Statistics in focus

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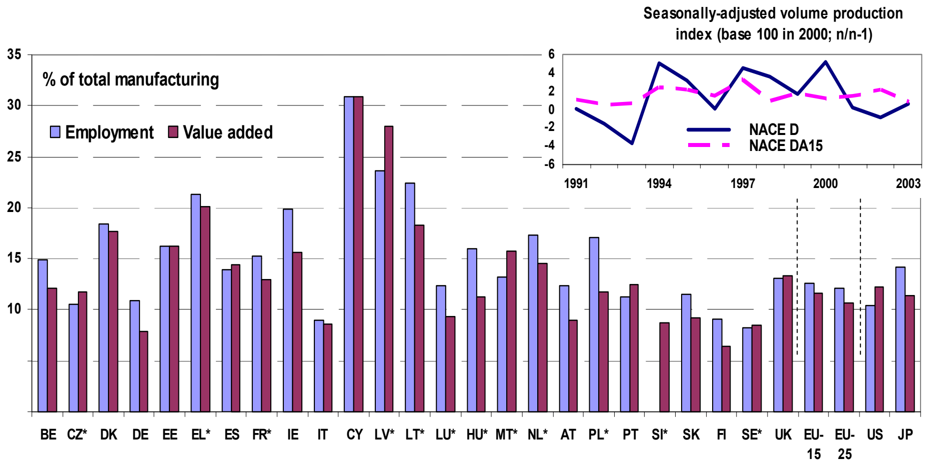
The food industry in Europe

The food industry is the sector that processes and packages products for human and animal consumption (NACE Rev.1, division 15). Since the sector is usually less vulnerable than others to economic fluctuations, the demand for food products being relatively static, its activity is less cyclic and more constant than in manufacturing in general, but also shows more modest growth (see box, Figure 1).

Figure 1: Weight of the food industries in the EU and the Member States, 2001



* The latest data available for these indicators are: 2000 (HU, MT); 1999 – value added only (FR, LT, SI); 1998 (PL); 1997 (NL);
CZ, LV, LU, SE: the data used are from the agricultural and food industries (NACE DA), including the tobacco industry.
EL: the data used concern businesses with more than 20 persons employed. The United States data were obtained from the US Census Bureau; those from Japan were obtained from the METI (Ministry of Economy, Trade and Industry).

Source: Eurostat, unless otherwise mentioned.

With a value added of EUR 175.6 billion recorded in 2001 by structural business statistics (SBS), food is Europe's second largest manufacturing sector after the metal industry. The main operators reflect their demographic weight: Germany, the United Kingdom and France together produce over 51% of the Community's value added and 53% of its production in this sector. With a global specialisation rate (definition: see methodological notes) of more than 20% (compared with an average of 11.5% in the European Union), most new Member States are highly active in the sector (Cyprus and the Baltic States being prime examples). Greece, Denmark and the Netherlands also tend to specialise in food; specialisation rates are lowest in Finland, Germany and Sweden (Table 1).

Table 1 : Weight of the food industries in the EU and the Member States, 2001

Sector	Total EU employment (thousands)	Total EU value added (EUR billions)	Main contributor to value added, EU	Member State in which this sector is	
				biggest	smallest
Meat (15.1)	987.9	31.1	Germany	Poland	Slovakia
Fruit and vegetables (15.3)	262.9	10.4	United Kingdom	Malta	Lithuania
Dairy products (15.5)	404.8	17.4	France	Lithuania	Malta
Other food products (15.8)	1 865.6	65.1	Germany	Cyprus	Finland
Beverages (15.9)	446.1	31.2	United Kingdom	Cyprus	Finland
Other misc. food products (15.2-4-6-7)	455.2	20.4	United Kingdom	Latvia	Luxembourg
Food industries (15)	4 422.5	175.6	Germany	Cyprus	Finland
Manufacturing (D)	34 249.5	1 535.6	--		

