



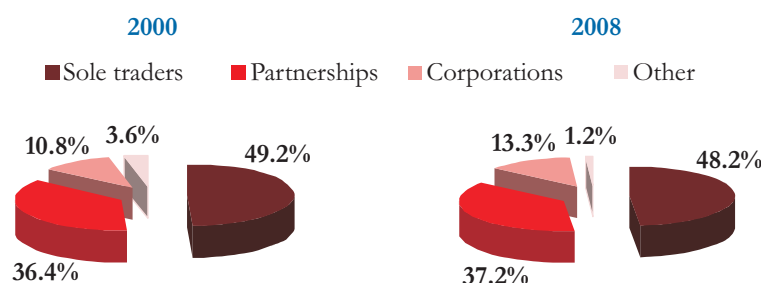
## A PRODUCTIVE VENETO: THE FOOD INDUSTRY

### TRENDS AND GEOGRAPHICAL DISTRIBUTION OF BUSINESSES

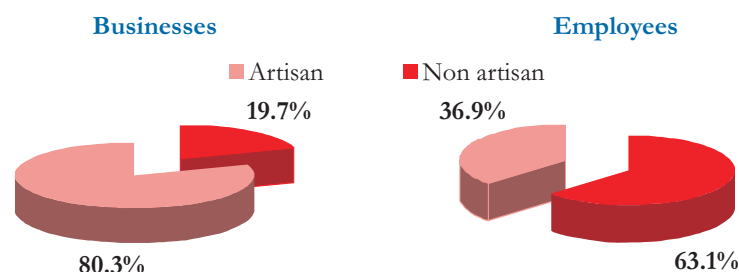


	Number	% variation on the previous year	% variation on 2000	% share of Veneto total
Active businesses in 2008	7,368	2.5	26.6	1.6
Employees 2005	42,920	-1.5	1.8	2.6

#### Businesses by kind of ownership: Veneto



#### Artisan businesses: % share. Veneto - Year 2008



#### Survival rate (\*) of active businesses in the sector. Veneto - Years 2002:2005

active year	years of survival		
	2003	2004	2005
2002	93.9	88.3	83.2
2003	100.0	93.7	88.0
2004		100.0	94.2

survival at three years

survival at two years

survival at one year

(\*) Survival rate at time t+n: % ratio of the number of active businesses at t and the survivors at t+n and number of businesses active at t.

#### Economic aggregates

	Value (mln euro)	% share of Veneto total	% share of the Italian sector
Added value 2006	2,272.9	1.8	9.6
Investments 2005	800.9	2.6	12.8

This issue of Statistics Flash analyses the industrial and geographical structure and trends of the Veneto food industry. This does not include actual farms, but combines various statistical and administrative sources with data for different periods. Italy's local unit register (Asia-Unità Locali), which is compiled by ISTAT, is the main source for analysing production units, and is currently available for the region for 2002-2005. Veneto food companies account for 6.9% of national food production.

In 2005, there was an average of 8.2 employees for each local unit. This figure is more than 4 employees higher than the total regional average, but lower than the average for the manufacturing industry (9.4 employees).

In this sector the share of small firms (sole traders) is less significant than in other sectors. Their number has decreased while the number of corporations has risen.

The number of artisan businesses in this sector is very high compared to that in Veneto industry on the whole.

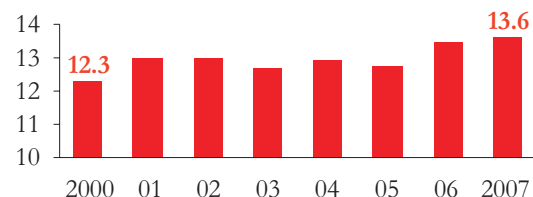
Analysis of the survival of active businesses from 2002 into the following years shows a greater stability of this sector compared to other kinds of firms in Veneto: more than 83% of the businesses in 2002 were still active in 2005 (79.4% for businesses in Veneto in general). In economic terms the food industry produced 1.8% of the total wealth of Veneto and contributed 9.6% of the sector's production on a national level. Taking into account inflation, the long-term estimate (2000-2006) shows a substantial reduction of added value, even though there are signs of recovery for the last two years.

