Agriculture and fisheries

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Statistics in focus
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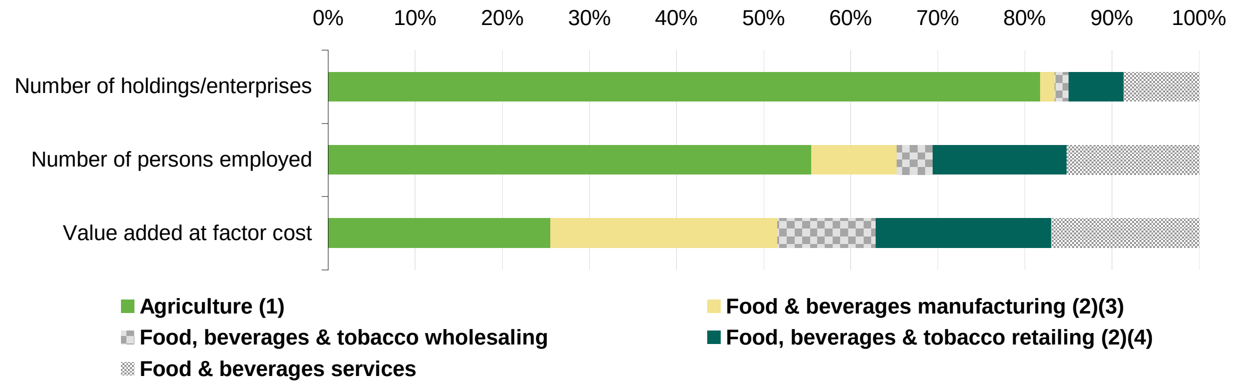
From farm to fork –
a statistical journey along the EU's food chain

This Statistics in focus presents the latest statistics available in relation to the food chain in the European Union (EU). The food chain usually starts on the farm within the agricultural sector. Some goods are already processed on the farm, while most food is subsequently processed or transformed within the manufacturing sector, before it is distributed through wholesaling and transport activities. Consumers purchase the majority of the food that they eat from a range of different retail outlets (supermarkets, specialist food retailers, markets and stalls), while food and beverages are also purchased from a variety of food service providers (restaurants, take-away outlets, cafés or bars).

There were just over 48 million persons employed within the EU-27's food chain in 2008; they worked in close to 17 million different holdings/enterprises – the majority of which (81.8 %) were agricultural holdings (Figure 1), often small in size. Together, all of the holdings/enterprises within the EU-27's food chain generated EUR 751 008 million of added value; the figures for value added equate to output minus intermediate consumption. The distribution of value added was quite different to that for enterprises/holdings, insofar as the relative importance of non-agricultural activities was considerably higher. For example, although food and beverages manufacturing enterprises accounted for just 1.6 % of the total number of holdings/enterprises in the EU-27's food chain in 2008, their contribution to the value added was much higher, at 26.0 %.

Figure 1: Structure of the food chain, selected indicators, EU-27, 2008
(%)



(1) Number of holdings and number of persons employed, 2007.

(2) Value added at factor cost, estimated.

(3) Excluding beverages for the number of enterprises.

(4) Number of persons employed, estimated.

Source: Eurostat (online data codes: ef_ov_kvftesu, ef_so_lfaa, aact_eaa01, sbs_na_ind_r2, sbs_na_dt_r2, sbs_na_1a_se_r2)

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Particularly high numbers of agricultural holdings in eastern Europe

There was a considerable disparity between Member States as regards their respective structures within the food chain from agriculture through to retailing and food services (Table 1).

The highest number of agricultural holdings was found in the eastern Member States – in particular, Romania and Poland – which were characterised by land fragmentation and subsistence holdings (rather than commercial farms). In contrast, the number of food and beverage manufacturing, wholesaling, retailing and service providing enterprises and local units peaked in the southern Member States – in particular, in Italy and Spain. For example, in Spain there was, on average, one local unit (single restaurant, bar or café) providing food and beverage services for each 157 inhabitants.

Agricultural and food and beverage manufacturing, wholesaling, retailing and service providing enterprises tended, on average, to be much larger, with higher market concentration in Germany and the United Kingdom, as well as some northern countries – such as Finland and the Baltic States.

Table 1: Number of enterprises and local units
(1 000)

	No. of holdings / enterprises							**No. of local units**			
		Food and beverages activities						Food and beverages activities			
			Wholesaling (1)		Retailing (1)						
	Agri-culture	Manu-facturing	Total	Own account	Total	In special-ised stores	Ser-vices	Manu-facturing	Own account whole-saling (1)	Retailing in special-ised stores (1)	Ser-vices
	2007	2008						2008			
EU-27 (2)	**13 700.4**	**267.9**	**275.1**	**207.5**	**1 060.2**	**493.9**	**1 448.4**	**:**	**:**	**:**	**:**
EA-17 (2)	**5 464.2**	**216.6**	**:**	**:**	**:**	**:**	**:**	**:**	**:**	**:**	**:**
BE	48.0	8.0	:	5.8	19.8	10.9	42.6	8.4	5.1	10.9	42.9
BG	493.1	5.1	5.4	5.3	31.5	8.3	19.2	5.2	5.5	8.5	19.5
CZ	39.4	6.6	:	3.1	:	6.2	48.0	*8.2*	*3.8*	*6.8*	*49.0*
DK	44.6	1.7	1.8	1.8	5.6	2.5	12.0	2.2	2.0	2.8	13.7
DE	370.5	31.6	12.0	10.4	59.3	31.9	131.7	:	:	:	:
EE	23.3	0.4	0.5	0.5	0.9	0.1	1.3	0.5	0.5	0.2	1.4
IE (3)	128.2	0.6	:	1.8	6.5	2.6	12.7	0.7	2.0	3.1	:
EL	860.2	*16.4*	:	:	:	:	:	:	:	:	:
ES (3)	1 043.9	28.7	49.8	43.3	150.3	112.9	266.7	29.7	50.2	129.4	289.4
FR	527.4	62.2	:	18.4	126.7	56.9	193.2	65.3	21.4	50.4	210.4
IT (2)	1 679.4	57.5	75.2	34.2	192.2	106.3	247.4	68.3	40.2	119.1	268.5
CY	40.1	1.0	0.7	0.7	3.4	0.9	6.0	1.0	0.8	1.2	6.4
LV	107.8	0.7	1.0	1.0	3.4	0.3	2.3	1.5	:	:	3.9
LT	230.3	1.2	0.8	0.7	12.1	0.2	2.8	2.5	1.0	0.3	3.5
LU	2.3	0.2	0.4	0.4	0.5	0.3	2.4	:	:	:	:
HU	626.3	6.7	5.3	4.5	24.6	7.2	29.9	8.1	5.2	7.5	31.2
MT	11.0	:	:	:	:	:	:	:	:	:	:
NL	76.7	4.3	7.2	6.5	14.1	8.9	30.6	6.0	7.6	10.9	33.8
AT	165.4	4.0	2.5	2.2	9.0	5.3	30.1	6.3	2.6	7.4	36.0
PL	2 391.0	16.0	15.8	14.2	102.2	22.9	48.9	21.2	:	:	50.5
PT	275.1	10.8	10.9	10.3	51.1	28.0	79.4	11.8	11.0	29.0	84.5
RO	3 931.4	9.6	9.4	8.4	74.2	8.5	19.4	10.0	:	:	:
SI	75.3	1.1	0.8	0.4	1.3	0.5	6.8	1.3	0.5	0.5	7.0
SK	69.0	0.9	0.6	0.5	0.5	0.2	1.8	1.0	0.7	0.5	2.1
FI	68.2	1.8	1.4	1.1	4.2	1.1	9.7	1.9	1.5	2.1	15.4
SE	72.6	3.4	5.1	4.5	11.9	5.9	22.2	3.8	4.7	6.5	23.2
UK	299.8	7.4	16.0	14.7	58.9	28.5	120.8	9.8	16.6	37.0	156.4
NO	49.9	*2.1*	1.8	1.6	5.6	1.0	7.7	:	1.7	1.7	9.0
HR	:	3.4	1.3	1.3	5.1	1.3	16.2	:	:	:	:

(1) Including tobacco.

(2) Food and beverage manufacturing, excluding beverages.

(3) Total retailing of food and beverages, excluding stalls and markets.

Source: Eurostat (online data codes: ef_ov_kvftesu, sbs_na_ind_r2, sbs_na_dt_r2, sbs_na_1a_se_r2, sbs_sc_r2preli and sbs_r_nuts06_r2)

The United Kingdom had the largest food and beverage retail workforce and the largest food services workforce among the EU Member States

The subsistence nature of farming is apparent, as more than 5 million persons were employed in the agricultural labour force in Poland and almost 6.5 million in Romania in 2008; these two countries accounted for 43.2 % of the EU-27's workforce of 26.7 million persons (Table 2).

Germany had the largest workforce for food and beverage manufacturing (845 400 persons, 17.9 % of the EU-27 total). Spain had the largest number of persons employed in food and beverage wholesaling (350 600, 17.5 %) and specialised food and beverage retailing (254 700, 18.0 %); the latter accounted for more than one third (37.9 %) of those employed in Spanish food and beverage retailing (no other Member State reported a share above 30 %). There were 1.28 million persons employed in the United Kingdom within food and beverage retailing (17.3 % of the EU-27 total); this likely reflected a high propensity for supermarkets to engage part-time staff. A similar pattern was observed for food and beverage services, as the United Kingdom recorded the largest workforce in the EU (1.58 million, 21.6 %).

Table 2: Regular farm labour force and number of persons employed (1)
(1 000)

	Agriculture		Food and beverages activities									
				Wholesaling		Retailing						
	(persons)	(annual working units)	Manu-facturing	Total	Own account	Total	In special-ised stores	Ser-vices	Manu-facturing	Own account whole-saling	Retailing in special-ised stores	Ser-vices
	2007		2008						2009 preliminary data			
EU-27	**26 669.4**	**10 796.0**	**4 725.0**	**2 001.5**	**1 868.1**	**7 369.7**	**1 416.9**	**7 316.5**	**:**	**:**	**:**	**:**
EA-17	**11 172.8**	**4 852.9**	**3 088.4**	**:**	**1 243.2**	**:**	**1 006.7**	**4 835.2**	**:**	**:**	**:**	**:**
BE	89.1	62.6	99.5	:	34.3	128.2	33.2	146.3	91.4	31.9	28.0	138.7
BG	950.0	466.6	106.5	44.9	44.5	102.0	18.9	92.0	:	:	:	:
CZ	191.9	134.0	125.2	:	*32.5*	:	*19.5*	*126.2*	*122.0*	*31.3*	*18.7*	*130.5*
DK	85.1	53.7	81.7	21.1	20.7	:	19.7	107.7	75.8	19.8	18.7	104.2
DE	915.1	555.1	845.4	218.8	213.3	984.5	199.1	955.5	842.7	204.3	196.1	966.7
EE	65.4	31.3	16.1	:	5.2	20.8	1.0	14.3	14.5	4.8	1.0	12.3
IE (2)	244.3	144.3	40.0	:	23.7	97.2	11.9	107.8	37.4	:	:	:
EL	1 508.2	488.5	*88.8*	:	83.5	:	74.5	229.8	:	:	:	:
ES (2)	2 125.3	790.2	389.4	350.6	338.3	672.0	254.7	1 002.1	372.4	327.0	248.6	963.9
FR	1 060.4	718.6	:	:	:	:	:	:	:	:	:	:
IT (3)	3 174.2	1 169.4	401.0	227.8	179.1	702.2	205.6	972.6	:	:	:	:
CY	84.5	24.3	13.1	6.5	6.3	9.9	2.4	24.8	13.2	6.1	2.4	24.3
LV	217.6	103.9	30.7	10.8	10.7	44.7	2.0	25.7	25.6	8.7	2.0	19.8
LT	480.9	176.3	48.5	15.6	15.5	71.4	1.5	34.9	44.0	14.4	1.6	30.2
LU (4)	5.3	3.7	0.5	3.3	3.2	7.5	:	12.9	0.5	2.8	:	12.9
HU	1 260.8	389.7	110.2	38.9	37.1	141.7	19.1	106.6	106.7	35.6	18.1	102.4
MT	17.6	4.2	:	:	:	:	:	:	:	:	:	:
NL	224.1	151.0	127.6	80.4	78.2	309.4	58.9	304.2	:	:	:	:
AT	420.8	159.2	77.7	27.3	26.8	116.8	24.0	153.5	77.0	26.6	23.5	154.5
PL	5 041.9	2 193.7	438.1	123.4	117.1	554.6	107.3	203.0	417.8	116.8	101.9	180.0
PT	682.3	315.3	111.4	61.3	59.7	160.9	45.3	232.3	109.3	58.7	44.9	227.7
RO	6 467.6	2 044.0	*206.9*	*106.2*	*102.3*	*280.5*	*31.9*	*98.0*	*193.2*	*91.2*	*23.7*	*98.4*
SI	200.6	80.0	17.8	3.3	2.8	27.8	1.5	23.5	17.0	3.0	1.5	24.1
SK	212.4	87.5	40.0	11.7	11.0	30.9	3.7	15.9	36.8	11.1	3.5	17.1
FI	143.5	67.7	39.7	9.4	8.8	58.9	5.3	50.6	38.1	8.5	5.3	50.0
SE	150.0	63.4	65.6	37.2	36.2	99.3	16.9	106.3	63.7	35.8	17.4	108.3
UK	650.8	317.9	423.2	215.0	208.4	1 277.5	173.4	1 581.1	351.6	202.0	174.8	1 539.3
NO	142.8	53.1	*49.8*	17.1	16.7	77.4	6.9	60.9	49.0	16.2	7.3	59.6
HR (2)	:	:	67.5	9.6	9.4	64.9	7.5	60.3	66.9	9.0	6.2	63.3