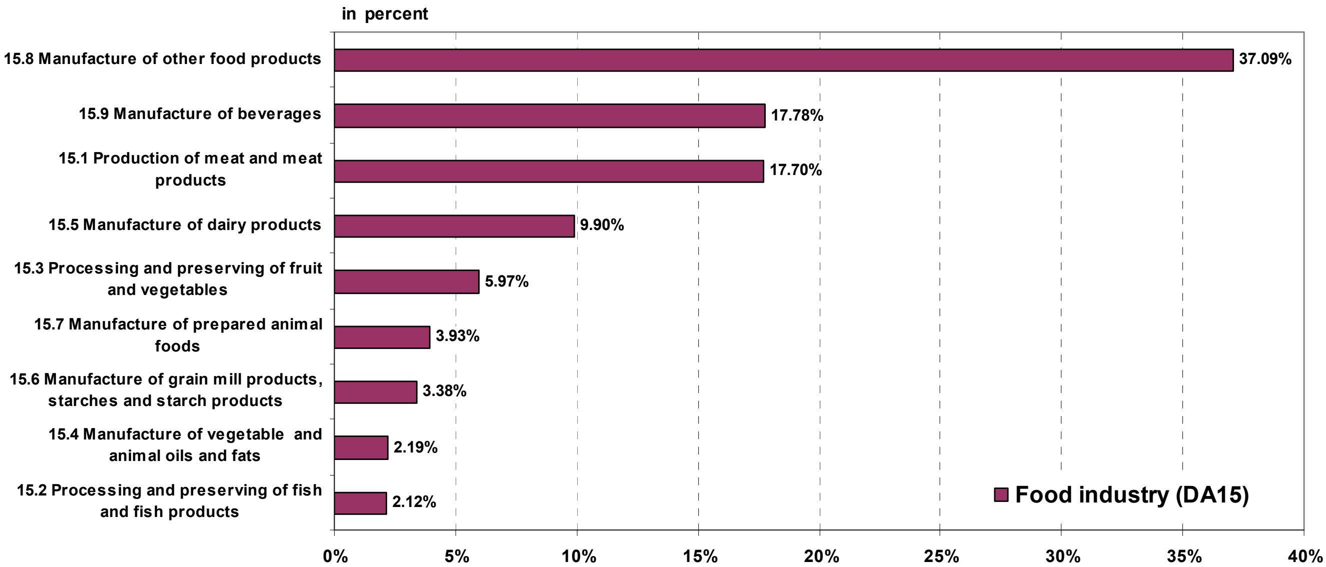
Notes: most/least specialised Member State: see methodological notes for details.

Traditional branches making way for product diversification

The food industry traditionally has four major branches (Figure 2). The recent changes in activity in these branches is largely a result of changes in consumer behaviour (see page 5).

The beverages industry (division 15.9) and the meat industry (division 15.1) now have similar weights, with beverages having gradually lost ground over the past decade. Despite the difficulties encountered at the end of the period as a result of the uncertainty created by the bovine spongiform encephalopathy (BSE) epidemic, the meat branch has maintained and even improved its position within the food sector. The weight of bread (13%, part of division 15.8) and milk (10%) production also diminished over the period. The dairy industries have seen their position fluctuate most widely since 1990 (by over 2 points). The small traditional branches (fish, oils and fats, animal feed) have also lost ground. These traditional branches have thus yielded progressively to “other” food products (most in division 15.8), illustrating the growing diversification in the sector. A few segments – chocolate and chocolate confectionery, preserved pastry goods and condiments, amongst others – have grown markedly over the past few years.

Figure 2: Share of value added of food-industry in the food industry as a whole, 2001



The same structural business statistics show that 4.4 million people (almost 2 million in Germany, the United Kingdom and France) were employed in the EU food industry (including the accession countries) in 2001: 13% of the manufacturing workforce (Table 1). Almost 20% of jobs in the sector were in the accession countries.

Bread (1.2 million people) and meat (0.98 million) production were the biggest employers, while milk and beverages accounted for 0.40 and 0.44 million jobs respectively.

Low apparent productivity, low worker qualification rate

Table 2 shows the main elements used to assess production factors. The food industry is more labour-intensive than manufacturing as a whole, but the apparent productivity of the work done varies widely. The disparity has, of course, increased further with the arrival of new Member States. Value added is no more than EUR 15 000 per person employed in Estonia, Lithuania, Hungary and Slovakia, but over EUR 50 000 in Belgium, Denmark, Finland and the United Kingdom. Ireland can be seen as a special case, returning outstanding apparent productivity figures (as in many industrial activities), bearing in mind its unusual position in the international manufacturing ranks. This phenomenon has continued in recent years (particularly in “beverages” and “other food products” – divisions 15.9 and 15.8 of NACE Rev.1). Ireland’s apparent productivity has risen still further, with a 12% increase in 2001 (+15% in previous years).

In most of the new Member States (particularly Latvia and Hungary) and in Romania, apparent productivity rose by up to 25 points between 1999 and 2000 and by another 5 points between 2000 and 2001).