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on InfoCamere and Istat-Asia data 2005

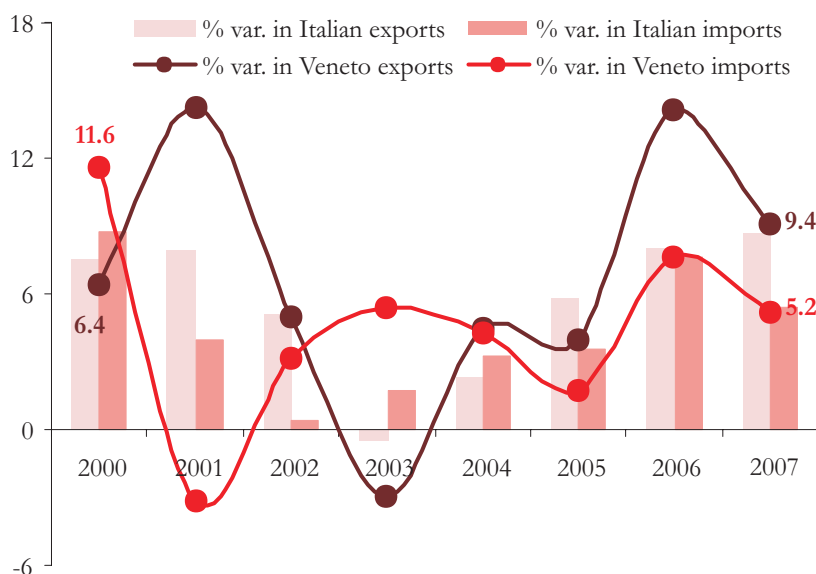
## Foreign trade in food products

	Value (mln euro)	% variation on the previous year	% variation on 2000	% share of the Veneto total	% share of the Italian sector
Exports 2007	3,280.5	9.4	57.9	6.5	13.6
Imports 2007	4,585.1	5.2	11.5	11.5	13.5

### The foreign market share of the food industry. Veneto - Years 2000:2007

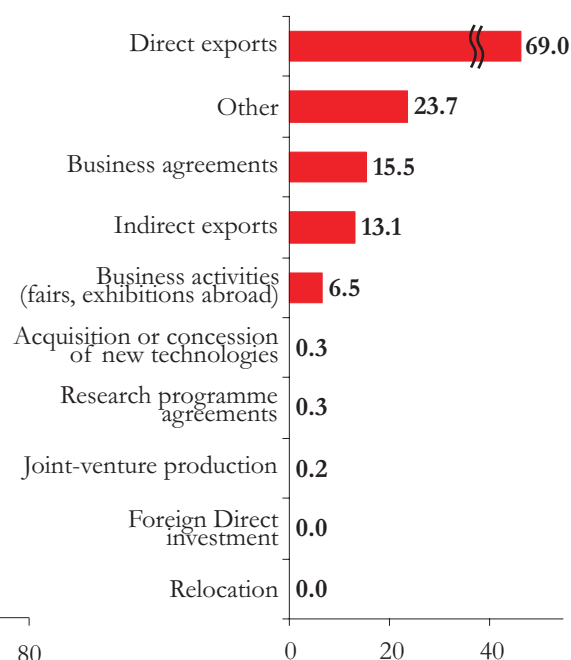


### Trade trends. Veneto and Italy - Years 2000:2007

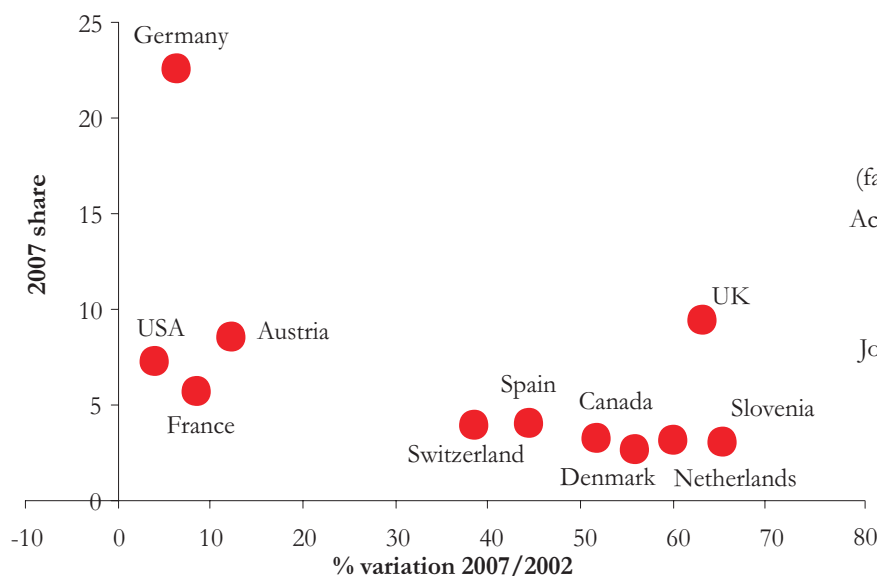


In 2007, the food trade (including wine production) continued to increase, though less so than the previous year. This sector makes up 13.6% of national exports. The main markets are Germany, the United Kingdom, Austria, the United States and France, although exports to Slovenia, the Netherlands and Denmark have risen considerably. About one third of the businesses in the food sector are involved in foreign trade, mainly exports or business agreements.