(1) Regular farm labour force: family labour force and permanently employed (regular) non-family workers.
(2) Total retailing of food and beverages, excluding market stalls.
(3) Food and beverage manufacturing, excluding beverages.
(4) Food and beverage manufacturing, beverages only; total retailing of food and beverages, excluding in specialised stores.
Source: Eurostat (online data codes: ef_so_lfaa, sbs_na_ind_r2, sbs_na_dt_r2, sbs_na_1a_se_r2, sbs_sc_r2preli, sbs_dt_r2preli)

There were almost 14 million agricultural holdings operating in the EU-27's food chain

Primary agricultural output includes, among others, products such as crops, animals ready for slaughter, or milk. These move down the food chain as agricultural output is processed/transformed into products ready for consumption. Processing can be relatively simple, such as grading or preserving, tinning and freezing, or may involve more elaborate transformations, such as the production of ready-to-eat meals.

The EU's common agricultural policy (CAP) was initially set-up in order to encourage an expansion in the volume of food being produced. The focus of the CAP has changed and there have been a number of policy reforms to redress problems associated with the over-supply of agricultural products, while considering the implications of intensive farming practices on the environment and food safety. The new CAP approach provides incentives for farmers to produce food in hygienic conditions, maintaining high standards of animal welfare, using environmentally-friendly production methods, while promoting a sustainable rural economy.

Table 3: Number of holdings and regular farm labour force, EU-27, 2007
(1 000)

	Number of holdings	Regular farm labour force (1)
ALL TYPES OF FARMING	**13 700.4**	**26 669.4**
Crops	**6 976.4**	**13 436.1**
Specialist cereals, oilseed & protein crops	1 432.2	2 462.6
General field cropping	1 311.5	2 491.3
Specialist horticulture	230.9	635.6
Specialist vineyards	504.2	1 066.6
Specialist fruit & citrus fruit	664.8	1 264.7
Specialist olives	888.2	1 642.6
Various permanent crops combined	359.6	771.8
Mixed cropping	1 585.0	3 100.9
Livestock	**4 499.6**	**8 936.6**
Specialist dairying	656.6	1 598.5
Specialist cattle-rearing & fattening	349.1	705.9
Cattle-dairying, rearing & fattening combined	144.2	358.3
Sheep, goats & other grazing livestock	1 070.9	1 910.6
Specialist granivores	725.6	1 293.7
Mixed livestock, mainly grazing livestock	748.8	1 630.3
Mixed livestock, mainly granivores	804.3	1 439.2
Mixed crops & livestock	**1 952.9**	**3 912.9**
Field crops-grazing livestock combined	829.7	1 928.4
Various crops & livestock combined	1 123.2	1 984.5
Non-classifiable holdings	**271.5**	**383.8**

(1) Covers the family labour force and permanently employed (regular) non-family workers.

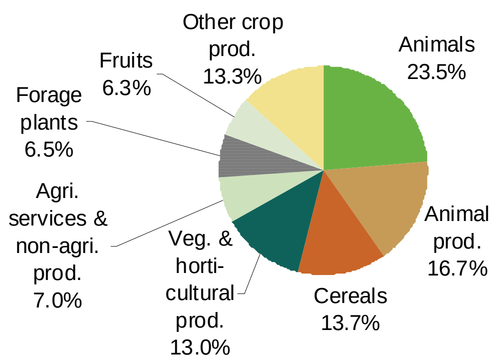
Source: Eurostat (online data codes: ef_ov_kvftesu, ef_ov_lfft)

There were almost 14 million agricultural holdings across the EU-27 in 2007, with a regular farm labour force of more than 26 million persons.

Just over half of the EU-27's agricultural holdings in 2007 were specialised in producing crops (Table 3), while livestock farming was the next largest category (almost one third of all holdings). Crops also accounted for just over half of the EU-27's farm labour force.

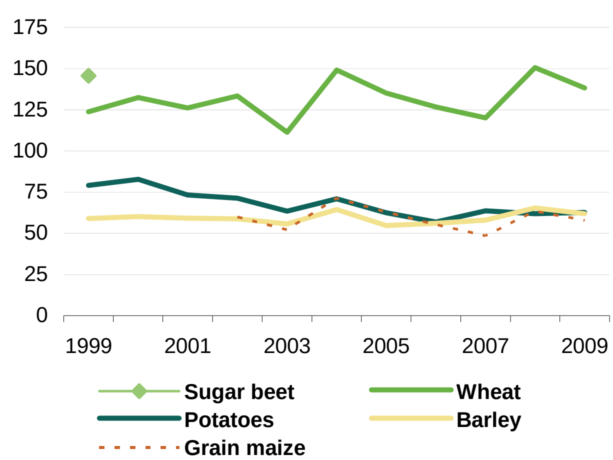
Primary products of the food chain are split between crop products (such as cereals and vegetables), animals (cattle, pigs) and animal products (milk) – the relative importance of these was quite evenly distributed when measured in terms of gross output (Figure 2).

