FOODDRINK EUROPE

Data & Trends

EU Food and Drink Industry

2026 Edition

EU Food and Drink Industry Figures

Turnover

€1,523 billion

Leading manufacturing sector in the EU

Value added

1.9%

of EU gross value added

Consumption

21.6%

of household expenditure on food and drink products

Employment

4.8 million

people

Number of companies

309,000

R&D expenditure

€2 billion

Sales within the EU Single Market

87%

of food and drink turnover

Small and medium-sized enterprises

38.7%

of food and drink turnover

56.7%

of food and drink employment

External trade

€190 billion

Exports

€109 billion

Imports

€81 billion

Trade balance

#1

Exporter of food and drinks

Sources: Eurostat; Joint Research Centre; UN COMTRADE

Contents

Introduction

The 2026 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 global ranking of food and drink companies. Most of the data related to the structure of the food and drink sector are sourced from 2023 and 2024 for trade. To grasp the latest developments of the sector, refer to FoodDrinkEurope Quarterly Economic and Trade Bulletins, including Bulletins on the Input Costs.

This report covers the EU-27 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.

Contribution to the EU economy

Leading manufacturing sector in terms of turnover, value added and investment

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

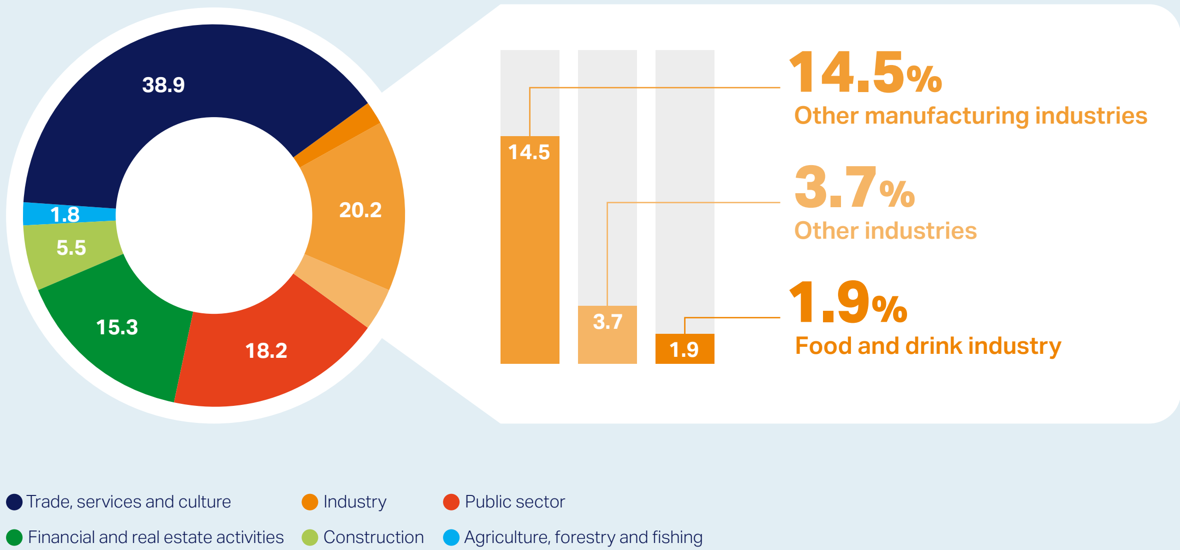
15.5%
Share of food and drink turnover in the EU manufacturing industry

12%
Share of food and drink value added in the EU manufacturing industry

14.3%
Share of food and drink companies in the EU manufacturing industry

- While the food and drink industry leads the manufacturing sector in turnover, value added, and investment, it remains highly diversified, characterised by a significantly large number of individual enterprises.
- In 2023, the EU food and drink industry generated a turnover of €1,523 billion and a value added of €296 billion.
- With €52 billion invested in 2023, the food and drink industry is the manufacturing sector with the highest capital spending.
- With nearly 309,000 companies in 2023, the food and drink industry accounts for 14.3% of all manufacturing companies in the EU.

Contribution of the food and drink industry to the EU economy (2023, %)

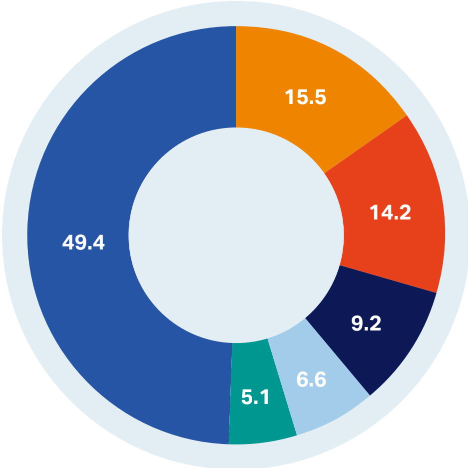


Source: Eurostat (National accounts)

Turnover in the EU manufacturing industry (2023, %)

15.5%
Food and drink industry

- Automotive
- Machinery and equipment
- Chemicals
- Pharmaceuticals
- Others

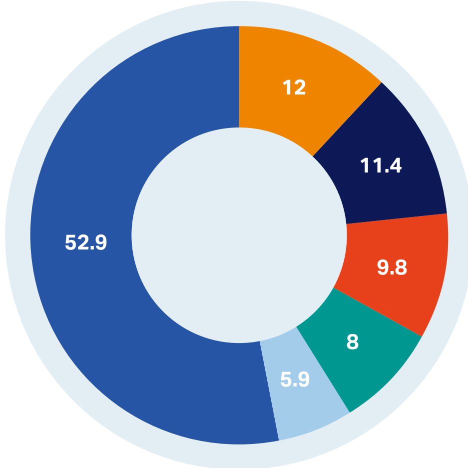


Source: Eurostat (SBS)

Value added in the EU manufacturing industry (2023, %)

12%
Food and drink industry

- Machinery and equipment
- Automotive
- Pharmaceuticals
- Chemicals
- Others

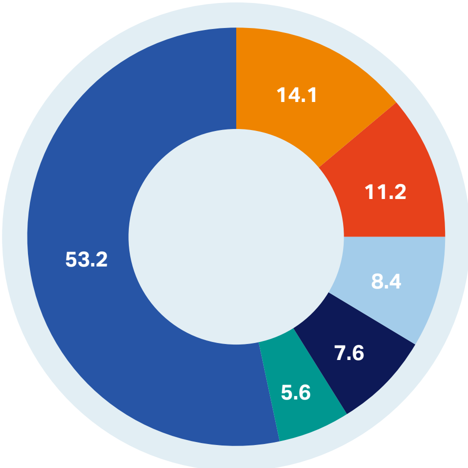


Source: Eurostat (SBS)

Investment in the EU manufacturing industry (2023, %)

14.1%
Food and drink industry

- Automotive
- Chemicals
- Machinery and equipment
- Pharmaceuticals
- Others

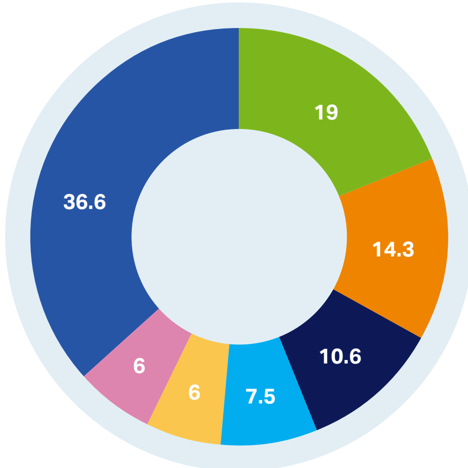


Source: Eurostat (SBS)

Number of companies in the EU manufacturing industry (2023, %)

14.3%
Food and drink industry

- Fabricated metal products
- Repair and installation of machinery and equipment
- Wood products
- Wearing apparel
- Furniture
- Others



Source: Eurostat (SBS)

Employment

Leading employer in the EU

4.8 million

Total number of persons employed in the EU food and drink industry

€134 billion

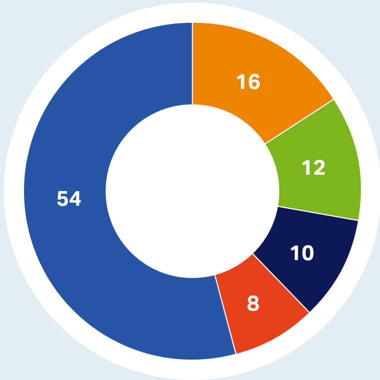
Wages and salaries paid by the EU food and drink industry

- Compared to other manufacturing sectors, the EU food and drink industry is a key job provider and a stable employer.
- Around 16% of employees in the manufacturing sector work in the food and drink industry in 2023.

Employment in the EU manufacturing industry
(2023, %)

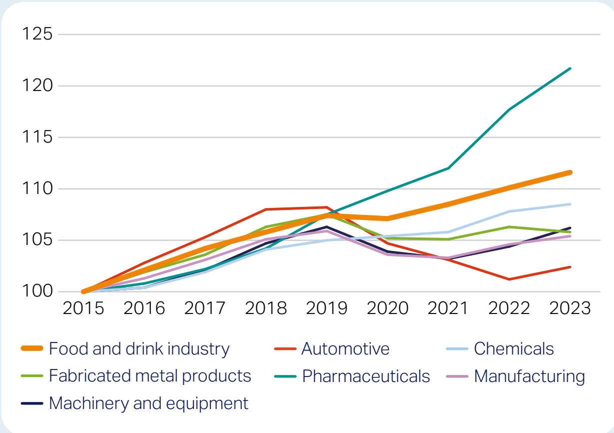
16%
Food and drink industry

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



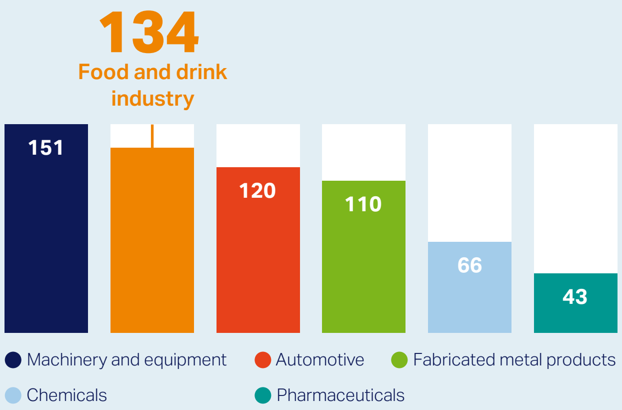
Source: Eurostat (SBS)

Employment in the EU manufacturing industry
(index, 2015=100)



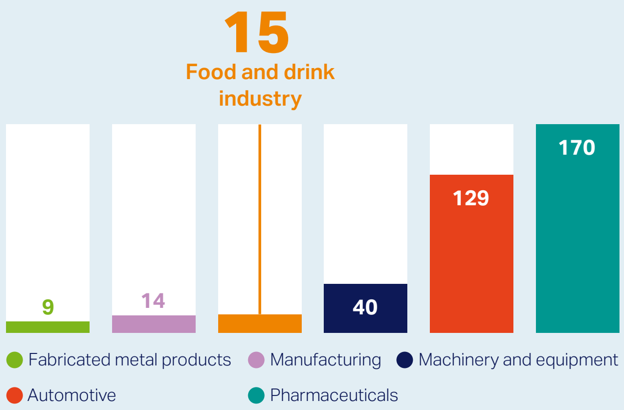
Source: Eurostat (STS)

Wages and salaries in the EU manufacturing industry
(2023, € billion)



Source: Eurostat (SBS)

Average number of persons employed per company in the EU (2023)



Source: Eurostat (SBS)