Table 2: Main food-industry indicators (DA15) in the Member States, 2001

	BE	CZ*	DK	DE	EE	EL**	ES	FR	IE
Production (EUR millions)	26 688	7 912	18 523	129 462	752	5 711	67 301	117 647	17 674
Number of persons employed	101 352	147 395	88 074	823 581	19 952	47 629	370 783	619 352	50 013
Value added (EUR millions)	5 339	1 755	4 553	32 693	159	1 790	15 059	26 837	5 159
Labour cost per employee (EUR thousands/person)	35.5	6.2	33.6	27.1	4.9	19.2	23.1	29.3	32.3
Apparent productivity (EUR thousands/person employed)	52.7	11.9	51.7	39.7	8.0	37.6	40.6	43.3	103.2
Simple wage-adjusted labour productivity (%)	148.3	192.4	154.0	146.6	161.7	196.2	175.7	147.7	318.9

	IT	CY	LV*	LT	LU*	HU	MT	NL	AT
Production (EUR millions)	90 830	954	1 111	1 167	646	6 151	310	37 414	10 848
Number of persons employed	431 497	11 454	36 555	55 228	4 253	121 087	4 129	160 985	77 965
Value added (EUR millions)	17 543	287	457	249	212	1 302	118	7 856	3 202
Labour cost per employee (EUR thousands/person)	28.4	:	4.0	:	30.7	5.5	12.3	33.8	30.4
Apparent productivity (EUR thousands/person employed)	40.7	25.0	12.5	4.5	49.9	10.8	28.7	48.8	41.1
Simple wage-adjusted labour productivity (%)	143.3	:	314.9	:	162.4	195.3	233.7	167.5	135.2

	PL	PT	SI	SE*	SK	FI	UK	EU-15	EU-25
Production (EUR millions)	19 635	10 457	1 567	13 090	2 103	7 818	97 389	668 968	719 693
Number of persons employed	467 255	102 716	:	65 716	48 416	39 834	509 916	3518 105	4422 519
Value added (EUR millions)	5 310	2 242	354	3 520	362	1 998	30 540	160 665	175 689
Labour cost per employee (EUR thousands/person)	:	12.4	13.3	36.3	4.7	33.4	31.3	28.3	23.9
Apparent productivity (EUR thousands/person employed)	11.4	21.8	:	53.6	7.5	50.2	59.9	47.4	39.7
Simple wage-adjusted labour productivity (%)	:	175.6	:	147.7	158.3	150.0	191.4	160.2	:

* CZ, LV, LU, SE: the data used are from the food and tobacco industries (Nace DA)
** EL: the data used cover enterprises with more than 20 persons employed in the food and tobacco industries (table enter_l_ms)

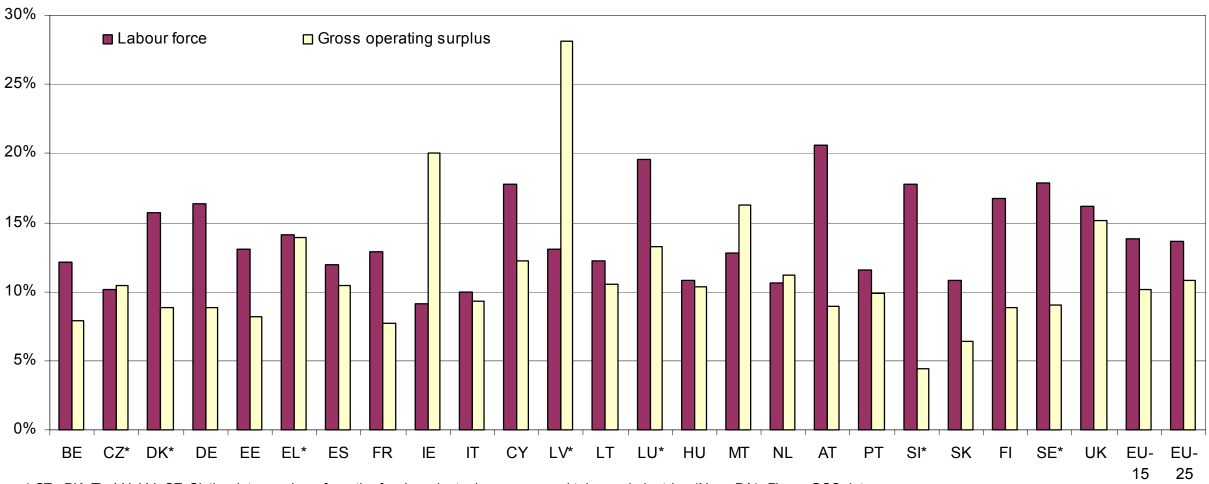
The integration rate (VA/production) (24.5%) is lower than in manufacturing as a whole (28.7%). The rate is high in Ireland and the United Kingdom and low in Slovakia.

At Community level, the share of gross operating surplus (GOS) in production costs is higher in the food industry (11%) than in manufacturing as a whole (10%). The GOS share is over 15% in Ireland, Latvia, Malta and the United Kingdom, but under 5% in Slovenia (Figure 3).