Figure 2: Agricultural gross output at basic prices, EU-27, 2008
(%)



Source: Eurostat (online data code : aact_eaa01)

Figure 3: Crop production, EU-27
(million tonnes)



Source: Eurostat (online data code: food_in_pagr5)

Food prices respond to changes in stocks that are essentially driven by the weather and its effect on harvests – see the peaks and troughs in wheat production (Figure 3). The quantity of wheat produced in the EU-27 peaked at 151 million tonnes in 2008 – before falling back to 138 million tonnes in 2009, while the production of potatoes fell from a high of 83 million tonnes in 2000 to a low of 57 million tonnes by 2006, before recovering somewhat to 63 million tonnes by 2009.

The production of specific agricultural and food products depends to a large degree upon climatic/geological conditions, the availability of land and water resources, and the level of imports; these factors help determine which type of farming is practised in each Member State (Table 4).

Animal production is generally measured in terms of slaughtered carcass weight. Using this measure, pig meat was by far the largest category of meat production in the EU-27, at 22.0 million tonnes in 2010. This was 2.8 times as high as the production of bovine meat (from cattle) and more than 30 times higher than the production of sheep meat.

Table 4: Agricultural output: main agricultural and food products generated, 2009
(1 000 tonnes)

	Cereals (1)	Fresh vegetables (2)	Drinking milk (3)	Cream (3)(4)	Bovines (5)	Pigs (5)	Sheep (5)	Poultry (6)
EU-27	***296 149***	**:**	**:**	**:**	**7 902**	**22 041**	**717**	**11 651**
BE	3 324	1 577	660	139	263	1 129	3	513
BG	6 427	502	58	1	5	37	4	96
CZ	7 832	:	644	44	74	276	0	188
DK	10 117	:	482	63	131	1 666	2	184
DE	49 748	3 662	5 288	568	1 183	5 438	20	1 380
EE	874	39	89	28	9	32	0	16
IE	1 996	:	509	21	559	214	48	124
EL	4 814	3 445	467	17	58	114	71	178
ES	17 827	9 941	3 566	133	598	3 401	125	1 345
FR	70 000	5 638	3 638	352	1 521	2 010	83	1 712
IT	15 892	11 668	2 690	130	1 075	1 633	36	1 180
CY	57	117	76	4	4	57	3	28
LV	1 663	170	72	27	18	23	0	23
LT	3 807	287	88	2	43	55	0	75
LU	189	2	:	:	10	10	0	:
HU	13 590	1 614	387	6	27	416	0	360
MT	0	59	29	0	1	7	0	4
NL	2 089	4 701	710	34	389	1 288	13	799
AT	5 144	595	716	61	225	542	7	113
PL	29 827	4 810	1 461	240	386	1 741	1	1 342
PT	1 069	:	837	17	94	384	10	296
RO	14 873	2 734	222	47	27	234	3	287
SI	533	84	143	15	36	25	0	61
SK	3 330	100	260	27	14	69	1	64
FI	4 261	252	734	54	82	203	1	96
SE	5 250	:	905	104	147	262	5	119
UK	*21 618*	2 503	6 713	254	925	774	281	1 571
NO	*1 347*	:	:	:	:	:	:	:
CH	1 008	:	489	83	:	:	:	:
HR	3 442	232	328	27	55	89	1	60
MK	567	:	:	:	:	:	:	:
TR	*33 373*	26 784	:	:	:	:	:	:

(1) Including rice; Norway and Switzerland, 2008.

(2) Including melons and strawberries; Estonia, Greece and France, 2008; United Kingdom, 2007.

(3) Malta and Switzerland, 2008.

(4) For direct consumption.

(5) 2010.

(6) EU-27, 2009; all other countries 2010.

Source: Eurostat (online data codes: food_in_pagr2, apro_mk_pobta and food_in_pagr5)

Almost one quarter (23.6 %) of the EU-27's production of cereals in 2009 was attributed to France, while Germany (16.8 %) and Poland (10.1 %) were the only other Member States to record double-digit shares.

Italy and Spain were the leading producers of fresh vegetables in the EU, each accounting for around one fifth of total production; the Netherlands was also specialised in producing fresh vegetables.

The United Kingdom and Germany recorded the highest production of drinking milk, and Germany's position as a leading producer of dairy products was consolidated as it also recorded, by far, the highest production of cream.

As regards meat production, France and Germany were the largest producers of bovine meat in 2010 (19.3 % and 15.0 % of the EU-27 total), Germany and Spain were the biggest producers of pig meat (24.7 % and 15.4 %), while poultry production was widespread across most of the Member States. In contrast, sheep production was concentrated within the United Kingdom (39.2 % of the EU-27 total) and Spain (17.4 %), while Greece and Ireland were also relatively specialised.

Bakeries account for over half of the food and beverage manufacturing enterprises in the EU

Once crops/livestock or other products have been harvested/reared, they are generally processed, preserved or slaughtered in downstream manufacturing activities.

The manufacture of bakery and farinaceous products accounted for more than half of the food and beverage manufacturing enterprises in the EU-27 in 2008 (157 100); meat processing (which includes the slaughtering of animals) accounted for the next highest number (41 200); there were relatively few enterprises (3 800) engaged in the processing of fish and crustaceans in the EU-27 (Table 5).

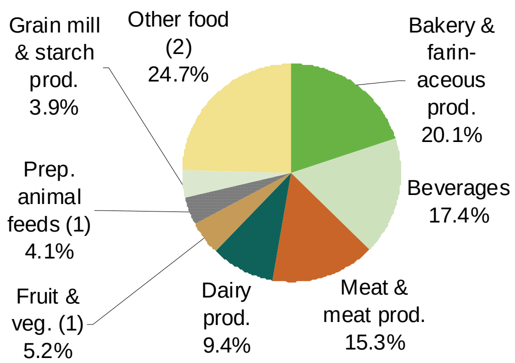
Table 5: Structure of food and beverages manufacturing, by activity, EU-27, 2008

	No. of enter-prises (1 000)	No. of persons employed (1 000)	Turnover (EUR million)
Food & beverages	**:**	**4 725**	**992 782**
Food products	**267.9**	**4 245**	**846 625**
Meat & meat products	41.2	977	190 182
Fish, crustaceans & molluscs	*3.8*	120	22 466
Fruit & vegetables	10.1	278	:
Vegetable & animal oils & fats	*8.8*	65	49 074
Dairy products	11.7	359	139 459
Grain mill & starch products	7.0	113	45 184
Bakery & farinaceous products	157.1	1 531	111 827
Other food products	23.0	678	:
Prepared animal feeds	5.1	124	*70 000*
Beverages	**:**	**480**	**146 157**

Source: Eurostat (online data code: sbs_na_ind_r2)

There would appear to be a considerable difference in the average size of food and beverage manufacturing enterprises, as the relative importance of the subsectors was quite different in terms of their respective shares of value added (Figure 4). Relatively high shares were recorded for the manufacture of dairy products (9.4 %), meat processing (15.3 %) and beverages (17.4 %).