Sectors

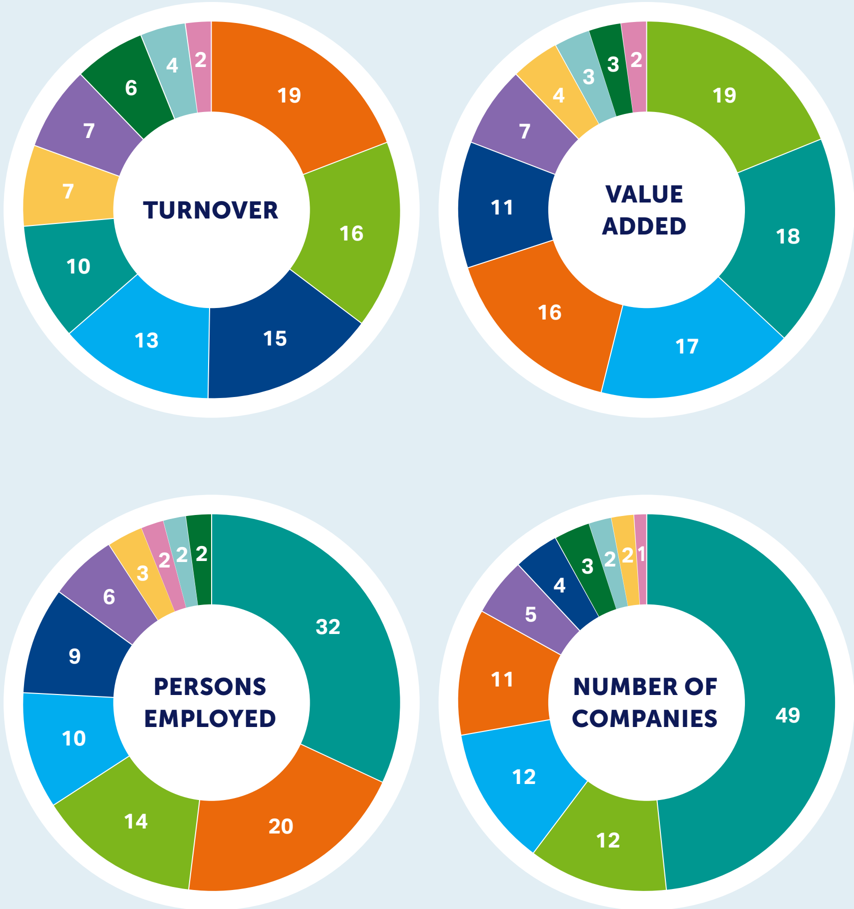
Offering a wide variety of food and drinks to consumers

19%

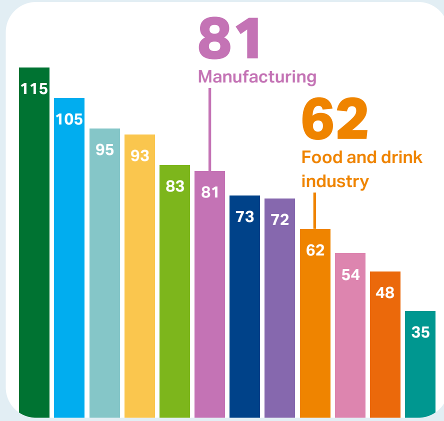
Share of the food and drink industry's turnover attributed to the meat sector

- 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 products, dairy products, drinks and the "various food products" category) represent nearly three quarters of the total turnover and 85% of the total number of employees.
- On average, labour productivity in the food and drink industry is lower than in manufacturing as a whole (62 and 81 respectively).
- Labour productivity varies by sector. Oils and fats, and drinks register the highest value in the food and drink sector.

Turnover, value added, persons employed and number of companies in food and drink industry sectors (2023, %)



Labour productivity
(2023, €1,000/person)

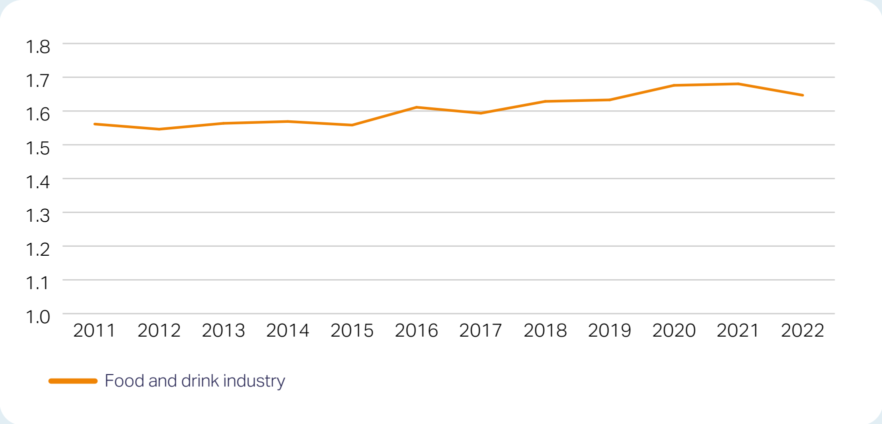


Source: Eurostat (SBS)

Trends in turnover, value-added, production, employment and number of companies

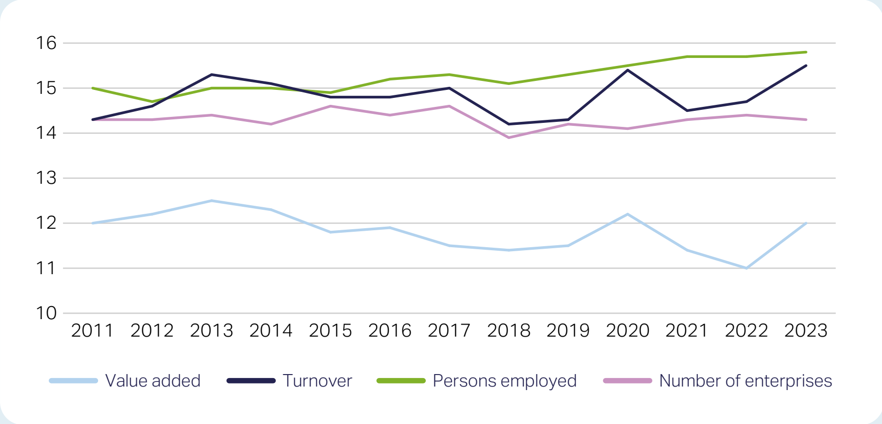
- Between 2011 and 2022, the food and drink industry's contribution to the EU economy remained relatively stable, showing only a modest increase compared with 2011.
- The sector's share of manufacturing employment is consistently higher than its share of manufacturing value added, indicating that labour productivity remains below the manufacturing average.
- Volume of production in the EU food and drink industry has followed a more stable and steady growth path than manufacturing overall, with fewer fluctuations over time.
- Value added in the food and drink industry increased by 66% between 2011 and 2023, closely mirroring the performance of total manufacturing, which grew by 67% over the same period.
- The number of companies in the sector grew by 9.5% between 2011 and 2023, driven primarily by a substantial rise in the number of drink manufacturers (+59%).

Contribution of the food and drink industry to the EU economy, 2011–2022 (% of EU gross value added)



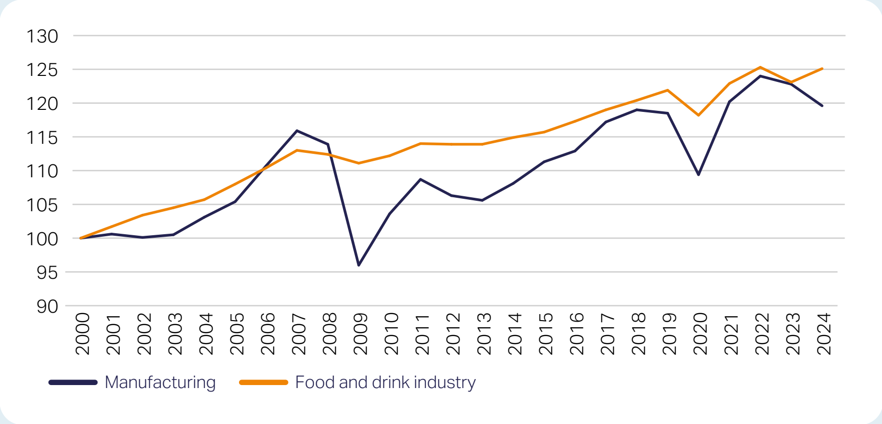
Source: Eurostat (SBS); The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Share of food and drink industry's turnover, value added, employment and number of enterprises in the manufacturing industry, 2011–2023 (%)



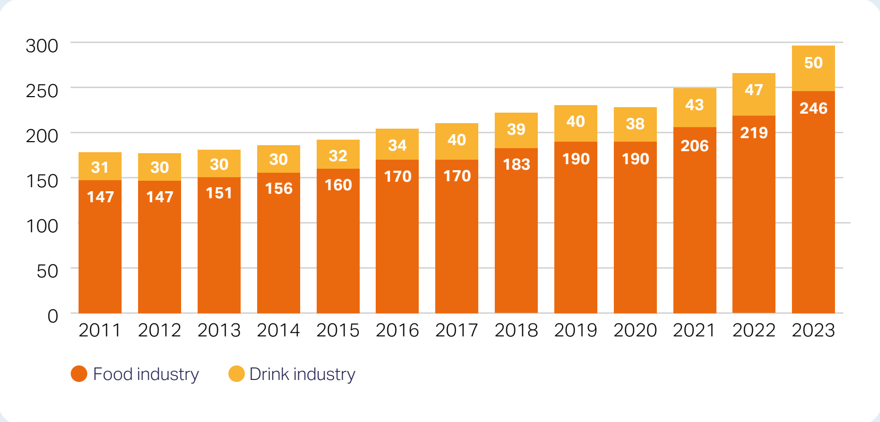
Source: Eurostat (SBS)

Volume of production in the food and drink industry and manufacturing industry (index, 2000=100)



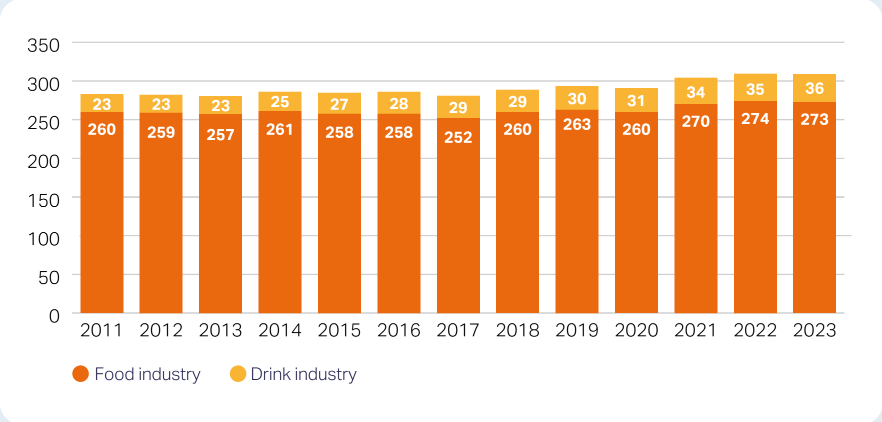
Source: Eurostat (STS)

Value added in the EU food and drink industry, 2011–2023 (€ billion)



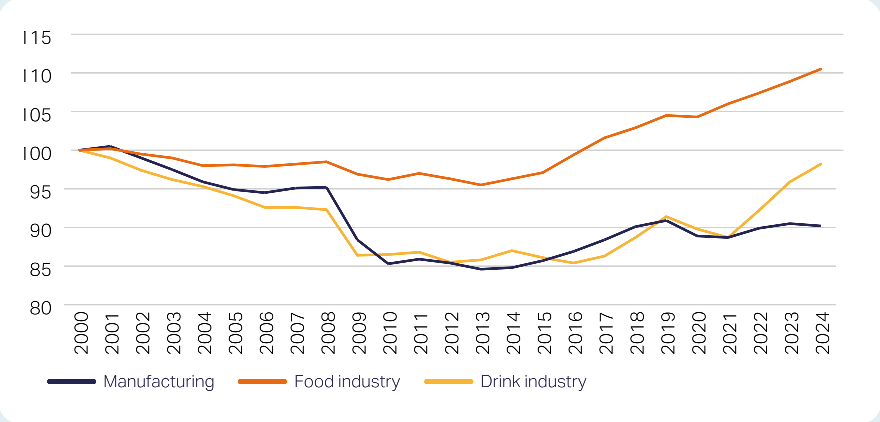
Source: Eurostat (SBS); The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Number of companies in the food and drink industry, 2011–2023 (1,000)



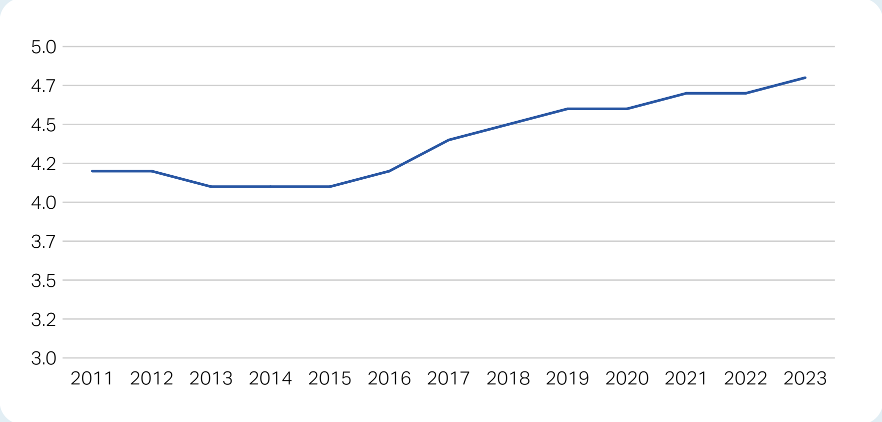
Source: Eurostat (SBS); The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Employment in the food, drink, and manufacturing industry (index, 2000=100)



