DATA & TRENDS

EU FOOD AND DRINK INDUSTRY

2016

CONTENTS

INTRODUCTION

The 2016 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, the largest manufacturing industry 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 EU and global ranking of food and drink companies.

This report covers the whole EU-28 food and drink industry, which is identified by the NACE rev2 codes C10 (food products) and C11 (drinks).
All figures presented here come from official sources and have been elaborated by FoodDrinkEurope.

EU FOOD AND DRINK INDUSTRY FIGURES

TURNOVER

€1,089 billion

Largest manufacturing sector in the EU

EMPLOYMENT

4.25 million people

Leading employer in the EU

VALUE ADDED

1.8%

of EU gross value added (GVA)[1]

NUMBER OF COMPANIES

289,000

CONSUMPTION

14%

of household expenditure on food and drink products

SMEs

49.5%

of food and drink turnover

62.8%

of food and drink employment

EXTERNAL TRADE

€98.1 billion

Exports

€72.9 billion

Imports

€25.2 billion

Trade balance

17.8%

EU share of global exports

R&D EXPENDITURE

€2.5 billion

Sources: Eurostat; UN COMTRADE; JRC

[1] For definition, see page 22

Single Market

CONTRIBUTION TO THE EU ECONOMY

The largest manufacturing sector in terms of turnover, value added and employment

1.8%
Contribution of the food and drink industry to EU gross value added (GVA)[1]

15.6%
Share of food and drink turnover in manufacturing

13%
Share of food and drink value added in manufacturing

- The food and drink industry is a major contributor to Europe's economy, ahead of other manufacturing sectors, such as the automotive industry.
- The industry maintains the characteristics of a stable, resilient and robust sector.
- In 2015, the volume of food and drink production was the highest since 2008.
- The EU food and drink industry generated a turnover of €1,089 billion (2014) and a value added of €212 billion (2013).

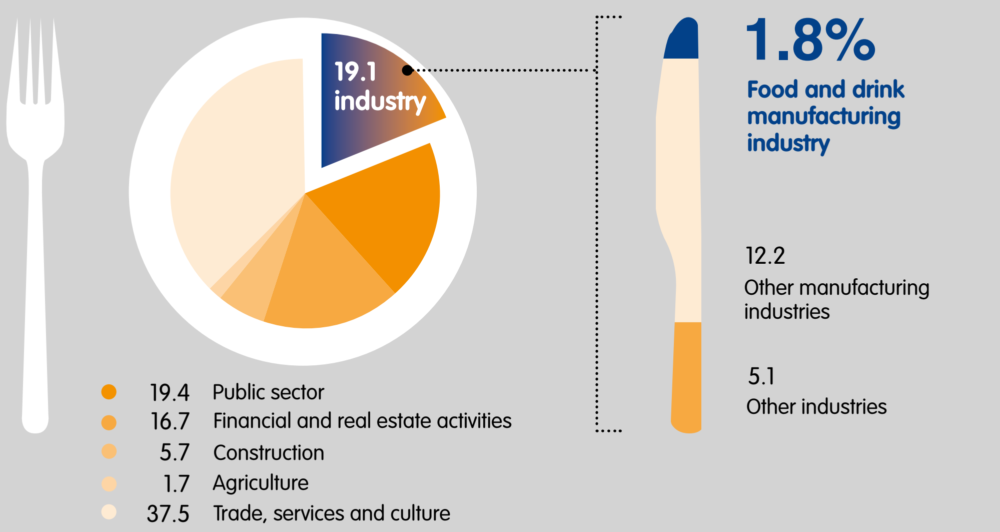
Recent developments in the EU food and drink industry

	2013	2014	% change
Turnover (€ billion)	1,090	1,089	-0.1
Value added (€ billion)	212	-	-
Number of employees (million)	4.25	-	-
Number of companies (1,000 units)	288	289	0.6

Source: Eurostat (SBS)

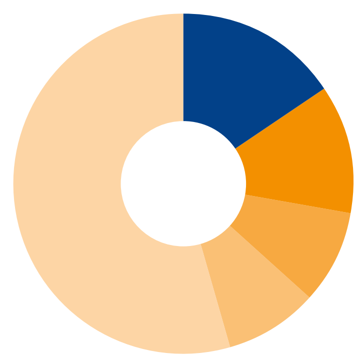
[1] For definition, see page 22

Contribution of the food and drink industry to the EU economy (2013,%)



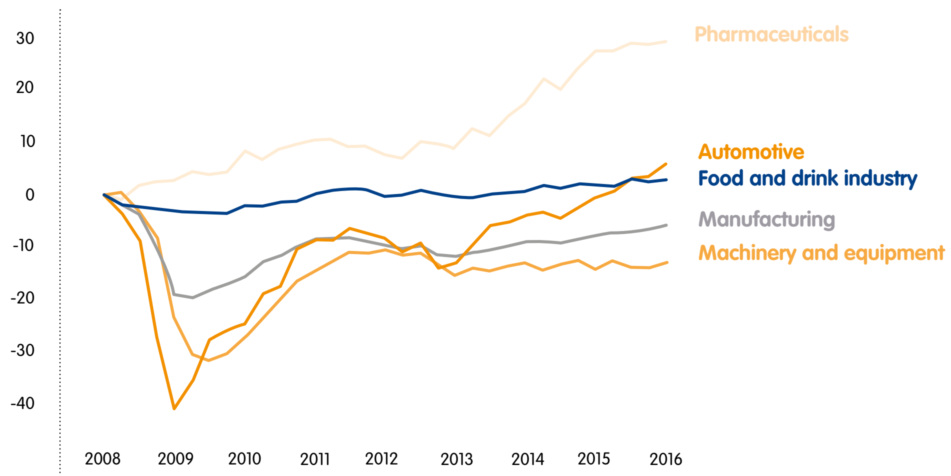
Source: Eurostat (National Accounts and SBS)

Share of turnover in the EU manufacturing industry (2013,%)



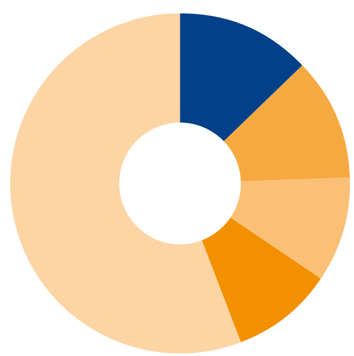
Source: Eurostat (SBS)

Production in the EU manufacturing industry (% change relative to the first quarter of 2008)



Source: Eurostat (STS)

Share of value added[1] in the EU manufacturing industry (2013,%)



1 For definition, see page 22

Source: Eurostat (SBS)

EMPLOYMENT

Leading employer in the EU

4.25 million

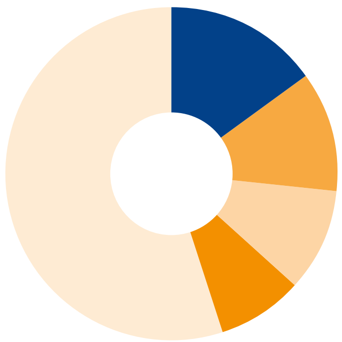
Total number of employees in the food and drink industry

15%

Share of food and drink industry employment in manufacturing

- Compared to other manufacturing sectors, the EU food and drink industry is a key job provider and a relatively stable employer.
- On average, labour productivity in the food and drink industry is lower than in most manufacturing sectors.
- The average number of persons employed by a food and drink company is 16; 2 more than the average manufacturing company.