Figure 4: Value added at factor cost of food and beverages manufacturing, EU-27, 2008
(%)



(1) Estimate.

(2) NACE Groups 10.2, 10.4 and 10.8: processing and manufacturing of fish, crustaceans and molluscs; vegetable and animal oils and fats; other food products.

Source: Eurostat (online data code: sbs_na_ind_r2)

The EU is self-sufficient in meat, dairy products, cereals and beverages

Aside from its own primary production, the EU imports a range of agricultural products from non-member countries. Indeed, it is the world's largest importer of food – and a high proportion of imports come from developing countries. Farmers and food producers in non-member countries who wish to export their goods to the EU need to respect the food safety principles that apply for EU farmers and producers; checks are made on imports at European borders as food enters the EU.

Several EU Member States are self-sufficient in a range of food products (Table 6) – for example, meat or cereals; self-sufficiency indicates up to what point domestic production covers the needs or domestic use of each Member State. However, the EU imports a range of products to meet consumer demand – among which vegetables and fruit accounted for 26.5 % of total food and beverage imports in 2010, fish, crustaceans and molluscs (21.9 %) and coffee, tea and cocoa (17.4%).

EU-27 imports of food and beverages were valued at EUR 78 254 million in 2010, with a trade deficit of EUR 5 095 million (Table 7). The origin of EU-27 imports of food and beverages (Figure 5) was highly diversified (as the top seven trading partners accounted for 43.9 % of total imports). The EU-27's two main partners for food and beverage imports in 2010 were both from South America: Brazil and Argentina.

Table 6: Self-sufficiency in the main agricultural products, 2009 (1)
(%)

	Cereals	Cattle	Pigs	Sheep & goats	Poultry
BE	:	136	239	:	:
BG (2)	:	75	40	109	78
CZ	:	0	:	:	:
DK	107	89	665	29	157
DE (3)	118	117	99	37	84
EE	122	91	100	89	52
IE	73	617	167	344	100
EL	87	66	91	100	100
ES	74	:	:	:	:
FR	190	105	106	46	117
IT	80	61	70	49	108
CY (3)	:	65	97	77	84
LV (4)	172	:	:	90	:
LT	210	:	:	:	:
LU	92	94	66	3	1
HU	216	163	96	639	134
MT	0	:	:	:	:
NL (3)	17	112	244	95	186
AT	105	142	106	72	72
PL	102	:	:	:	:
PT (5)	25	53	67	79	93
RO (6)	139	100	57	150	79
SI (7)	56	103	70	99	113
SK	:	130	51	150	69
FI	:	:	:	:	:
SE	117	:	:	:	:
UK (4)	115	75	54	90	5

(1) Excluding rice; Spain, 2008; Denmark and Sweden, 2006; self-sufficiency: gross indigenous production / total domestic uses (expressed as a percentage).

(2) Cattle, 2007.

(3) All types of meat, 2007.

(4) All types of meat, 2008.

(5) Cereals, sheep and goats and poultry, 2008.

(6) Pigs, sheep and goats, 2008.

(7) Cereals, 2007; all types of meat, 2008.

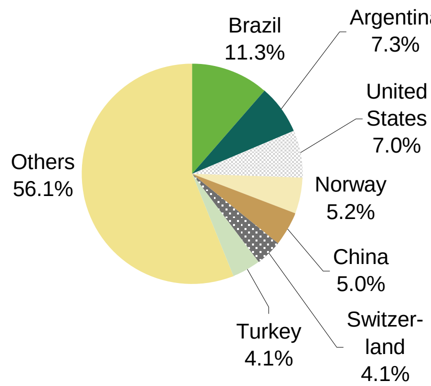
Source: Eurostat (online data code: food_in_pagr6)

Table 7: Value of extra-EU-27 trade, 2010
(EUR million)

	Imports	Exports	Net trade
Food & beverages	**78 254**	**73 159**	**-5 095**
Live animals	271	1 378	1 106
Meat & meat products	5 007	6 245	1 238
Dairy products & birds' eggs	665	7 686	7 021
Fish, crust., molluscs	17 105	2 996	-14 110
Cereals & cereal prep.	3 364	9 526	6 161
Vegetables & fruit	20 764	8 759	-12 006
Sugars, sugar prep. & honey	2 168	2 103	-65
Coffee, tea, cocoa	13 581	5 475	-8 106
Animal feeding stuff	8 529	3 112	-5 417
Miscellaneous edible products	2 332	7 639	5 307
Beverages	4 466	18 241	13 775

Source: Eurostat (online data code: DS_018995)

Figure 5: Origin of extra EU-27 imports of food, live animals and beverages, EU-27, 2010
(% of total)



Source: Eurostat (online data code: DS_018995)

The majority of the food, beverage and tobacco goods that are transported within the EU travel less than 150 kilometres

The EU places great importance on the quality of food distributed to consumers. No matter the origin (EU farms or imports from further afield), the same rules are applied. Wholesaling and transporting play a vital role in the food chain, providing logistical services to move food and beverages between producers, processors and retailers.

Table 8: Structure of food, beverages and tobacco wholesaling, by activity, EU-27, 2008

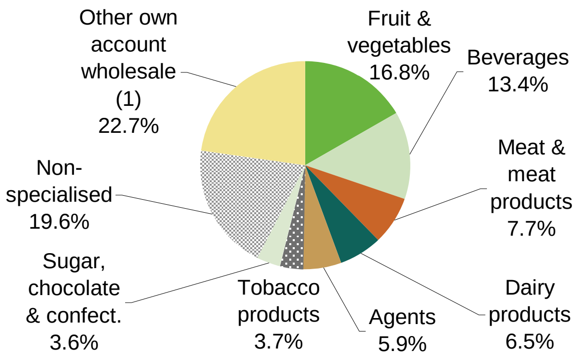
	No. of enter-prises (1 000)	No. of persons employed (1 000)	Turnover (EUR million)
Agents & own account	**275.1**	**2 002**	**979 421**
Agents	**67.6**	**133**	**67 698**
Own account	**207.5**	**1 868**	**911 723**
Fruit & vegetables	44.5	418	143 842
Meat & meat products	23.6	178	87 089
Dairy products, eggs, oils & fats	14.4	*115*	86 371
Beverages	37.1	264	114 491
Tobacco products	2.2	40	86 347
Sugar & confectionery	10.0	*70*	33 784
Coffee, tea, cocoa & spices	5.5	38	15 076
Other own account wholesaling (1)	40.0	*270*	121 735
Non-specialised	30.1	475	222 987

(1) NACE Classes 46.33, 46.36 and 46.38: wholesale of other food, including fish, crustaceans and molluscs; sugar and confectionery; dairy products, eggs and edible oils and fats.

