

# ECONOMIC BULLETIN Q2 2025

**Moderate increase in production and turnover, manufacturing prices, and a continued solid trade performance for most product categories**

## Food and drink industry

### Moderate increase in production and turnover, and manufacturing prices

- In Q2 2025, EU food and drink industry production increased by 0.5% compared to the previous quarter.
- EU food and drink industry turnover increased by 1.5% compared to the previous quarter.
- The year-on-year comparison shows an increase in both total manufacturing production and food and drink industry production (1.3% and 1.4% respectively), compared to Q2 2024. Turnover shows an increase of 1% in total manufacturing and 5% in the food and drink industry, compared to Q2 2024.
- Food manufacturing prices increased by 1% compared to the previous quarter and by 2.3% year-on-year.

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### Employment up in the food and drink industry, unchanged in total manufacturing

- In Q2 2025, employment levels in both the food and the drink industry increased by 0.2% and 1.3% respectively while they remained unchanged in total manufacturing.
- Year-on-year, employment levels show an increase in both the food and the drink industry (1.4% and 0.3% respectively) whereas they decreased in total manufacturing (-0.6%).

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### Decreasing confidence in food and drink industry, and slight increase in total manufacturing

- Compared to the previous quarter, confidence in the food and the drink industry registered a decrease in Q3 2025 (-1.5 points, -0.3 points), whereas confidence in total manufacturing showed a slight increase (0.1 points).

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### EU exports reach €48.4 billion

- EU exports of food and drinks totalled €48.4 billion in Q2 2025 (Q2 2025/Q2 2024: +2.9%).
- The trade balance reached a surplus of €19.4 billion (Q2 2025/Q2 2024: -3.9%).

- The top 5 products with the largest share in export value generated €24.2 billion in Q2 2025 (meat products, dairy products, cocoa, chocolate and sugar confectionery, other food products category, and wine).
- EU imports of food and drinks reached €29 billion (Q2 2025/Q2 2024: +8%).

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## Agricultural commodities

### Mixed trends in agricultural commodity prices

- The FAO food price index increased by 1.3% in Q2 2025 compared to the previous quarter and rose by 6.3% compared to Q2 2024.
- The year-on-year comparison shows a mixed picture in EU and world market agricultural commodity prices with commodity prices decreasing, such as cocoa, white sugar, soft wheat, soybean and soybean meal, and most other commodity prices trending upwards, especially coffee.

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## Retail

### Slight increase in retail trade in foodstuffs

- Both retail trade in foodstuffs and total retail trade slightly increased by 0.8% and 1% respectively in Q2 2025.
- The year-on-year comparison shows an increase of retail trade in foodstuffs and total retail trade (1.7% and 2.9% respectively).
- Food consumer prices increased by 0.9% compared to the previous quarter and by 3% year-on-year.

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### Latest Economic Bulletin on input costs

- Provides detailed information on the inflationary pressures on energy prices, transport costs, packaging, machinery for processing, labour, agricultural raw materials, animal feed and fertilizers.

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## Methodology

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- Except for imports and exports data which represent the evolution of the current quarter compared to the same quarter of the previous year, all other evolutions are primarily represented with respect to the previous quarter.
- EU refers to EU27 (excluding the UK) in the text, unless otherwise specified.
- The EU food and drink industry is identified by NACE Rev.2 codes C10 (manufacture of food products) and C11 (manufacture of beverages).

### Sources

European Commission, Eurostat data and indices (production, turnover, retail trade, employment, prices)

<http://ec.europa.eu/eurostat/home>

European Commission, Eurostat statistics explained

[http://ec.europa.eu/eurostat/statistics-explained/index.php/Main\\_Page](http://ec.europa.eu/eurostat/statistics-explained/index.php/Main_Page)

European Commission, Eurostat Easy Comext Trade Data (based on division 10 & 11 of the NACE Rev.2 classification), CPA 2.1

<https://ec.europa.eu/eurostat/comext/newxtweb/>

European Commission, DG ECFIN business survey data

[https://ec.europa.eu/info/business-economy-euro/indicators-statistics/economic-databases/business-and-consumer-surveys\\_en](https://ec.europa.eu/info/business-economy-euro/indicators-statistics/economic-databases/business-and-consumer-surveys_en)

FAO Food Price Index

<http://www.fao.org/worldfoodsituation/foodpricesindex/en/>

European Commission, DG Agriculture and Rural Development (DG AGRI)

<https://ec.europa.eu/agriculture/>

European Commission, DG Agriculture and Rural Development (DG AGRI), Commodity price dashboard

[https://agriculture.ec.europa.eu/data-and-analysis/markets/price-data/price-dashboard\\_en](https://agriculture.ec.europa.eu/data-and-analysis/markets/price-data/price-dashboard_en)

European Commission, Eurostat News Release, 'Volume of retail trade down by 0.3% in the euro area and by 0.2% in the EU', 6 March 2025

<https://ec.europa.eu/eurostat/en/web/products-euro-indicators/w/4-06032025-ap>

### About the quarterly economic bulletin

FoodDrinkEurope's Economic Bulletin is published on a quarterly basis. It covers a set of key indicators which highlight the major economic trends in the European food and drink industry: production, turnover, employment, external trade, key raw material prices, and retail trade.