Source: Eurostat (STS)

Employment in the food and drink industry, 2011–2023 (million)



Source: Eurostat (SBS); The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Small and medium-sized enterprises

Small scale, big impact

€558 billion
Turnover[1]

€124 billion
Value added

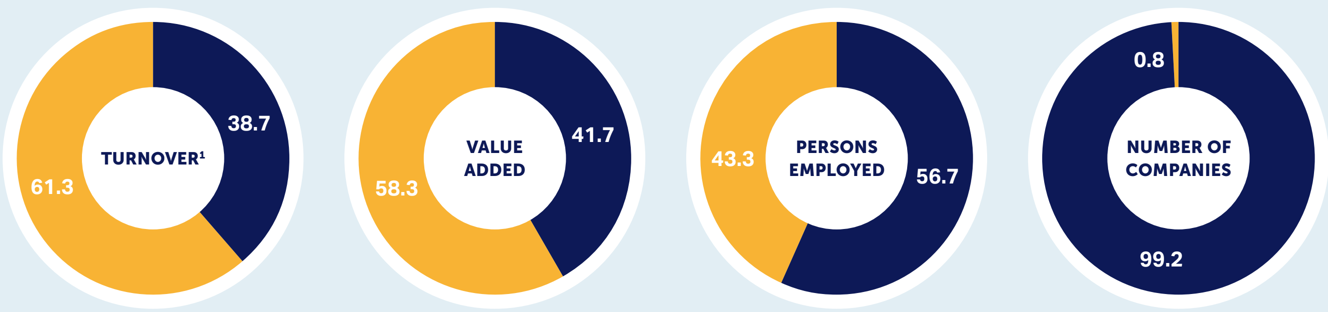
2.6 million
Persons employed

99.2%
of food and drink companies

- The food and drink industry is a highly diversified sector with many companies of different sizes.
- SMEs generate 38.7% and 41.7% of the food and drink industry turnover and value added respectively and provide more than half of jobs in the sector.
- The food and drink industry accounts for over 306,000 SMEs.

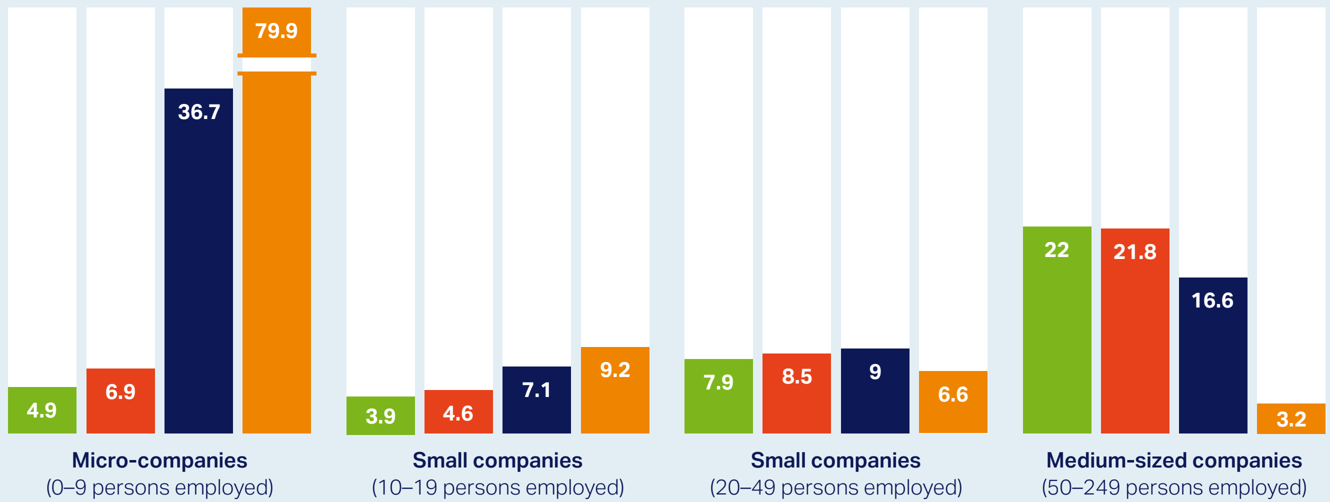
[1] 2022 data

Contribution of SMEs and large companies to the EU food and drink industry (2023, %)



Source: Eurostat (SBS)

SMEs in the food and drink industry (2023, % by company size)



Source: Eurostat (SBS)

The national picture

A key industry across the EU Member States

#1

manufacturing employer in most EU Member States

61%

Share of turnover of the EU's four 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, and Spain are the largest EU food and drink producers by turnover.

Food and drink industry data in EU Member States (2023)

	Employment ranking in manufacturing	Turnover (€ billion)	Value added (€ billion)	Number of employees (1,000)	Number of companies
Austria	#2	37.3	9.2	97.9	5,025
Belgium	#1	83.7	14.2	113.9	8,067
Bulgaria	#1	9.7	1.8	88.7	5,881
Croatia	#1	6.8	1.7	57.3	3,442
Cyprus	#1	2.3	0.5	15.4	945
Czech Republic	#4	22.2	4.5	117.1	13,546
Denmark	#2	32.6	5.3	59.7	1,688
Estonia	#2	2.6	0.6	14.6	1,043
Finland	#3	13.7	2.8	38.4	2,547
France	#1	265.5	53.2	757.5	61,241
Germany	#2	277.6	62.5	1008.4	26,629
Greece	#1	23.5	4.7	143.8	15,712
Hungary	#2	19.9	3.6	110.2	4,783
Ireland	#1	29.5	11.2	56.9	2,100
Italy	#3	191.1	36.7	478.7	51,005
Latvia	#2	2.8	0.6	22.7	1,389
Lithuania	#1	6.3	1.4	41.2	2,406
Luxembourg	#1	1.2	0.3	5.2	154
Malta	#1	0.6	0.2	4.4	429
Netherlands	#1	117.4	18	148.8	9,286
Poland	#1	102.6	20.1	457.1	19,242
Portugal	#1	23.9	4.5	113.7	11,518
Romania	#2	20	3.3	194.4	11,041
Slovakia	#3	7.4	1.4	47.3	6,327
Slovenia	#3	3.4	0.8	17.7	2,958
Spain	#1	178.9	31	463.9	28,335
Sweden	#4	22.4	4.2	59	4,384

[1] As published by Eurostat (SBS) or FoodDrinkEurope National Federations

Food supply chain

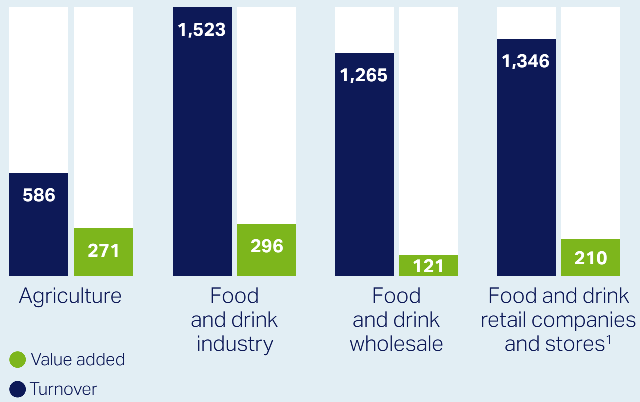
Diverse economic operators with specific business models

5.8%
Share of the food supply chain in EU gross value added

10.2%
Share of the food supply chain in EU employment

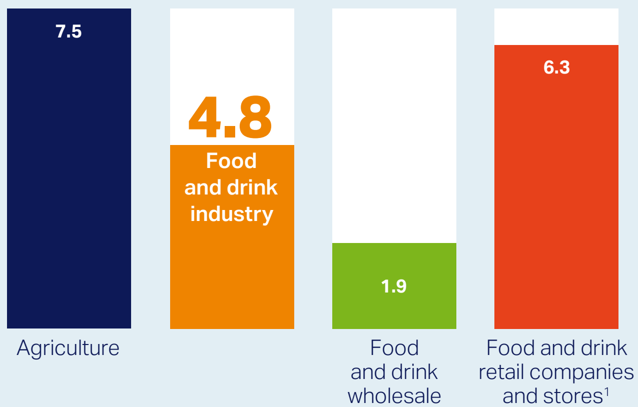
- The food supply chain employs 20.5 million people.
- The total turnover amounts to €4.7 trillion and the value added to €898 billion.
- The EU extensive food supply chain, from agriculture and the input industry to food and drink services, employs 29.8 million workers.

Turnover and value added in the EU food supply chain
(2023, € billion)

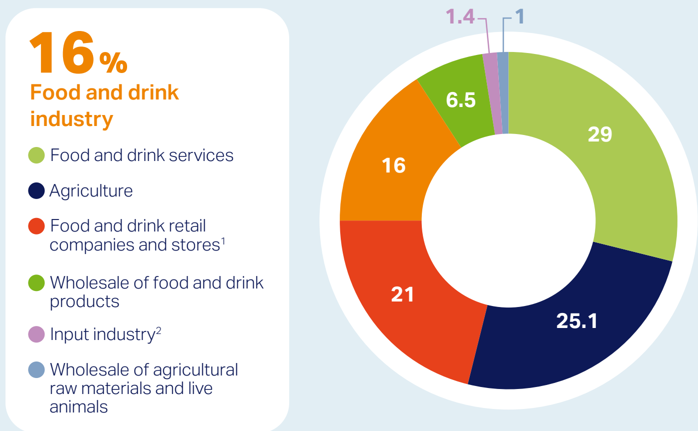


Number of companies in the EU food supply chain
(2023, 1,000)

Persons employed in the EU food supply chain
(2023, million)



Employment in the EU extensive food supply chain
(2023, %)



Source: Eurostat (Agriculture, National Accounts, SBS)

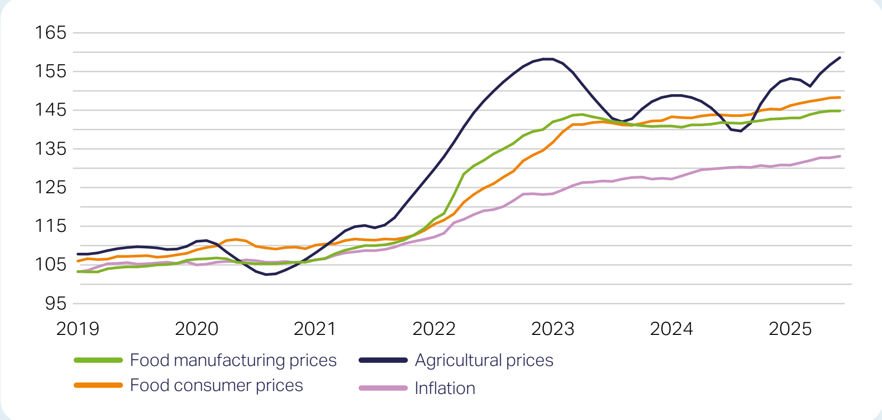
[1] Specialised and non-specialised stores with food and drinks predominating
[2] 2017 data for fertilisers industry

Price and input cost trends in the EU food supply chain

Developments across energy, packaging, and supply chain prices

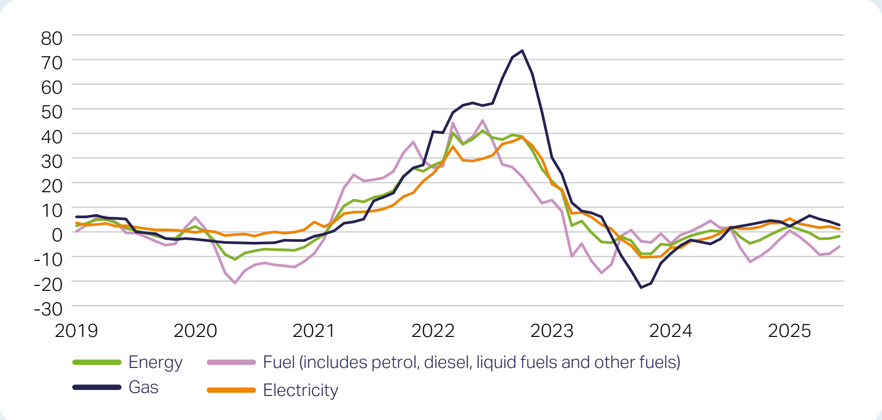
- In June 2025, prices in the EU food supply chain increased compared to the same month in 2024: agricultural prices (+10.8%), food manufacturing prices (+2.1%), food consumer prices (+3.1%), and general inflation (+2.3%).
- Energy annual inflation was down by 1.8% in June 2025 compared to June 2024. The sub-components showed a mixed picture, with fuel (including petrol, diesel, liquid fuels and other fuels) at -6%, gas at +2.8%, and electricity at +1.2%.
- Packaging price trends showed mixed movements year-on-year in June 2025, with decreases in paper and plastic materials alongside small increases in wooden and metal packaging.