Source: Eurostat (online data code : sbs_na_dt_r2)

Figure 6: Value added at factor cost of food, beverages and tobacco wholesaling, EU-27, 2008

(%)



(1) NACE Classes 46.37 and 46.38: wholesale of coffee, tea, cocoa and spices and wholesale of other food, including fish, crustaceans and molluscs.

Source: Eurostat (online data code : sbs_na_dt_r2)

One of the largest wholesaling activities concerns fruit and vegetables, employing 418 000 persons across the EU-27 in 2008 and generating about one sixth of the total value added within food, beverages and tobacco wholesaling (Table 8).

Agricultural, forestry and fishing products, together with food, beverages and tobacco products accounted for just over a quarter of all the goods transported by road within the EU-27 in 2009 and for 18.1 % of the goods transported by road nationally (Table 9); the majority of these goods were transported less than 150 km (Figure 7).

Table 9: Transport of agricultural, fishing, food, beverage and tobacco products, EU-27, 2009

	Road (1)		Rail (2)
	National	Intra-EU	
Transport quantity (million tonnes)			
All products	14 257	459	1 340
Products of agriculture, hunting & forestry; fish & other fishing products	1 078	52	69
Food products, beverages & tobacco	1 503	66	22
Share of transport (% of all products)			
Products of agriculture, hunting & forestry; fish & other fishing products	7.6	11.3	5.1
Food products, beverages & tobacco	10.5	14.4	1.6

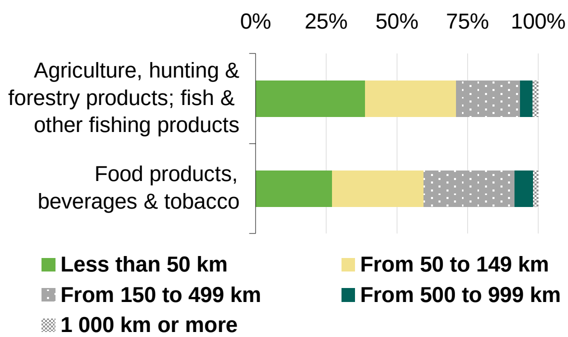
(1) Excluding Malta.

(2) Greece, 2008; Luxembourg and the Netherlands, not available.

Source: Eurostat (online data codes: food_pd_aatran17, rail_go_grpgood, road_go_na_tgtt, road_go_cta_gtt and road_go_ia_lgtt)

Figure 7: Annual road freight transport by distance, EU-27, 2009 (1)

(%, based on tonnes)



(1) Excluding Malta.

Source: Eurostat (online data code: road_go_ta_dctg)

In recent decades, European consumers have increasingly turned to eating out

At the end of the food chain, consumers may choose to purchase food and beverages from specialist retailers (butchers, bakers), non-specialised outlets (supermarkets), or market stalls.

There were 7.4 million persons working within the food, beverages and tobacco retailing sector in the EU-27 in 2008 (Table 10). Non-specialised food retailing accounted for almost 80 % of the workforce and a higher share (86.2 %) of turnover.

Table 10: Structure of food, beverages and tobacco retailing, by activity, EU-27, 2008

	No. of enter-prises (1 000)	No. of persons employed (1 000)	Turnover (EUR million)
Food, beverages & tobacco	**1 060.2**	***7 370***	***1 068 566***
Non-specialised - food, beverages or tobacco predominating	**419.7**	***5 784***	***920 833***
Specialised - food, beverages & tobacco	**493.9**	**1 417**	***136 000***
Fruit & vegetables	76.9	168	*15 088*
Meat & meat prod.	124.6	358	32 954
Fish, crustaceans & molluscs	33.3	71	6 162
Bread, cakes & confectionery	61.8	269	13 342
Beverages	39.9	146	21 382
Tobacco prod.	69.5	*150*	24 440
Other	87.9	255	22 632
Stalls & markets	**146.7**	**169**	**11 733**

Source: Eurostat (online data code : sbs_na_dt_r2)

Table 11: Structure of food and beverages services, by activity, EU-27, 2008

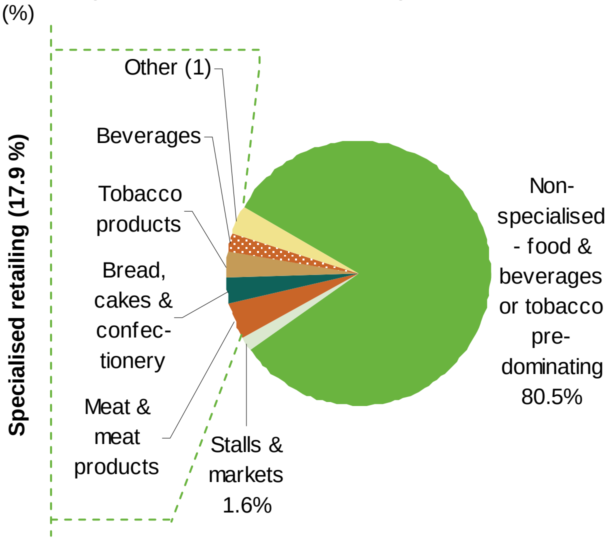
	No. of enter-prises (1 000)	No. of persons employed (1 000)	Turnover (EUR million)
Food & beverage service activities	**1 448.4**	**7 317**	**322 113**
Restaurants & mobile food service activities	764.9	4 233	186 025
Event catering activities	34.8	395	17 133
Other food service activities	22.7	565	27 408
Beverage serving activities	626.1	2 124	91 547

Source: Eurostat (online data code : sbs_na_1a_se_r2)

In contrast, there were more specialised food, beverage and tobacco retail enterprises than there were non-specialised retailers. Among these, the most important activities (in terms of added value) included the sale of meat and meat products, and the sale of bread, cakes and confectionery.

