Data & Trends
EU Food and Drink Industry
2021
## EU Food and Drink Industry Figures

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<th>Category</th>
<th>Figure</th>
<th>Notes</th>
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<td><strong>Turnover</strong></td>
<td>€1,093 billion</td>
<td>A leading manufacturing sector</td>
</tr>
<tr>
<td><strong>Exports</strong></td>
<td>€145 billion</td>
<td></td>
</tr>
<tr>
<td><strong>Imports</strong></td>
<td>€78 billion</td>
<td></td>
</tr>
<tr>
<td><strong>Trade balance</strong></td>
<td>€67 billion</td>
<td>#1 exporter of food and drinks</td>
</tr>
<tr>
<td><strong>Value added</strong></td>
<td>1.9%</td>
<td>of EU gross value added</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td>4.5 million people</td>
<td>Leading employer in the EU</td>
</tr>
<tr>
<td><strong>Number of companies</strong></td>
<td>289,000</td>
<td></td>
</tr>
<tr>
<td><strong>Consumption</strong></td>
<td>21.5%</td>
<td>of household expenditure on food and drinks</td>
</tr>
<tr>
<td><strong>Sales within the Single Market</strong></td>
<td>88%</td>
<td>of food and drink turnover</td>
</tr>
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<td><strong>Small and medium-sized companies</strong></td>
<td>40.5%</td>
<td>of food and drink turnover</td>
</tr>
<tr>
<td><strong>R&amp;D expenditure</strong></td>
<td>€1.9 billion</td>
<td></td>
</tr>
<tr>
<td><strong>External trade</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sources:</strong></td>
<td>Eurostat; Joint Research Centre; UN COMTRADE</td>
<td></td>
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</tbody>
</table>
INTRODUCTION

The 2021 edition of the ‘Data & Trends of the EU Food and Drink Industry’ report offers a comprehensive picture of the structure and economics of Europe’s food and drink sector, one of the largest manufacturing industries in the EU in terms of turnover, value added and employment.

The report provides in-depth analysis of the Single Market, world markets, and a global ranking of food and drink companies. Most of the data related to the structure of the food and drink sector date back to 2018 and 2019. To find out more about the impact of the Covid-19 pandemic on the sector, you are invited to join our mailing list to receive Quarterly Economic and Trade Bulletins.

This report covers the whole EU27 food and drink industry, which is identified by the NACE Rev2 codes C10 (food products) and C11 (drinks). Therefore, unless otherwise stated, the UK is no longer included in the EU data presented in this report.

All figures presented here come from official sources and have been reviewed by FoodDrinkEurope.
CONTRIBUTION TO THE EU ECONOMY

A leading manufacturing sector in terms of turnover and value added

- The food and drink industry is a major contributor to Europe's economy, together with the automotive and machinery and equipment industries.
- In 2018, the EU food and drink industry generated a turnover of €1,093 billion and a value added of €222 billion.
- With €41 billion invested in 2018, the food and drink industry is the manufacturing sector with the highest capital spending.
- The industry maintains the characteristics of a stable, resilient and robust sector.

1.9% Contribution of the food and drink industry to EU gross value added

14.2% Share of food and drink turnover in manufacturing

11.4% Share of food and drink value added in manufacturing

**CONTRIBUTION OF THE FOOD AND DRINK INDUSTRY TO THE EU ECONOMY**

(2018, %)

- Trade, services and culture: 38.8%
- Industry: 20.2%
- Public sector: 15.3%
- Financial and real estate activities: 18.7%
- Construction: 3.2%
- Agriculture, forestry and fishing: 1.9%
- Other manufacturing industries: 15%
- Other industries: 3.2%

Source: Eurostat (National Accounts)
**Turnover in the EU Manufacturing Industry (2018, %)**

14.2%
Food and drink industry

- Automotive
- Machinery and equipment
- Chemicals
- Fabricated metal products
- Others

Source: Eurostat (SBS)

**Value Added in the EU Manufacturing Industry (2018, %)**

11.4%
Food and drink industry

- Machinery and equipment
- Automotive
- Fabricated metal products
- Others

Source: Eurostat (SBS)

**Investment in the EU Manufacturing Industry (2018, %)**

14.6%
Food and drink industry

- Automotive
- Fabricated metal products
- Chemicals
- Machinery and equipment
- Others

Source: Eurostat (SBS)

**Volume of Production in the EU Manufacturing Industry**

(% change relative to the first quarter of 2015)

Source: Eurostat (STS)
EMPLOYMENT

A leading employer in the EU

4.52 million
Total number of persons employed in the food and drink industry

€105 billion
Wages and salaries paid by the food and drink industry

- Compared to other manufacturing sectors, the EU food and drink industry is a key job provider and a stable employer.
- On average, labour productivity in the food and drink industry is lower than in the manufacturing sector as a whole.
- A food and drink company employs on average 16 persons, i.e. 1 more than the average manufacturing company.
The EU food and drink industry is diverse, with a variety of sectors ranging from fruit and vegetable processing to dairy production and drinks.

The top 5 sub-sectors (bakery and farinaceous products, meat products, dairy products, drinks and the “various food products” category) represent three-quarters of the total turnover and more than 80% of the total number of employed persons and companies in the industry.

Labour productivity varies by sub-sector. Drinks and animal feeds generate the highest value in the food and drink sector.

Source: Eurostat (SBS)
The food and drink industry is a highly diversified sector with many companies of different sizes.

SMEs generate more than 40% of the food and drink industry turnover and value added and provide more than half of jobs in the sector.

The food and drink industry accounts for almost 290,000 SMEs.

1 EU28 data for 2017
#1 employer
The food and drink industry is the biggest employer in manufacturing in half of the Member States.

63%
Share of turnover of the EU’s 4 largest food and drink producers

The food and drink industry ranks among the top three manufacturing industries in terms of turnover and employment in most Member States.

France, Germany, Italy and Spain are the largest EU food and drink producers by turnover.