Labour costs, however, are markedly lower in the food industry (14% as against 19%). Austria shows the highest labour costs at nearly 20% – far above those of the Czech Republic, Ireland, Italy, Hungary and the Netherlands (all close to 10%).

Latvia and Lithuania stand out amongst the new Member States with a return on capital (equal to GOS/VA) of nearly 70% for the former and 25% for the latter, while the other new countries are close to the European average at roughly 40% (compared with 35% for manufacturing as a whole).

Figure 3: Labour costs and gross operating surplus related to production in the Member States, 2001 – in % of total production

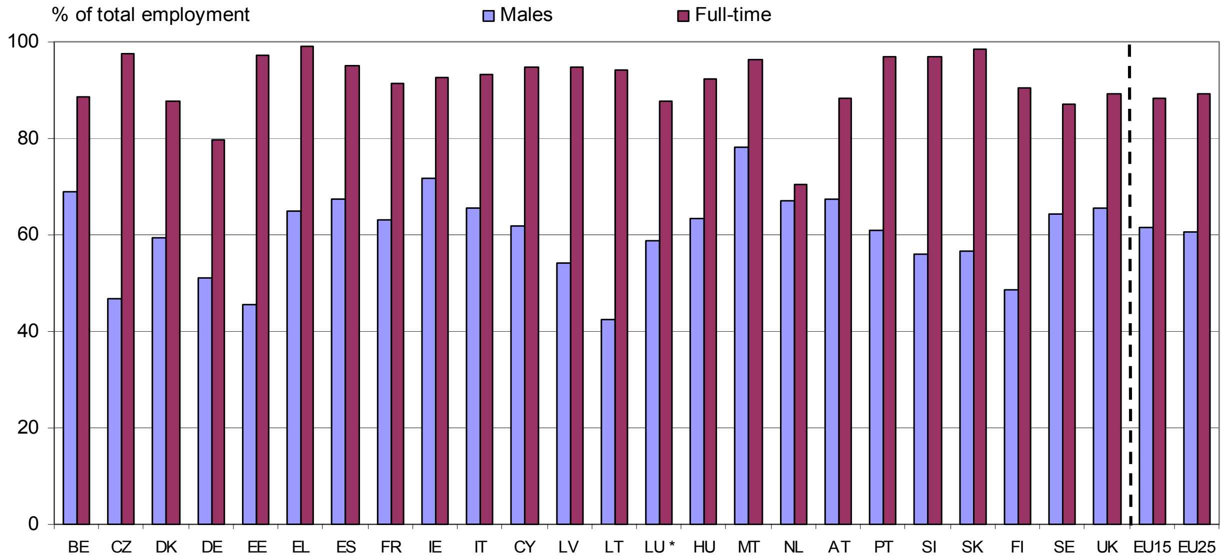


* CZ, DK, EL, LU, LV, SE, SI: the data used are from the food products, beverages and tobacco industries (Nace DA); PL: no GOS data.

Like most industrial sectors, food is dominated by males, but women still fill for more jobs (39.4%) than in manufacturing a whole (35.5%). Malta and Ireland record far lower female employment rates, at 21.7% and 28.2% respectively – see Figure 4 – but there are fewer men than women in the food industry in Finland (48.8%), the Czech Republic (46.7%), Estonia (45.5%) and Lithuania (42.5%).

Full-time working is less common in the Community food sector (89.1%) than in manufacturing as a whole (92.8%). In 2002, Germany (79.6%) and the Netherlands (70.4%) showed the lowest full-time rates, and the Czech Republic, Estonia, Greece and Slovakia the highest, at 97%. In the latter countries, female employment does not go hand in hand with part-time working.

Figure 4: Percentages of male workers and full-time workers in the food industries, 2002



* LU data unreliable; small sample

Food-industry workers appear to be less well qualified than in manufacturing as a whole. Over 16% of those employed in manufacturing had university degrees in 2002, but fewer than 11% of those in the food sector. Slightly over 36% of food-sector workers in the EU in 2002 had completed only primary education. The Czech Republic, Lithuania and Slovakia showed the lowest rates of unqualified workers, at less than 20%. Austria, Belgium, Spain, Estonia, Finland and Ireland showed the highest proportions of graduate workers in 2002, at over 15%.

Large companies in the north and SMEs in the south

The food sector is highly diversified, with large multinationals as well as small family firms. In terms of turnover, the biggest food companies in the EU are in the United Kingdom (Unilever, Diageo, Cadbury-Schweppes), France (Danone) and the Netherlands (Heineken). Although value added in the Community is concentrated in large companies (52.8% in 2001), food-sector jobs in most Member States tend to be in small and medium-sized businesses with fewer than 250 workers (Table 3).

