



STATISTICHE

UNDERSTANDING VENETO IN FIGURES AND DIAGRAMS

FLASH

2018 is the National Year of Italian food and this offers the opportunity to explore the food and agricultural specialities of Veneto in all their many facets, examining the territory also in terms of landscape and tourist attraction, and trying to know the entire production chain, its players and its products. A complete analysis is provided in chapter 8 of the 2018 Statistical Report of Regione Veneto, whereas this issue of Statistiche Flash will present a summary of the most purely economic aspect of the agri-food supply chain.

Italy is the first country in the world for the number of certified quality food products, counting the PDOs (Protected Denomination of Origin), PGIs (Protected Geographical Indication) and TSGs (Guaranteed Traditional Speciality): in 2017, considering the wine & food products all together, this number amounts to 818. Veneto's contribution is one of the best. Veneto ranks second for the number of food products, behind Emilia Romagna, and generates a production value of almost 400 million euros.

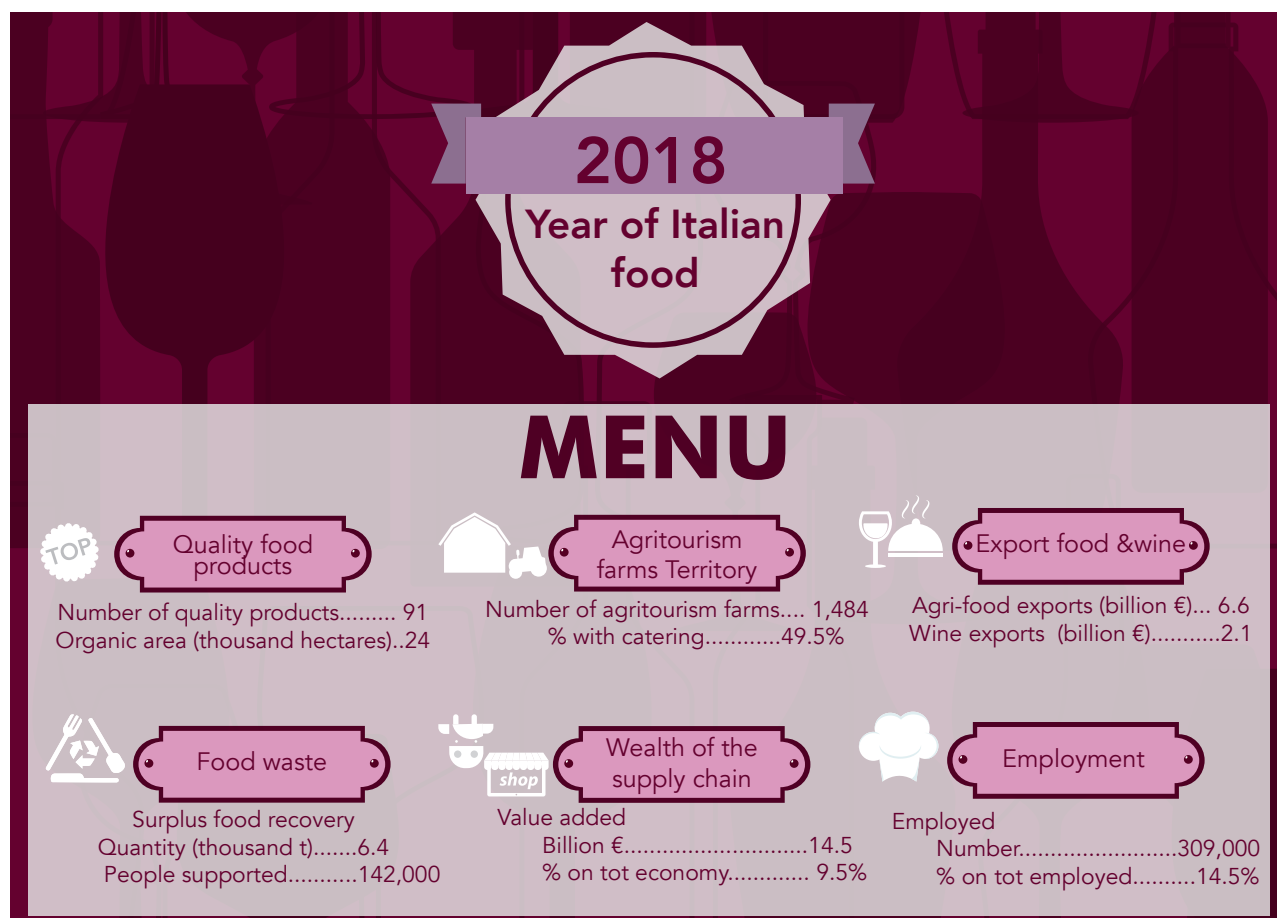
The flagship product is the Asiago cheese that creates a turnover to the production of almost 100 million euros. Also for wine, Veneto is the second region of Italy for the number of certificates, with a turnover of 1.3 billion euros and the undisputed leader of success is the PDO Prosecco.