## FOOD AND DRINK INDUSTRY DATA BY MEMBER STATE

<table>
<thead>
<tr>
<th>Employment ranking in manufacturing</th>
<th>Turnover (€ billion)</th>
<th>Value added (€ billion)</th>
<th>Number of employees (1,000)</th>
<th>Number of companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria²</td>
<td>1</td>
<td>25.1</td>
<td>6.4</td>
<td>88</td>
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<tr>
<td>Belgium</td>
<td>1</td>
<td>54.9</td>
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<td>5.7</td>
<td>-</td>
<td>51</td>
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<td>Czechia</td>
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<td>14.7</td>
<td>3.3</td>
<td>112</td>
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<td>Denmark</td>
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<td>Estonia</td>
<td>2</td>
<td>2</td>
<td>0.3</td>
<td>14.8</td>
</tr>
<tr>
<td>Finland</td>
<td>4</td>
<td>11.2</td>
<td>2.6</td>
<td>38</td>
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<tr>
<td>France³</td>
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<td>213.1</td>
<td>-</td>
<td>674.8</td>
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<tr>
<td>Germany³</td>
<td>4</td>
<td>185.3</td>
<td>47.2</td>
<td>618.7</td>
</tr>
<tr>
<td>Greece⁴</td>
<td>1</td>
<td>15.5</td>
<td>3.3</td>
<td>134</td>
</tr>
<tr>
<td>Hungary⁵</td>
<td>3</td>
<td>11.5</td>
<td>2.8</td>
<td>79.6</td>
</tr>
<tr>
<td>Ireland⁶</td>
<td>1</td>
<td>27.5</td>
<td>8.4</td>
<td>54.9</td>
</tr>
<tr>
<td>Italy</td>
<td>2</td>
<td>145</td>
<td>34.6</td>
<td>385</td>
</tr>
<tr>
<td>Luxembourg³</td>
<td>1</td>
<td>1</td>
<td>0.3</td>
<td>5.8</td>
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<tr>
<td>Netherlands</td>
<td>1</td>
<td>76.2</td>
<td>14</td>
<td>138.7</td>
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<tr>
<td>Poland</td>
<td>1</td>
<td>57.7</td>
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<td>397.5</td>
</tr>
<tr>
<td>Portugal</td>
<td>1</td>
<td>17.5</td>
<td>3.4</td>
<td>118.8</td>
</tr>
<tr>
<td>Romania²</td>
<td>1</td>
<td>13.1</td>
<td>9.3</td>
<td>178.6</td>
</tr>
<tr>
<td>Slovakia</td>
<td>3</td>
<td>4.9</td>
<td>0.9</td>
<td>52.9</td>
</tr>
<tr>
<td>Slovenia</td>
<td>5</td>
<td>2.3</td>
<td>0.6</td>
<td>14.6</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
<td>119.2</td>
<td>26.4</td>
<td>436.7</td>
</tr>
<tr>
<td>Sweden</td>
<td>3</td>
<td>18.9</td>
<td>4.4</td>
<td>50.8</td>
</tr>
</tbody>
</table>

1 As published by FoodDrinkEurope National Federations or Eurostat
2 Number of companies from 2018
3 All data from 2018
4 Data for companies with more than 20 employees; value added from 2018
5 All data from 2018; small food and drink producers and family businesses included in the number of companies
6 Source: National Tax and Customs Administration of Hungary
7 Turnover from 2018
8 Value added from 2018
9 Only limited liability companies, joint stock companies or similar
10 No data available for Cyprus, Latvia, Lithuania and Malta
The turnover of the bioeconomy amounts to €2.2 trillion and the value added to €613 billion. The food and drink industry contributes to roughly half and one-third respectively.

In 2017, the bioeconomy employed 17.5 million people in the EU, of which one-quarter was in the food and drink industry.

The Horizon Europe Research and Innovation programme of the European Commission will invest €8.95 billion in the Cluster 6 of the programme, dedicated to Food, Natural Resources and Agriculture in the next 7 years (2021-2027).
**FOOD SUPPLY CHAIN**

Diverse economic operators with specific business models

- The food supply chain employs 21 million people.
- The total turnover amounts to €3.5 trillion and the value added to €701 billion.
- The EU extensive food supply chain, from agriculture and the input industry to food and drink services, employs 30 million workers.

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**5.8%**

Share of the food supply chain in EU gross value added

**10.8%**

Share of the food supply chain in EU employment

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**Turnover and Value Added in the EU Food Supply Chain (2018, € billion)**

<table>
<thead>
<tr>
<th></th>
<th>Turnover</th>
<th>Value added</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>455</td>
<td>220</td>
</tr>
<tr>
<td>Food and drink industry</td>
<td>1,083</td>
<td>222</td>
</tr>
<tr>
<td>Food and drink wholesale</td>
<td>975</td>
<td>95</td>
</tr>
<tr>
<td>Food and drink retail companies and stores</td>
<td>1,016</td>
<td>164</td>
</tr>
</tbody>
</table>

**Persons Employed in the EU Food Supply Chain (2018, million)**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>8.8</td>
</tr>
<tr>
<td>Food and drink industry</td>
<td>4.5</td>
</tr>
<tr>
<td>Food and drink wholesale</td>
<td>1.9</td>
</tr>
<tr>
<td>Food and drink retail companies and stores</td>
<td>6.1</td>
</tr>
</tbody>
</table>

**Number of Companies in the EU Food Supply Chain (2018, 1,000 units)**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>289</td>
</tr>
<tr>
<td>Food and drink industry</td>
<td>10,283</td>
</tr>
<tr>
<td>Food and drink wholesale</td>
<td>262</td>
</tr>
<tr>
<td>Food and drink retail companies and stores</td>
<td>819</td>
</tr>
</tbody>
</table>

**Employment in the Extensive EU Food Supply Chain (2018, %)**

- Food and drink industry: 15.0%
- Input industry: 0.9%
- Wholesale of agricultural raw materials and live animals: 27.0%
- Wholesale of food and drink products: 29.2%
- Food and drink retail companies and stores: 15.0%
- Food and drink services: 6.4%
- Agriculture: 20.1%

Source: Eurostat (Agriculture, National Accounts, SBS)
CONSUMPTION

Food and drinks\(^1\): the second largest household expenditure

**€1,580bn**
EU household expenditure on food and drinks

**21.5%**
Average share of EU household expenditure on food and drinks

- In 2019, EU consumers spent €1,580 billion, or 21.5% of their budget, on food and drinks, either purchased in shops or consumed in restaurants and cafés. Out-of-home consumption represents one-third of consumer spending on food and drink products.

- Across Member States, the share of overall household expenditure on food and drink products varied from 17% to 29% (11% to 25% when considering only food and drinks purchased in shops).