Price developments in the EU food supply chain, January 2019 – June 2025
(index, 2015 = 100)



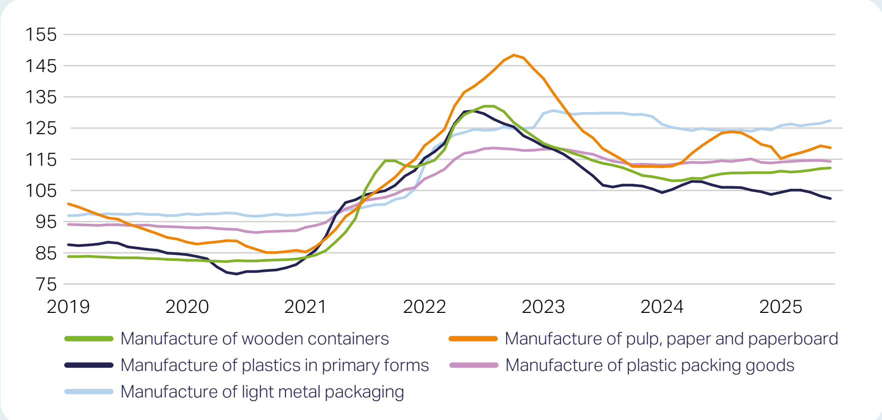
Source: Eurostat (Prices); DG Agriculture and Rural Development

Evolution of energy prices in the EU, January 2019 – June 2025
(% annual rate of change)



Source: Eurostat

Producer prices for different types of packaging, January 2019 – June 2025
(index, 2021=100)



Source: Eurostat (STS)

Revenue and investment

Margins under pressure from increasing costs

€108 billion

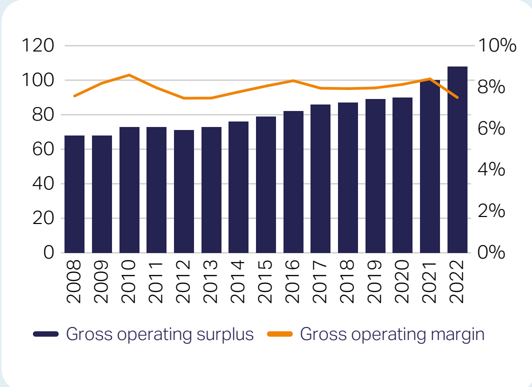
EU gross operating surplus

#1 in manufacturing

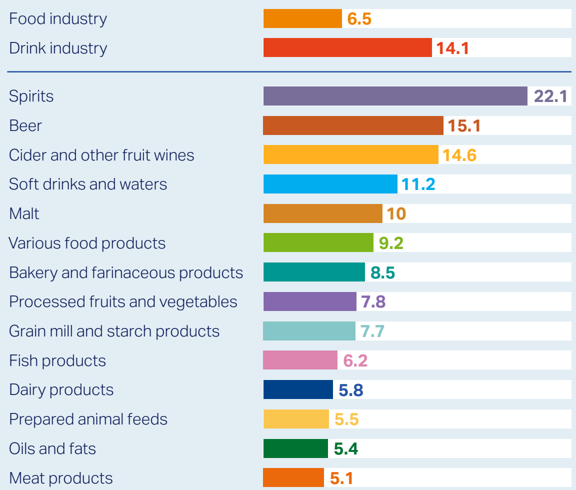
Investment in physical assets

- The gross operating surplus in the EU food and drink industry rose from €67.7 billion (2008) to €108 billion (2022), driven largely by higher turnover rather than by improved profitability.
- Gross operating margins have remained stable at around 8% since 2014 but fell by 0.9% in 2022 due to rising input costs, with pressures continuing in 2023–2024.
- The food and drink industry is the largest investor in physical assets in the EU manufacturing sector, with gross investment rising by about 50% between 2008 and 2023, reaching €52 billion.
- Out of the world's top 2000 companies for R&D private investment, 32 operate in the food and drink industry. Together, these companies invested €9.9 billion in R&D in 2023, €2 billion of which was invested by 8 food and drink companies based in the EU.
- These 8 EU companies are located in France, the Netherlands (2), Belgium, Denmark, Germany and Ireland (1).

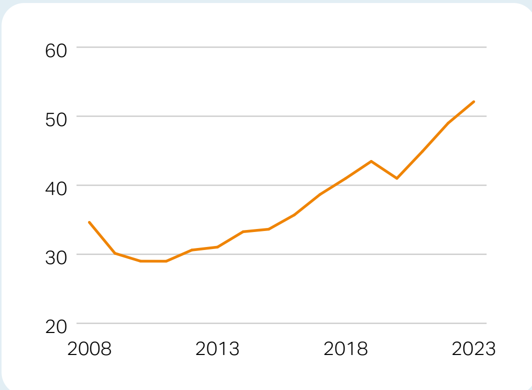
Gross operating surplus and margins in the food and drink industry, 2008–2022 (€ billion and %)



Gross operating margins in the food and drink industry sectors, 2022 (%)



Gross investment in physical assets by the EU food and drink industry (€ billion)



Source: Eurostat (SBS) and The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

R&D private investment of food and drink companies listed in the world's top 2000 companies by R&D (2023)

	R&D investment (€ billion)	R&D investment (% of total)	Number of companies
TOTAL	9.9	100	32
Switzerland	2.1	21.2	1
EU	2	20.2	8
US	1.6	16.2	9
UK	0.9	9.1	1
Japan	0.7	7.1	4
China	0.6	6.1	6

Source: Joint Research Centre

Financing gap for investment in the EU agri-food sector

Unmet financing demand from SMEs and cost of the transition in agriculture

€5.5 billion
SMEs financing gap

€28-35 billion
Cost of EU-wide transition to more sustainable agriculture (1st year)

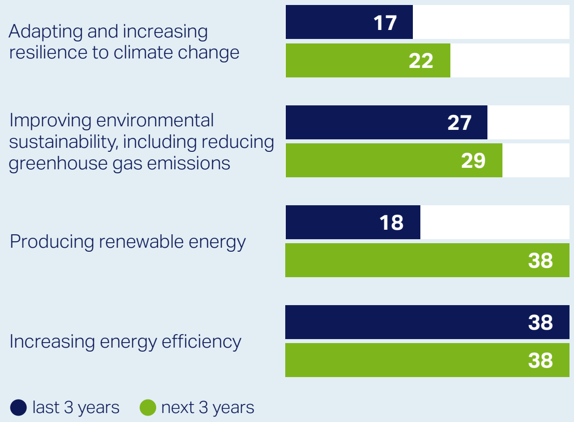
- In 2022, there was a €5.5 billion financing gap for EU-24 agri-food enterprises. Out of this financing gap, €4 billion or 73% corresponds to small enterprises.
- The financing gap was 53% lower than in 2017. It declined more for small companies (-59%) than for medium-sized ones (-25%). The decrease is mostly driven by lower demand for long-term loans (-70%) with reduced average loan size.
- In 2022, the financing gap for agri-food SMEs who intended to invest for green purposes accounted for €1.3 billion, 24% of the total. The activities targeted for investment were, in the first place, increasing energy efficiency.
- An EU-wide transition to more sustainable agriculture, based on improved soil health, will cost around €28-35 billion for the first year. Costs, which vary from one Member State to the other, are expected to decrease in the long term and will be lower than the cost of no action. The EU estimates that soil degradation already costs around €50 billion per year due to the loss of essential services that good quality soils provide.

Financing gap by enterprise size and financial product (2022, € million)

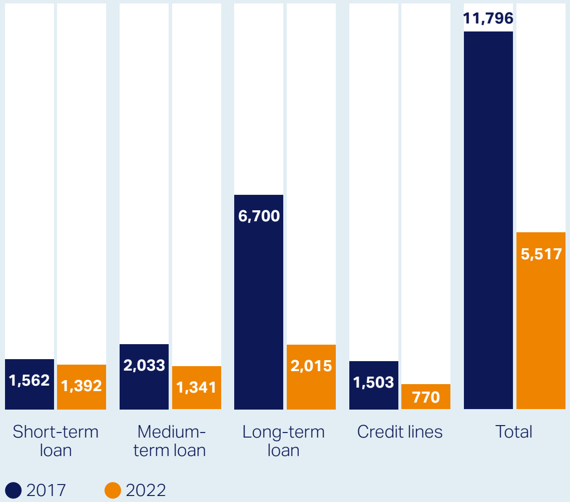
	Total	Short-term loan	Medium-term loan	Long-term loan	Credit lines
Small	4,029	805	908	1,880	435
Medium	1,489	587	432	134	335
Total	**5,517**	**1,392**	**1,341**	**2,015**	**770**

Note: short-term loans (less than 18 months); medium-term loans (between 18 months and 5 years); long-term loans (above 5 years); credit lines (bank and credit card overdraft)

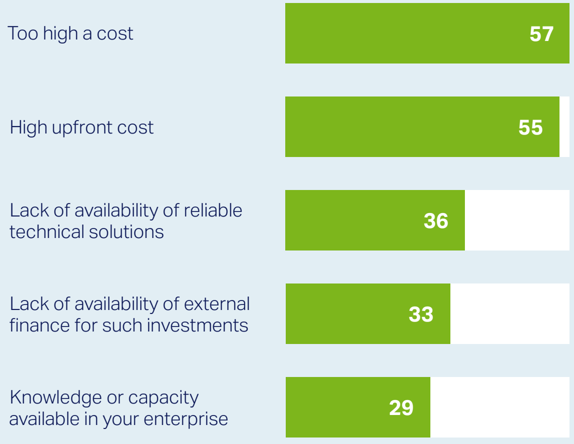
Financing gap by financial product (€ million)



Frequency of green investment categories (2022, %)



Main obstacles to green investments (2022, %)



Note: 'Other' 5%; 'don't know' : 4%; None 7%

Source: fi-compass, 2023, Survey on financial needs and access to finance of EU agri-food enterprises (24 EU Member States)

Bioeconomy

The food and drink industry: a key contributor to the bioeconomy

5%

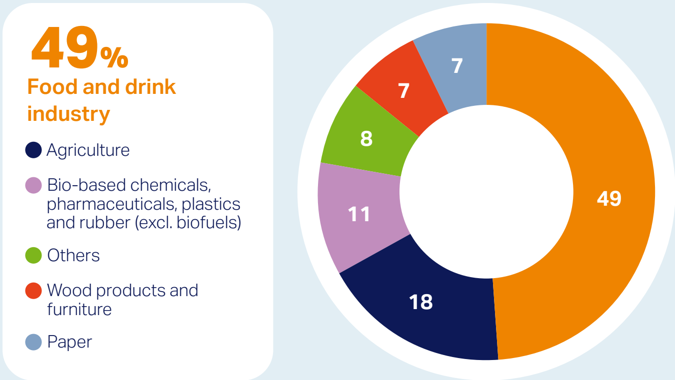
Contribution of the bioeconomy to the EU gross domestic product (GDP)

8%

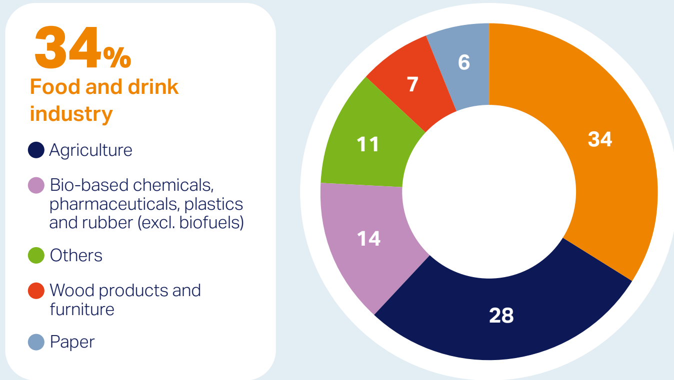
Share of the bioeconomy in European labour force

- The EU bioeconomy generated a turnover of €3.1 trillion and a value added to €863 billion in 2023. The food and drink industry contributes to roughly half and one-third respectively.
- In 2023, the bioeconomy employed 17.1 million people in the EU, of which more than one quarter was in the food and drink industry.
- During the last decade, the value added of the EU bioeconomy and the value added of the food and drink industry contribution have been steadily increasing.