### Percentage of food-industry businesses by type of foreign economic activity. Veneto - Year 2008

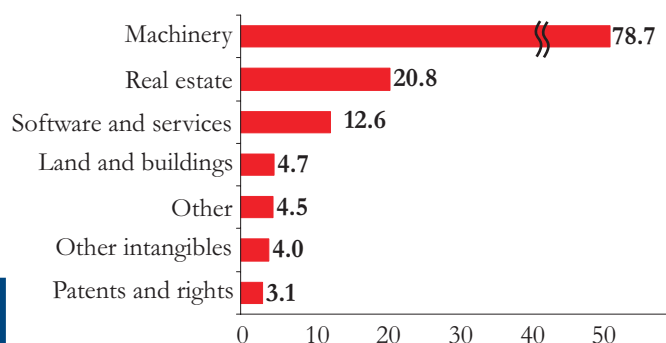


### Leading markets in the sector. Veneto - Years 2002:2007

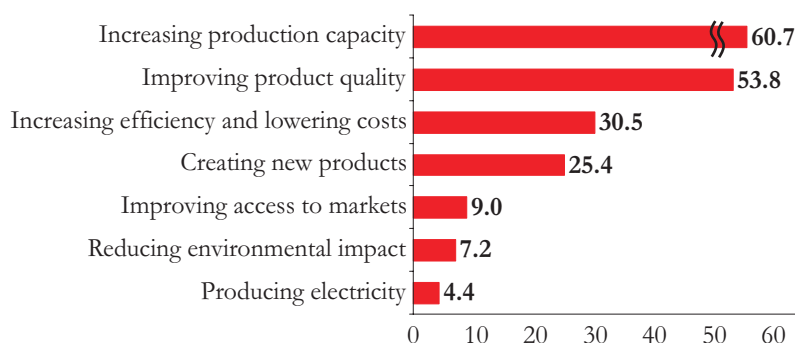


## Investments in the sector (\*)

### Percentage of food-industry businesses by type of investments made. Veneto - Year 2008



### Percentage of food-industry businesses by reasons for investments. Veneto - Year 2008



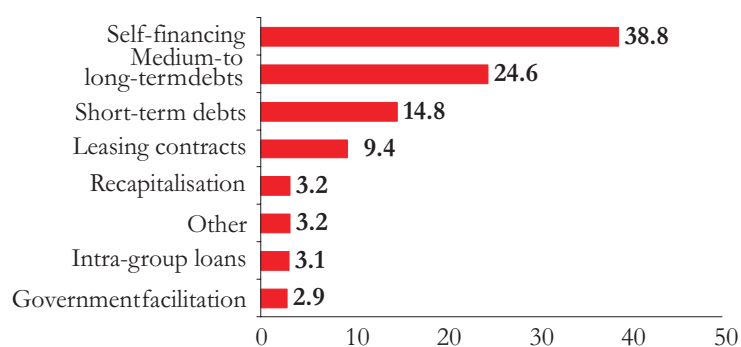
(\*) Multiple answers possible

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat and Indagine MET data

## Financial channels and innovation in the food industry (\*)

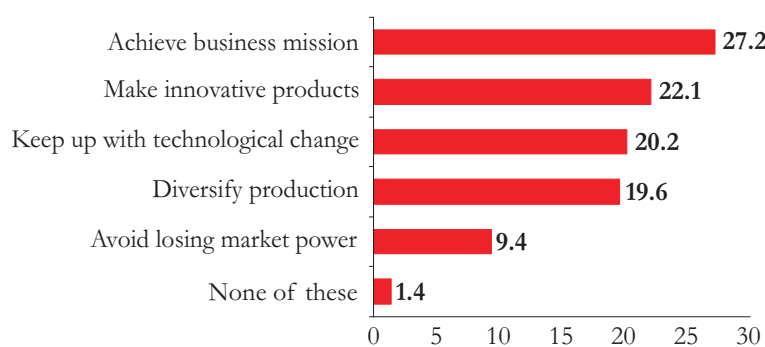
### Percentage of food-industry businesses by type of financial channels used for making investments.