\(^1\) Either purchased in shops or consumed in restaurants and cafés

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**BREAKDOWN OF EU HOUSEHOLD CONSUMPTION EXPENDITURE** (2019, % of total expenditure)

- 27.7% Housing, water and energy
- 13.1% Transport
- 23.5% Furnishings and household equipment
- 8.7% Recreation and culture
- 5.5% Others
- 6.9% Expenditure in restaurants and cafés
- 21.5% Food and drinks
- 14.6% Expenditure in shops

Source: Eurostat (National Accounts)

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**PRICE DEVELOPMENTS IN THE EU FOOD SUPPLY CHAIN** (index, 2015 = 100)

Source: Eurostat (Prices); DG Agriculture and Rural Development

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**HOUSEHOLD CONSUMPTION EXPENDITURE ON FOOD AND DRINKS BY MEMBER STATE** (2019, % of total expenditure)

Source: Eurostat (National Accounts)
CONSUMER EXPECTATIONS

Public knowledge of the current food system and consumer appetite for change

45% taste
The main factor influencing consumer purchases

- Taste (45%), food safety (42%) and cost (40%) are the main factors influencing Europeans’ food purchases.
- Europeans consider food being healthy for them (74%) as the most important aspect of a sustainable diet, far above all other aspects such as minimising waste.
- Two-thirds of Europeans say that they eat a healthy and sustainable diet most of the time (56%) or always (10%).
- Affordability of healthy and sustainable options (49%), having healthy food choices available where they usually shop for food (45%) and clear information on food labelling regarding a product’s impact (41%) would help citizens in adopting a healthier and more sustainable diet.
- Almost 9 out of 10 Europeans consider that farmers and food companies should themselves take action to raise their products’ sustainability standards.

TOP 5 FACTORS INFLUENCING FOOD PURCHASES (%)¹

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>45%</td>
</tr>
<tr>
<td>Food safety</td>
<td>42%</td>
</tr>
<tr>
<td>Cost</td>
<td>40%</td>
</tr>
<tr>
<td>Where the food comes from</td>
<td>34%</td>
</tr>
<tr>
<td>Nutrient content</td>
<td>33%</td>
</tr>
</tbody>
</table>

SUSTAINABLE DIET FOR CONSUMERS (%)²

<table>
<thead>
<tr>
<th>Habit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating variety of different foods</td>
<td>58%</td>
</tr>
<tr>
<td>Eating more fruit and vegetables</td>
<td>58%</td>
</tr>
<tr>
<td>Eating seasonal, local</td>
<td>47%</td>
</tr>
<tr>
<td>Eating more home-cooked meals</td>
<td>43%</td>
</tr>
<tr>
<td>Little or no pesticides</td>
<td>43%</td>
</tr>
</tbody>
</table>

ASPECTS OF SUSTAINABLE DIET IMPORTANT FOR THE CONSUMERS (%)²

<table>
<thead>
<tr>
<th>Importance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>What you eat is healthy for you</td>
<td>74%</td>
</tr>
<tr>
<td>What you eat supports local economy</td>
<td>50%</td>
</tr>
<tr>
<td>What you eat has been produced in a way that minimises waste</td>
<td>40%</td>
</tr>
</tbody>
</table>

KEY ACTORS IN MAKING FOOD SYSTEMS SUSTAINABLE (%)²

1. 65% Farmers and fishers
2. 58% Food manufacturers
3. 47% National governments
4. 43% Consumers
5. 38% EU Institutions

¹ Maximum 3 answers
² Multiple answers possible

Source: Special Barometer 505, European Commission
EU QUALITY SCHEMES

Protecting and promoting the geographical origin as well as traditional know-how of food and drinks

7%  
The share of GIs and TSGs in the overall sales of European food and drinks

15.5%  
The share of GIs and TSGs in the overall European food and drink exports to third countries

In 2017, 3,207 product names were protected in the EU. Each Member State produced Geographical Indications (GIs) and Traditional Specialities Guaranteed (TSGs) foodstuffs.

GIs and TSGs all together accounted for an estimated sales value of €77.1 billion in 2017. More than half of this value derived from wines.

The national market was the first outlet for GIs and TSGs. Exports to third countries amounted to €17 billion, representing 22.1% of the total GIs and TSGs sales.

The sales value of GIs and TSGs was, on average, double the sales value for similar products without a certification. The value premium rate stood at 2.9 for wines, 2.5 for spirits and 1.5 for agricultural products and foodstuffs.

1 EU28
2 Under the EU quality policy, product names can be granted with a Geographical Indication (GI) if they have a specific link to the place where they are made. GIs include Protected Designation of Origins (PDO) and Protected Geographical Indications (PGI). Traditional Speciality Guaranteed (TSG) highlights the traditional aspects such as the way the product is made or its composition, without being linked to a specific geographical area.

Source: AND study for the European Commission, 2019
The EU food and drink industry emits 85Mt CO₂e per year (2015). Most of these emissions are associated with energy use. From the electricity grid, 62% of energy use is consumed as heat and 38% as power.

In the EU, an estimated 20% of total food produced each year is lost or wasted. Households generate more than half of total food waste in the EU (47 million tonnes).

In 2019, almost 8.5% of the EU’s agricultural area was farmed organically, 2.5 percentage points more than in 2015. Austria leads with 25% of its agricultural area farmed organically, followed by Estonia and Sweden.

In the EU, 41% of plastic packaging waste was recycled in 2018, 10 percentage points more than in 2008. In eight Member States, more than half of the plastic packaging waste was recycled.

---

5th Rank of the food and drink industry1 in terms of GHG emission in manufacturing

1 Including tobacco industry

FOOD WASTE IN THE EU

In the EU, an estimated 20% of total food produced each year is lost or wasted. Households generate more than half of total food waste in the EU (47 million tonnes).

In 2019, almost 8.5% of the EU’s agricultural area was farmed organically, 2.5 percentage points more than in 2015. Austria leads with 25% of its agricultural area farmed organically, followed by Estonia and Sweden.

In the EU, 41% of plastic packaging waste was recycled in 2018, 10 percentage points more than in 2008. In eight Member States, more than half of the plastic packaging waste was recycled.

---

1 Including tobacco industry

Estimated costs: €143 billion

Source: Decarbonisation road map for the European food and drink manufacturing sector, Ricardo, July 2021

Source: Decarbonisation road map for the European food and drink manufacturing sector, Ricardo, July 2021

Source: Eurostat

Source: European Commission

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Source: Eurosta...
Drivers of innovation can be divided into 15 trends, grouped along five axes, corresponding to general consumer expectations: pleasure, health, physical, convenience, and ethics.