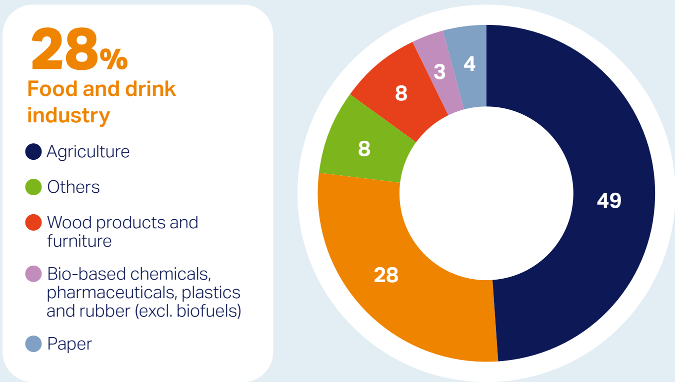
Turnover in the EU bioeconomy (2023, %)



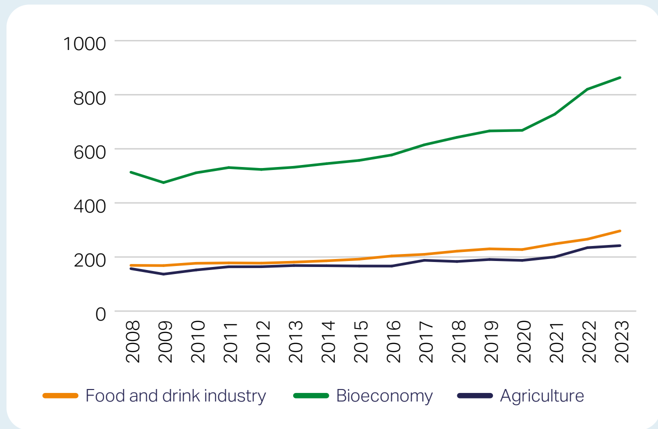
Value added in the EU bioeconomy (2023, %)



Employment in the EU bioeconomy (2023, %)



Value added in the EU bioeconomy (billion €)



Source: Joint Research Centre

Sustainability

Delivering more sustainable food systems

5th

Rank of the food and drink industry[1] in terms of GHG emission in manufacturing

- Scope 1 and 2 emissions make up for 12% of the total EU food and drink industry emissions. Scope 3 represents 88% of the total emissions, out of which 73% come from the primary production of agricultural raw materials.
- Around 58 million tonnes of food were lost or wasted in the EU in 2023, which represents around 130 kg of food waste per inhabitant.
- The food and drink industry uses 9% of all water used in manufacturing, behind manufacturing of chemicals and pharmaceuticals (56%), paper (19%) and basic metals (11%).

Overview of GHG emissions of all 3 scopes for the food and drink sector

Scope 3 Upstream Emissions

Primary production: 509.39 $MtCO_2eq$ (73%)

Packaging: 62.53 $MtCO_2eq$ (9%)

Scope 1 & 2 Emissions

Food and drink: 84.2 $MtCO_2eq$ (12%)

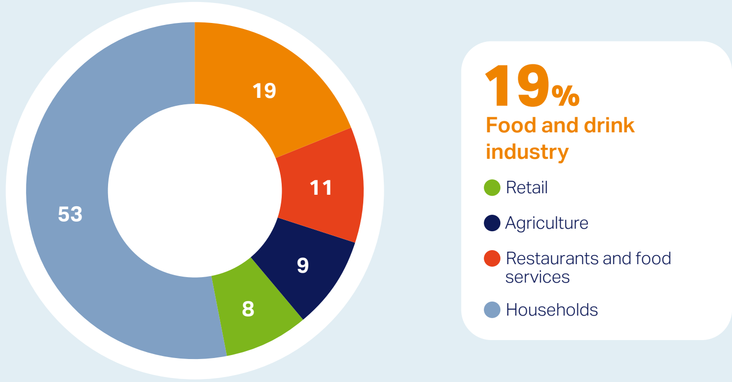
Scope 3 Downstream Emissions

Distribution: 36.04 $MtCO_2eq$ (5%)

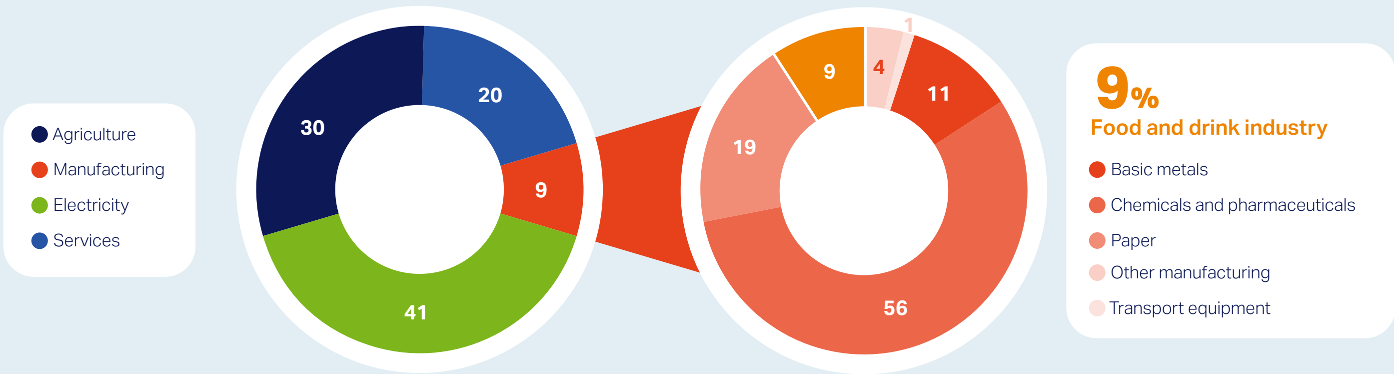
Waste management: 5.74 $MtCO_2eq$ (1%)

Source: Anthesis and FoodDrinkEurope, Net Zero Pathway for the European Food and Drink Sector, 2025

Food waste in the EU by supply chain level (2023, %)



Water use by sector and in manufacturing (%)



Source: Eurostat

[1] Including tobacco industry

Consumption

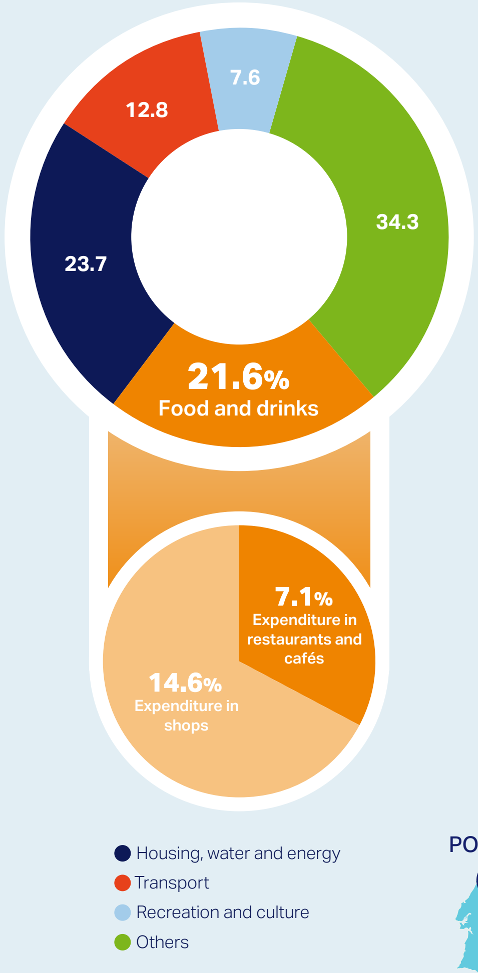
Food and drinks[1]: the second largest household expenditure

€1,934 billion
EU household expenditure on food and drinks

21.6% Average share of EU household expenditure on food and drinks

- In 2023, EU consumers spent €1,934 billion, or 21.6% of their budget on food and drinks, either purchased in shops or consumed in restaurants and cafés.
- Out-of-home consumption of food and drink products represents almost a third of total consumer spending.
- Across Member States, the share of overall household expenditure on food and drink products, including out-of-home consumption, varied from 18% to 31% (12% to 25% when considering only food and drinks purchased in shops).
- Although market spending grew rapidly, volumes of food and drink consumption declined in 2023. Between 2021 and 2023, food volumes fell by 7% and non-alcoholic drink volumes by 5%.

Breakdown of EU household consumption expenditure (2023, % of total expenditure)



Household consumption expenditure on food and drinks by Member State (2023, % of total expenditure)

[1] Either purchased in shops or consumed in restaurants and cafés

Source: Eurostat (National Accounts)

European Union

Trade within the Single Market

The first market for EU food and drinks

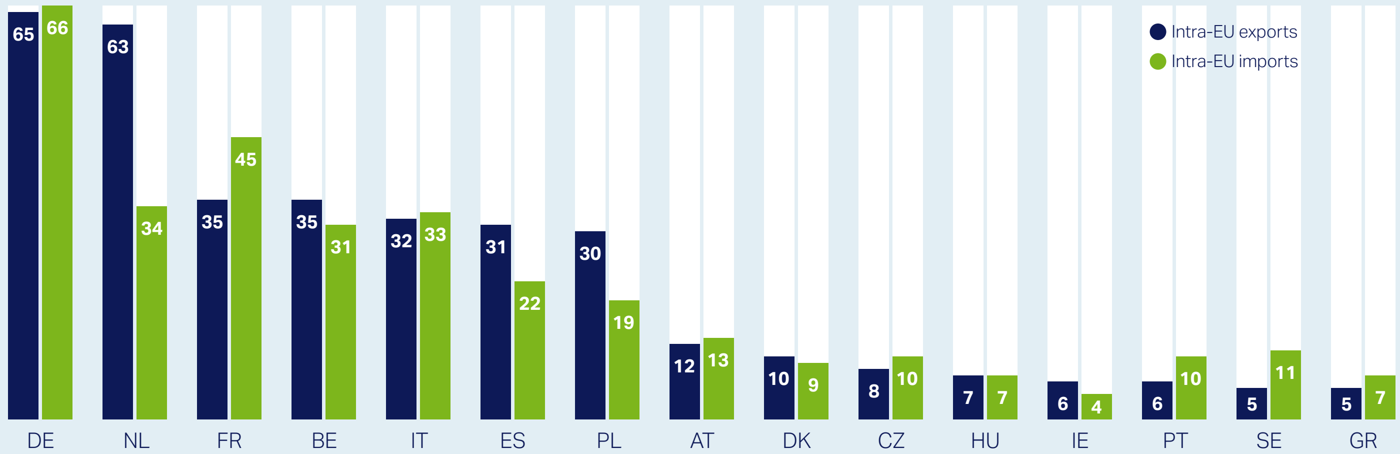
€373 billion
Intra-EU exports

€190 billion
Extra-EU exports

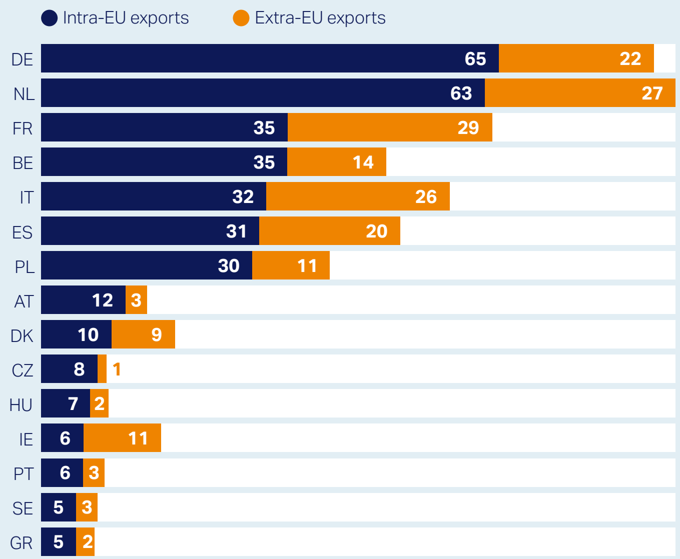
€563 billion
Total EU exports

- More than 65% of EU food and drink exports are destined for the Single Market.
- Germany is the EU Member State with the highest value of intra-EU trade in food and drinks.
- Except for drinks, exports in most sectors to the Single Market exceed those to third countries.