Veneto - Year 2008



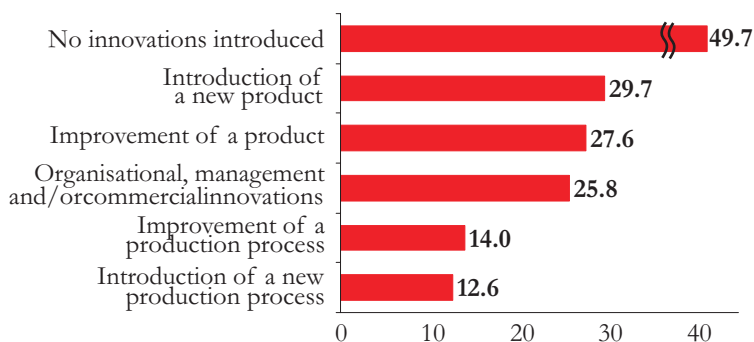
### Percentage of food-industry businesses by reason for research and development.

Veneto - Year 2008



### Percentage of food-industry businesses by innovations introduced in the three-year period 2005—07.

Veneto - Year 2008



(\*) Multiple answers possible

### Average score given to the principal factors governing competitive advantage in food-industry businesses. Veneto - Year 2008

(Scores from 1 to 10)



In 2008 investments were made by 44.6% of businesses in the sector with the aim of improving product quality and increasing production. These investments were mainly in machinery, but also in real estate, software and services. The investments were mainly self-financed. Others were made through loans and leasing contracts. Only 10.7% of businesses in the sector invested in research and development, 27.2% of which do so as a company mission, as well as to develop innovative products, to keep up with technological change and to diversify production.

Between 2005-2007, 51.3% of businesses introduced innovation. This was mainly through bringing a new product onto the market, improving an existing product, organisational innovations within the company, or improving the production process.

The quality of work is the main factor governing the sector's competitive advantage.

## Geographical analysis

	No. businesses 2008	No. local units	% share of local units	No. local unit employees	% share of local unit employees	Rate of employment potential	% share of exports 2007	Density	Productive potential
Belluno	265	190	3.5	824	1.8	3.9	0.4	0.1	0.9
Padova	1,426	1,084	19.7	7,483	16.6	8.4	11.2	0.5	1.2
Rovigo	481	350	6.4	2,456	5.5	10.0	5.8	0.2	1.4
Treviso	1,427	1,191	21.7	8,330	18.5	9.8	12.4	0.5	1.4
Venezia	1,222	907	16.5	6,451	14.3	7.8	11.8	0.4	1.1
Verona	1,375	953	17.4	13,381	29.7	15.4	50.3	0.3	1.1
Vicenza	1,172	814	14.8	6,117	13.6	7.3	7.9	0.3	1.0
<b>Veneto</b>	<b>7,368</b>	<b>5,489</b>	<b>100.0</b>	<b>45,043</b>	<b>100.0</b>	<b>9.5</b>	<b>100.0</b>	<b>0.3</b>	<b>1.2</b>

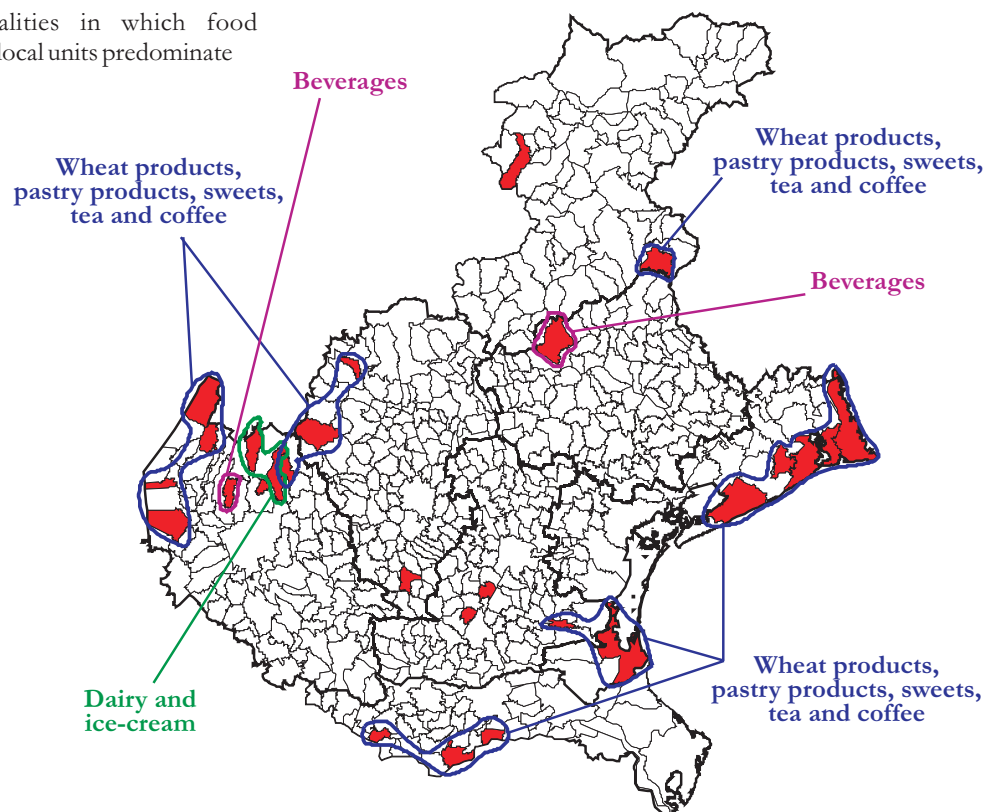
Rate of employment potential: No. local unit employees / Resident pop. x 100