Italy, where small firms (with fewer than 50 workers) employ the highest numbers (61.2%) and produce over 43% of total value added in the sector, is far ahead of all other Member States in these terms, even those in the south. At the other end of the scale, in the north the United Kingdom and Denmark concentrate more than 60% of food employment in large companies, which generate 75% and 72% respectively of total value added in these two countries.

At Community level, apparent productivity at EUR 54 600 per person employed is highest in large companies. Other than in Ireland, the highest values are recorded in the Netherlands and Belgium. Of the new Member States, Cyprus shows the highest productivity levels.

Table 3: Value added and employment by size of enterprise (NACE Rev.1 division 15) in the EU, 2001

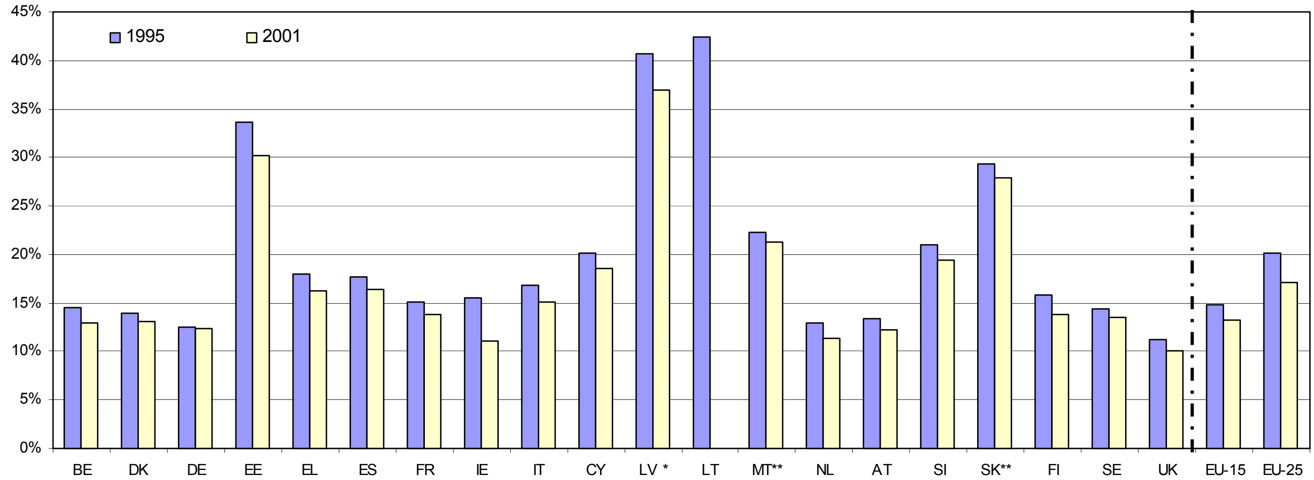
	BE	CZ	DK	DE*	EE*	ES	FR	IE	IT	CY	LT	LV	HU*	NL	PT*	FI*	SE*	UK*	EU-15	EU-25
alue added (%)																				
to 49	28.2	11.6	13.0	22.3	5.3	33.7	32.2	7.6	43.5	35.5	9.4	14.9	11.5	18.4	27.7	15.5	16.0	10.9	24.4	23.9
0 to 249	26.4	35.4	15.5	26.3	43.9	24.5	20.2	36.2	22.1	51.6	27.3	35.1	21.1	17.4	29.1	18.7	16.0	14.5	22.3	23.3
50 or more	45.4	53.0	71.5	51.5	50.8	41.8	47.6	56.3	34.3	12.9	63.3	50.0	67.4	64.2	43.3	65.8	68.1	74.6	53.3	52.8
umber of persons employed by size of enterprise (%)																				
to 49	43.9	29.0	20.0	37.3	10.6	49.5	44.7	15.5	61.2	46.5	27.7	21.8	26.8	34.6	49.9	23.7	24.1	11.9	38.8	37.0
0 to 249	22.7	34.0	15.9	26.7	36.8	23.3	20.0	35.4	16.3	44.0	34.7	38.4	22.8	21.0	28.1	16.1	15.7	19.0	22.3	24.3
50 or more	33.4	36.9	64.2	36.0	52.5	27.2	35.4	49.1	22.5	9.5	37.6	39.8	50.4	44.4	22.0	60.2	60.1	69.1	38.9	38.7
pparent labour productivity (EUR thousands/person employed)																				
to 49	33.9	4.3	33.7	24.7	4.0	27.6	31.3	50.3	29.1	19.1	2.1	8.2	5.7	32.4	12.7	32.8	35.4	57.8	28.8	25.8
0 to 249	61.1	11.1	50.5	40.7	9.5	42.7	43.8	105.4	55.5	29.3	5.0	10.9	12.3	50.4	23.6	58.1	54.3	47.7	45.9	38.4
50 or more	71.7	15.3	57.6	59.2	7.7	62.5	58.4	118.2	62.4	33.8	10.6	15.0	17.8	88.3	45.1	54.8	60.7	67.6	62.8	54.6

cause NACE DA15 includes many confidential data, the data shown concern the food and tobacco industries (NACE DA).