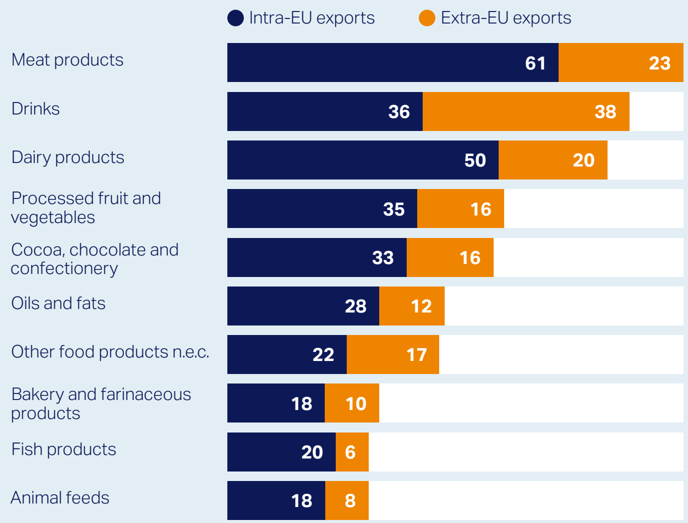
Intra-EU food and drink trade of the top 15 exporters (2024, € billion)



Intra and extra-EU food and drink exports of the top 15 intra-EU exporters (2024, € billion)



Intra and extra-EU food and drink exports of main sectors (2024, € billion)



Source: Eurostat (Comext)

Trade figures

International trade: creating new market opportunities and unlocking opportunities for diversification

€190 billion Exports

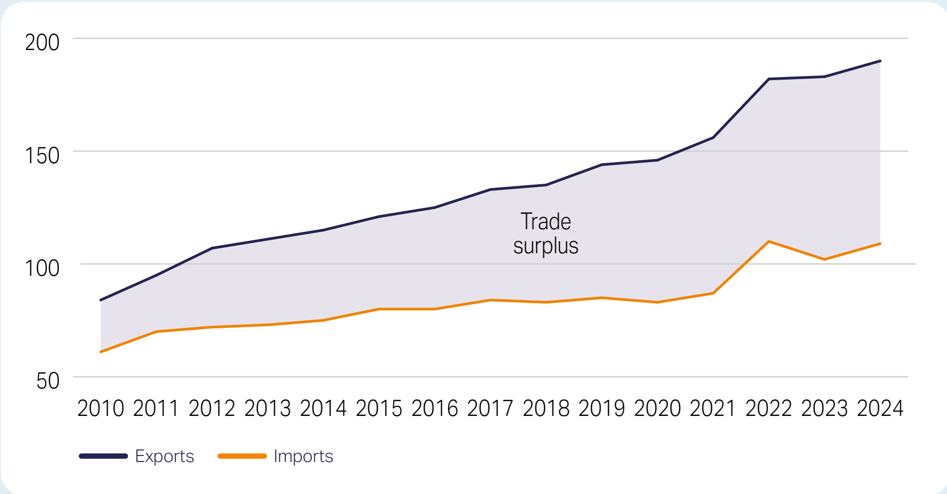
€109 billion Imports

€81 billion Trade balance

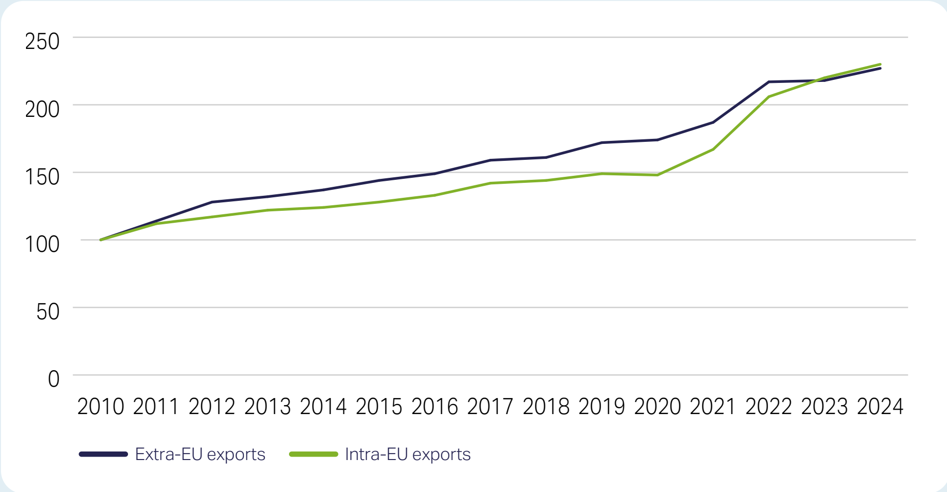
- A third of EU total food and drink exports were sold to non-EU markets. During the 2015–2024 period, extra-EU exports increased on average by 5% per year, and intra-EU exports by 7% per year.
- EU food and drink exports increased for the 14th consecutive year (+4% compared to 2023) to reach €190 billion, while imports amounted to €109 billion (+6.4% compared to 2023).
- EU food and drink accounted for 7% of the EU's total goods exports, making it a leading export sector after machinery and equipment, chemicals, and other manufactured goods. With a trade surplus of €81 billion, the industry is also a key contributor to the EU's overall trade balance.
- Export growth to 16 of the EU's top 20 markets was positive during the 2023–2024 period. A similar trend was observed for imports, with imports up from 15 out of the EU's top 20 sourcing markets.
- USMCA countries (US, Canada, Mexico) remain by far the EU's largest trading partner by region, followed by the EFTA states (Iceland, Liechtenstein, Norway and Switzerland), the Southern Mediterranean and Turkey, and the Greater China region.

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

Evolution of extra-EU food and drink trade (€ billion)



Evolution of extra and intra-EU exports (index, 2010=100)



Source: Eurostat (Comext)

EU food and drink trade flows with key regions (2024, € million)

Source: Eurostat (Comext)

Top EU trading partners

Export markets	2024 € million	% change 2023–2024
UK	44,660	▲ 4
US	27,817	▲ 11
China	11,209	▼ 7
Switzerland	8,871	▲ 5
Japan	6,200	▲ 3
Norway	5,197	▲ 4
Canada	4,485	▲ 10
Russia	4,395	▼ 13
Australia	4,079	▲ 11
Korea	4,010	▲ 5

Import origins	2024 € million	% change 2023–2024
UK	13,853	▲ 3
Brazil	7,308	▼ 10
US	6,538	▲ 7
China	6,327	▲ 7
Ukraine	5,856	▲ 27
Argentina	5,442	▲ 22
Türkiye	5,402	▲ 19
Switzerland	4,795	▲ 4
Indonesia	3,591	▼ 2
Norway	3,222	▲ 4

Trade figures by sector

International trade success backed by strong EU food and drink sectors

42%

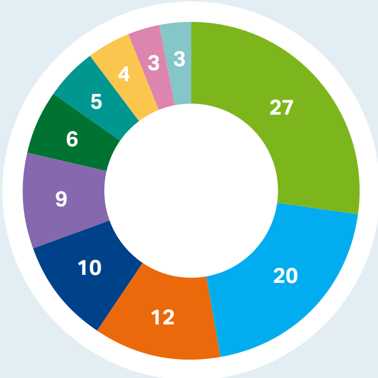
Combined export market share of the drinks, meat and dairy sectors

55%

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

- Sectors with the highest growth in exports: cocoa, chocolate and confectionery, condiments and seasonings, processed tea and coffee.
- Sectors with the highest growth in imports: cocoa, chocolate and confectionery, condiments and seasonings, and processed fruits and vegetables.
- The combined exports of the EU drinks, meat, and dairy sectors totalled €81.1 billion in 2024. The "various food products" category, which includes goods like chocolate, biscuits, confectionery and food preparations, generated exports worth €50.5 billion.

Sectors in EU food and drink exports (2024, %)



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

Source: Eurostat (Comext)

Exports and imports by sector (2024, € million)

	Exports		Imports	
	2024 € million	% change 2023–2024	2024 € million	% change 2023–2024
Drinks	38,187	-2	8,695	-0.4
of which: wine	16,800	-2	1,488	-5
spirits	8,728	-4	4,380	-3
beer	3,800	-1	743	-3
mineral waters and soft drinks	6,605	1	1,982	11
Various food products	50,537	11	20,719	15
of which: cocoa, chocolate and confectionery	15,631	21	7,667	55
processed tea and coffee	4,464	10	3,014	4
condiments and seasonings	4,072	11	1,728	17
Meat products	22,984	2	8,020	0.2
Dairy products	19,943	0.4	2,520	6
Processed fruits and vegetables	16,247	6	17,421	14
Oils and fats	12,023	8	22,617	5
Bakery and farinaceous products	9,796	4	1,881	12
Animal feeds	7,765	4	2,839	12
Grain mill and starch products	6,465	1	3,854	2
Fish products	6,029	-0.3	20,293	-0.4

Trade figures by product

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

>100

EU food and drink product categories exported

>200

Export markets

- Wine and food preparations are the EU's key exports by product, with values exceeding €16 billion and €10 billion respectively in 2024.
- Exports increased in 7 out of the EU's top 10 product categories, while the most significant declines were recorded for spirits, wine, and pork meat.
- Imports increased in 7 out of the EU's top 10 product categories, while the most significant declines were recorded for palm oil, fish fillets, and spirits.

Top 10 EU food and drink exports and imports by destination and origin (2024)

Exports

	€ million	% change 2023–2024	Top 3 destinations
Wine	16,798	-2	US, UK, Switzerland
Food preparations, not specified	10,857	8	UK, US, China
Bread, pastries and biscuits	10,147	5	UK, US, Switzerland
Animal feeds, pet foods	9,641	0.4	UK, Norway, Switzerland
Chocolate	9,118	12	UK, US, Russia
Spirits	8,728	-4	US, UK, China
Malt extract and food preparations, including infant food	8,651	0.1	China, UK, Saudi Arabia
Cheese	8,462	4	UK, US, Switzerland
Pork meat fresh, chilled and frozen	6,219	-2	Japan, UK, China
Olive oil	5,594	47	US, Brazil, UK

Imports

	€ million	% change 2023–2024	Top 3 origins
Animal feeds, pet foods	13,121	1	Brazil, Argentina, China
Fish fillets	5,771	-4	Norway, Iceland, China
Spirits	4,380	-3	UK, US, Mexico
Palm oil	4,118	-14	Indonesia, Malaysia, Guatemala
Food preparations, not specified	3,530	12	UK, US, Switzerland
Prepared of preserved fish	3,276	6	Ecuador, Morocco, China
Juices	2,854	24	Brazil, Vietnam, Costa Rica
Sunflower oil	2,750	38	Ukraine, Serbia, Moldova
Cocoa butter, fat and oil	2,519	122	Côte d'Ivoire, Ghana, Cameroon
Beef meat fresh, chilled and frozen	2,426	9	Argentina, UK, Brazil

Source: Eurostat (Comext)

EU position in global food and drink trade

A leading player on the world stage

#1

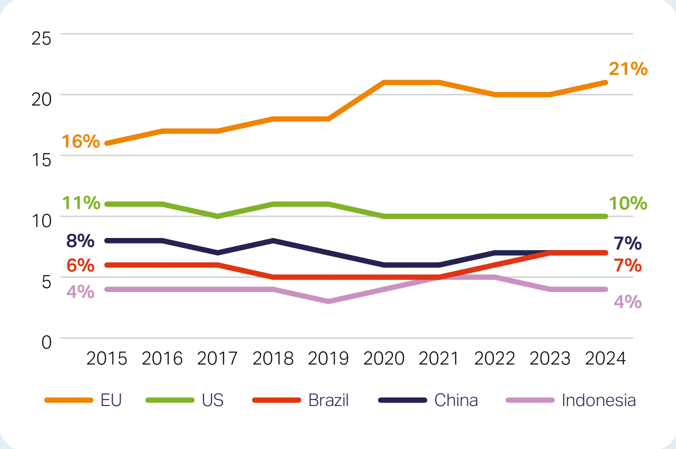
exporter of food and drinks

#2

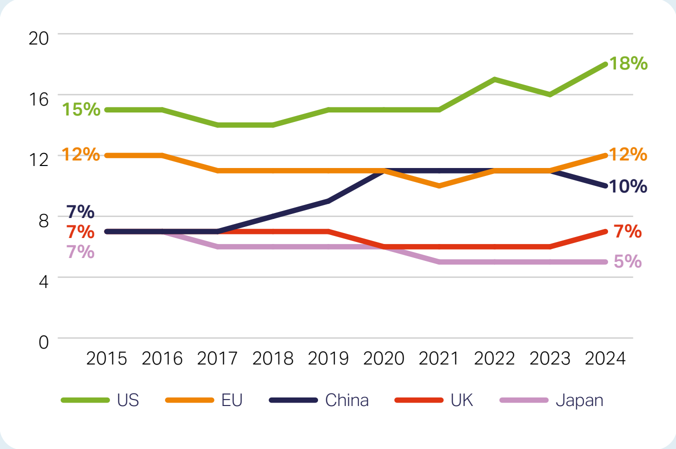
importer of food and drinks

- The EU is the world's largest exporter of food and drinks, ahead of the US, Brazil, China, and Indonesia.
- The EU is the second-largest importer, after the US and ahead of China, the UK, and Japan.
- From 2020 -2024, the EU's share of food and drink imports fell among several major trading partners, contrasting with small increases in Switzerland and Australia.