In 2017, Veneto exported agri-food products for 6.6 billion euros (+4.5% compared to 2016), increasing the share of the quality agri-food of almost 10 points in the last 3 years.

In 2017, people working in the Veneto agri-food sector were 309 thousand, i.e., 14.5% of all workers employed in Veneto.

A GOOD DISH IS WORTH MORE THAN A TREASURE

A TABLE LAID WITH THE VENETO SPECIALITIES



Source: Processing of data from ISTAT, ISMEA and Regione Veneto by the Statistics Office of Regione Veneto

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Nowadays we are all chefs: a variety of media outlets, TV, social channels, radio and newspapers, suggest recipes, ingredients and ways of cooking, boiling, frying and experimenting all the time. There is often a lack of consideration towards the origin of food, the social value of what is cooked, who cares for and grows products, the ecological impact of what is imported from the other side of the world. On the other hand, there is a growing interest in food as a cultural product, as an element of identity and pride, as well as a driver of possible economic evolution, and not just as a commodity.

The Food sector, in fact, is one of the specialities of Veneto, one of the pillars of our economy. But what is the agri-food chain? What is its impact on the economy? Which sectors and players does it involve?

What are its trends? Is Veneto competitive in this sector?

We will try to give some answers. It is estimated¹ that in 2015, the Veneto agri-food chain generated a value added of over 14.5 billion euros, equal to about 9.5% of total wealth produced in Veneto, and up 6.4% compared to the figure recorded in the previous year.

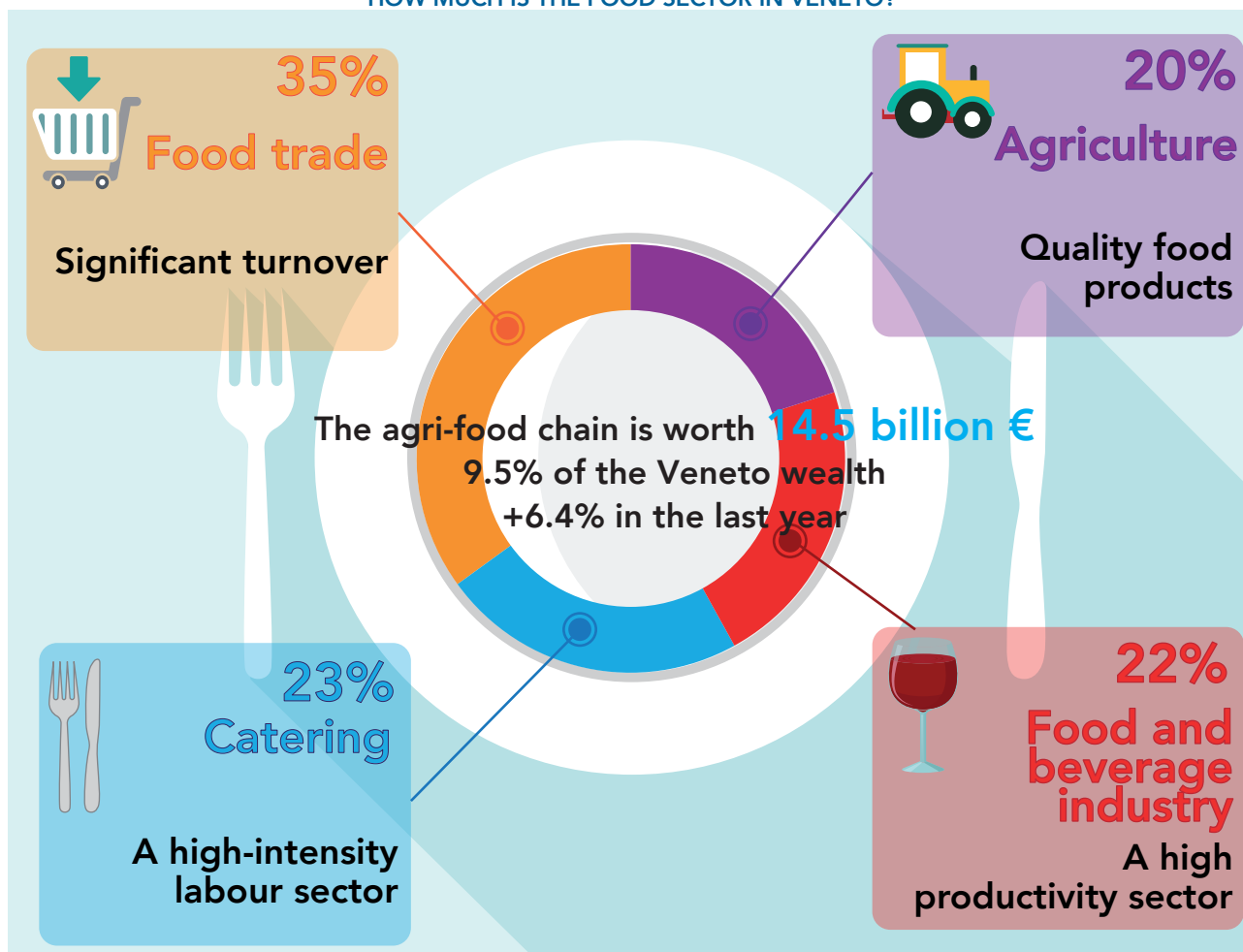
The weight of the agricultural sector's value added is 19.8%, less than one fifth of the entire supply chain, but this is due to the excessive division of production and the limited productivity of the sector. The share of value added generated by the industrial component is 21.6% and can be divided into 15.9% produced by the food industry and 5.6% by the beverage industry. The commercial intermediation component produces the most substantial part of the value added for the agri-food chain (35.3%); we should also note the significant incidence of the catering phase (23.3%).