- Pleasure was the leading driver of food innovation with a 46.5% share in 2020.
- Health, which ranked second, is slightly declining while Ethics continues to grow and gained 3.7 percentage points, driven by the Ecology trend.
- In 2020, soft drinks were the world leaders in innovation, with frozen salted products ranking second. The dairy products category came in a close third place and took the place of catering products.
TRADE WITHIN THE SINGLE MARKET

The first market for EU food and drinks

More than 60% of EU food and drink exports are destined for the Single Market.

Germany is the EU Member State with the highest value of intra-EU trade in food and drinks.

Except for drinks, the exports of most sectors to the Single Market exceed those to third countries.

**€236 billion**

Intra-EU exports

**€145 billion**

Extra-EU exports

**€381 billion**

Total EU exports

---

**INTRA-EU FOOD AND DRINK TRADE FOR THE TOP 15 EXPORTERS (2020, € billion)**

- **DE**
  - Intra-EU: 44
  - Extra-EU: 19
- **NL**
  - Intra-EU: 39
  - Extra-EU: 23
- **FR**
  - Intra-EU: 30
  - Extra-EU: 23
- **BE**
  - Intra-EU: 23
  - Extra-EU: 19
- **IT**
  - Intra-EU: 20
  - Extra-EU: 12
- **ES**
  - Intra-EU: 18
  - Extra-EU: 11
- **PL**
  - Intra-EU: 8
  - Extra-EU: 8
- **AT**
  - Intra-EU: 7
  - Extra-EU: 7
- **DK**
  - Intra-EU: 6
  - Extra-EU: 6
- **CZ**
  - Intra-EU: 5
  - Extra-EU: 5
- **HU**
  - Intra-EU: 4
  - Extra-EU: 4
- **IE**
  - Intra-EU: 3
  - Extra-EU: 3
- **SE**
  - Intra-EU: 3
  - Extra-EU: 3
- **PT**
  - Intra-EU: 3
  - Extra-EU: 3
- **EL**
  - Intra-EU: 3
  - Extra-EU: 3

Source: Eurostat (Comext)
Close to 40% of Member States’ total food and drink exports were sold to non-EU markets. During the 2010-2020 period, extra-EU exports increased on average by 5% per year, compared to 3% per year for intra-EU exports.

EU food and drink exports increased for the 11th consecutive year (+1% compared to 2019), representing 7.5% of total EU exports of goods. Imports amounted to €78 billion (+2% compared to 2019). This makes the EU a net exporter with a trade balance of €67 billion.

Exports to China reached a 2nd consecutive year of double-digit growth and also increased with several other key trading partners. Meanwhile, exports towards Japan, Russia, and the US declined (2019-2020 period).

USMCA countries (US, Canada, Mexico) remain by far the EU’s largest trading partner by region, followed by the Greater China region.

---

1 Exports and imports refer to extra-EU trade, unless otherwise specified

---
EU FOOD AND DRINK TRADE FLOWS WITH KEY REGIONS (2020, € million)

TOP EU TRADING PARTNERS

Export markets

<table>
<thead>
<tr>
<th></th>
<th>2020 € million</th>
<th>% change 2019-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>33,281</td>
<td>0</td>
</tr>
<tr>
<td>US</td>
<td>19,665</td>
<td>▼1</td>
</tr>
<tr>
<td>China</td>
<td>16,032</td>
<td>▲22</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6,526</td>
<td>▲7</td>
</tr>
<tr>
<td>Japan</td>
<td>5,149</td>
<td>▼9</td>
</tr>
<tr>
<td>Russia</td>
<td>4,779</td>
<td>▼3</td>
</tr>
<tr>
<td>Norway</td>
<td>3,776</td>
<td>▲9</td>
</tr>
<tr>
<td>Canada</td>
<td>3,359</td>
<td>▲7</td>
</tr>
<tr>
<td>Australia</td>
<td>3,032</td>
<td>▲6</td>
</tr>
<tr>
<td>Korea</td>
<td>2,791</td>
<td>▲4</td>
</tr>
</tbody>
</table>

Import origins

<table>
<thead>
<tr>
<th></th>
<th>2020 € million</th>
<th>% change 2019-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>13,545</td>
<td>▼8</td>
</tr>
<tr>
<td>Brazil</td>
<td>4,722</td>
<td>▼6</td>
</tr>
<tr>
<td>China</td>
<td>4,508</td>
<td>▼9</td>
</tr>
<tr>
<td>Switzerland</td>
<td>4,421</td>
<td>0</td>
</tr>
<tr>
<td>US</td>
<td>3,764</td>
<td>▼6</td>
</tr>
<tr>
<td>Argentina</td>
<td>3,516</td>
<td>▼8</td>
</tr>
<tr>
<td>Indonesia</td>
<td>3,249</td>
<td>▲13</td>
</tr>
<tr>
<td>Ukraine</td>
<td>2,749</td>
<td>▲5</td>
</tr>
<tr>
<td>Turkey</td>
<td>2,688</td>
<td>▲9</td>
</tr>
<tr>
<td>Norway</td>
<td>2,381</td>
<td>▲4</td>
</tr>
</tbody>
</table>

Source: Eurostat (Comext)
International trade success backed by strong EU food and drink sectors

48%
Combined export market share of the drinks, meat and dairy sectors

54%
Combined import market share of fish products, oils and fats and processed fruits and vegetables sectors

- Sectors with the highest growth in exports: animal feeds, oils and fats, and meat products.
- Sectors with the highest growth in imports: animal feeds, grain mill and starch products, prepared meals and dishes.
- The combined exports of the EU drinks, meat, and dairy sectors totalled €70.6 billion in 2020. The "various food products" category, which includes goods like chocolate, biscuits, confectionery and food preparations, generated exports worth €32.7 billion.