Share of employment in the EU manufacturing industry (2013,%)

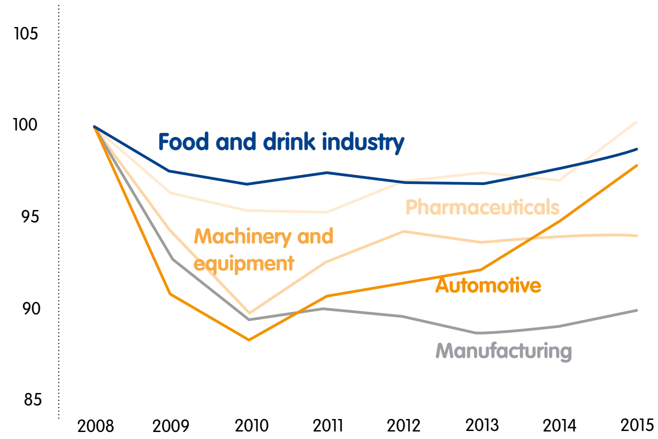


15% Food and drink industry

11.7	Fabricated metal products
10.2	Machinery and equipment
8.2	Automotive
54.8	Others

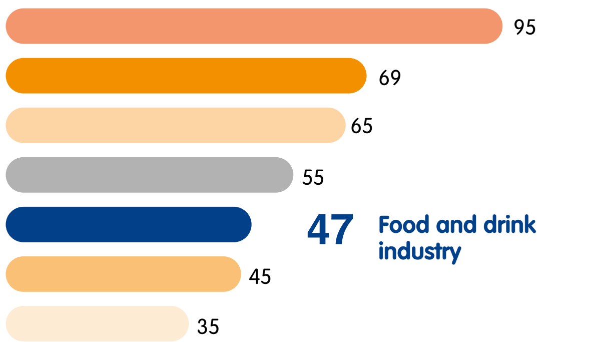
Source: Eurostat (SBS)

Employment in the EU manufacturing industry (index, 2008=100)



Source: Eurostat (STS)

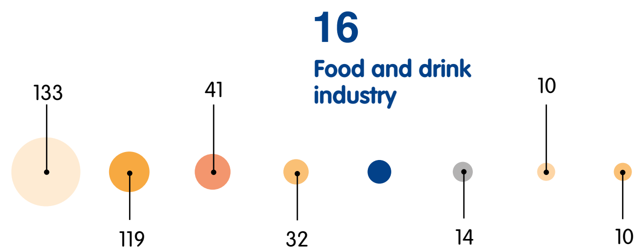
Labour productivity[1] (2013, €1,000/person)



Chemicals
Automotive
Machinery and equipment
Manufacturing
Fabricated metal products
Textiles

Source: Eurostat (SBS)

Average number of persons employed per company (2013)



Pharmaceuticals
Automotive
Chemicals
Machinery and equipment
Manufacturing
Textiles
Fabricated metal products

Source: Eurostat (SBS)

[1] For definition, see page 22

VALUE ADDED

Sustained growth over the past 20 years[1]

+€405 billion

Growth of food and drink turnover over the past 20 years

19.4%

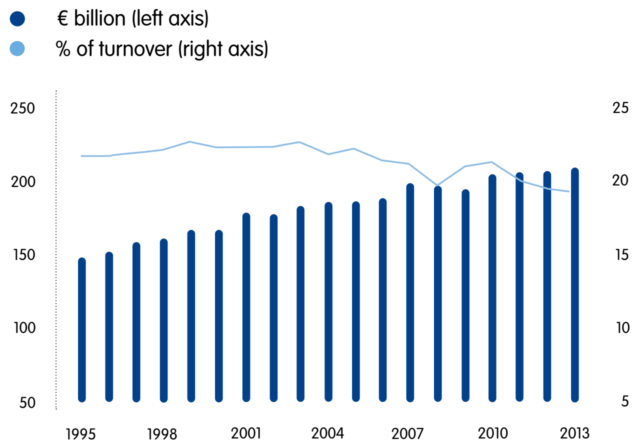
Share of value added[2] in turnover of the food and drink industry

- In 2013, the EU food and drink industry generated a turnover of €1,090 billion, 80% of which was spent in input costs. Value added resulted in €212 billion.
- Value added of the EU food and drink industry is being outpaced by input costs: between 2005 and 2013 value added has grown by 1.5% per year while input costs have grown by 3.8% per year.
- Over the past decade, the growth of value added in the food and drink industry has been higher than the overall manufacturing growth.
- Nevertheless, the growth of input costs has squeezed the value added of the food and drink industry, compared to manufacturing in general.

[1] For more information please read the FoodDrinkEurope report "A Competitive EU Food and Drink Industry for Growth and Jobs"

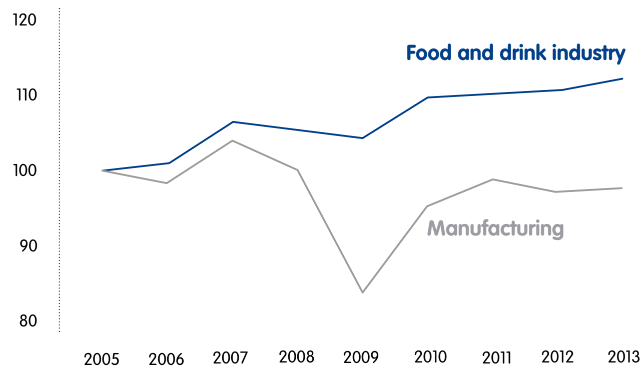
[2] For definition, see page 22

Value added of the EU food and drink industry



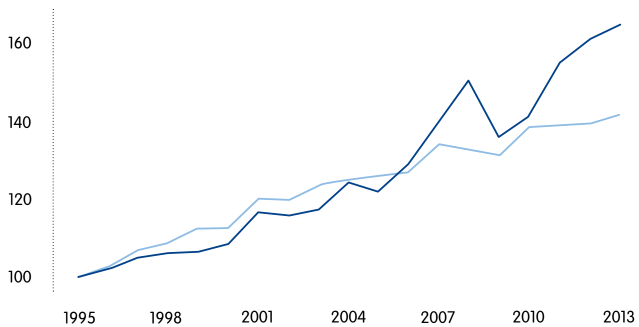
Source: Wageningen Economic Research

Value added in the EU food and drink industry and in manufacturing (index, 2005=100)



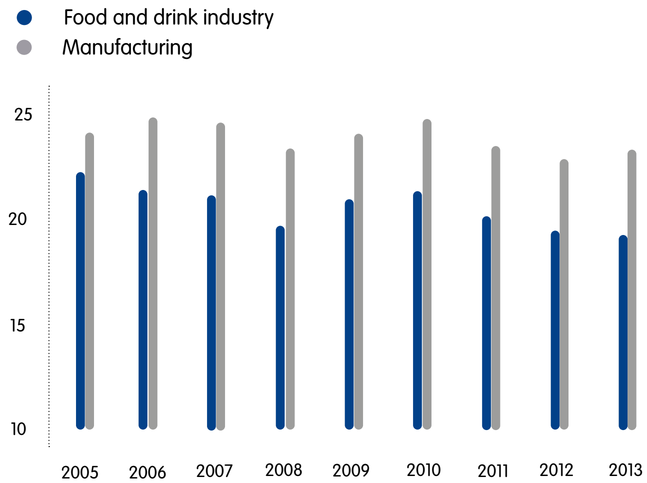
Source: Eurostat (SBS)

Value added and input costs of the EU food and drink industry (index, 1995=100)



Source: Wageningen Economic Research

Value added as a share of turnover in the food and drink industry and in manufacturing (%)



Source: Eurostat (SBS)

SECTORS AT EU LEVEL

Offering a wide variety of food and drink products to all consumers in the EU

20%

Share of the meat sector turnover

32%

Share of employees working in the bakery and farinaceous sector

- 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 sectors (bakery and farinaceous products, meat sector, dairy products, drinks and "various food products" category) represent three quarters of the total turnover and more than 80% of the total number of employees and companies.
- Labour productivity varies by sector. For drinks, animal feeds and "various food products" it is much higher than for overall manufacturing.