Consumption less food-centred

Consumption by households increased throughout the European Union between 1995 and 2001, and most of all in the new Member States: Cyprus (+35%), Estonia (+40%) and Lithuania (+42%). The rise in consumption was aimed primarily at culture (leisure and culture in the new Member States, communications products for EU15). The share spent on food and non-alcoholic beverages fell accordingly between 1995 and 2001 (Figure 5), largely as a result of the increase in households' disposable income. The sharpest drops were seen in Estonia (3.4 points) and Ireland (4.5 points). Households in the Baltic States on average spent over 30% of their budgets on food in that period, while household in a large majority of Member States spent under 15%, with the United Kingdom (11% of the household budget), Germany (12%), the Netherlands (12%) and Austria (13%) recording the lowest figures.

Figure 5: Share of European household budgets spent on the consumption of food and non-alcoholic beverages



* 1998 data used (2001 not available).
** 1998 data used (1995 not available).
The EU-15 and EU-25 aggregates are averages compiled from available data.

In 1999, European households spent over 24% of their "food and non-alcoholic beverages" budgets on meat (CP0112) and 16% on bread and cereals (CP0111). Those in Portugal, Spain and Greece spent proportionately more on fish (CP0113), oils and fats (CP0115), those in the United Kingdom on vegetables (CP0117), and German households on non-alcoholic beverages (CP012).

Quite apart from the overall drop in the share of the household budget spent on food, buying habits have changed markedly in the EU in recent years, sometimes in response to external constraints (health scares). Consumption by European households has seen changes in the meat sector (CP0112), with its share of consumption falling significantly, by about 2 points, between 1994 and 1999 in almost all countries: Belgium was the great exception, with a rise from 19% in 1994 to 27% in 1999 (Table 4). Consumption of bread and cereals (CP0111) appears to have increased proportionately over the same period in many countries (BE, IE, DK, ES, LU, FI, UK).

Table 4: Distribution (%) of the consumption of food and non-alcoholic beverages in household budgets in 1994 and 1999

	BE		DK		EL		ES		FR		IE	
	1994	1999	1994	1999	1994	1999	1994	1999	1994	1999	1994	1999
Bread and cereals (cp0111)	12.8	17.7	15.8	16.6	11.9	11.8	14.0	15.4	17.4	17.4	12.8	17.1
Meat (cp0112)	18.7	26.8	24.4	21.7	27.6	24.1	28.1	28.1	27.7	25.5	27.1	24.4
Fish and seafood (cp0113)	7.5	5.7	3.8	4.2	7.1	7.8	12.4	13.4	6.0	6.0	2.3	2.4
Milk, cheese and eggs (cp0114)	13.7	12.1	13.7	14.1	20.4	15.2	13.2	13.7	13.7	13.9	15.6	13.2
Oils and fats (cp0115)	3.4	2.5	3.1	2.8	8.8	9.1	4.5	3.7	2.5	2.3	3.5	2.2
Fruit (cp0116)	8.0	6.4	5.5	5.7	8.7	8.2	8.4	7.8	6.9	6.3	4.6	4.7
Vegetables (cp0117)	11.2	9.3	8.8	9.6	7.9	11.7	8.9	7.8	11.0	11.1	11.3	11.1
Sugar, jam, honey, syrup, chocolate and confectionery (cp0118)	8.1	6.8	11.9	11.5	3.0	5.7	3.4	3.3	4.8	5.7	8.4	8.8
Food products n.e.c. (cp0119)	4.4	3.1	2.3	2.4	0.0	0.9	1.5	1.3	3.8	5.0	4.8	5.2
Non-alcoholic beverages (cp012)	12.2	9.7	10.8	11.3	4.5	5.4	5.5	5.4	6.2	6.9	9.5	10.9
	IT		**LU**		**NL**		**PT**		**FI**		**UK**	
	1994	1999	1994	1999	1994	1999	1994	1999	1994	1999	1994	1999
Bread and cereals (cp0111)	19.7	17.2	14.6	16.2	16.8	16.9	15.1	14.4	15.5	17.2	16.6	19.4
Meat (cp0112)	25.9	24.5	30.8	26.9	22.0	21.1	29.2	27.8	22.6	19.0	23.1	22.5
Fish and seafood (cp0113)	7.1	8.5	4.0	5.0	2.1	2.5	15.3	16.9	3.7	3.5	4.0	3.6
Milk, cheese and eggs (cp0114)	14.7	14.5	12.8	13.0	16.3	15.4	11.7	12.3	17.9	17.4	14.3	12.5
Oils and fats (cp0115)	5.4	4.6	3.4	3.3	2.6	2.6	5.6	4.6	3.3	2.7	2.5	2.1
Fruit (cp0116)	7.6	9.2	6.7	7.8	7.9	7.7	7.3	7.5	6.4	6.8	6.4	6.5
Vegetables (cp0117)	7.9	8.8	7.5	8.7	10.7	11.9	9.5	9.2	8.4	9.1	13.0	13.9
Sugar, jam, honey, syrup, chocolate and confectionery (cp0118)	3.7	3.6	5.9	6.1	6.6	6.9	2.5	2.8	8.5	7.9	4.8	7.0
Food products n.e.c. (cp0119)	0.0	0.8	5.4	2.7	5.5	5.4	0.5	0.6	5.7	7.5	6.5	3.8
Non-alcoholic beverages (cp012)	7.9	8.3	9.0	10.3	9.3	9.6	3.2	3.9	8.0	8.9	8.8	8.9