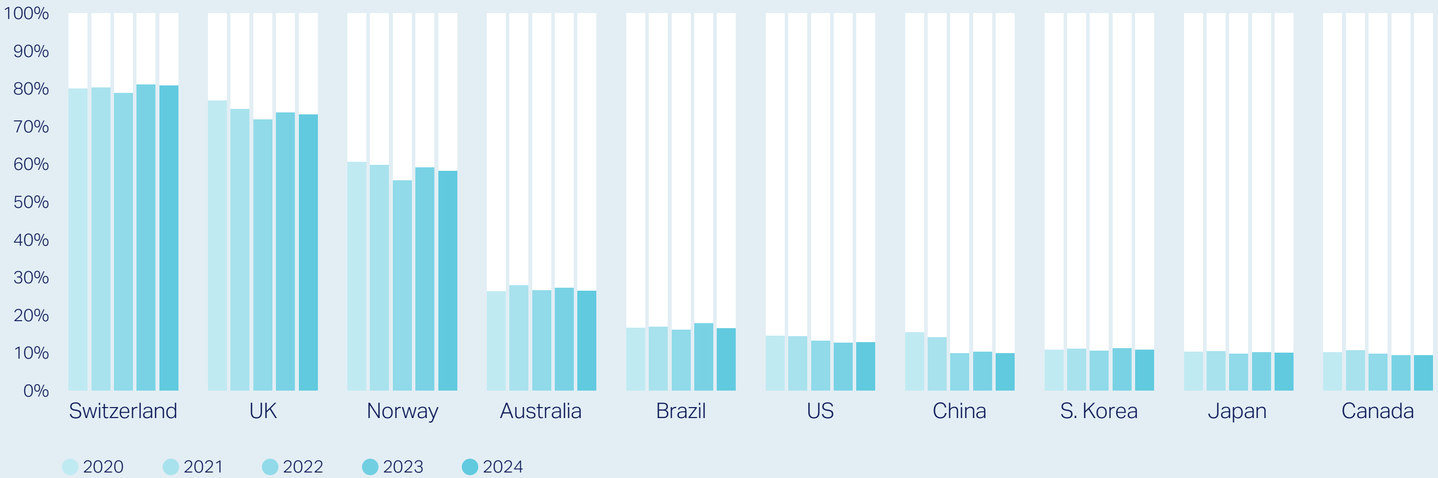
Share of world food and drink exports



Share of world food and drink imports



EU products in total food and drink imports of selected countries (2020–2024, %)



Source: UN COMTRADE

Innovation and consumer trends

Innovation key to greater consumer choice

Pleasure

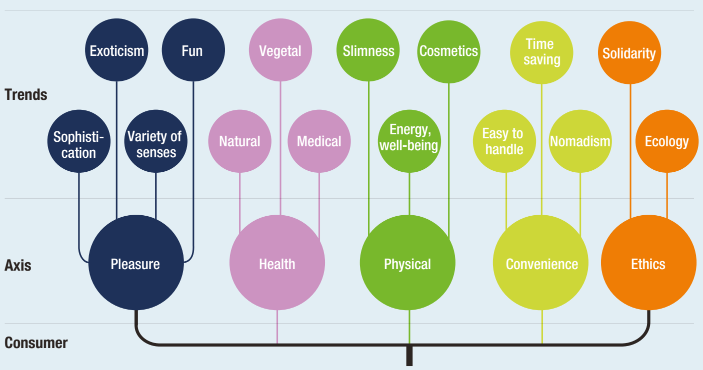
Leading driver of food innovation in Europe

#1

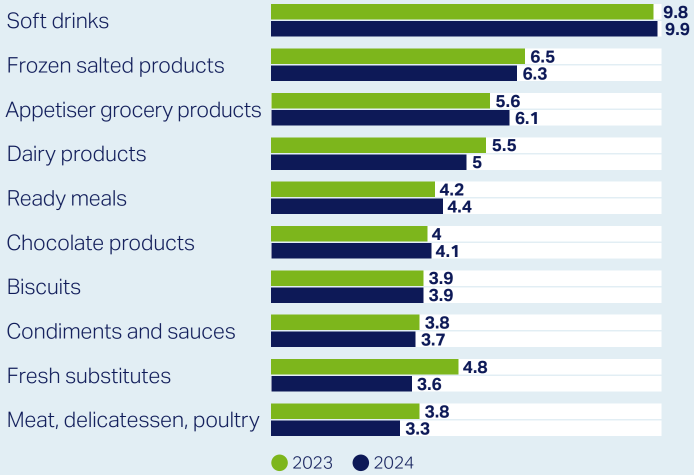
Soft drinks are the world's most innovative food sector

- 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 remains the leading driver of food innovation, accounting for 56.8% of the innovative offering in 2024.
- Health-oriented innovation continues to decline in 2024, yet it still holds the second position.
- Soft drinks remain the most dynamic category for innovation in 2024.

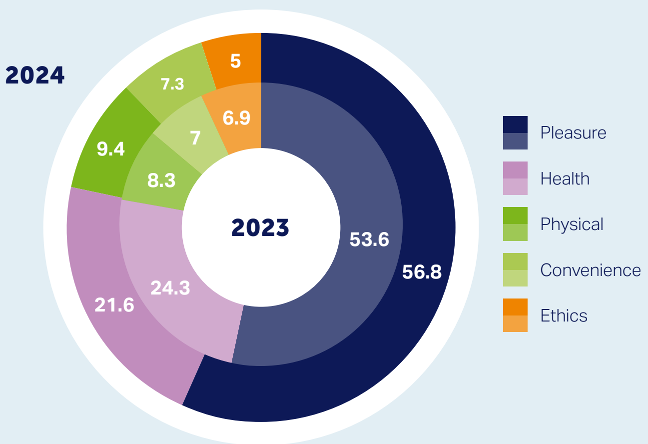
Food innovation trends



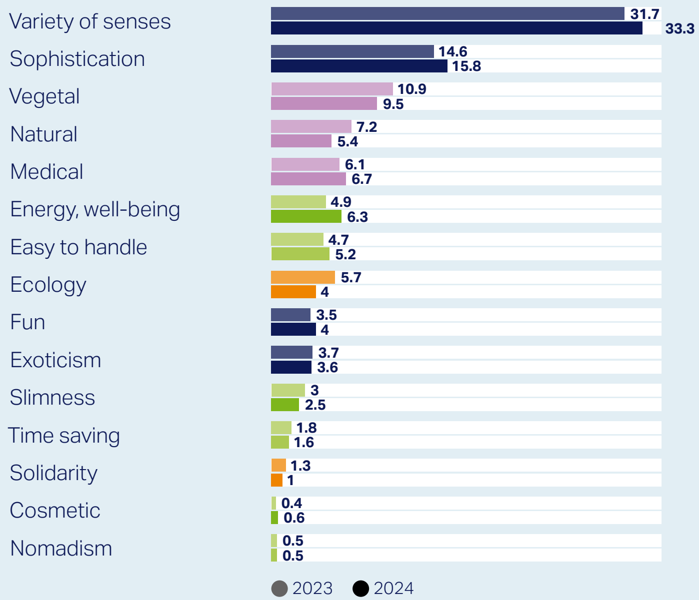
The world's 10 most innovative food sectors (%)



Drivers of innovation in Europe (%)



Food innovation trends in Europe (%)



Source: World Food Innovation Barometer by ProtéinesXTC

Competitiveness of the EU food and drink industry versus major competitors

Strong but US growing faster

€250 million

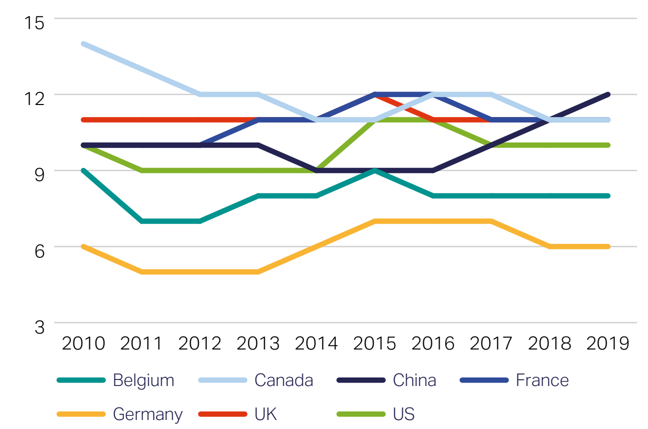
EU value added, making it the largest globally

- From 2010 to 2021, gross value added grew by 50% in the EU, lagging behind the United States, where it expanded by 71%.
- The EU has the lowest labour productivity among Canada, the UK, and the US; in 2021, US productivity (€130,000 per employee) was 2.4 times higher than the EU level (€54,000 per employee).
- Gross operating margins remain broadly stable across countries (6–14%), with Canada and the US consistently higher, and Germany the lowest.

Structure of the food and drink industry in the EU and 4 competing countries (2012–2022)

	Turnover (€ billion)			Persons employed (million)		
	2012	2022	% change 2012–22	2012	2022	% change 2012–22
EU	**950**	**1,441**	**52**	**3.5**	**4.7**	**33**
Canada	78	118	52	0.3	0.3	15
China	363	495	37	3.1	2.7	-11
UK	114	153	34	0.4	0.5	29
US	652	1,019	56	1.6	1.7	10

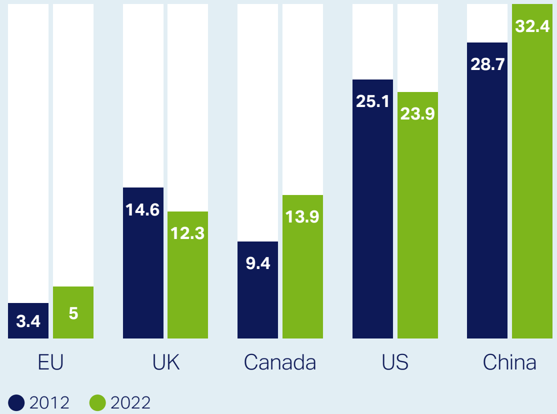
Gross operating margins in the food and drink industry (%)



Gross value added, person employed and labour productivity in the food and drink industry in the EU and 4 competing countries

	2021			2010–21 change	
	Gross value added (€ million)	Persons employed 1,000	Labour productivity (€1,000/ person/year)	Gross value added (%)	Labour productivity (%)
EU	**250,284**	**4,659**	**54**	**50**	**35**
Canada	52,809	300	176	28	-7
China	-	2,903	-	-	-
UK	38,000	456	83	32	9
US	213,470	1,638	130	71	51

Turnover per enterprise in the food and drink industry (€ million)



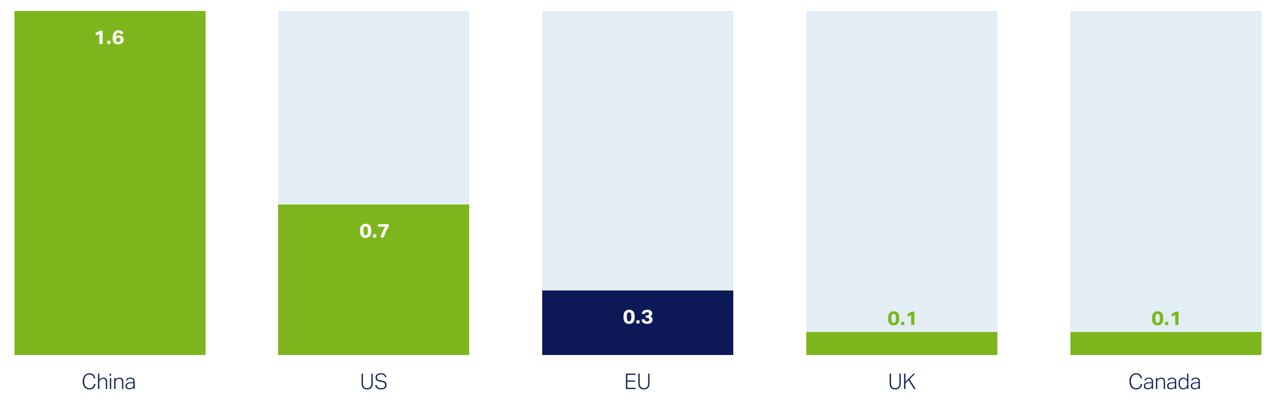
Source: Eurostat (SBS) and The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