**SECTORS IN EU FOOD AND DRINK EXPORTS (2020, %)**

- Various food products
- Drinks
- Meat products
- Dairy products
- Processed fruits and vegetables
- Bakery and farinaceous products
- Oils and fats
- Animal feeds
- Fish products
- Grain mill and starch products

**Source:** Eurostat (Comext)

**EXPORTS AND IMPORTS BY SECTOR (2020, € million)**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Exports 2020</th>
<th>% change 2019-2020</th>
<th>Imports 2020</th>
<th>% change 2019-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drinks</td>
<td>30,688</td>
<td>-9</td>
<td>6,869</td>
<td>-9</td>
</tr>
<tr>
<td>of which: wine</td>
<td>13,025</td>
<td>-9</td>
<td>1,731</td>
<td>-1</td>
</tr>
<tr>
<td>spirits</td>
<td>6,809</td>
<td>-19</td>
<td>3,063</td>
<td>-14</td>
</tr>
<tr>
<td>beer</td>
<td>3,626</td>
<td>-1</td>
<td>562</td>
<td>-11</td>
</tr>
<tr>
<td>mineral waters and soft drinks</td>
<td>5,650</td>
<td>2</td>
<td>1,432</td>
<td>-7</td>
</tr>
<tr>
<td>Various food products</td>
<td>32,710</td>
<td>2</td>
<td>14,059</td>
<td>0</td>
</tr>
<tr>
<td>of which: chocolate and confectionery</td>
<td>9,110</td>
<td>-2</td>
<td>4,073</td>
<td>1</td>
</tr>
<tr>
<td>prepared meals and dishes</td>
<td>5,255</td>
<td>5</td>
<td>1,377</td>
<td>5</td>
</tr>
<tr>
<td>processed tea and coffee</td>
<td>3,052</td>
<td>3</td>
<td>2,655</td>
<td>2</td>
</tr>
<tr>
<td>Meat products</td>
<td>23,767</td>
<td>9</td>
<td>6,205</td>
<td>-14</td>
</tr>
<tr>
<td>Dairy products</td>
<td>16,203</td>
<td>3</td>
<td>2,159</td>
<td>-6</td>
</tr>
<tr>
<td>Processed fruits and vegetables</td>
<td>10,761</td>
<td>0</td>
<td>8,693</td>
<td>2</td>
</tr>
<tr>
<td>Bakery and farinaceous products</td>
<td>7,950</td>
<td>4</td>
<td>1,475</td>
<td>-4</td>
</tr>
<tr>
<td>Oils and fats</td>
<td>7,246</td>
<td>11</td>
<td>16,092</td>
<td>4</td>
</tr>
<tr>
<td>Animal feeds</td>
<td>5,738</td>
<td>12</td>
<td>2,207</td>
<td>12</td>
</tr>
<tr>
<td>Fish products</td>
<td>5,042</td>
<td>-5</td>
<td>17,216</td>
<td>-9</td>
</tr>
<tr>
<td>Grain mill and starch products</td>
<td>4,479</td>
<td>0</td>
<td>2,756</td>
<td>5</td>
</tr>
</tbody>
</table>
**TRADE FIGURES BY PRODUCT**

Providing high-quality, value-added food and drinks worldwide

### TOP 10 EU FOOD AND DRINK EXPORTS AND IMPORTS BY DESTINATION AND ORIGIN (2020)

#### Exports

<table>
<thead>
<tr>
<th>Product</th>
<th>€ million</th>
<th>% change 2019-2020</th>
<th>Top 3 destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine</td>
<td>13,024</td>
<td>-9</td>
<td>US, UK, Switzerland</td>
</tr>
<tr>
<td>Pork meat fresh, chilled and frozen</td>
<td>10,062</td>
<td>27</td>
<td>China, Japan, UK</td>
</tr>
<tr>
<td>Infant food and other preparations</td>
<td>7,797</td>
<td>3</td>
<td>China, UK, Saudi Arabia</td>
</tr>
<tr>
<td>Food preparations, not specified</td>
<td>7,388</td>
<td>5</td>
<td>UK, US, Switzerland</td>
</tr>
<tr>
<td>Animal feeds, pet foods</td>
<td>7,355</td>
<td>11</td>
<td>UK, Russia, Norway</td>
</tr>
<tr>
<td>Spirits</td>
<td>6,809</td>
<td>-19</td>
<td>US, UK, China</td>
</tr>
<tr>
<td>Bread, pastries and biscuits</td>
<td>6,416</td>
<td>0</td>
<td>UK, US, Switzerland</td>
</tr>
<tr>
<td>Cheese</td>
<td>6,204</td>
<td>2</td>
<td>UK, US, Japan</td>
</tr>
<tr>
<td>Chocolate</td>
<td>5,807</td>
<td>-3</td>
<td>UK, US, Russia</td>
</tr>
<tr>
<td>Offal, poultry meat</td>
<td>4,986</td>
<td>-2</td>
<td>China, UK, Hong Kong</td>
</tr>
</tbody>
</table>

#### Imports

<table>
<thead>
<tr>
<th>Product</th>
<th>€ million</th>
<th>% change 2019-2020</th>
<th>Top 3 origins</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish fillets</td>
<td>4,883</td>
<td>-7</td>
<td>China, Norway, US</td>
</tr>
<tr>
<td>Palm oil</td>
<td>4,450</td>
<td>15</td>
<td>Indonesia, Malaysia, Papua New Guinea</td>
</tr>
<tr>
<td>Spirits</td>
<td>3,063</td>
<td>-14</td>
<td>UK, US, Mexico</td>
</tr>
<tr>
<td>Prepared and preserved fish</td>
<td>2,729</td>
<td>-3</td>
<td>Ecuador, Morocco, China</td>
</tr>
<tr>
<td>Food preparations, not specified</td>
<td>2,672</td>
<td>5</td>
<td>UK, US, Switzerland</td>
</tr>
<tr>
<td>Frozen fish</td>
<td>2,125</td>
<td>-5</td>
<td>Norway, Russia, Greenland</td>
</tr>
<tr>
<td>Fruit and vegetable juices</td>
<td>1,979</td>
<td>-6</td>
<td>Brazil, UK, Turkey</td>
</tr>
<tr>
<td>Prepared and preserved fruits and nuts</td>
<td>1,807</td>
<td>6</td>
<td>Turkey, China, US</td>
</tr>
<tr>
<td>Wine</td>
<td>1,729</td>
<td>-1</td>
<td>Chile, UK, US</td>
</tr>
<tr>
<td>Coffee (decaffeinated or roasted)</td>
<td>1,703</td>
<td>4</td>
<td>Switzerland, UK, Vietnam</td>
</tr>
</tbody>
</table>

Source: Eurostat (Comext)
With the departure of the UK from the EU, the EU has become an even larger exporter of food and drinks than before.

The EU now ranks in third place in terms of imports from the rest of the world, behind China and the US and ahead of the UK and Japan.

The recent five-year performance of EU products imported by selected third countries was mostly positive, particularly the growth of the EU share in food and drink imports by Brazil (+5.4%), Switzerland and Australia (+3%), Korea (+2.4%), Canada (+2.3%) and Norway (+1.5%).