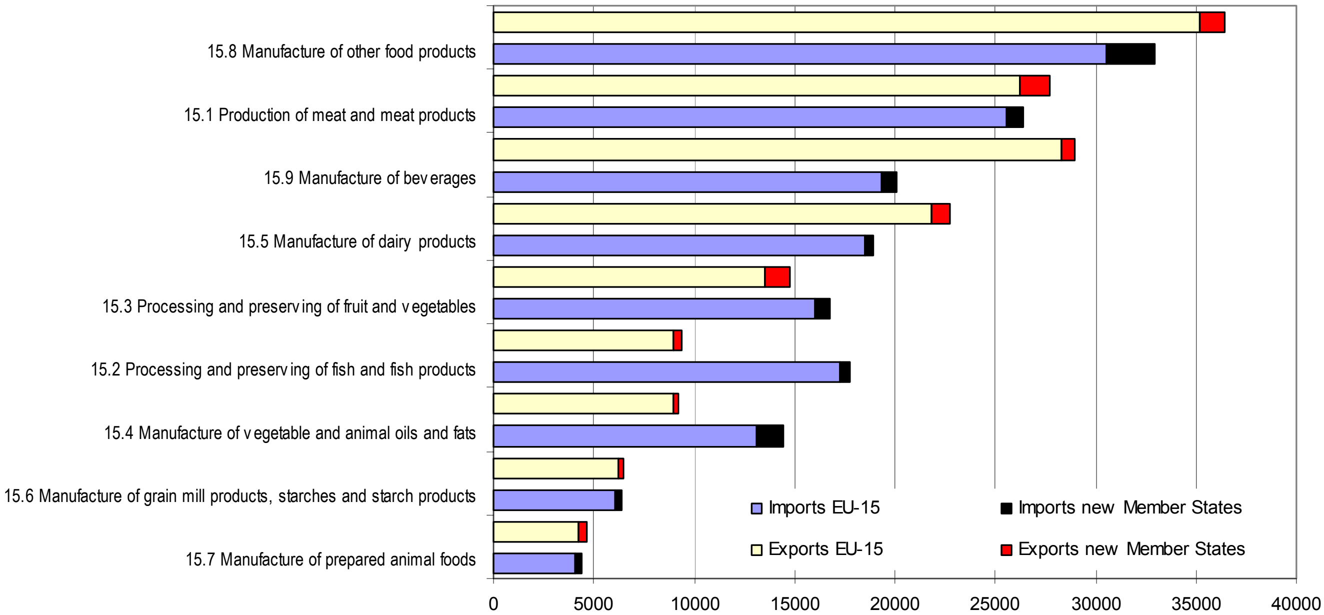
No data available for other EU-25 countries

Competition and complementarity in the new Member States

In 2003 the European Union exported food products valued at EUR 39.8 billion to the rest of the world and imported food worth EUR 39.4 billion – reflecting an average annual growth of 4.5% and 4.3% respectively between 1999-2003. Manufacturing in general grew by an average of 6.2% for exports and 5.5% for imports over the same period. External-trade data show that intra-Community trade in food accounts for over 75% of all trade, with flows of around EUR 120 billion.

In 2003. the United States (23%), Japan (9%), Russia (7%) and Canada (3%) were some of the biggest importers of Community food products. More specifically, 57% of exports to the USA came from the beverages industry; a 35% increase in EU exports to the US was recorded between 1999 and 2003. The EU imports most of its food from Brazil (11%), Argentina (9%), the United States (8%) and China (4%).