Turnover, value added, number of employees and companies in food and drink industry sectors (2013,%)

Labour productivity[1] (2013, €1,000/person)

Source: Eurostat (SBS)

[1] For definition, see page 22

SMALL AND MEDIUM-SIZED ENTERPRISES[1]

Small Scale, Big Impact

€538 billion
Turnover

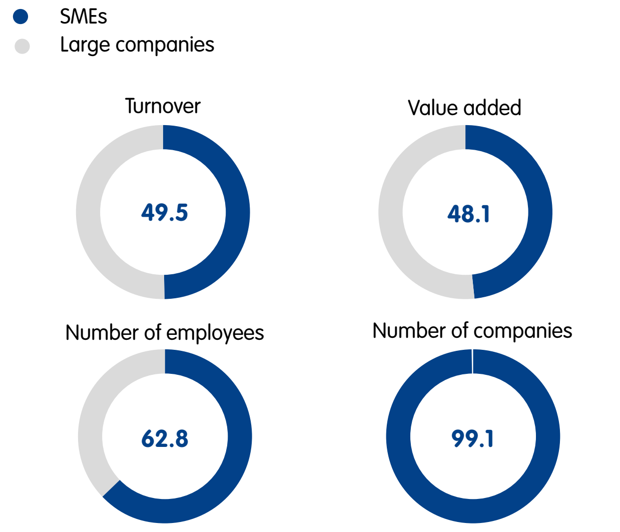
2.8 million
Employees

€102 billion
Value added

99.1%
of food and drink companies

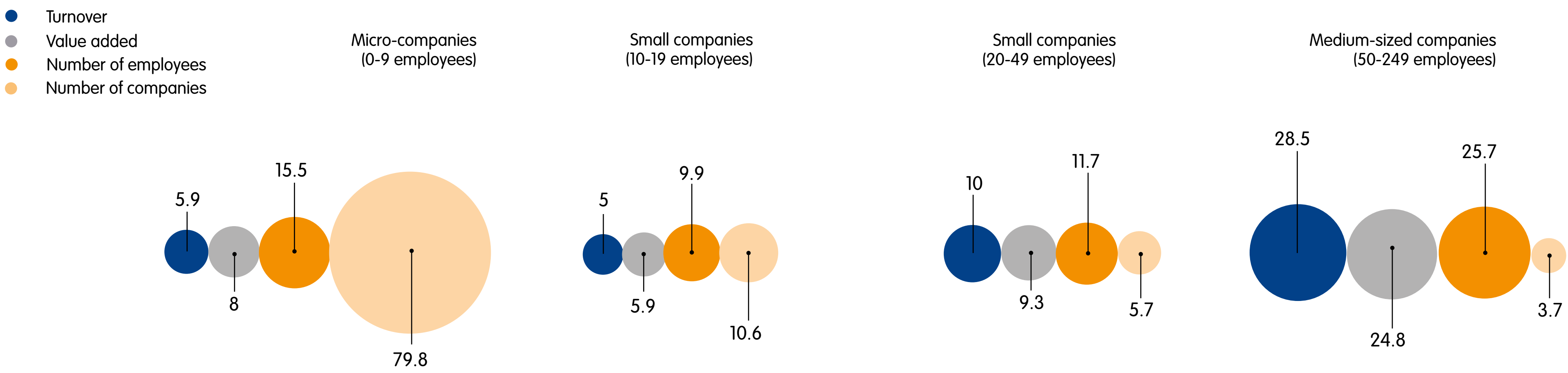
- The food and drink industry is a highly diversified sector with many companies of different sizes.
- SMEs generate almost 50% of the food and drink industry turnover and value added and provide two thirds of the employment of the sector.
- The food and drink industry accounts for more than 285,000 SMEs.

Contribution of SMEs and large companies to the EU food and drink industry (2013,%)



Source: Eurostat (SBS)

SMEs in the EU food and drink industry (2013,% by company size)



[1] For definition, see page 22

Source: Eurostat (SBS)

THE NATIONAL PICTURE

A key industry in the economies of EU Member States

#1 employer

The food and drink industry is the biggest employer in manufacturing in more than half of the Member States

66%

Share of turnover of the EU's 5 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.
- Germany, France, Italy, the UK and Spain are the largest EU food and drink producers by turnover.
- The industry is an essential part of national economies. The share of the food and drink industry employment exceeds 15% in more than half of the Member States.

Food and drink industry data as published by FoodDrinkEurope National Federations[1] (2014)

	Employment ranking in manufacturing	Turnover (€ billion)	Value added (€ billion)	Number of employees (1,000)	Number of companies
Austria	-	22	5.1	82.6	3,872
Belgium	1	48	7.6	88.5	4,532
Bulgaria	2	4.9	0.9	94.7	5,963
Croatia[2]	1	5.1	4.7	37.7	2,970
Czech Republic	4	11.6	1.9	92.4	7,538
Denmark	2	25.8	4.3	44.8	1,589
Estonia	2	1.9	0.4	15.1	525
Finland[2]	3	11.2	2.7	38	1,700
France	1	184.5	36.2	619.5	62,225
Germany[3]	3	172.2	35.2	559.8	5,828
Greece[4]	1	14.5	2	86.4	1,330
Hungary	2	11.2	1.9	99.8	6,700
Ireland[5]	1	26.4	7.1	39.2	607
Italy	3	132	27	385	54,931
Latvia	1	1.8	0.4	25.8	1,003
Lithuania	1	4.2	0.7	42.5	1,601
Netherlands	1	68.8	10.9	126.3	5,639
Poland	1	49.5	10.6	423.8	14,625
Portugal	1	14.9	2.7	104.3	10,807
Romania	1	11.1	-	178.9	8,798
Slovakia[3]	3	3.8	0.7	28.1	268
Slovenia	3	2.2	0.5	16	2,160
Spain	1	93.4	28	479.8	28,343
Sweden	4	18.4	4.3	54	3,965
United Kingdom	1	120.9	33.4	415	6,360

1 Or by Eurostat (SBS)
2 2015 data except for turnover
3 Companies with more than 20 employees
4 Small food and drink producers excluded
5 2012 data

R&D AND INNOVATION

Innovation key to greater consumer choice

#1

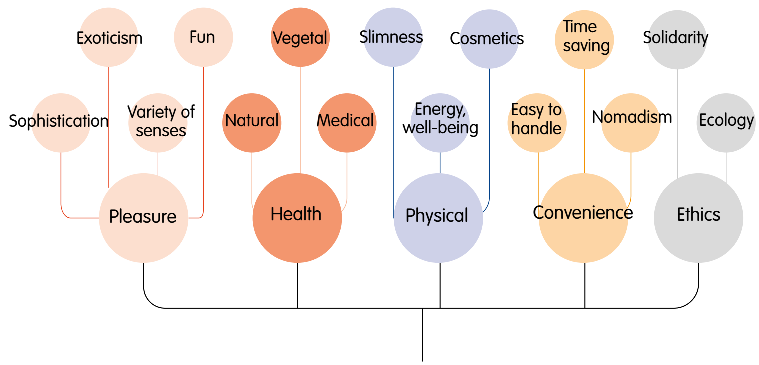
Ready-made meals is the most innovative food sector in Europe

Pleasure

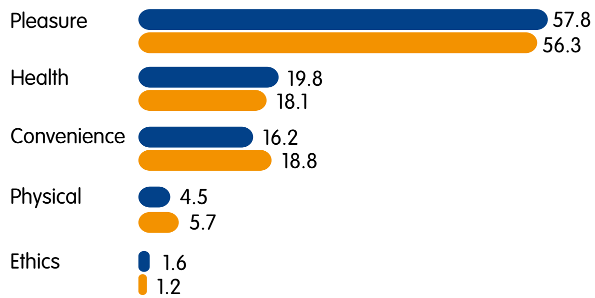
Leading driver of food innovation

- 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, including variety of senses and sophistication, is by far the leading axis with a 58% share in 2015.
- Ready-made meals are leaders in innovation in 2015, pushing soft drinks to third place. Dairy products stay at the second place.