Europeans have increasingly chosen to eat out or buy take-away foods during the last few decades. There were almost 1.5 million enterprises providing food and beverage consumer service activities in the EU-27 in 2008 (Table 11). Just over half were restaurants and 43.2 % were cafés or bars/pubs. The relative importance of restaurants was even greater in terms of their share of value added (58.1 % of the total – Figure 9).

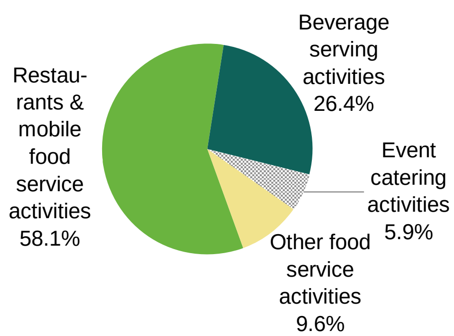
Figure 8: Value added at factor cost of food, beverages and tobacco retailing, EU-27, 2008
(%)



(1) NACE Classes 47.21, 47.23 and 47.29: retail sale in specialised stores of fruit and vegetables; fish, crustaceans and molluscs; and other food.

Source: Eurostat (online data code : sbs_na_dt_r2)

Figure 9: Value added at factor cost of food and beverages services, EU-27, 2008
(%)



Source: Eurostat (online data code : sbs_na_1a_se_r2)

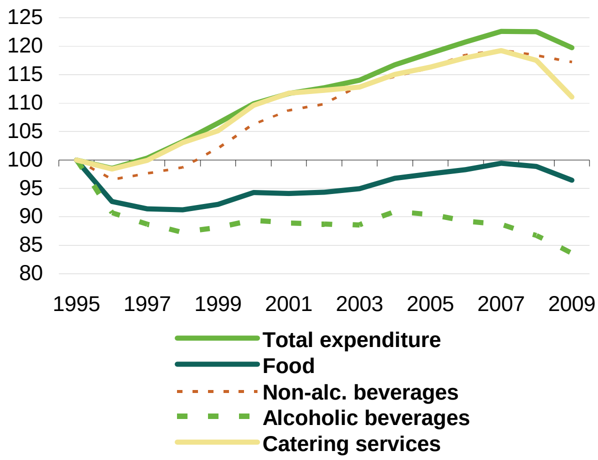
Restaurant and café prices rose faster than inflation during the last decade

Food prices may be affected by population growth and rising living standards (in emerging economies), which have changed global consumption patterns (meat replacing vegetables), while leading to increased demand for a range of food commodities. Within developed economies, urbanisation and higher living standards have also resulted in changes to consumption patterns, with more processed foods being eaten and people making more frequent trips to catering outlets. Competing uses for food output also influence prices – for example, farm output of crops (corn, sugar cane, rapeseed) may also be used as animal feed or for the production of biofuels. When food for human consumption is substituted by other uses then food prices are likely to rise.

Although the use of restaurants and take-away facilities has increased historically, this development stopped abruptly as the financial and economic crisis resulted in the volume of EU-27 household expenditure on catering services being reduced by 5.4 % between 2008 and 2009 – compared with a 2.4 % reduction for total food and beverages expenditure (Figure 10). Food and beverages accounted for 21.5 % of household expenditure in 2009, ranging from 17.4 % in the Netherlands to 34.1 % in Romania (Figure 11).

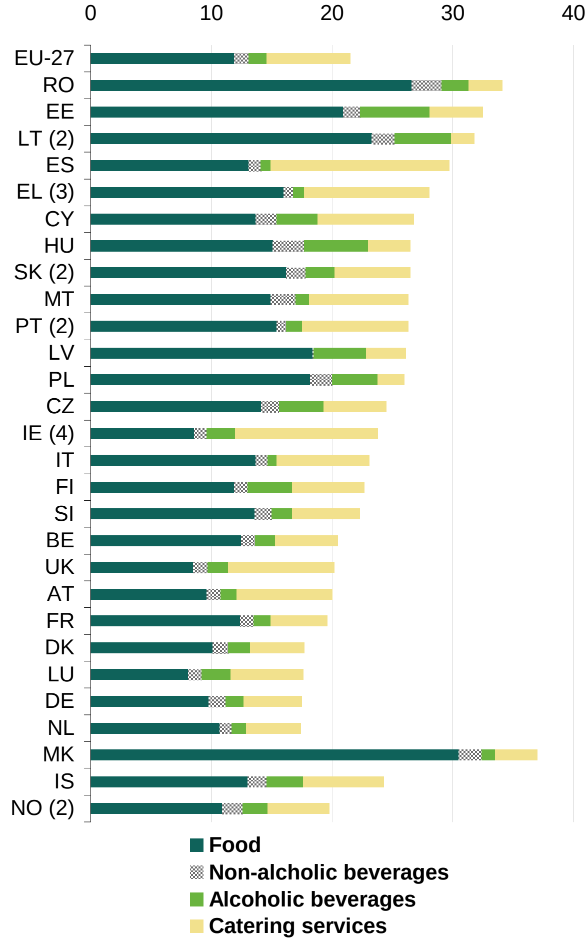
EU-27 consumer prices rose, on average, by 2.4 % per annum between 2000 and 2010 (Figure 12). Food prices increased at a slightly faster pace (2.9 % per annum), with particularly large increases in 2001 and 2008; higher price rises were recorded for restaurants and cafés (3.2 % per annum).

Figure 10: Development of household final consumption expenditure, volumes, EU-27
(1995=100)



Source: Eurostat (online data code: nama_cO3_k)

Figure 11: Mean household final consumption expenditure on food and beverages, 2009 (1)
(% of total)



(1) Bulgaria and Sweden, not available.

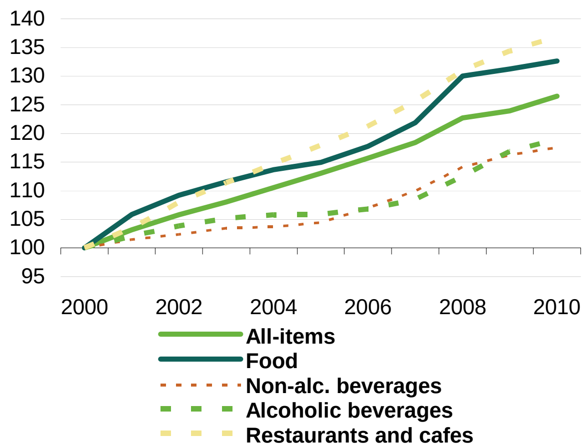
(2) 2007.