Figure 6: Volume (EUR millions) of EU imports and exports by sector, 2003 (Intra+Extra)



In 2003, the ten new Member States accounted for 9% of imports associated with the oils and fats branch, 8% for animal feed and 8% for other food products. 6% of meat exports, 8% of fruit and vegetables and 9% of animal feed come from these countries (Figure 6). Hungary and Poland differ from the other accession countries by specialising more in exports of meat products, fruit and vegetables (taking intra-Community and extra-Community trade together). In 2003 these two countries accounted for 5% of Community meat exports and for 8% of fruit and vegetable exports. The other main EU actors on these markets are Greece, Spain, Italy and Portugal.

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

EU: European Union , including the 25 Member States (BE, CZ, DK, DE, EE, EL, ES, FR, IE, IT, CY, LV, LT, LU, HU, MT, NL, AT, PL, PT, SI, SK, FI, SE, UK).

SYMBOLS

":" unavailable or confidential.

DEFINITIONS

Division of employment and value-added by sector of activity: Employment and value-added in the Structural Business Statistics (SBS) are divided into sectors of activity according to the NACE Rev.1 system of classification. This categories activity by section (1-letter codes), sub-section (2-letter codes), division (2-digit codes), groups (3-digit codes) and classes (4-digit codes). Food activities are included in Section D and include the following divisions and groups:

DA	Manufacture of food products, beverages and tobacco
15	Manufacture of food products and beverages
15.1	Production, processing and preserving of meat and meat products
15.2	Processing and preserving of fish and fish products
15.3	Processing and preserving of fruit and vegetables
15.4	Manufacture of vegetable and animal oils and fats
15.5	Manufacture of dairy products
15.6	Manufacture of grain mill products, starches and starch products
15.7	Manufacture of prepared animal feeds
15.8	Manufacture of other food products
15.9	Manufacture of beverages

Number of persons employed: defined as the total number of persons who work in the observation unit (inclusive of working proprietors and 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). It includes part-time workers, seasonal workers, apprentices and home workers who are on the pay roll. The observation unit for aggregating data is the enterprise, which is defined as '*the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources*'.

Value added: Value added measured at factor cost, which is the gross income from operating activities after adjusting for operating subsidies and indirect taxes (including value-added tax). The distribution of value added can be studied with the help of a ratio such as GOS/VA, or the return on capital.

Production value: The production value measures the amount actually produced by the unit, based on sales, including changes in stocks and the resale of goods and services.

Personnel costs: The total remuneration, in cash or in kind, payable by an employer to an employee (regular and temporary employees as well as home workers) in return for work done by the latter during the reference period.

Apparent labour productivity: Value added at factor cost divided by the number of persons employed (expressed in EUR thousands per person employed).

Wage-adjusted labour productivity: (value added at factor cost/personnel costs) x (number of employees/number of persons employed)) x 100 (expressed as a percentage).

DATA SOURCES

Structural Business Statistics (SBS): collected within the framework of the Council Regulation on structural business statistics (Council Regulation (EC, EURATOM) No. 58/97 of December 1996. The SBS Regulation governs the transmission of data to Eurostat from reference year 1995 onwards. In theory it covers all market activities in sections C to K and M to O of NACE Rev. 1, but in practice the data available are confined to NACE Rev. 1 Sections C to K, excluding Section J, Financial Services. For further information, visit: http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html

The SBS data used in the analysis are taken from Eurostat's New Cronos database: Industry, Trade and Services.

EU Labour Force Survey (LFS): a survey of private households which provides data on the population living in these by nationality and by work status as well as by sex and age. The main focus is on employment, unemployment and inactivity and the various aspects of these, including the sector of activity in which people are employed and the highest level of education attained.

Levels of education attained: Levels of education attained are based on the International Standard Classification of Education (ISCED), revised in 1997, which divides the levels into 7 main domains in three groups: lower secondary (levels 0 to 2), upper secondary (levels 3 and 4), and higher education (levels 5 and 6).

Household consumption: the breakdown of household expenditure by consumption function at constant prices is taken from the national accounts. Breakdowns are by activity branch, investment product and consumption function (Theme 2 – Economy and Finance). Private household final consumption expenditure is broken down according to the Classification of Household Goods and Services, dating from 1998 (Theme 3 – Population and Social Conditions).

COMEXT: External trade statistics database managed by Eurostat and containing data on intra-EU (arrivals/dispatches) and extra-EU (imports/exports) trade. The data, broken down by product group, have been aggregated to reproduce the NACE Rev.1 activity groups.

Further information:

➢ Databases

Eurostat web site/Industry, trade and services/Industry, trade and services - horizontal view/Structural Business Statistics (Industry, Construction, Trade and Services)/Annual enterprise statistics

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