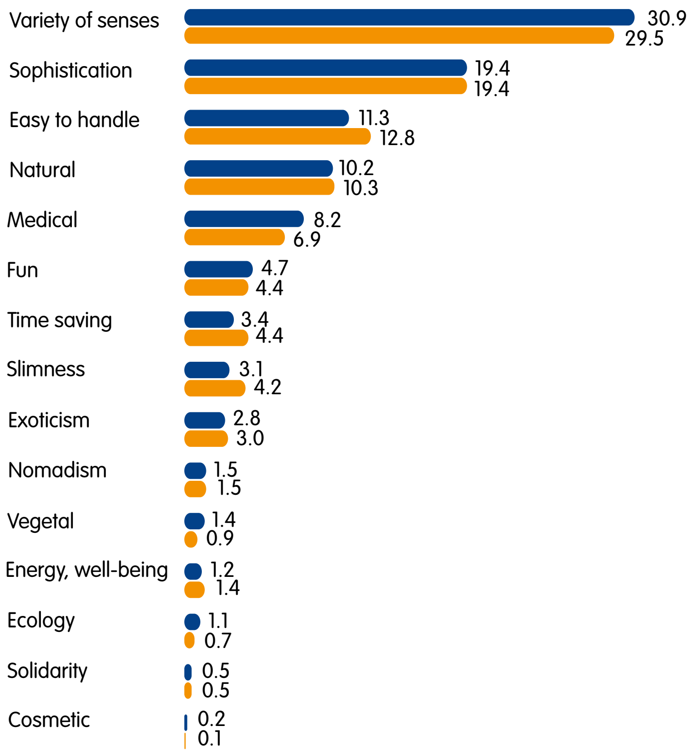
Food innovation trends in Europe



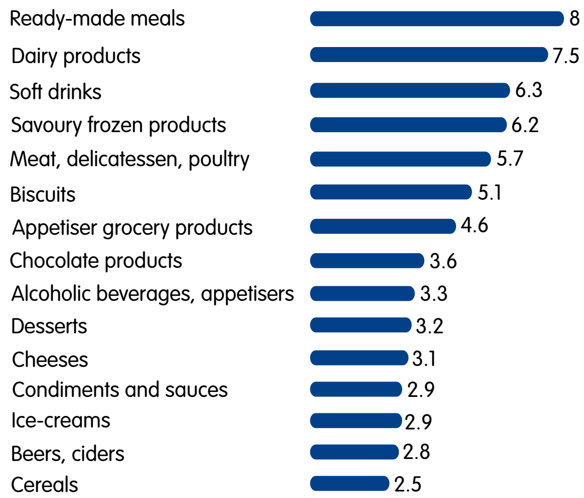
Drivers of innovation in Europe (2014-2015,%)



Food innovation trends in Europe (2014-2015,%)



The 15 most innovative food sectors in Europe (2015,% of total European food innovation)



- 2015
- 2014

Source: XTC World Innovation Panorama 2016

CONSUMPTION

Food and drink products: the second largest household expenditure

14%

Share of EU household expenditure on food and drink products

€1,074 billion

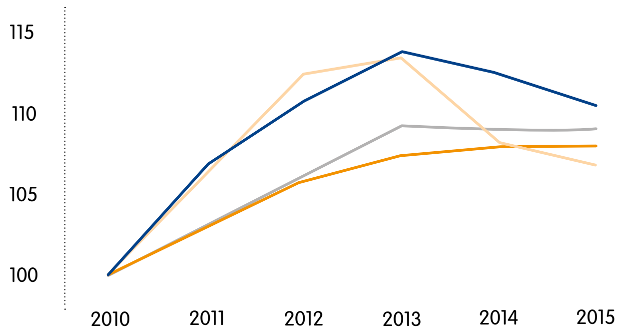
EU household expenditure on food and drink products

- In 2014, the share of household expenditure on food and drink products remained stable compared to the previous year.
- Across Member States, household expenditure on food and drink products varies from 10% to 32%.
- Agricultural prices are more volatile than food manufacturing prices and food prices paid by consumers. Food manufacturing prices include other input costs than agricultural raw materials.

Household consumption expenditure on food and drink products by Member State (2014, % of total expenditure)

Sources: Eurostat (National Accounts); Croatian Bureau of Statistics

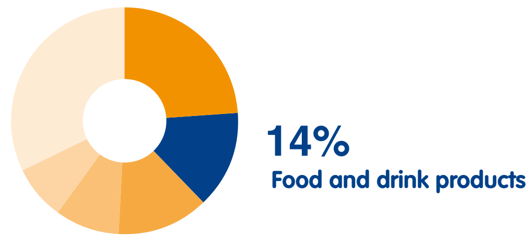
Price developments in the food chain (index, 2010=100)



- Inflation
- Agricultural prices
- Food manufacturing prices
- Food consumer prices

Source: Eurostat (Economic Accounts for Agriculture, STS and Prices)

Breakdown of EU household consumption expenditure (2014, % of total expenditure)



- 24 Housing, water and energy
- 13 Transport
- 9 Recreation and culture
- 8 Restaurants and hotels
- 32 Others

Source: Eurostat (National Accounts)

FOOD SUPPLY CHAIN

Driving forces in the food supply chain: agriculture, the food and drink industry and retail

6%

Share of the food supply chain in EU gross value added

11%

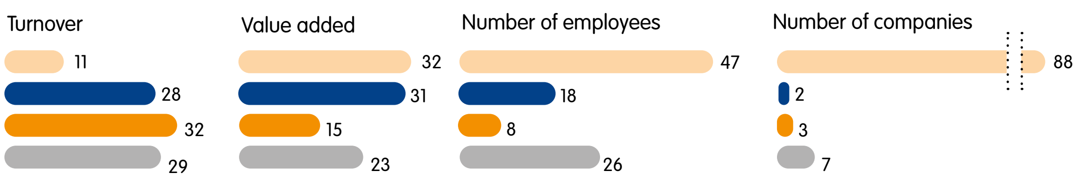
Share of the food supply chain in EU employment

- In 2013, there were 24 million people employed in the food supply chain.
- The total turnover exceeds €3.9 trillion and the value added almost reaches €700 billion.
- Around 31 million professionals work in the extensive food supply chain across the EU, from agriculture and the input industry to food and drink services.

Structural overview of the food supply chain (2013)

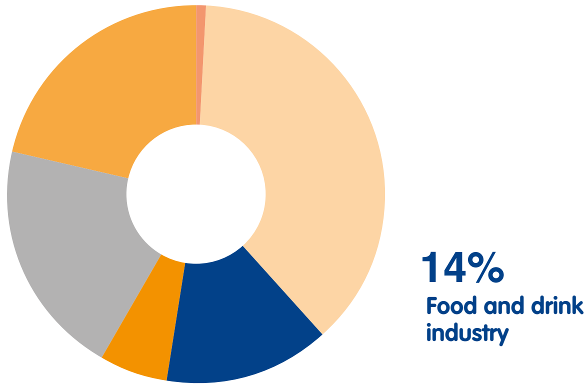
	Agriculture	Food and drink industry	Wholesale of agricultural and food products	Food and drink retail
Turnover (€ billion)	426	1,090	1,249	1,110
Value added (€ billion)	219	212	102	162
Number of employees (million)	11.3	4.3	2	6.2
Number of companies (1,000 units)	10,800	288	337	809

Turnover, value added, employees and companies in the food supply chain (2013,%)



- Agriculture
- Food and drink industry
- Wholesale of agricultural and food products
- Food and drink retail

Employment in the extensive food supply chain (2013,%)



- 1 Input industry
- 38 Agriculture
- 6 Wholesale of agricultural and food products
- 20 Food and drink retail
- 21 Food and drink services

Source: Eurostat (National accounts, SBS, FSS, Economic Accounts for Agriculture)

World markets

TRADE FIGURES

International trade: a key source of growth for the industry

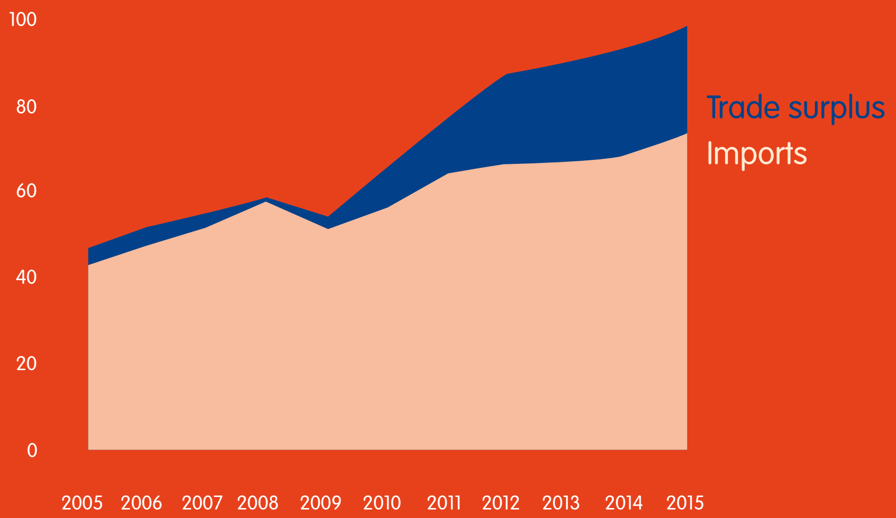
€98.1 billion
Exports[1]