**For more information on FoodDrinkEurope and its activities, please visit: [www.fooddrinkeurope.eu](http://www.fooddrinkeurope.eu)**

# ECONOMIC BULLETIN Q2 2025

## Annex

### Production and turnover of the EU food and drink industry

#### Production index (2021=100)

	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Total manufacturing</b>	99.5	99.3	99.3	100.7	100.8	
<b>% change</b>	-0.1	-0.2	0.0	1.4	0.1	1.3
<b>Food and drink industry</b>	102.	101.7	102.	102.9	103.4	
<b>% change</b>	0.1	-0.3	0.3	0.9	0.5	1.4

Source: Eurostat

The industrial production index (also called industrial output index or industrial volume index) measures the changes in the price-adjusted output of industry.

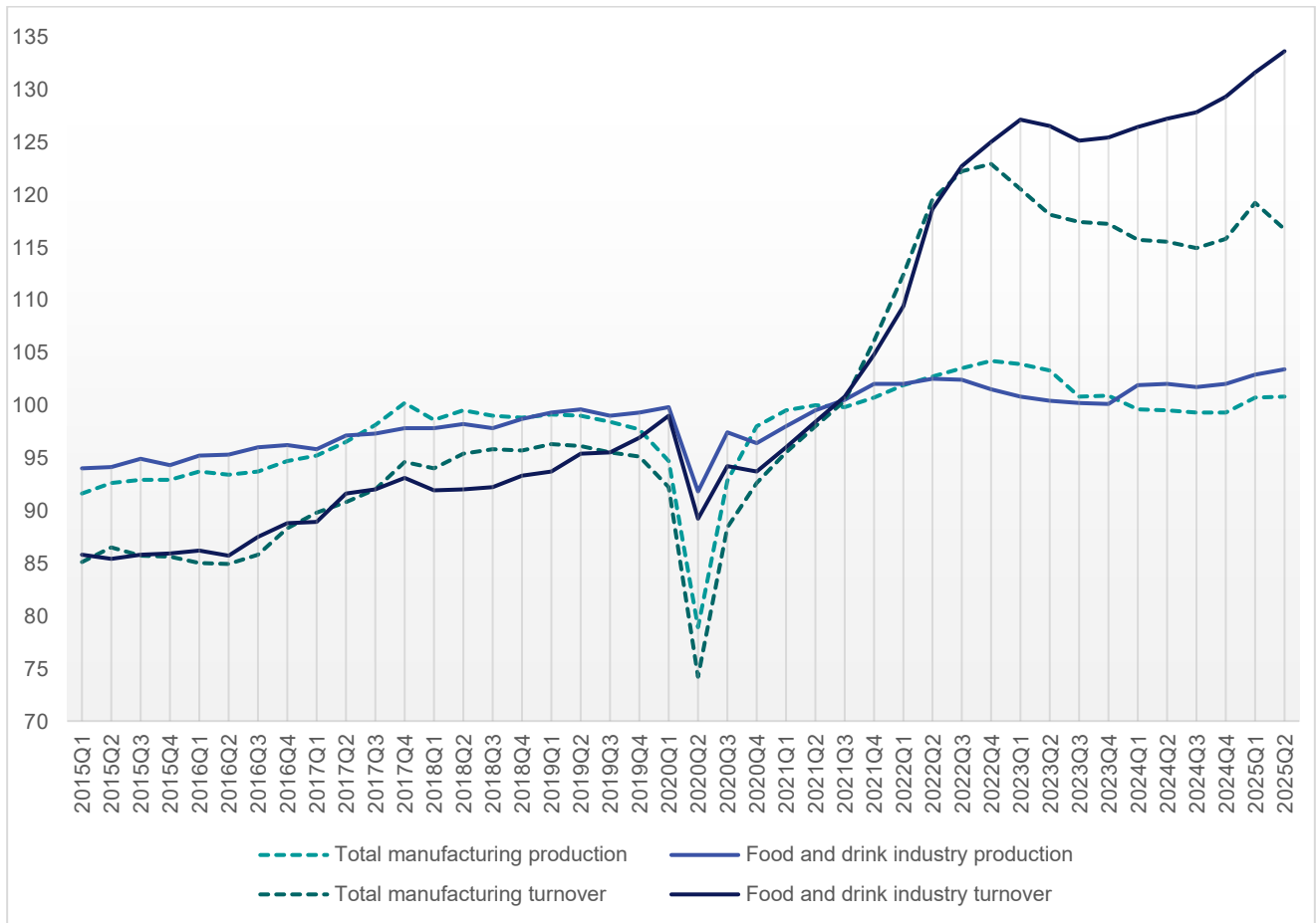
#### Turnover index (2021=100)

	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Total manufacturing</b>	115.5	114.9	115.8	119.2	116.7	
<b>% change</b>	-0.2	-0.5	0.8	2.9	-2.1	1
<b>Food and drink industry</b>	127.2	127.8	129.3	131.6	133.6	
<b>% change</b>	0.6	0.5	1.2	1.8	1.5	5

Source: Eurostat

The index of industrial turnover measures the development of turnover (sales) in the European industry (it is influenced by changes in prices of the traded industrial goods and by changes of the traded volumes of goods).