---

1 Takes into account the change in Member State composition of the EU.
2 No data for Russia, year 2020

Source: UN COMTRADE
EU-UK TRADE

Major trading partners with closely integrated supply chains

€33.3 billion
EU food and drink exports to the UK

€13.5 billion
EU food and drink imports from the UK

€19.8 billion
EU-UK trade balance

- EU exports of food and drinks to the UK amounted to €33.3 billion in 2020. The UK ranks first in terms of export market, ahead of the US (€19.7 billion) and China (€16 billion).
- Among the EU Member States, Ireland has by far the strongest trade link with the UK. Close to 35% of Ireland's food and drink exports are destined for the UK and more than 50% of its imports come from the UK.
- Wine is the EU's most prominent product exported to the UK, while distilled spirits lead the imports of food and drinks from the UK.

**KEY MEMBER STATE EXPORTERS OF FOOD AND DRINKS TO THE UK (2020)**

<table>
<thead>
<tr>
<th>Member State</th>
<th>Exports to UK (€ billion)</th>
<th>Share of Member States' total exports¹ (%)</th>
<th>Rank of UK as export destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>5.3</td>
<td>8.7</td>
<td>4</td>
</tr>
<tr>
<td>France</td>
<td>4.6</td>
<td>10.1</td>
<td>3</td>
</tr>
<tr>
<td>Ireland</td>
<td>4.4</td>
<td>34.6</td>
<td>1</td>
</tr>
<tr>
<td>Germany</td>
<td>4.3</td>
<td>7.0</td>
<td>5</td>
</tr>
<tr>
<td>Italy</td>
<td>3.3</td>
<td>8.9</td>
<td>4</td>
</tr>
<tr>
<td>Belgium</td>
<td>2.9</td>
<td>9.2</td>
<td>4</td>
</tr>
<tr>
<td>Poland</td>
<td>2.5</td>
<td>10.0</td>
<td>2</td>
</tr>
<tr>
<td>Spain</td>
<td>2.2</td>
<td>6.3</td>
<td>5</td>
</tr>
<tr>
<td>Denmark</td>
<td>1.3</td>
<td>8.6</td>
<td>4</td>
</tr>
<tr>
<td>Greece</td>
<td>0.4</td>
<td>8.9</td>
<td>3</td>
</tr>
</tbody>
</table>

¹ Intra and extra-EU exports

**EU EXPORTS TO THE UK BY SECTOR (2020, %)**

- Various food products
- Meat products
- Drinks
- Dairy products
- Processed fruits and vegetables
- Bakery and confectionery products
- Oils and fats
- Grain mill and starch products
- Animal feeds
- Fish products

**TOP EU-UK FOOD AND DRINK EXPORTS AND IMPORTS (2020, € million)**

<table>
<thead>
<tr>
<th>Product</th>
<th>Exports</th>
<th>Imports</th>
<th>Trade Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine</td>
<td>2,526</td>
<td>307</td>
<td>2,220</td>
</tr>
<tr>
<td>Bread, pastry and biscuits</td>
<td>2,386</td>
<td>709</td>
<td>1,677</td>
</tr>
<tr>
<td>Chocolate</td>
<td>2,025</td>
<td>592</td>
<td>1,434</td>
</tr>
<tr>
<td>Cheese</td>
<td>1,901</td>
<td>560</td>
<td>1,341</td>
</tr>
<tr>
<td>Animal feed, pet foods</td>
<td>1,686</td>
<td>1,009</td>
<td>678</td>
</tr>
<tr>
<td>Prepared and preserved meat</td>
<td>1,466</td>
<td>257</td>
<td>1,209</td>
</tr>
<tr>
<td>Offal, poultry meat</td>
<td>1,341</td>
<td>268</td>
<td>1,073</td>
</tr>
<tr>
<td>Soft drinks</td>
<td>1,223</td>
<td>332</td>
<td>892</td>
</tr>
<tr>
<td>Food preparations</td>
<td>1,210</td>
<td>777</td>
<td>432</td>
</tr>
<tr>
<td>Bovine meat fresh, chilled and frozen</td>
<td>1,129</td>
<td>406</td>
<td>723</td>
</tr>
<tr>
<td>Pork meat fresh, chilled and frozen</td>
<td>969</td>
<td>234</td>
<td>735</td>
</tr>
<tr>
<td>Fruit and vegetable juices</td>
<td>785</td>
<td>128</td>
<td>656</td>
</tr>
<tr>
<td>Sausages</td>
<td>710</td>
<td>26</td>
<td>684</td>
</tr>
<tr>
<td>Fat, meat smoked</td>
<td>692</td>
<td>52</td>
<td>641</td>
</tr>
<tr>
<td>Sauce, condiments</td>
<td>684</td>
<td>284</td>
<td>400</td>
</tr>
<tr>
<td>Prepared and preserved vegetables</td>
<td>669</td>
<td>69</td>
<td>600</td>
</tr>
<tr>
<td>Malt extract, other food preparations</td>
<td>603</td>
<td>175</td>
<td>428</td>
</tr>
<tr>
<td>Pasta</td>
<td>595</td>
<td>69</td>
<td>526</td>
</tr>
<tr>
<td>Spirits</td>
<td>586</td>
<td>1,872</td>
<td>-1,286</td>
</tr>
<tr>
<td>Beer</td>
<td>505</td>
<td>239</td>
<td>266</td>
</tr>
</tbody>
</table>

Source: Eurostat (Comext)
Population and income growth will continue to drive food demand. Meeting the additional demand will depend on the availability and productivity of resources.

Addressing hunger, malnutrition in all its forms and food production are key to meeting the goals of the 2030 Agenda for Sustainable Development. The UN Food Systems Summit, held on 23 September 2021, aims to contribute to these objectives by transforming global food systems.

Food production and nutritional security were the highest priority areas for adaptation identified in the national contributions of countries within the Paris Climate Agreement context.

Forests cover a third of the world’s land but are in serious danger from deforestation and forest degradation. Since 1990, the world’s forests shrank by 1.3 million square kilometres, an area larger than South Africa.