€72.9 billion
Imports[1]

€25.2 billion
Trade surplus

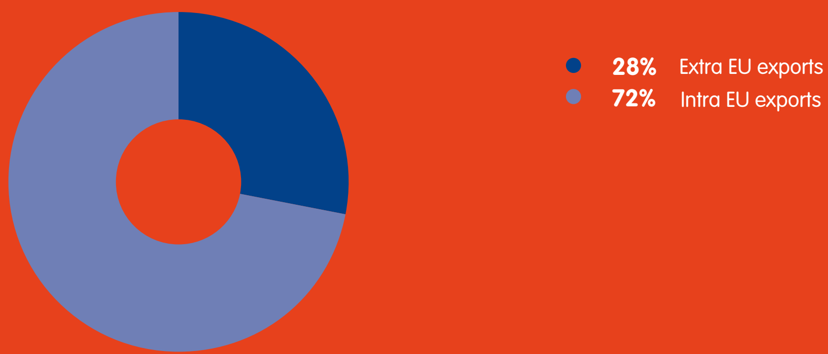
- EU food and drink exports nearly doubled over the past decade to reach €98.1 billion in 2015 and a trade surplus of €25.2 billion. EU exports increased by 5.2% compared to 2014.
- More than one quarter of EU food and drink exports are sold to non-EU countries, at a growing rate. EU exports to most key markets increased in 2015 with some exceptions.
- EU food and drink imports from third countries reached €72.9 billion in 2015, an increase of 6.5% compared to the previous year.
- NAFTA remains by far the EU's largest trading partner by region, followed by EFTA, ASEAN, the ACP group of countries and Mercosur[2].

EU food and drink trade (2005-2015, € billion)



Total intra and extra EU exports of food and drink products (2015)

€345.9 billion

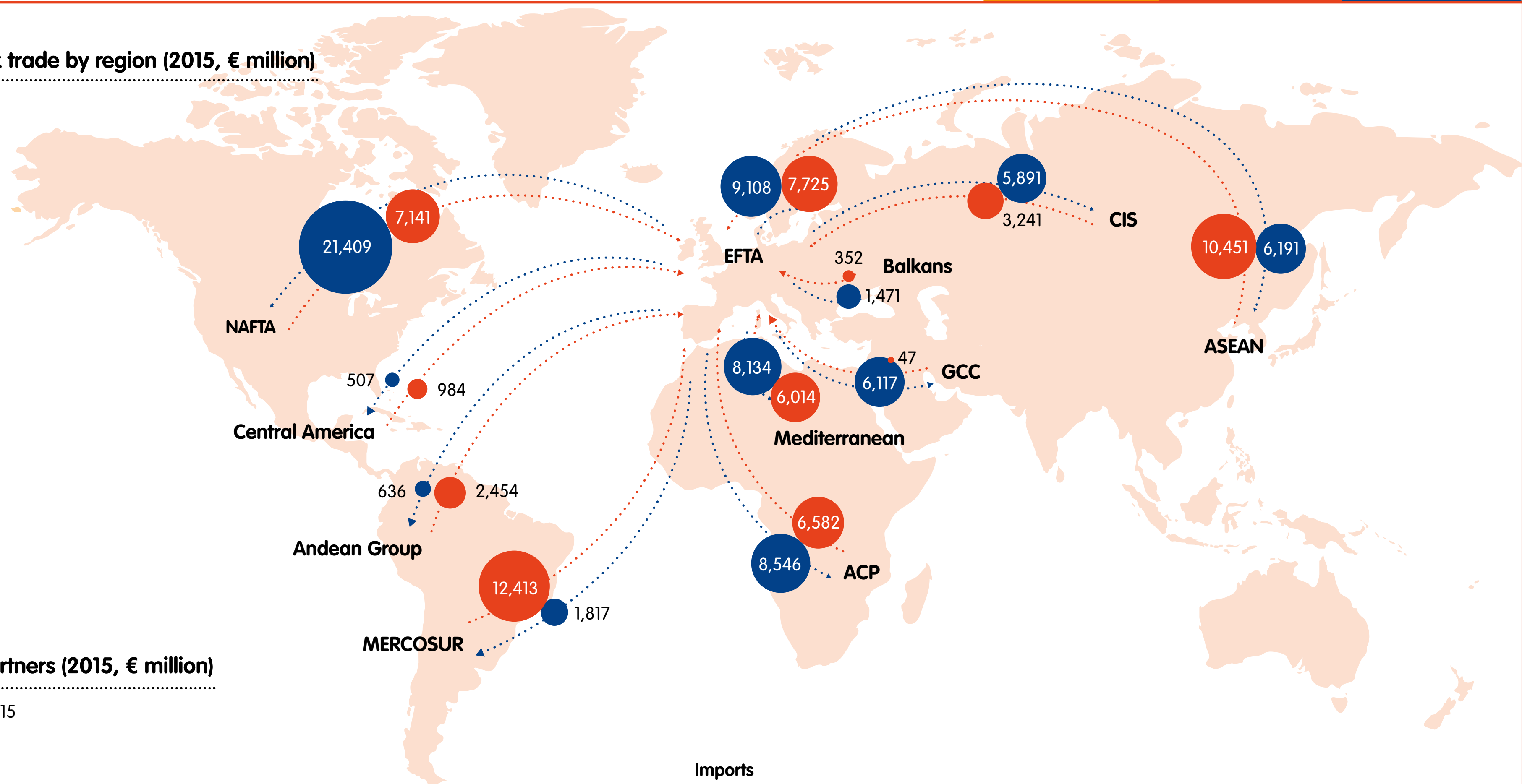


[1] Exports and imports refer to extra EU trade, unless otherwise specified

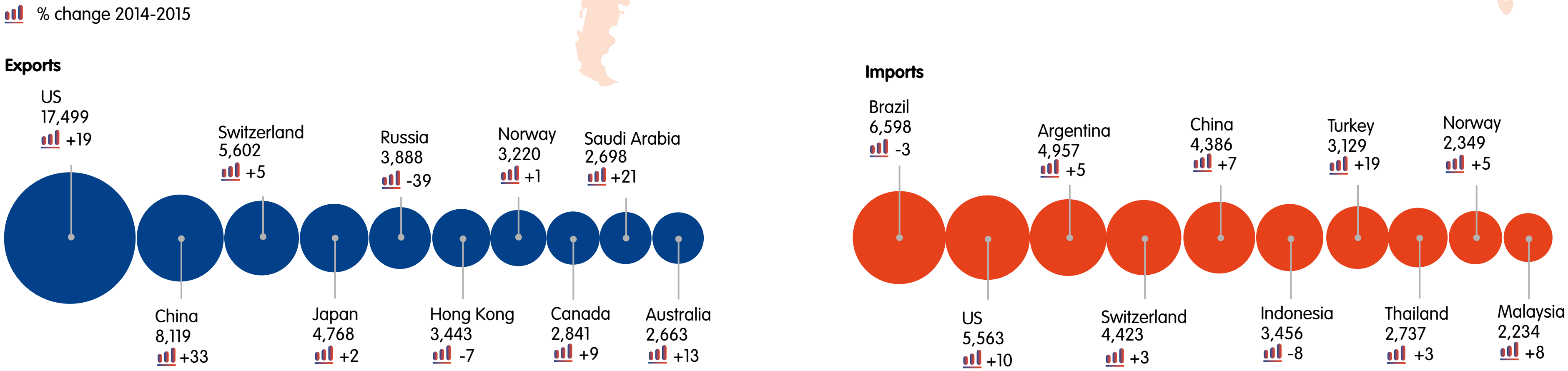
[2] For definition, see page 22

Source: Eurostat (Comext)

EU food and drink trade by region (2015, € million)



Top EU trading partners (2015, € million)



Source: Eurostat (Comext)

TRADE FIGURES BY SECTOR

External trade success backed by strong EU food and drink sectors

51%

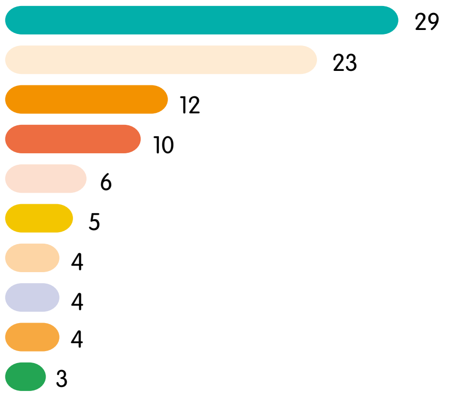
Combined export market share of the drinks, meat and dairy sectors

60%

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

- Top 3 best performing exports by sector: grain mill and starch products +11%, animal feeds 10%, oils and fats +10%.
- Top 3 imports by sector: processed fruits and vegetables +15%, animal feeds +15%, bakery and farinaceous products +13%.
- The combined exports of the EU drinks, meat and dairy sectors totalled €49.7 billion in 2015. The 'various food products' category which includes goods like chocolate, biscuits, confectionery, food preparations, etc., generated €22.3 billion in exports.