Among the various components of the supply chain, there is a focus on the food industry, which had a strong expansion from 2008 to 2015 (+25.7%) and, what is more, still continues to increase its economic impact. In fact, while its weight in the entire Veneto economy increased from 1.7% to 2.2%, the share of wealth produced with respect to the entire Veneto manufacturing industry increased by well over 2.5 points, from 7.7% in 2008 to 10.3% in 2015.

¹The estimation methodology is available from the Statistics Office of the Regione Veneto

THE WEALTH PRODUCED BY THE FOOD CHAIN

HOW MUCH IS THE FOOD SECTOR IN VENETO?



Source: Processing of data from ISTAT by the Statistics Office of Regione

To provide a brief overview of Veneto agri-food chain using available data from official statistics, the perimeter of the chain, now called *restricted agri-food*, has been restricted to three sectors: industrial processing of agricultural products, commercial distribution and catering activities, with the exclusion of agricultural production.

Despite the international crisis, the slowdown in domestic demand and the consequent reduction in the number of businesses in the sector, the restricted food supply chain is performing stronger than the regional economy as a whole, and its economic performance is growing significantly: in the three-year period of 2013-2015, the turnover of Veneto businesses in the sector grew by an average of +2.5%, a higher performance than the pace of regional GDP. The excellent state of health of the Veneto agri-food sector is also confirmed