1 Under business as usual scenario, base year, 2012 =100

Source: FAO

Source: The State of Food Security and Nutrition in the World 2021 (SOFI 2021), FAO; WHO

Source: United Nations

<table>
<thead>
<tr>
<th>NATIONAL CONTRIBUTIONS TO THE PARIS CLIMATE AGREEMENT: TOP 5 PRIORITY AREAS IDENTIFIED FOR ADAPTING TO CLIMATE CHANGE, 2020 (% of countries that included adaptation information)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food production and nutritional security</td>
</tr>
<tr>
<td>Terrestrial and wetland ecosystems</td>
</tr>
<tr>
<td>Freshwater resources</td>
</tr>
<tr>
<td>Human health</td>
</tr>
<tr>
<td>Key economic sectors and services</td>
</tr>
</tbody>
</table>

The State of Food Security and Nutrition in the World 2021 (SOFI 2021), FAO; WHO

Global food and nutrition security challenge, including the effect of the COVID-19 pandemic (2020)

More than 2 billion people suffer from micronutrient deficiency

768 m (+118 million in 2020/2019) people suffer from hunger

1 in 3 people in the world (+320 million in 2020/2019) do not have access to adequate food

39% of the world’s adult population is overweight

Global population in 2050

9.7 billion

50%

Increase in global food production by 2050

Changing forest area (1990-2015, change in thousands of km²)

<table>
<thead>
<tr>
<th>Region</th>
<th>Change in KM²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe &amp; Central Asia</td>
<td>235</td>
</tr>
<tr>
<td>East Asia &amp; Pacific</td>
<td>133</td>
</tr>
<tr>
<td>North America</td>
<td>64</td>
</tr>
<tr>
<td>South Asia</td>
<td>45</td>
</tr>
<tr>
<td>Middle East &amp; North Africa</td>
<td>33</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>33</td>
</tr>
<tr>
<td>Latin America &amp; Caribbean</td>
<td>-830</td>
</tr>
<tr>
<td>-970</td>
<td></td>
</tr>
</tbody>
</table>

Source: the World Bank

Meeting global demand for food by 2050

+50% global food production

+16.5 million hectares of arable land (+15%)

+28% increase in yields
Out of the world’s top 2,500 companies for R&D private investment, 60 operate in the food and drink industry. Together, these companies invested €9.5 billion in R&D in 2019, €1.9 billion of which was invested by 11 food and drink companies based in the EU.

These 11 EU companies are located in the Netherlands (3), France, Ireland and Germany (2), Belgium and Denmark (1).

The EU1 food and drink industry2 has a lower R&D investment intensity when compared with several food and drink industries worldwide.

Across EU Member States1, R&D investment intensity varies from 0.50% to 0.01%.

1 Based on available data
2 Including tobacco
## KEY FOOD AND DRINK COMPANIES

Ranking of agri-food companies by global agri-food sales

<table>
<thead>
<tr>
<th>Name</th>
<th>Headquarters</th>
<th>Sales (€ billion)</th>
<th>Operations in the EU</th>
<th>Main sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cargill</td>
<td>US</td>
<td>113.3</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>Nestlé</td>
<td>CH</td>
<td>78.8</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>PepsiCo, Inc.</td>
<td>US</td>
<td>65.7</td>
<td>✓</td>
<td>beverages, snacks</td>
</tr>
<tr>
<td>Archer Daniels Midland Company</td>
<td>US</td>
<td>60.1</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>JBS</td>
<td>BR</td>
<td>46.3</td>
<td>✓</td>
<td>meat, dairy</td>
</tr>
<tr>
<td>AB InBev</td>
<td>BE</td>
<td>43.8</td>
<td>✓</td>
<td>beer</td>
</tr>
<tr>
<td>Tyson Foods</td>
<td>US</td>
<td>38.7</td>
<td>-</td>
<td>meat</td>
</tr>
<tr>
<td>Bunge</td>
<td>US</td>
<td>38.2</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>Mars</td>
<td>US</td>
<td>35.2</td>
<td>✓</td>
<td>prepared foods, confectionery, pet food</td>
</tr>
<tr>
<td>Olam International</td>
<td>SG</td>
<td>33.5</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>The Coca-Cola Company</td>
<td>US</td>
<td>30.8</td>
<td>✓</td>
<td>beverages</td>
</tr>
<tr>
<td>Mondelēž International</td>
<td>US</td>
<td>24.8</td>
<td>✓</td>
<td>confectionery, biscuits, snacks, dairy</td>
</tr>
<tr>
<td>Kraft Heinz</td>
<td>US</td>
<td>24.5</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>WH Group</td>
<td>CN</td>
<td>23.9</td>
<td>✓</td>
<td>meat</td>
</tr>
<tr>
<td>Heineken</td>
<td>NL</td>
<td>23.8</td>
<td>✓</td>
<td>beer</td>
</tr>
<tr>
<td>Danone</td>
<td>FR</td>
<td>23.6</td>
<td>✓</td>
<td>dairy &amp; plant-based, water, baby &amp; medical nutrition</td>
</tr>
<tr>
<td>Lactalis</td>
<td>FR</td>
<td>21.1</td>
<td>✓</td>
<td>dairy</td>
</tr>
<tr>
<td>CHS</td>
<td>US</td>
<td>20.7</td>
<td>-</td>
<td>multi-product</td>
</tr>
<tr>
<td>Unilever</td>
<td>NL/UK</td>
<td>19.1</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>Suntory</td>
<td>JP</td>
<td>15.7</td>
<td>✓</td>
<td>(alcoholic) beverages and foods</td>
</tr>
<tr>
<td>General Mills</td>
<td>US</td>
<td>15.3</td>
<td>✓</td>
<td>prepared foods</td>
</tr>
<tr>
<td>Diageo</td>
<td>UK</td>
<td>14.3</td>
<td>✓</td>
<td>alcoholic beverages</td>
</tr>
<tr>
<td>Grupo Bimbo</td>
<td>MX</td>
<td>13.6</td>
<td>✓</td>
<td>bakery</td>
</tr>
<tr>
<td>Kellogg Company</td>
<td>US</td>
<td>12.9</td>
<td>✓</td>
<td>prepared foods, snacks, cereals</td>
</tr>
<tr>
<td>Yili Group</td>
<td>CN</td>
<td>12.3</td>
<td>-</td>
<td>dairy</td>
</tr>
<tr>
<td>Ferrero</td>
<td>IT</td>
<td>12.3</td>
<td>✓</td>
<td>confectionery</td>
</tr>
<tr>
<td>Fonterra</td>
<td>NZ</td>
<td>11.7</td>
<td>✓</td>
<td>dairy</td>
</tr>
<tr>
<td>Marfrig Group</td>
<td>BR</td>
<td>11.7</td>
<td>-</td>
<td>meat</td>
</tr>
<tr>
<td>Name</td>
<td>Headquarters</td>
<td>Sales (€ billion)</td>
<td>Operations in the EU</td>
<td>Main sectors</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------</td>
<td>-------------------</td>
<td>----------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Pilgrim’s Pride</td>
<td>US</td>
<td>11.3</td>
<td>✓</td>
<td>meat</td>
</tr>
<tr>
<td>FrieslandCampina</td>
<td>NL</td>
<td>11.1</td>
<td>✓</td>
<td>dairy</td>
</tr>
<tr>
<td>Arla Foods</td>
<td>DK</td>
<td>10.6</td>
<td>✓</td>
<td>dairy</td>
</tr>
<tr>
<td>Asahi Group</td>
<td>JP</td>
<td>10.2</td>
<td>✓</td>
<td>(alcoholic) beverages and foods</td>
</tr>
<tr>
<td>China Mengniu</td>
<td>CN</td>
<td>9.6</td>
<td>-</td>
<td>dairy</td>
</tr>
<tr>
<td>NH Foods</td>
<td>JP</td>
<td>9.6</td>
<td>-</td>
<td>meat, processed foods, fish products, dairy</td>
</tr>
<tr>
<td>ConAgra Brands</td>
<td>US</td>
<td>9.5</td>
<td>-</td>
<td>prepared foods</td>
</tr>
<tr>
<td>DSM</td>
<td>NL</td>
<td>9.0</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>Hormel Foods</td>
<td>US</td>
<td>8.6</td>
<td>-</td>
<td>meat, grocery products, refrigerated and specialty foods</td>
</tr>
<tr>
<td>Pernod Ricard</td>
<td>FR</td>
<td>8.4</td>
<td>✓</td>
<td>alcoholic beverages</td>
</tr>
<tr>
<td>Meiji Holdings</td>
<td>JP</td>
<td>8.1</td>
<td>-</td>
<td>dairy, chocolate</td>
</tr>
<tr>
<td>Danish Crown</td>
<td>DK</td>
<td>8.1</td>
<td>✓</td>
<td>meat</td>
</tr>
<tr>
<td>Carlsberg</td>
<td>DK</td>
<td>7.9</td>
<td>✓</td>
<td>beer</td>
</tr>
<tr>
<td>Campbell’s</td>
<td>US</td>
<td>7.9</td>
<td>-</td>
<td>soups, sauces, snacks, beverages</td>
</tr>
<tr>
<td>Yamazaki Baking</td>
<td>JP</td>
<td>7.8</td>
<td>-</td>
<td>bread, confectionery, snacks</td>
</tr>
<tr>
<td>Kirin Holdings</td>
<td>JP</td>
<td>7.6</td>
<td>-</td>
<td>alcoholic and non-alcoholic beverages</td>
</tr>
<tr>
<td>Associated British Foods</td>
<td>UK</td>
<td>7.6</td>
<td>✓</td>
<td>sugar, starch, prepared foods</td>
</tr>
<tr>
<td>Hershey Company</td>
<td>US</td>
<td>7.6</td>
<td>-</td>
<td>chocolate, confectionery</td>
</tr>
<tr>
<td>Kerry Group</td>
<td>IE</td>
<td>7.0</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>BRF</td>
<td>BR</td>
<td>6.8</td>
<td>✓</td>
<td>meat</td>
</tr>
<tr>
<td>Oetker Group</td>
<td>DE</td>
<td>6.7</td>
<td>✓</td>
<td>multi-product</td>
</tr>
<tr>
<td>McCain Foods</td>
<td>CD</td>
<td>6.7</td>
<td>✓</td>
<td>frozen potato products, prepared foods</td>
</tr>
<tr>
<td>Barry Callebaut</td>
<td>CH</td>
<td>6.4</td>
<td>✓</td>
<td>chocolate, cocoa</td>
</tr>
<tr>
<td>Südzucker</td>
<td>DE</td>
<td>6.1</td>
<td>✓</td>
<td>sugar, multi-product</td>
</tr>
<tr>
<td>DuPont</td>
<td>US</td>
<td>5.7</td>
<td>✓</td>
<td>nutrition &amp; biosciences</td>
</tr>
<tr>
<td>Savencia</td>
<td>FR</td>
<td>5.2</td>
<td>✓</td>
<td>dairy</td>
</tr>
</tbody>
</table>