### EU quarterly manufacturing production and turnover, 2015-2025 (2021=100)



Source: Eurostat

### Food and drink production by Member State

Member State	2025 Q1 / 2024 Q4 (% change)	2025 Q2 / 2025 Q1 (% change)	2025 Q2 / 2024 Q2 (% change)
<b>EU</b>	0.9	0.5	1.4
<b>Austria</b>	2.1	-1.6	-0.6
<b>Belgium</b>	2.7	5.9	6.4
<b>Bulgaria</b>	-9.5	-1.4	-11.5
<b>Czech Republic</b>	0.2	1.1	2.6
<b>Denmark</b>	3.2	2.8	5.8
<b>Finland</b>	1.7	-0.1	1.1
<b>France</b>	0.7	-1	-1
<b>Germany</b>	1.3	1.9	3.2
<b>Greece</b>	1.6	2.9	3.6
<b>Hungary</b>	-1.6	1.6	-2.3
<b>Italy</b>	0.6	-0.3	0.7
<b>Latvia</b>	3.7	2.2	7.5
<b>Lithuania</b>	3.5	1.8	7.1
<b>Netherlands</b>	1.8	na	na
<b>Poland</b>	0.9	-0.3	3.1
<b>Portugal</b>	2.8	-2.8	0.7
<b>Romania</b>	4.4	0.3	3
<b>Spain</b>	1.2	0.2	1.2

Source: Eurostat. No data available for Croatia, Cyprus, Estonia, Ireland, Luxembourg, Malta, Slovakia, Slovenia, Sweden

### Food and drink turnover by Member State

Member State	2025 Q1 / 2024 Q4 (% change)	2025 Q2 / 2025 Q1 (% change)	2025 Q2 / 2024 Q2 (% change)
<b>EU</b>	1.8	1.5	5
<b>Austria</b>	5.6	-0.4	4.7
<b>Belgium</b>	1.3	3.9	7.1
<b>Czech Republic</b>	1.6	1.5	5.9
<b>Denmark</b>	3.2	2.4	5.2
<b>Finland</b>	1.9	-1	2.3
<b>France</b>	0.7	0.7	3.1
<b>Germany</b>	1.1	2.1	5.8
<b>Greece</b>	-1.2	4	3.9
<b>Hungary</b>	-2.8	2.3	-2.9
<b>Italy</b>	2.8	1.1	5.3
<b>Latvia</b>	4.9	2.9	9.2
<b>Lithuania</b>	6.2	-0.1	11.8
<b>Netherlands</b>	2.4	na	na
<b>Poland</b>	1.2	1.4	5.4
<b>Romania</b>	3.3	-1.5	5
<b>Spain</b>	3.8	0.7	2.6

Source: Eurostat. No data available for Bulgaria, Croatia, Cyprus, Estonia, Ireland, Luxembourg, Malta, Portugal, Slovakia, Slovenia, Sweden