FOCUS ON THE CORE OF VENETO AGRI-FOOD SECTOR

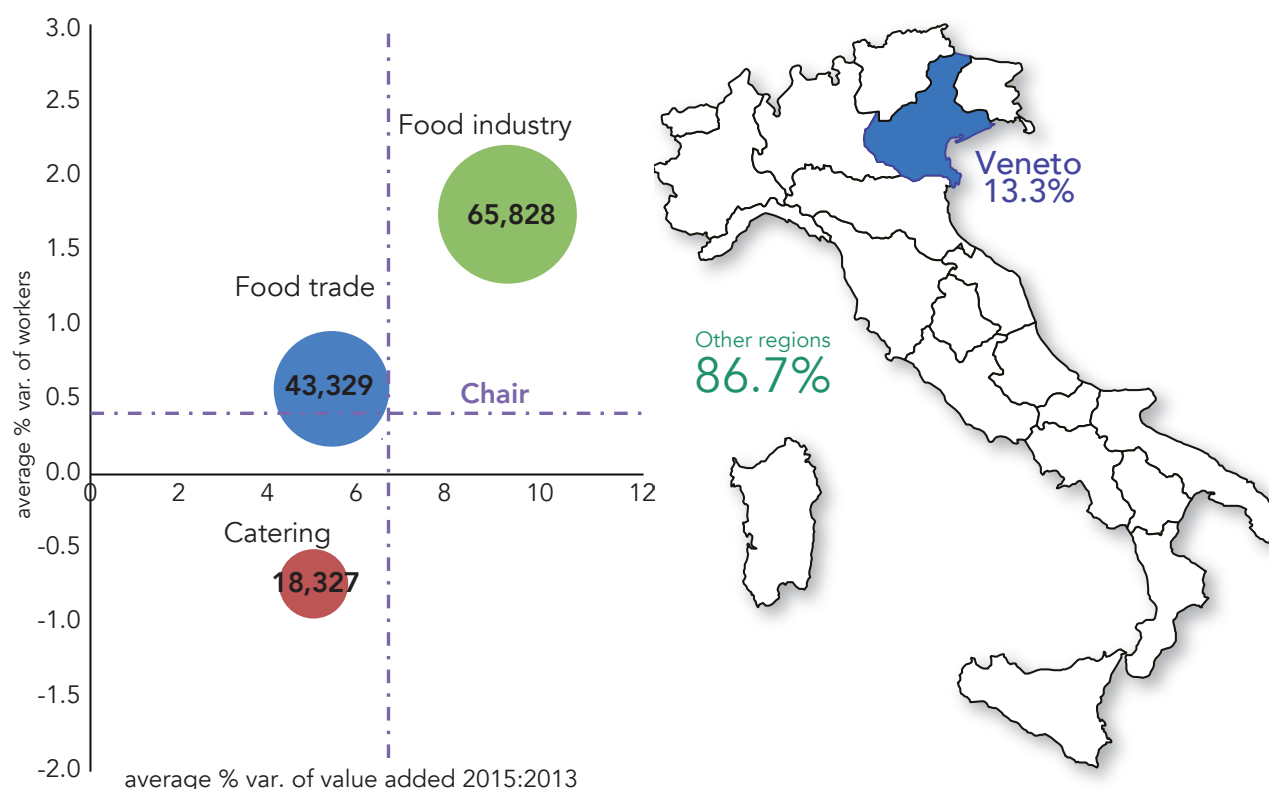
by the results of the value added generated by the restricted supply chain, which grows at higher rates both with respect to turnover (+6.1% per year in the three years in consideration) and regional GDP. The driving force behind the excellent economic performance of the restricted food supply chain has been the Food & Beverage segment: the historical propensity for internationalisation and the entry into new foreign markets, both European and non-European, has generated a significant increase in the foreign turnover for the businesses in the sector which has more than offset the drop in domestic consumption. The incidence of foreign component on total turnover has increased in recent years (from 16% in 2013 to 18% in 2015), thanks to the quality and typicality of many Veneto high value added productions.

In 2015, there were over 44,000 agri-food businesses in Veneto, which accounted for 7.7% of the Italian total; most of the businesses were in the catering and food trade sectors (4% and 3.1% respectively). In terms of workers, the weight of the Veneto businesses was even greater and equal, in 2015, to 10.3% of the total number of workers in the Italian restricted agri-food sector. Over 4% of the workers was employed in food distribution and about the same number in the catering sector; the share of the food industry sector increased (1.9%), supported by a high average business size.

The turnover of the Veneto restricted agri-food sector was equal to more than 56 billion in 2015 and accounted for 13.3% of the Italian turnover of this sector

THE RESULTS OF VENETO BUSINESSES IN FOOD INDUSTRY, FOOD TRADE AND CATERING

Performance of the restricted agri-food chain sectors. % distribution of the turnover of the restricted agri-food chain compared to the same national sector. Year 2015
Productivity value year 2015 (euros), 2015:2013 average
% annual variation of value added and workers. Veneto



A comparative analysis was carried out between the Italian regions giving particular attention to the businesses of the food industry and catering services.

In 2015, there were over 26,000 production units in the sectors analysed in Veneto, employing over 147,000 people, of whom over two-thirds in the catering sector; in absolute terms, Veneto is the third largest Italian region, after Lombardy and Emilia Romagna, for the size of its agro-food employment base.

The same three regions also have a place on the podium in terms of turnover and value added: Veneto remains behind Lombardy and Emilia Romagna, with a turnover in the food industry and catering of around 24 billion euros and a value added of almost 5 billion euros in 2015.

However, the most interesting comparison is in terms of labour productivity, which is an indicator of entrepreneurial production capacity measured as the value added produced per worker: for businesses in the food industry in Veneto, productivity was around 66,000 euros in 2015, well above the national value of 56,544 euros; in addition to the aforementioned Lombardy and Emilia Romagna, the other regions with the highest labour productivity in the food industry are Valle d'Aosta, Piedmont and the Autonomous

IS VENETO AGRI-FOOD CHAIN COMPETITIVE?