Share of EU exports by sector (2015,%)



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

Source: Eurostat (Comext)

Exports and imports by sector (2015, € million)

	Exports		Imports	
	2015	**% change 2014-2015**	**2015**	**% change 2014-2015**
Drinks	28,309	+9	5,665	+11
of which: spirits	10,275	+7	1,517	+9
wine	9,824	+9	2,765	+13
beer	3,418	+18	413	+10
mineral waters and soft drinks	3,345	+14	925	+6
Various food products	22,347	+5	10,795	+3
of which: chocolate and confectionery	6,063	+6	2,865	+6
processed tea and coffee	2,195	+9	2,180	+9
Meat products	11,264	+4	7,332	+5
Dairy products	10,089	-9	707	-19
Processed fruits and vegetables	5,828	+6	9,536	+15
Oils and fats	5,257	+10	16,623	-1
Bakery and farinaceous products	4,207	+8	757	+13
Fish products	3,593	+2	17,561	+6
Animal feeds	3,493	+10	1,020	+15
Grain mill products and starch products	3,392	+11	1,873	+7

TRADE FIGURES BY PRODUCT

Diversified products and markets

>100

EU food and drink product categories exported worldwide

>180

Export markets

- Spirits and wine remain the top EU exports, with growth rates of 7% and 9% respectively. The top EU exports also include European specialties such as chocolate, cheese and beer.
- Double digit growth in exports was recorded for pet food (+11%) and beer (+18%) compared to 2014 - while exports of cheese decreased over the same period.
- Most of the top EU food and drink imports, such as fish fillets, wine and fruit juices increased over the 2014-2015 period, while imports of palm oil decreased.

Top 10 EU food and drink exports and imports by destination/origin (€ million)

Exports	2015	% change 2014-2015	Top 3 destinations
Spirits	10,275	+7	US, Singapore, China
Wine	9,823	+9	US, Switzerland, China
Infant food and other preparations	5,651	+4	China, Hong Kong, Saudi Arabia
Food preparations	5,101	+2	US, Russia, Switzerland
Pork meat fresh, chilled and frozen	3,957	+8	Japan, China, Korea
Chocolate	3,801	+4	US, Russia, Switzerland
Cheese	3,483	-3	US, Switzerland, Japan
Pet food	3,427	+11	Russian, US, Switzerland
Bread, pastries and biscuits	3,395	+9	US, Switzerland, Norway
Beer	3,371	+18	US, China, Canada

Imports	2015	% change 2014-2015	Top 3 origins
Fish fillets	4,984	+7	China, Norway, Iceland
Palm oil	4,239	-7	Indonesia, Malaysia, Papua New Guinea
Wine	2,765	+13	Chile, US, Australia
Prepared and preserved fish	2,744	0	Ecuador, Morocco, Thailand
Fruit juices	2,372	+4	Brazil, Costa Rica, Thailand
Crustaceans	2,255	+16	Morocco, India, Peru
Prepared and preserved fruits and nuts	2,215	+33	Turkey, Thailand, US
Bovine meat fresh, chilled and frozen	1,806	+11	Brazil, Argentina, Uruguay
Frozen fish	1,790	+10	Norway, US, Russia
Food preparations	1,615	+2	US, China, Turkey

Source: Eurostat (Comext)

EU FOOD AND DRINK MARKET SHARE

Number 1 exporter and number 2 importer of food and drink products in the world

17.8%

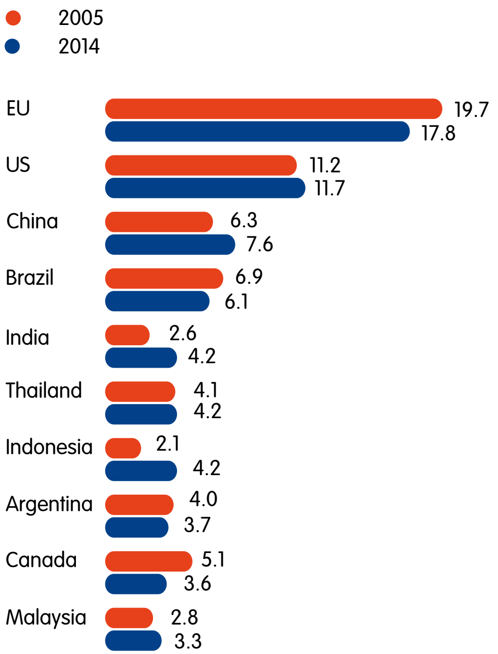
EU share in global food and drink exports

13.8%

EU share in global food and drink imports

- Global food and drink exports more than doubled in the period 2005-2014.
- EU share in global food and drink exports has decreased over the past decade (from 19.7% in 2005 to 17.8% in 2014), while emerging countries such as China, Indonesia, India and Malaysia have grown in importance.
- The performance of EU products in selected third country imports remained relatively stable over the 2010-2014 period, with a few exceptions. A considerable decline occurred in Russia, while EU market share has significantly increased in China.

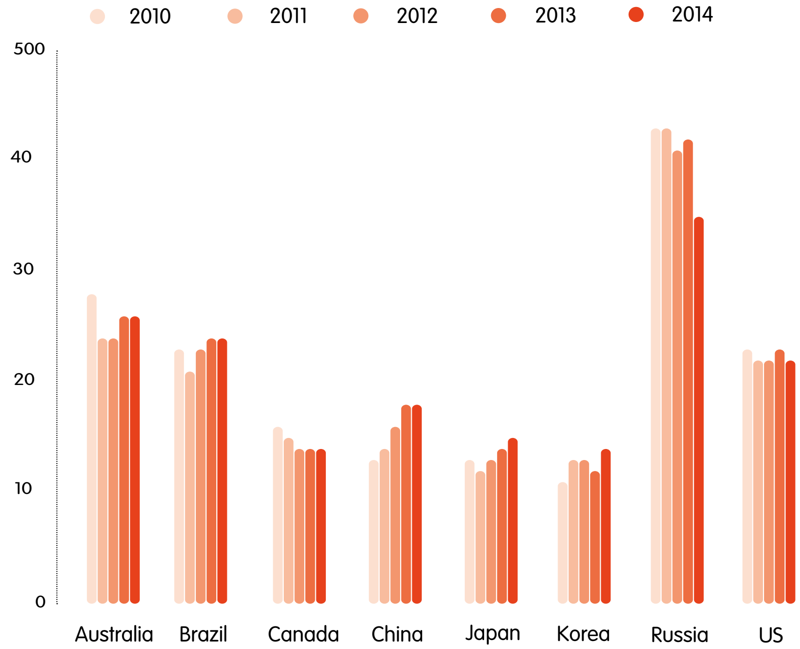
Share of global food and drink exports (2005-2014,%)



Top 10 exporters of food and drink products (2014, $ billion)

Exports			Imports		
EU	1.	124	US	1.	96
US	2.	81	EU	2.	92
China	3.	53	Japan	3.	49
Brazil	4.	42	China	4.	45
Indonesia	5.	30	Canada	5.	27
Thailand	6.	29	Russia	6.	25
India	7.	29	Hong Kong	7.	20
Argentina	8.	26	Korea	8.	19
Canada	9.	25	Mexico	9.	17
Malaysia	10.	23	Saudi Arabia	10.	15
R.o.W. 232			R.o.W. 256		