## Employment in the EU food and drink industry

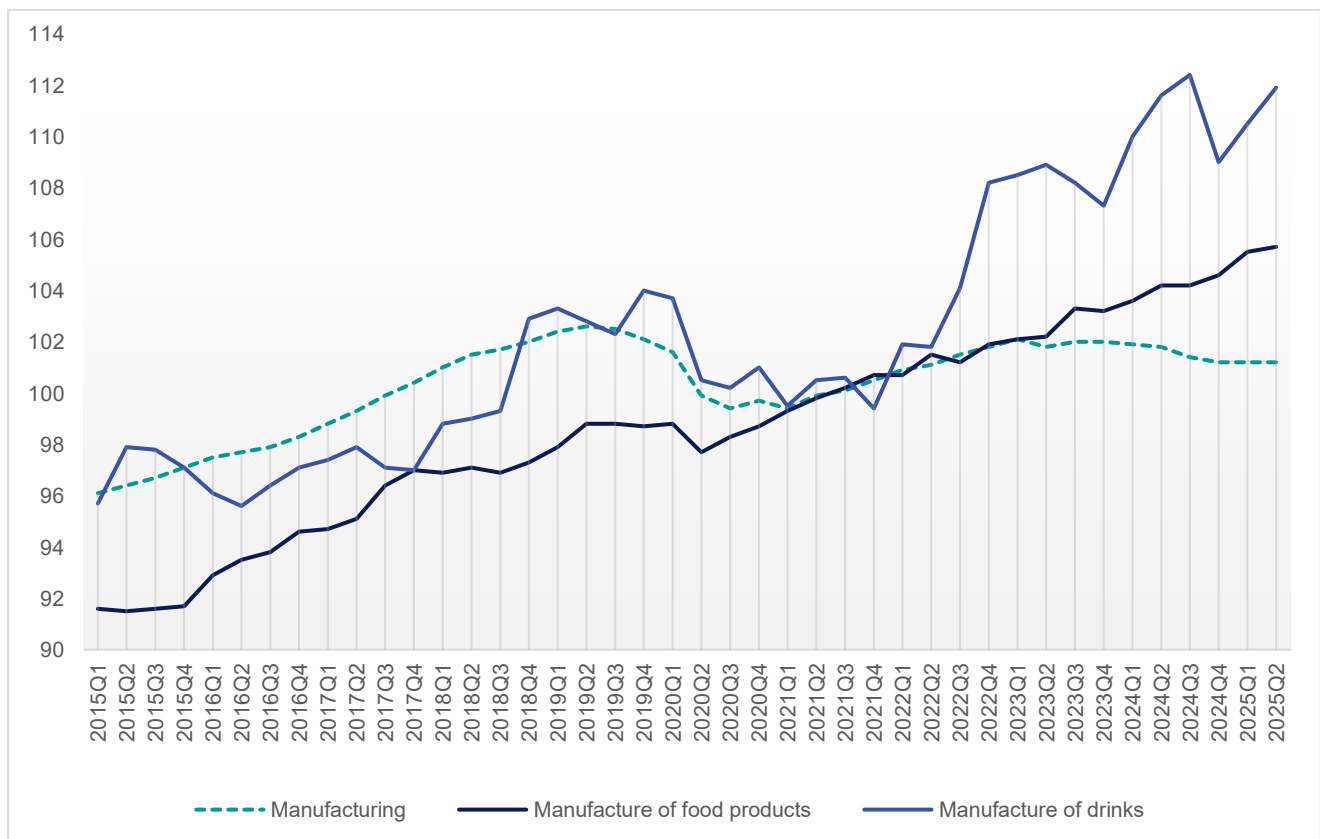
### Employment index (2021=100)

Employment	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Total manufacturing</b>	101.8	101.4	101.2	101.2	101.2	
<b>% change</b>	-0.1	-0.4	-0.2	0	0	-0.6
<b>Food industry</b>	104.2	104.2	104.6	105.5	105.7	
<b>% change</b>	0.6	0	0.4	0.9	0.2	1.4
<b>Drink industry</b>	111.6	112.4	109	110.5	111.9	
<b>% change</b>	1.5	0.7	-3.0	1.4	1.3	0.3

Source: Eurostat

The employment index measures the number of persons employed in the total manufacturing industry vs. the food and drink industry in the EU, seasonally adjusted.

### Employment in the EU food and drink industry compared to manufacturing, 2015-2025 (2021=100)



Source: Eurostat

**Food industry employment by Member State**

Member State	2025 Q1 / 2024 Q4 (% change)	2025 Q2 / 2025 Q1 (% change)	2025 Q2 / 2024 Q2 (% change)
EU	0.9	0.2	1.4
Austria	1.7	0.4	1.7
Belgium	1	na	na
Croatia	-0.5	0.2	2.2
Czech Republic	-0.8	-0.4	-0.2
Denmark	0	0.3	-0.3
Finland	4.7	7.6	16.1
France	0.3	0.3	1.3
Germany	1	0.8	2.3
Ireland	1.5	5.4	0.3
Italy	1.8	0.2	3.1
Latvia	-7.5	3	-5.6
Lithuania	1.9	0.4	2.7
Netherlands	0.4	na	na
Poland	0.7	0.3	1.3
Portugal	-0.1	0.4	1.5
Spain	1	-1.9	-0.5
Sweden	0.7	0.1	1.6

Source: Eurostat. No data available for Bulgaria, Cyprus, Estonia, Greece, Hungary, Luxembourg, Malta, Romania, Slovakia, Slovenia