1 Based on the most recent complete fiscal year
2 Figures have been converted to Euro with ECB bilateral annual exchange rates series, but only figures in the original currency are relevant
3 Operations in the EU refer to the presence of processing plants in one or more Member States
Gross value added (GVA)
The gross value added is the value of goods and services produced by a sector minus the cost of the raw materials and other inputs used to produce them. GVA measures the contribution to the economy of each individual sector.

Investment
Investment is defined as investment during the reference period in all tangible goods. Investments in intangible and financial assets are excluded.

Labour productivity
Labour productivity provides a measure of the efficiency of the workforce to produce goods and services. Labour productivity is calculated as the gross value added (GVA) divided by persons employed.

Persons employed
The number of persons employed includes the total number of persons who work in the observation unit (including of working proprietors, partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams).

Small and medium-sized enterprises (SMEs)
For Eurostat's Structural Business Statistics database: micro = less than 10; small = 10 to 49; medium-sized = 50 to 249; large = more than 250 persons employed. The SBS size-class data are solely based on the definition relating to the number of persons employed and not to the turnover level.

Value added
The value added at factor costs is the gross income from operating activities after adjusting for operating subsidies and indirect taxes.

Wages and salaries
Wages and salaries are defined as the total remuneration, in cash or in kind, payable to all persons counted on the payroll (including homeworkers), in return for work done during the accounting period regardless of whether it is paid on the basis of working time, output or piecework and whether it is paid regularly or not.

GLOSSARY

Abbreviation of world regions

ACP
African, Caribbean and Pacific countries

Andean Group
Bolivia, Colombia, Ecuador and Peru

ASEAN (Association of Southeast Asian Nations)
Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam

Central America
Panama, Guatemala, Costa Rica, El Salvador, Honduras and Nicaragua

CIS (Commonwealth of Independent States)
Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine and Uzbekistan

EFTA (European Free Trade Area)
Iceland, Liechtenstein, Norway and Switzerland

EU
EU refers to EU27, unless otherwise specified

GCC (Gulf Cooperation Council)
Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates

Greater China region
China, Hong Kong, Macau and Taiwan

Mercosur
Argentina, Brazil, Paraguay and Uruguay

Southern Mediterranean region and Turkey
Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria, Tunisia and Turkey

USMCA countries
US, Mexico, and Canada

Western Balkans
Albania, Bosnia-Herzegovina, Kosovo, North Macedonia, Montenegro and Serbia