0.3%

EU R&D investment intensity in the food and drink industry

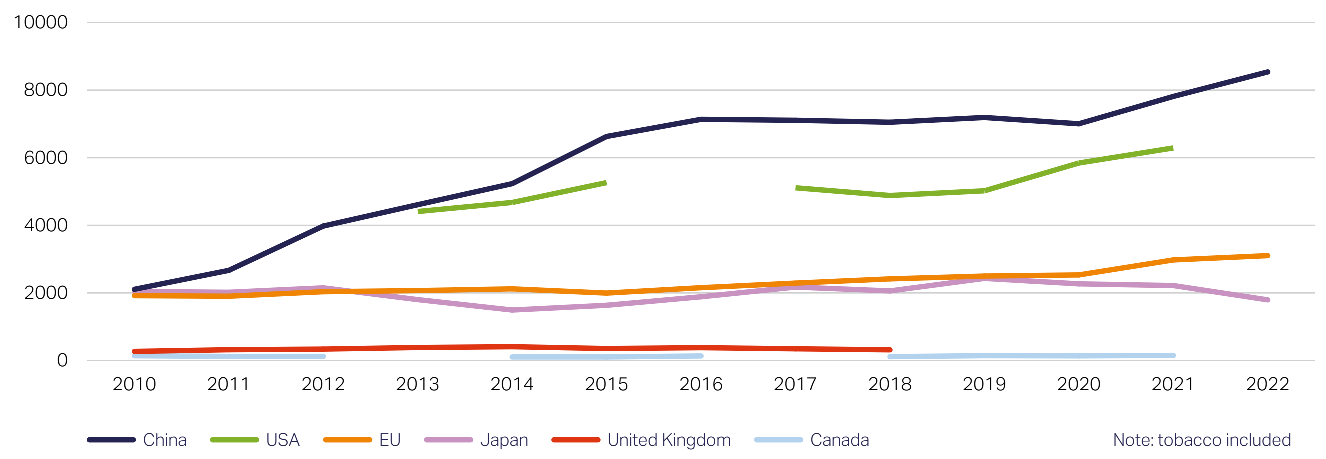
- In 2021, the EU devoted 0.3% of turnover to R&D, above Canada and the UK but over five times lower than China and less than half the US level.
- EU intramural R&D spending rose 62% (2010–2022), from €1.9 billion to €3.1 billion. France, the Netherlands and Germany contributed to nearly half of the R&D expenditures in EU food and drink industry.
- The US invested €6.3 billion in 2021 (+43% since 2013), while China showed the strongest growth, reaching €8.5 billion in 2022—four times its 2010 level.

R&D expenditures in the food and drink industry as % of turnover (2021)



Source: The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Intramural R&D expenditures of food and drink industry (€ million)



Source: The EU food and drink industry: a competitiveness analysis, Wageningen Social & Economic Research, February 2025

Food future

Availability of resources and sustainable production

9.7 billion

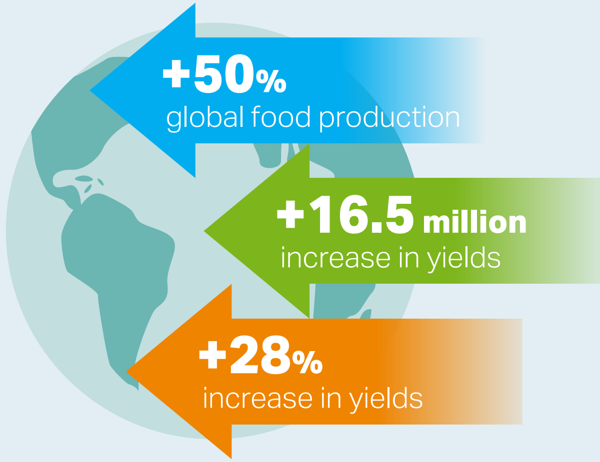
Global population in 2050

50%

Increase in global food production by 2050

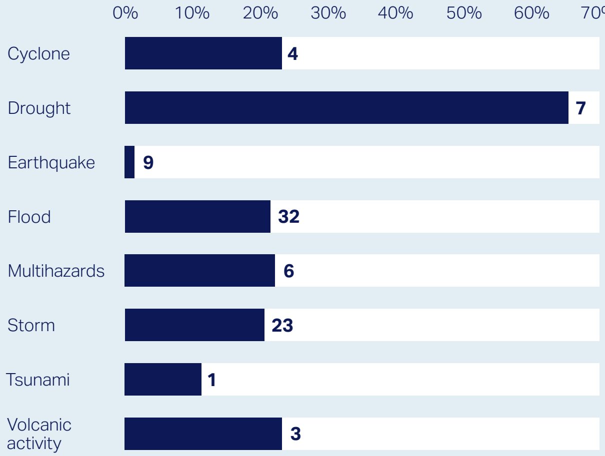
- Population and income growth will continue to drive food demand. Meeting the additional demand will depend on the availability of resources and capacity to boost sustainable production.
- In 2024, 2.6 billion people in the world could not afford a healthy diet. Women and people living in rural areas were particularly affected. 8.2% of global population faced hunger, a slight decrease from previous years.
- At global level, agricultural losses make up an average of 23% of the total impact of disasters across all sectors. Drought is the single largest driver of disaster-related agricultural losses.
- Food production is responsible for 26 % of global greenhouse gas emissions, out of which 82% come from agricultural activities.

Meeting global demand for food by 2050



Source: FAO

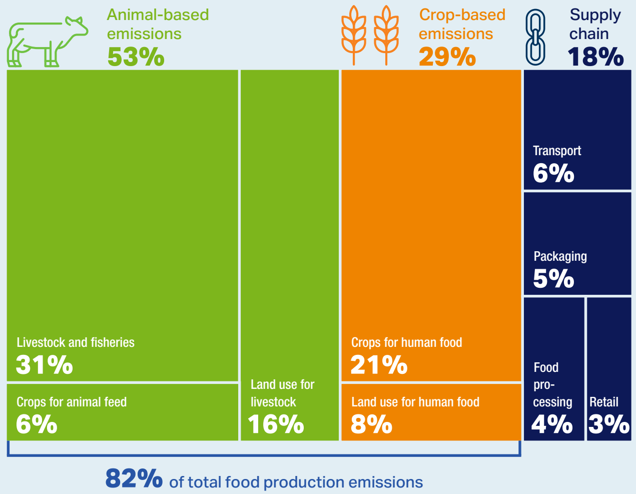
Share of loss in agriculture by hazard type (%)



Note: Figure to right of bar corresponds to total number of events.

Source: FAO, The impact of disasters on agriculture and food security, 2023

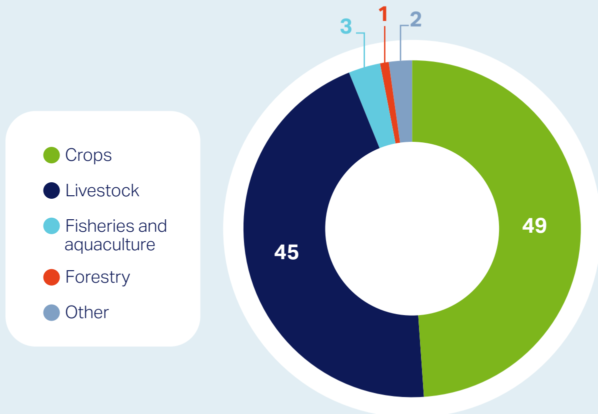
Global greenhouse gas emissions from food production



Source: European Court of Auditors, 2021

Breakdown of losses in agriculture by subsectors

(2007–2022, %)



Global food and nutrition security challenge

Around
673 million
people faced **hunger** in 2024 (8.2% of global population) – decrease from 2023 (8.5%) and 2022 (8.7%)

2.6 billion
people could not afford a **healthy diet** in 2024. Global median food price inflation rose from 2.3% in 2020 to 13.6% in 2023

In 2024, **11.1% of the global population had diabetes**, and 3.4 million deaths have been attributed to this NCD. Disease prevalence expected to rise to 13% by 2050

2.3 billion
people have been moderately or severely **food insecure** in 2024. Food insecurity is more prevalent amongst women and in rural populations

1 in 8
people were **obese** (2022)

35 million
children under the age of 5 were **overweight** in 2024

Sources: The State of Food Security and Nutrition in the World 2025; WHO; Diabetes atlas 2025

Key food and drink companies

Ranking of agri-food companies with operations in Europe[1], by global agri-food sales[2]

Name	Headquarters	Sales (€ billion)[3]	Main sectors
Cargill	US	142.4	multi-product
Nestlé	CH	96	multi-product
PepsiCo, Inc.	US	84.6	beverages, snacks
Archer Daniels Midland Company	US	78.8	multi-product
JBS	BR	71.1	meat, dairy
AB InBev	BE	55.1	beer
Mars	US	50.7	prepared foods, confectionery, pet food
Bunge	US	48.9	multi-product
The Coca-Cola Company	US	43.3	beverages
Heineken	NL	36	beer
Mondelēz International	US	33.6	confectionery, snacks, dairy
Lactalis	FR	30.3	dairy
Danone	FR	27.4	dairy, plant-based, water, baby & medical nutrition
WH Group	CN	23.9	meat
KraftHeinz	US	23.8	multi-product
Unilever	UK	21.7	multi-product
Grupo Bimbo	MX	20.6	bakery
Suntory	JP	18.8	(alcoholic) beverages and foods
Diageo	UK	18.7	alcoholic beverages
Ferrero	IT	18.4	confectionery
General Mills	US	18.1	multi-product
Asahi Group	JP	17.9	(alcoholic) beverages and foods
Keurig Dr Pepper Inc.	US	14.2	hot and cold beverages
Fonterra	NZ	14.1	dairy
Arla Foods	DK	13.8	dairy
FrieslandCampina	NL	12.9	dairy

Name	Headquarters	Sales (€ billion)[3]	Main sectors
dsm-firmenich	CH	12.8	multi-product
Molson Coors	US	12.7	beer
Associated British Foods	UK	12.4	sugar, starch, prepared foods
Kellanova	US	11.7	prepared foods, snacks, cereals
Pernod Ricard	FR	11	alcoholic beverages
McCain Foods	CD	10.9	frozen potato products, appetisers, snacks
Barry Callebaut	CH	10.8	chocolate, cocoa
Carlsberg	DK	10.1	beer
Danish Crown	DK	9.1	meat
JDE Peets	NL	8.8	coffee, tea
Südzucker	DE	8.5	sugar, multi-product
Kerry Group	IE	8	multi-product
Savencia	FR	7.1	dairy
Oetker Group	DE	6.3	multi-product
LVMH	FR	5.9	wines, spirits
IFF	US	5.7	nutrition & biosciences
Roquette	FR	4.5	ingredients
Pladis Global	UK	4	confectionery
Glanbia	IE	3.5	nutrition, ingredients, dairy
Nomad Foods	UK	3.1	frozen food products
Tate & Lyle	UK	2.5	ingredients
Bonduelle	FR	2.2	prepared and frozen vegetables
The GB Foods	SP	1.4	multi-product
Paulig	FIN	1.2	multi-product

[1] Operations in the EU refer to the presence of processing plants in one or more Member States

[2] Based on the most recent complete fiscal year

[3] Figures have been converted to Euro with ECB bilateral annual exchange rates series, but only figures in the original currency are relevant

Glossary

Abbreviation of world regions

ACP
African, Caribbean and Pacific countries

Andean Group
Bolivia, Colombia, Ecuador and Peru

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

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

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

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

Emission scopes
Scope 1 emissions are direct emissions from owned or controlled sources.
Scope 2 emissions are indirect emissions from the generation of purchased energy.
Scope 3 emissions are all indirect emissions (not included in scope 2) that occur in the value chain of the reporting company, including both upstream and downstream emissions.[1]

1 Source : Greenhouse Gas Protocol

EU
EU refers to EU27, unless otherwise specified

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

Greater China region
China, Hong Kong, Macau and Taiwan

Mercosur
Argentina, Brazil, Paraguay and Uruguay

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

USMCA countries
US, Mexico, and Canada

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

Gross operating surplus (GOS)
It is defined as value added minus personnel costs. GOS is the surplus generated by operating activities after the labour factor input has been recompensed.

Glossary

Gross operating margin
It is the ratio of gross operating surplus to turnover.

Gross value added (GVA)
The gross value added is the value of goods and services produced by a sector minus the cost of the raw materials and other inputs used to produce them. GVA measures the contribution to the economy of each individual sector.

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

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

Persons employed
The number of persons employed includes the total number of persons who work in the observation unit (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 (e.g. sales representatives, delivery personnel, repair and maintenance teams).

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

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

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

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Published January 2026