Density: No. local units / area in km<sup>2</sup>

Productive potential: No. local units / Resident pop. x 100

## Cluster map of food industry by municipality

■ Municipalities in which food industry local units predominate

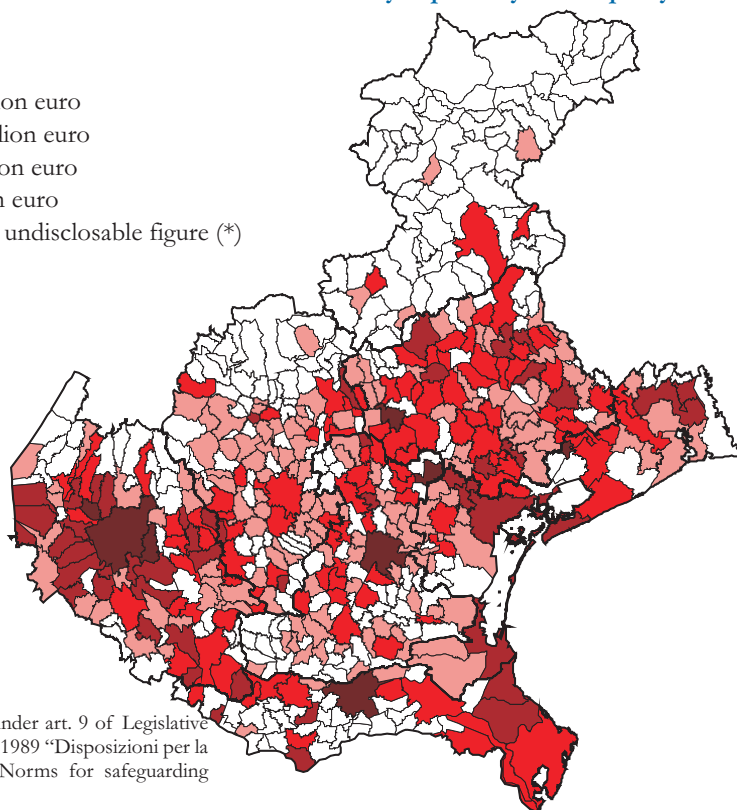


Geographical analysis shows food-industry specialisation in Verona, which has the highest number of industry employees per number of residents and exports 50% of Veneto food products. Rovigo and Treviso have the highest productive potential: 1.4 local units per 1000 residents.

The map of production clusters shows areas where local units for food production outnumber all the others. In particular this is the case in the west of Verona, in the east of the province of Venice and in the south-east of Padova. This activity is predominant in 25 out of 581 municipalities. Small specialised areas can be observed for certain activities: "Wheat products, pastry products, sweets, tea and coffee", "beverages" and "dairy and ice-cream". Cross-referencing a range of registers has allowed us to reconstruct a map of exporters shown according to their municipality (those working with food products, such as wine, are also considered). This shows a high level of exports, especially from municipalities to the north of Treviso, east of Verona and those around the Venetian lagoon.

## The value of food-industry exports by municipality

- More than 50 million euro
- From 10 to 50 million euro
- From 1 to 10 million euro
- Less than 1 million euro
- No exporter or an undisclosable figure (\*)



(\*) Data may not be divulged under art. 9 of Legislative Decree no. 322 of 6 September 1989 "Disposizioni per la tutela del segreto statistico" (Norms for safeguarding statistical secrecy)

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat-Asia 2005 data

In accordance with Regional Law no. 8 of 2002, Ufficio di Statistica della Regione Veneto gathers, analyses and disseminates statistical information for the region. The processed data herein is the patrimony of the entire region and is published in brochures and on the Regione Veneto website at [www.regione.veneto.it/statistica](http://www.regione.veneto.it/statistica).



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