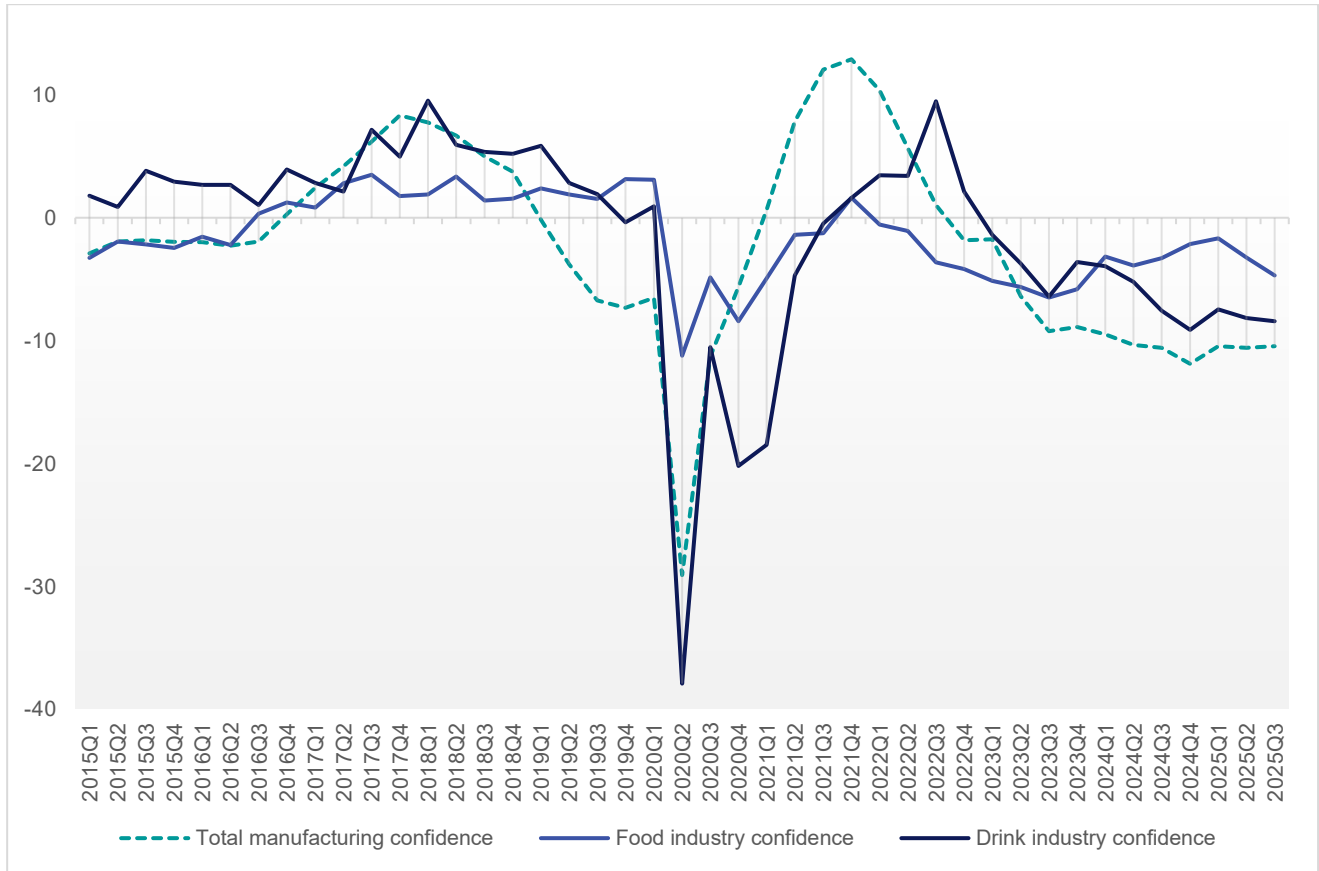
**Drink industry employment by Member State**

Member State	2025 Q1 / 2024 Q4 (% change)	2025 Q2 / 2025 Q1 (% change)	2025 Q2 / 2024 Q2 (% change)
EU	1.4	1.3	0.3
Austria	-0.5	0.2	-1.2
Belgium	-1.2	na	na
Croatia	-2.0	-0.1	-0.6
Czech Republic	4.8	0.4	8
Denmark	3.2	1.4	3.4
Finland	na	na	6.9
France	0.4	0.3	1.3
Germany	1.1	1.4	3.3
Ireland	3.9	33.9	12.1
Italy	-7.5	1.9	-10.3
Latvia	-0.3	0.3	-4.2
Lithuania	0.4	-0.7	-3.4
Netherlands	-0.7	na	na
Poland	1.2	0.4	3.5
Portugal	0.6	0.5	1.3
Spain	9.4	0.7	0.5
Sweden	2.2	0.3	-1.5

Source: Eurostat. No data available for Bulgaria, Cyprus, Estonia, Greece, Hungary, Luxembourg, Malta, Romania, Slovakia, Slovenia

## Confidence in the EU food and drink industry

EU quarterly manufacturing confidence indicators, 2015-2025



\* Subsector level data (i.e. the divisions of NACE rev.2 at the 2-digit level) for the industry have not undergone a full validation process, hence their use and interpretation deserve more caution.

Source: European Commission, DG ECFIN business survey data, own calculations

The confidence indicator is a statistical indicator based on the results from business surveys interrogating enterprises on their current economic situation and their expectations about future developments. The indicator is calculated as the simple arithmetic average of the seasonally adjusted balances of positive and negative answers to specific questions, e.g. regarding economic expectations.