Share of EU products in total food and drink imports of selected countries (2010-2014,%)



Source: UN COMTRADE

FOOD AND DRINK INDUSTRIES WORLDWIDE

EU: the largest food and drink industry worldwide in terms of turnover

#2

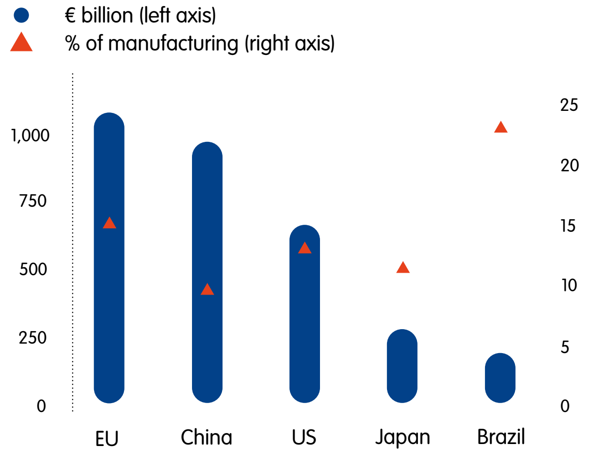
Food and drink industry second most trusted industry worldwide

Trust

The food and drink industry is more trusted than business worldwide

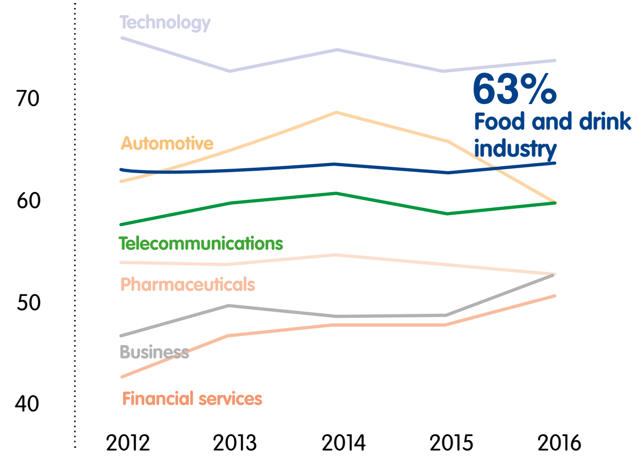
- In a global comparison, the EU food and drink industry ranks first in terms of turnover, ahead of China and the US. Altogether, these countries generate 59% of the world's food and drink turnover.
- Food and drink industry second most trusted industry worldwide, following technology.
- The global trust in the food and drink industry is significantly higher than trust in business (63% and 53% respectively in 2016).

Turnover of food and drink industries worldwide (2012)



Sources: Wageningen Economic Research; UNIDO

Trust in each industry sector worldwide (%)



Source: 2016 Edelman Trust Barometer

Trust in the food and drink industry worldwide (2016,%)

Source: 2016 Edelman Trust Barometer

GLOBAL TRENDS IN R&D

Sustained levels of R&D investment

0.23%

EU R&D private investment intensity

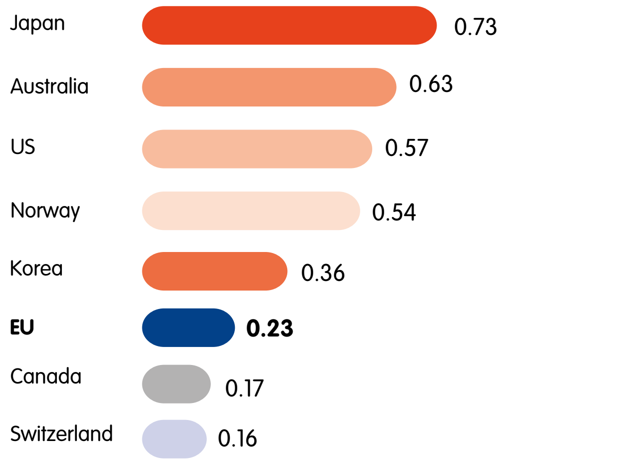
- Out of the world's top 2,000 companies for R&D investment, 54 operate in the food and drink industry. Together, these companies invested €9.3 billion in R&D in 2014, €2.5 billion out of which were invested by 15 food and drink companies based in the EU.
- These 15 EU companies are located in the Netherlands and the United Kingdom (4/country), France and Germany (2/country), Belgium, Denmark and Ireland (1/country).
- The EU food and drink industry has a lower R&D investment intensity compared to several food and drink industries worldwide.
- Across EU Member States, R&D investment intensity varies between 0.65% and 0.01%.

R&D private investment of food and drink companies listed in the world's top 2,000 companies by R&D (2014)

	R&D investment (€ billion)	R&D investment (% of total)	Number of companies
US	3.5	37.2	16
EU	2.5	27.2	15
Switzerland	1.6	17.3	2
Japan	1.4	14.5	14
New Zealand	0.1	1.2	1
China	0.1	0.8	2
Total	9.3	100	54

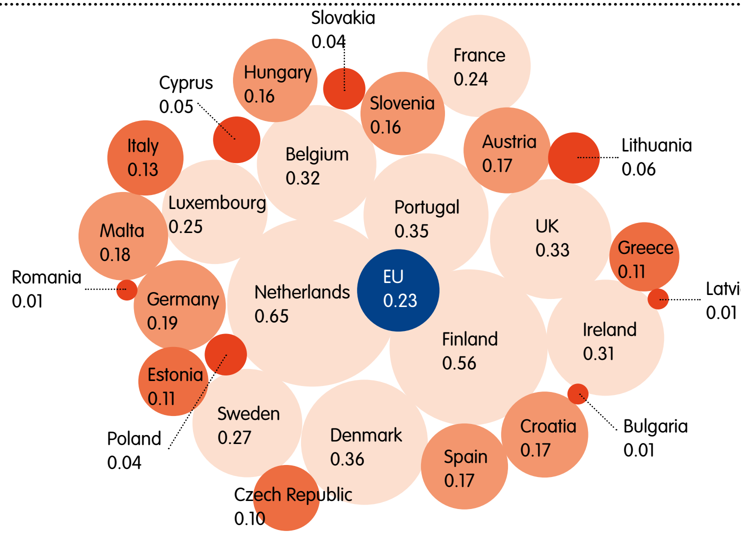
Source: The 2015 EU Industrial R&D Investment Scoreboard, JRC

Private investment of the food and drink[1] industry in R&D as a percentage of output (2010-2012[2],%)



Sources: Eurostat (BERD and National Accounts); OECD (STAN)

Private investment of the food and drink industry[1] in R&D as a percentage of output in the EU (2010-2012,%)



Source: Eurostat (BERD and National Accounts)