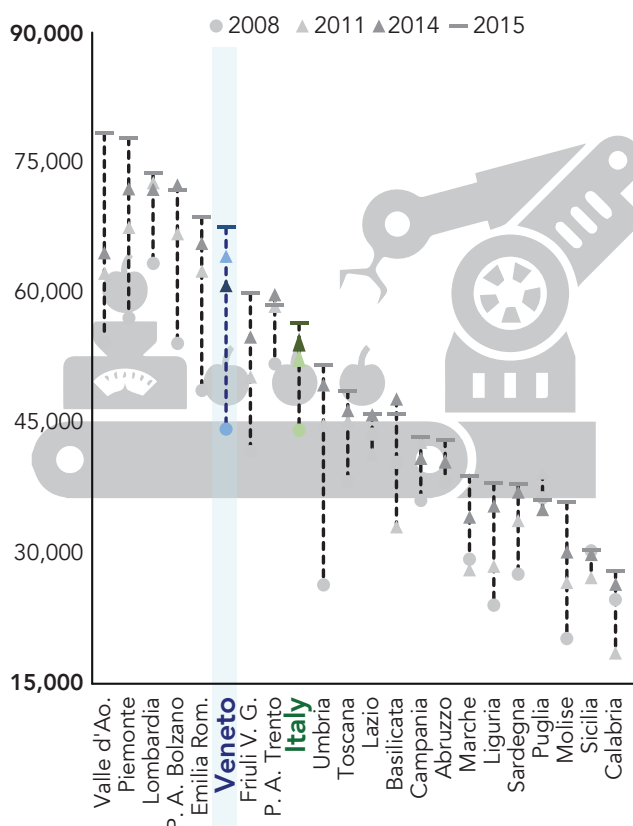
Province of Bolzano.

The productivity dynamics of the Veneto food industry is among the highest in Italy, with a strong growth and an increase of more than 20 thousand euros of value added per worker compared to the 2008 value.

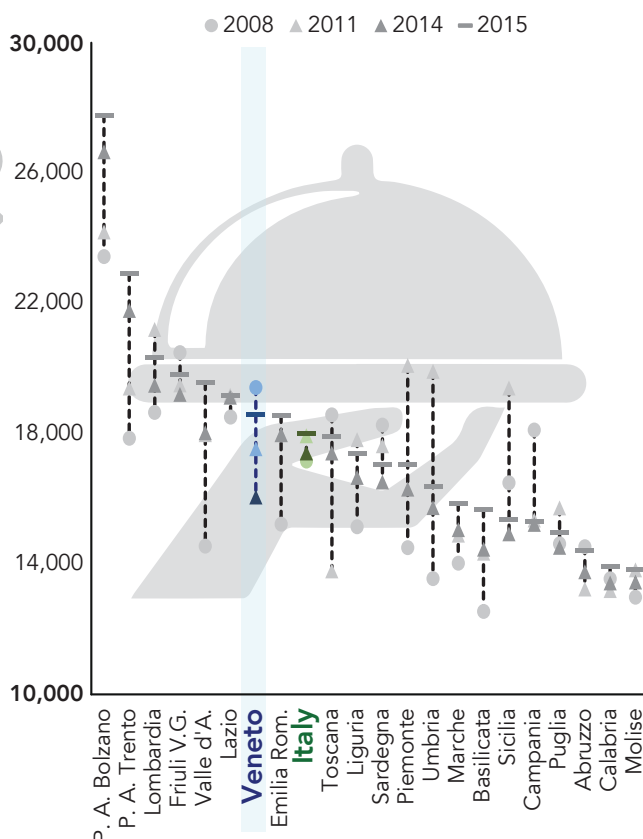
The other sector analysed, catering, not only has lower levels of productivity (18 thousand euros in Veneto in 2015), but also, instead of growing, in recent years has recorded a contraction in productivity, which remains below the values reached before the economic crisis. It should be noted that these levels and similar dynamics are mostly due to the fact that catering is a production sector that makes extensive use of the labour factor (labour-intensive sector).

THE COMPARISON WITH THE OTHER REGIONS

Value added per food industry worker by region (€) - Years 2008, 2011, 2014 and 2015



Value added per catering worker by region (€) - Years 2008, 2011, 2014 and 2015



Source: Processing of data from ISTAT by the Statistics Office of Regione Veneto



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