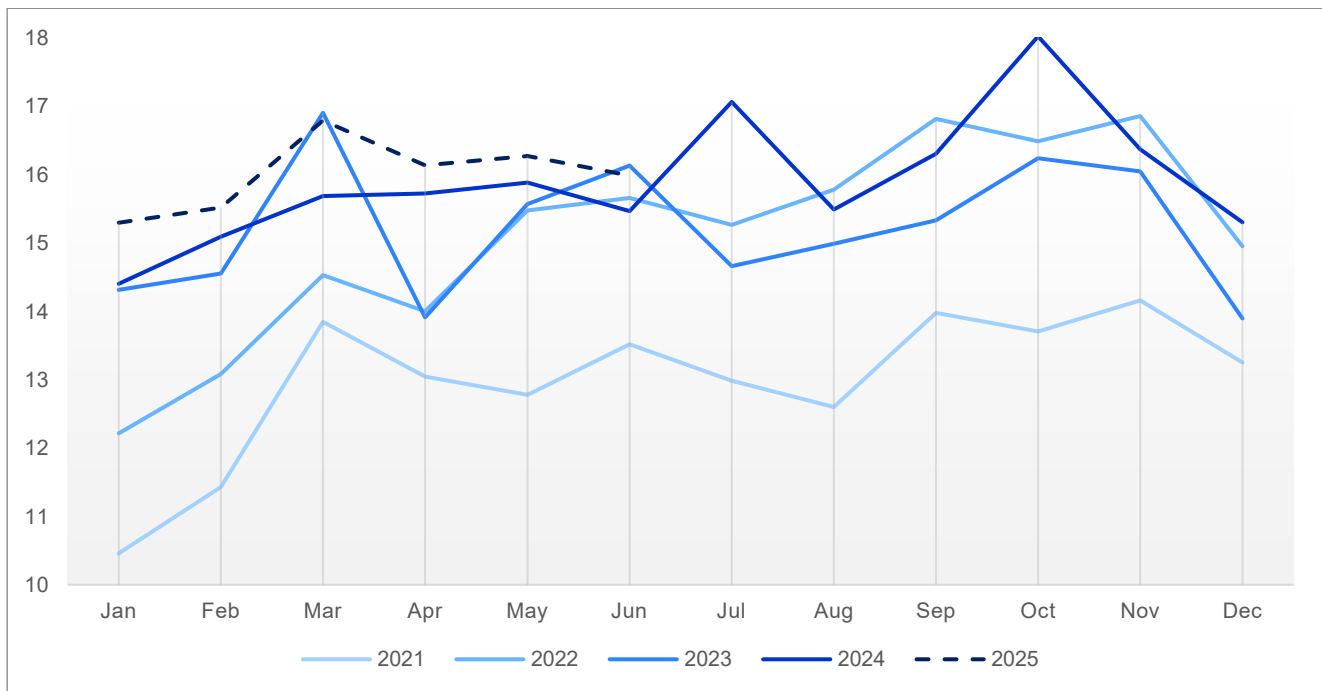
## External trade

### EU food and drink trade (€ billion)

	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Exports</b>	47.2	48.8	49.7	47.7	48.4	2.6%
<b>Imports</b>	26.8	27.7	29.2	28.5	29	8.3%
<b>Balance</b>	20.4	21.1	20.5	19.2	19.4	-4.8%