[1] Including tobacco
[2] 2009 data for Japan, 2010 for Korea and the US

FUTURE CHALLENGES AND OPPORTUNITIES

Trends and players driving change worldwide

9 billion

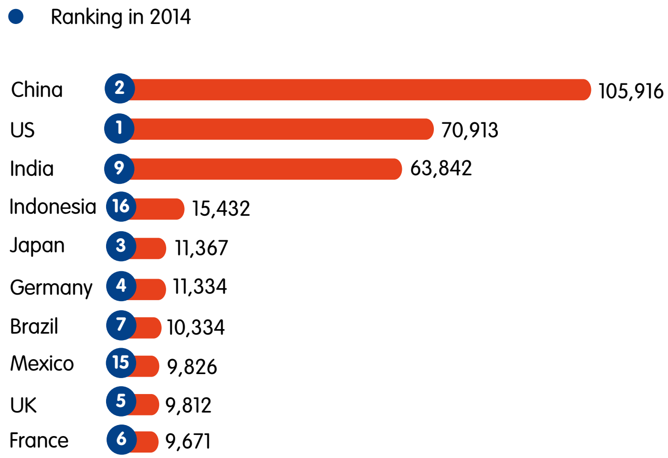
Global population in 2050

60%

Increase in global demand for food by 2050

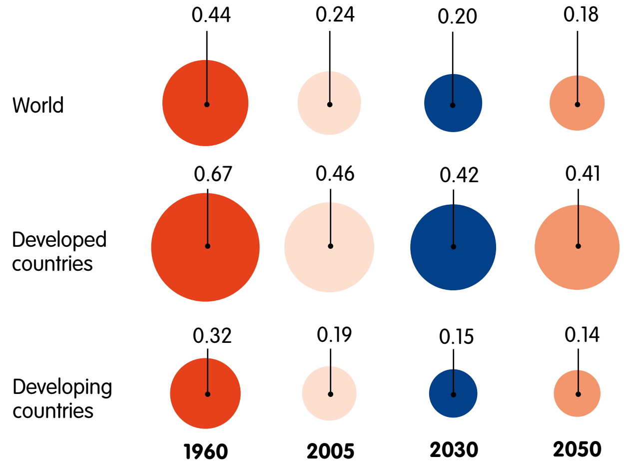
- In 1960, one hectare of land fed 2 people while in 2050 one hectare of land will be required to feed 5 people.
- Natural resources, upon which food production relies, will come under increased pressure in the future to meet a growing demand for food worldwide.
- Climate change increases the likelihood of more extreme temperatures and unpredictable weather events, which affect food production.
- By 2030 China is expected to overtake the US and become the largest economy in the world.
- In 2050 the top three economies in the world (China, the US and India) will each be richer than the next five (Indonesia, Japan, Germany, Brazil and Mexico) put together.

Top 10 economies in 2050[1] (nominal GDP, $ billion)



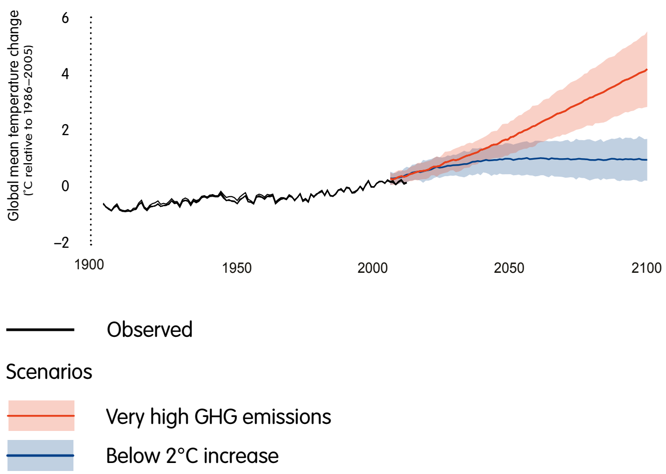
Source: The Economist Intelligence Unit

Arable land per capita (hectares in use per person)



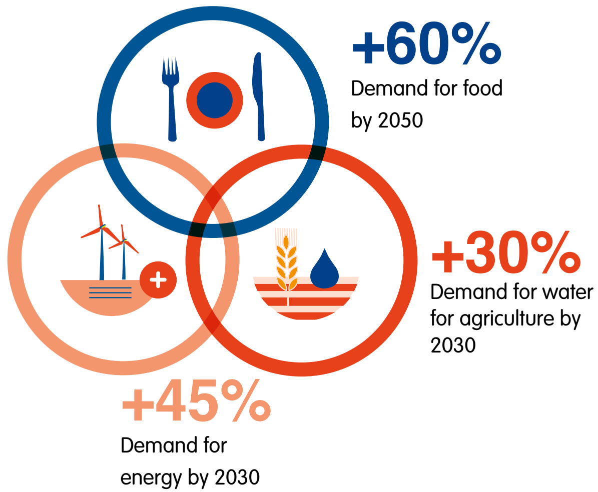
Source: World agriculture towards 2030/2050: the 2012 revision, FAO

Past and projected global temperature change



Source: Climate Change 2014: Synthesis Report, IPPC

Future global challenges (% increase)



Sources: The Future of Food and Farming (2011); FAO

[1] At market exchange rates

KEY FOOD AND DRINK COMPANIES

Ranking of global agri-food companies by global food and drink sales[1]

Name	Headquarters	Sales (€ billion)[2]	Main sectors
Cargill	US	96,62	multi-product
Nestlé	CH	82,66	multi-product
PepsiCo, Inc.	US	56,64	beverages, snacks
The Coca-Cola Company	US	39,78	beverages
JBS	BR	44,78	meat, dairy
AB InBev	BE	39,16	beer
Bunge	US	38,68	multi-product
Tyson Foods	US	35,80	meat
Archer Daniels Midland Company	US	34,06	cereal processing
Mars	US	29,64	prepared foods, confectionery
Mondelēz International	US	26,62	confectionery, snacks, dairy
KraftHeinz	US	24,65	multi-product
Unilever	NL/UK	23,00	multi-product
Danone	FR	22,41	dairy, water, baby & medical nutrition
Heineken	NL	20,51	beer
SABMiller	US	18,08	beer
Suntory	JP	17,90	alcoholic beverages
Lactalis	FR	16,50	dairy
General Mills Inc.	US	14,80	prepared foods
Diageo	UK	14,12	alcoholic beverages
Kirin Holdings	JP	13,49	beer, alcoholic beverages
Asahi Group	JP	13,80	beer, alcoholic beverages
Smithfield Foods	US	12,97	meat
Grupo Bimbo	MX	12,48	bakery
Fonterra	NZ	12,16	dairy
Kellogg Company	US	12,15	prepared foods, snacks, cereals
DuPont	US	11,72	multi-product
FrieslandCampina	NL	11,27	dairy
ConAgra Foods Inc.	US	10,55	prepared foods
Arla Foods	DK	10,26	dairy

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

Ranking of EU[2] agri-food companies by global food and drink sales[1]

Name	Headquarters	Sales (€ billion)[3]	Main sectors
Nestlé[4]	*CH*	*82,66*	*multi-product*
AB InBev	BE	39,16	beer
Unilever	NL/UK	23,00	multi-product
Danone	FR	22,41	dairy, water, baby & medical nutrition
Heineken	NL	20,51	beer
Lactalis	FR	16,50	dairy
Diageo	UK	14,12	alcoholic beverages
FrieslandCampina	NL	11,27	dairy
Arla Foods	DK	10,26	dairy
Ferrero	IT	9,54	confectionery
Carlsberg	DK	8,76	beer
Pernod Ricard	FR	8,56	alcoholic beverages
Associated British Foods	UK	8,39	sugar, starch, prepared foods
Danish Crown	DK	7,99	meat
DSM	NL	7,72	multi-product
Agrokor	HR	6,49	multi-product
Parmalat	IT	6,42	dairy, fruit beverages
Kerry Group	IE	6,10	multi-product
Südzucker	DE	5,73	sugar, multi-product
Barry Callebaut[4]	*CH*	*5,60*	*chocolate*
Oetker Group	DE	5,11	multi-product
Vion	NL	4,57	meat, ingredients
LVMH	FR	4,60	multi-product
Savencia	FR	4,44	dairy
Tereos	FR	4,20	sugar, multi-product
Glanbia	IE	3,67	dairy, ingredients
Barilla	IT	3,38	pasta, bakery
Tate & Lyle	UK	3,23	multi-product

1 Based on the most recent complete fiscal year
2 Headquarters in the EU
3 Figures have been converted to Euro with ECB bilateral annual exchange rates series, but only figures in the original currency are relevant
4 Switzerland

GLOSSARY

Abbreviation of world regions

ACP
Africa, Caribbean and Pacific group of 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

Balkans
Albania, Bosnia-Herzegovina, Kosovo, Former Yugoslav Republic of Macedonia, Montenegro and Serbia

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

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

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

EU
EU refers to EU-28, unless otherwise specified

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

Mediterranean region
Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Tunisia, Syria, Occupied Palestinian Territory

Mercosur
Argentina, Brazil, Paraguay, Uruguay and Venezuela

NAFTA (North American Free Trade Agreement)
Canada, Mexico and the US

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.

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.

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 employees. The SBS size-class data are solely based on the definition relating to the number of employees 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.

FOODDRINK EUROPE

Enjoy food, today and tomorrow

Avenue des Nerviens 9-31
Brussels 1040
Belgium
Tel.: +32 2 514 11 11

info@fooddrinkeurope.eu

@FoodDrinkEU

www.fooddrinkeurope.eu

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