED].⁸⁴ The Commission notes that Glenhaven Foods typically procures its primary chicken products from [REDACTED] [REDACTED],⁸⁵ for its downstream processing of chicken food products.⁸⁶ Furthermore, at least three other suppliers of primary chicken food products (Western Brand, Shannon Vale and Grove Turkeys) will remain active in the State following the implementation of the Proposed Transaction.

63. Furthermore, two suppliers of processed chicken food products in the State, Pan Euro Foods and Rosie & Jim,⁸⁷ confirmed to the Commission that they only procure primary chicken food products from suppliers based outside the State. The Commission considers that the fact that downstream processors of chicken food products can easily import primary chicken food products significantly constrain the merged entity's ability to engage in an input foreclosure strategy following implementation of the Proposed Transaction.

64. The Commission also notes that Manor Farm sold primary chicken food products to four downstream chicken processors in the State in 2025, one of whom was Glenhaven Foods. The other three chicken processors were Grove Turkeys, Western Brand and Shannon Vale, each of whom is vertically integrated.⁸⁸ Manor Farm does not currently supply primary chicken food products to any non-vertically integrated suppliers of processed chicken active in the State. The Commission considers that this makes it even further unlikely that the merged entity will have the ability to engage in an input foreclosure strategy following completion of the Proposed Transaction.

⁸⁴ The Parties note that Glenhaven Foods purchased primary chicken food products from [REDACTED] [REDACTED] Merger Notification Form, footnote 10. The Commission notes that Glenhaven Foods sourced primary chicken food products from [REDACTED] primary chicken suppliers in 2025. Glenhaven Foods' response to the Commissions further questions dated 26 August 2026, table E.

⁸⁵ The Commission considers that [REDACTED] % of Glenhaven Foods' purchases of primary chicken in 2025 came from primary chicken suppliers based on the Island of Ireland, [REDACTED] % came from EU-based primary chicken suppliers and the remaining [REDACTED] % came from primary chicken suppliers based in [REDACTED]

⁸⁶ For example, in 2025, Glenhaven Foods purchased a [REDACTED] of primary chicken from one supplier based in the State namely, [REDACTED]. In addition, Glenhaven Foods purchased primary chicken from [REDACTED] [REDACTED] and [REDACTED]. The remaining [REDACTED] primary chicken suppliers from whom Glenhaven Foods procured primary chicken were based outside the Island of Ireland. Glenhaven Foods' response to the Commissions further questions dated 26 August 2026, table E.

⁸⁷ Pan Euro Foods call with the CCPC on 27 August 2026, and Rosie & Jim call with the CCPC on 1 September 2026.

⁸⁸ Confidential Annex A to Scandinavian Standard's response to the Commission's further questions dated 31 August 2026. Each of Grove Turkeys, Western Brand and Shannon Vale have confirmed to the Commission that they are vertically integrated.



65. In light of the above, the Commission considers that the Proposed Transaction is unlikely to give rise to input foreclosure in relation to the potential market for the supply of primary chicken food products in the State.

Customer Foreclosure

66. **Scandinavian Standard is unlikely to have market power in the downstream supply of processed chicken food products as a result of the Proposed Transaction.** Customer foreclosure concerns are more likely to arise when the merged entity has market power in the downstream market i.e. if the merged entity is a significant customer as opposed to one of many customers.⁸⁹ As outlined above in Table 1, Glenhaven Foods has a small share (approximately [5-10]%) in the downstream market for the supply of processed chicken food products in the State. Therefore, the merged entity will not have the incentive to engage in customer foreclosure in relation to the supply of processed chicken food products in the State.

67. The Commission considers that a large number of downstream chicken processors will remain active in the State to which upstream suppliers of primary chicken can supply primary chicken. As shown above in Tables 1-3, there will remain at least 6 other suppliers of processed chicken food products in the State following the implementation of the Proposed Transaction. Therefore, the merged entity will not have the ability to engage in customer foreclosure in relation to the supply of processed chicken food products in the State.

68. Therefore, the Commission considers that the Proposed Transaction will not give rise to customer foreclosure concerns in relation to the supply of processed chicken food products in the State.

Conclusion on Competitive Analysis

69. In light of the above, the Commission considers that the Proposed Transaction will not substantially lessen competition in any market for goods or services in the State.

Ancillary Restraints

⁸⁹ [CCPC Guidelines for Merger Analysis](#), paragraph 5.15.



70. No ancillary restraints were notified.



Determination

The Competition and Consumer Protection Commission, in accordance with section 21(2)(a) of the Competition Act 2002, as amended, has determined that, in its opinion, the result of the proposed acquisition whereby Scandinavian Standard Nordic AB would acquire the entire issued share capital, and thus sole control, of Glenhaven Foods (Arklow) Unlimited Company, will not be to substantially lessen competition in any market for goods or services in the State, and, accordingly, that the acquisition may be put into effect.

For the Competition and Consumer Protection Commission

Brian McHugh

Chairperson

Competition and Consumer Protection Commission