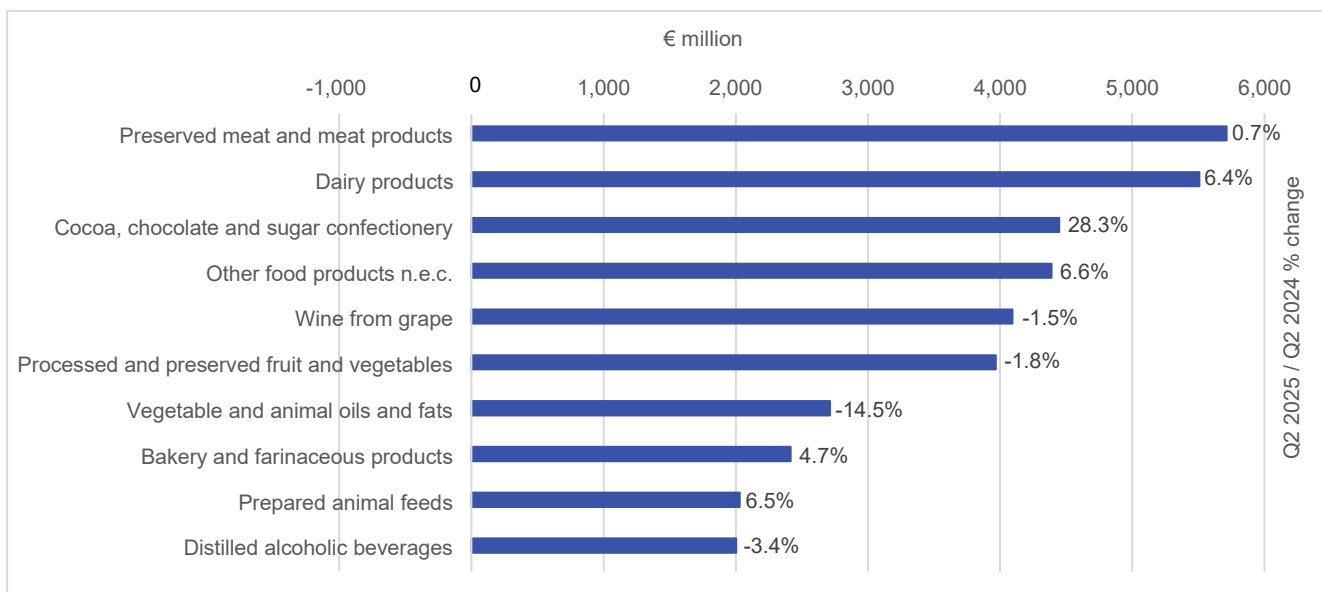
Source: Eurostat

### EU food and drink exports, 2021-2025 (€ billion)



Source: Eurostat

### Export performance by sector



Source: Eurostat - COMEXT, Nace Rev.2, Divisions 10 & 11

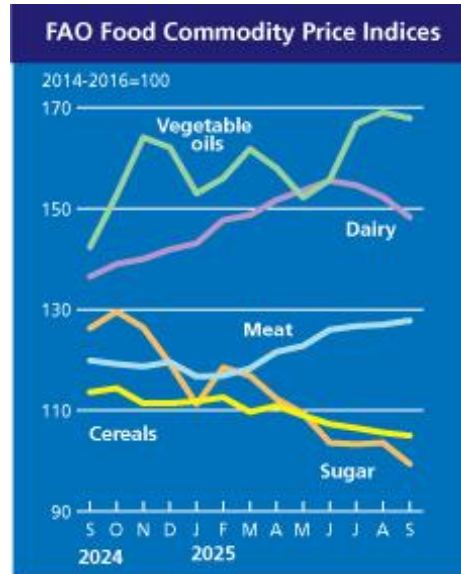
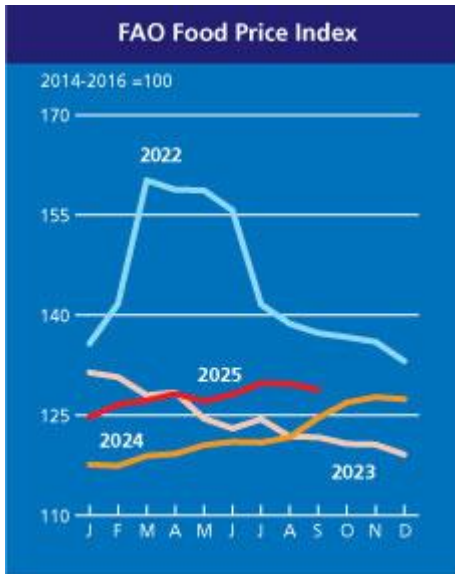
## EU food and drink trade by sector