(3) Provisional.

(4) 2008.

Source: Eurostat (online data code: nama_cO3_c)

Figure 12: Development of harmonised indices of consumer prices, EU-27
(2000=100)



Source: Eurostat (online data codes: food_pd_prc2 and prc_hicp_aind)

METHODOLOGICAL NOTES

DETAILS OF DATA SOURCES

The information presented is drawn from a range of different Eurostat databases. Many of these figures are collected together under the heading of 'Food: from farm to fork statistics', which brings together information on food products and the food sector which are considered relevant for food safety purposes. Primary reference data sources are also detailed below.

Food: from farm to fork statistics

The domain is structured in 4 main areas:

- Food consumption;
- From production to distribution: organic production, products with distinctive marks, production and sales of foodstuffs, prices and ancillary activities relating to packaging, transport and R&D in relation to food safety projects;
- Inputs to the food chain: intermediate inputs to agriculture (such as feeding stuffs, seed or fertilisers), primary production, extra-EU food imports (including information by partner);
- Actors involved in the food chain: the number of local units and enterprises within manufacturing, distribution, transport and service activities, and the number of agricultural holdings.

Survey on the structure of agricultural holdings (FSS)

Farm structure survey data are used to collect information on agricultural holdings in the Member States at different geographic levels (Member States, regions, districts) and over periods, they provide a base for decision making in the Common Agricultural Policy.

Two kinds of farm structure surveys are carried out:

- a basic survey (agricultural census) every 10 years,
- sample-based intermediate surveys.

Economic accounts for agriculture

This source provides information on income and expenditure in the agricultural sector. The data set includes statistics for the value of output (at producer and basic prices), intermediate consumption, subsidies and taxes, consumption of fixed capital, rent and interests, and capital formation. These accounts are a satellite account to the national accounts.

Structural business statistics (SBS)

SBS data have been collected within the legal framework provided by Council Regulation No 251/2009. The SBS data set relates to annual enterprise statistics and provides information on a range of business-related issues, such as: business demography (births and deaths of enterprises), output-related indicators, such as turnover or value added; input-related indicators, such as labour input, purchases of goods and services, or investment. The data are presented using the NACE Rev. 2 classification. Information may be broken down according to enterprise size class and (at a more aggregated level of detail) according to different regions (as defined by NUTS).

Road and rail freight transport statistics

The legal basis for the collection of road freight transport statistics is Council Regulation No 1172/1998. The figures are aggregated on the basis of sample surveys. The data are presented using the following units: tonnes, tonne-kilometres, vehicle-kilometres and numbers of journeys.

The legal basis for the collection of rail freight transport statistics is Council Regulation No 91/2003.

Goods (for both road and rail) are classified according to the standard goods classification for transport statistics 2007 (NST 2007). The data cover road freight transport by heavy goods vehicles and exclude operations by small goods vehicles.

External trade statistics

External trade statistics are an important data source for EU decision-makers, being used extensively for multilateral and bilateral negotiations within the framework of the common commercial policy.

Extra-EU imports relate to goods entering the EU-27 from non-member countries; these statistics are collected directly from traders on the basis of their customs declarations. Extra-EU trade statistics do not record exchanges involving goods in transit, placed in a customs warehouse or given temporary admission.

The data are presented using the standard international trade classification of the United Nations; currently, the fourth revision of the SITC is applied.

Annual national accounts

Household final consumption expenditure may be broken down according to consumption purpose (using the COICOP classification). The final consumption expenditure of households consists of expenditure incurred by residential institutional units on goods or services that are used for the direct satisfaction of the individual needs or wants or the collective needs of members of the community.

Price statistics: harmonised indices of consumer prices (HICP)

Harmonised indices of consumer prices (HICPs) are designed for international comparisons of consumer price inflation; they reflect price changes over time and provide the official measure of inflation within the EU and euro area. The coverage of HICPs is defined in terms of 'household final monetary consumption expenditure', by reference to the national accounts concepts of ESA95. Expenditures are classified according to the COICOP/HICP (classification of individual consumption by purpose adapted to the needs of HICPs).

DEFINITIONS OF VARIABLES AND INDICATORS

Agricultural holding: a single unit both technically and economically, which has single management and which produces agricultural products.

Number of enterprises: a count of the number of enterprises active during at least a part of the reference period.

Local unit: an enterprise or part thereof (factory, warehouse, office) situated in a geographically identified place.

Number of persons employed: the total number of persons who work in the observation unit (inclusive 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 (for example, sales representatives, delivery personnel, repair and maintenance teams); data relate to head counts. Note that within agricultural statistics the information in relation to persons employed may be provided either as a head count or alternatively as annual work units.

Turnover: comprises the total invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties.

Value added: output minus intermediate consumption. Value adjustments (such as depreciation) are not subtracted.

ABBREVIATIONS AND SYMBOLS

EU	European Union
EU-27	27 EU Member States
EA-17	17 Member States of the euro area

BE	Belgium	BG	Bulgaria
CZ	Czech Republic	DK	Denmark
DE	Germany	EE	Estonia
IE	Ireland	EL	Greece
ES	Spain	FR	France
IT	Italy	CY	Cyprus
LV	Latvia	LT	Lithuania
LU	Luxembourg	HU	Hungary
MT	Malta	NL	Netherlands
AT	Austria	PL	Poland
PT	Portugal	RO	Romania
SI	Slovenia	SK	Slovakia
FI	Finland	SE	Sweden
UK	United Kingdom		
NO	Norway	CH	Switzerland
HR	Croatia	MK	former Yugoslav Republic of Macedonia
TR	Turkey		

:	not available
Italics	values in tables are either estimates or provisional

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Further information

Eurostat Website: http://ec.europa.eu/eurostat

Data on 'Agriculture'
http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/data/database

Further information about 'Agriculture'
http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/introduction

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European Statistical Data Support:

With the members of the 'European statistical system', Eurostat has set up a network of support centres in nearly every Member State and in some EFTA countries.

Their role is to provide help and guidance to Internet users of European statistics.

Contact details for this support network can be found on the Eurostat website at:
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