Sector / Period	Exports			Imports			Balance		
	Q2 2024	Q2 2025	change	Q2 2024	Q2 2025	change	Q2 2024	Q2 2025	change
	€ million		%	€ million		%	€ million		%
<b>Food and drinks</b>	47,027	48,385	2.9%	26,864	29,002	8.0%	20,163	19,383	-3.9%
10 Food products	37,491	39,124	4.4%	24,658	26,819	8.8%	12,833	12,305	-4.1%
11 Beverages	9,536	9,261	-2.9%	2,206	2,182	-1.1%	7,330	7,078	-3.4%
<b>101 Preserved meat and meat products</b>	5,673	5,713	0.7%	2,017	2,397	18.8%	3,656	3,317	-9.3%
1011 Processed and preserved meat	3,275	3,320	1.4%	1,368	1,610	17.7%	1,906	1,710	-10.3%
1012 Processed and preserved poultry meat	914	930	1.7%	232	300	29.2%	682	630	-7.6%
1013 Meat and poultry meat products	1,485	1,464	-1.4%	417	487	16.8%	1,068	977	-8.5%
<b>102 Processed and preserved fish, crustaceans and molluscs</b>	1,340	1,545	15.3%	5,041	5,499	9.1%	-3,701	-3,954	6.8%
<b>103 Processed and preserved fruit and vegetables</b>	4,041	3,967	-1.8%	4,154	4,657	12.1%	-113	-690	511.4%
1031 Processed and preserved potatoes	1,156	1,028	-11.1%	56	49	-11.2%	1,101	978	-11.1%
1032 Fruit and vegetable juices	549	595	8.4%	678	708	4.3%	-130	-113	-12.9%
1039 Other processed and preserved fruit and vegetables	2,336	2,345	0.4%	3,420	3,900	14.0%	-1,084	-1,555	43.5%
<b>104 Vegetable and animal oils and fats</b>	3,174	2,713	-14.5%	5,647	5,274	-6.6%	-2,473	-2,562	3.6%
1041 Oils and fats	2,952	2,468	-16.4%	5,584	5,187	-7.1%	-2,632	-2,719	3.3%
1042 Margarine and similar edible fats	221	245	10.5%	63	87	38.1%	158	158	-0.5%
<b>105 Dairy products</b>	5,176	5,508	6.4%	655	825	25.9%	4,520	4,683	3.6%
1051 Dairy and cheese products	4,818	5,107	6%	555	719	29.6%	4,263	4,387	2.9%
1052 Ice cream	358	401	12.1%	100	105	5.4%	258	296	14.7%
<b>106 Grain mill products, starches and starch products</b>	1,598	1,617	1.2%	1,072	1,032	-3.7%	527	585	11.1%
1061 Grain mill products	844	879	4.1%	912	848	-7%	-68	30	-144.6%
1062 Starches and starch products	754	739	-2.1%	159	184	15.4%	595	555	-6.7%
<b>107 Bakery and farinaceous products</b>	2,306	2,415	4.7%	454	498	9.8%	1,852	1,917	3.5%
1071 Bread; fresh pastry goods and cakes	653	697	6.8%	142	157	10.7%	511	540	5.7%
1072 Rusks and biscuits; preserved pastry goods and cakes	1,176	1,241	5.5%	267	297	11%	909	944	3.8%
1073 Macaroni, noodles, couscous and similar farinaceous products	477	477	0.1%	44	44	-0.1%	433	433	0.1%
<b>108 Other food products</b>	12,154	13,531	11.3%	4,909	5,933	20.9%	7,245	7,598	4.9%
1081 Sugar	407	255	-37.3%	456	352	-22.8%	-49	-97	98.8%
1082 Cocoa, chocolate and sugar confectionery	3,466	4,448	28.3%	1,545	2,515	62.8%	1,921	1,932	0.6%
1083 Processed tea and coffee	1,089	1,375	26.2%	733	828	12.9%	356	547	53.5%
1084 Condiments and seasonings	1,003	969	-3.4%	441	476	7.9%	562	492	-12.4%
1085 Prepared meals and dishes	737	754	2.3%	337	351	4.1%	400	403	0.7%
1086 Homogenised food preparations and dietetic food	1,333	1,341	0.6%	15	17	9.9%	1,318	1,324	0.5%
1089 Other food products n.e.c.	4,118	4,390	6.6%	1,381	1,395	1%	2,737	2,995	9.4%
<b>109 Prepared animal feeds</b>	1,907	2,031	6.5%	704	698	-0.8%	1,204	1,332	10.7%
1091 Prepared feeds for farm animals	952	1,020	7.1%	294	270	-8.1%	658	750	14%
1092 Prepared pet foods	955	1,011	5.8%	410	429	4.5%	545	582	6.7%
<b>110 Beverages</b>	9,529	9,260	-2.8%	2,205	2,179	-1.2%	7,324	7,080	-3.3%
1101 Distilled alcoholic beverages	2,073	2,003	-3.4%	1,075	1,057	-1.7%	998	946	-5.3%
1102 Wine from grape	4,157	4,094	-1.5%	367	375	2%	3,790	3,719	-1.9%
1103 Cider and other fruit wines	138	124	-10.5%	18	18	-1.3%	120	105	-11.9%
1104 Other non-distilled fermented beverages	67	73	9.2%	3	2	-9%	64	71	10%
1105 Beer	1,026	880	-14.2%	215	200	-7.3%	811	681	-16%
1106 Malt	381	306	-19.7%	7	10	46.5%	375	296	-20.9%
1107 Soft drinks; mineral waters and other bottled waters	1,687	1,780	5.5%	519	517	-0.4%	1,167	1,262	8.2%

Source: Eurostat - COMEXT, Nace Rev.2, Divisions 10 &amp; 11

## Prices of agricultural commodities

### FAO Food Price Index



Source: FAO Food Price Index

### Main agricultural commodity prices

Agricultural commodity	EU			WORLD		
	Q2 2025 average	Q2 2025/ Q1 2025	Q2 2025/ Q2 2024	Q2 2025 average	Q2 2025/ Q1 2025	Q2 2025/ Q2 2024
	EUR/T	% change	% change	EUR/T	% change	% change
<b>CEREALS</b>						
Maize	217	-2.3	6.5	183	-11.1	1.5
Soft wheat	218	-5.3	3.5	194	-13.7	-12.8
<b>DAIRY</b>						
SMP	2,444	-3.7	0.8	2,614	-5.3	7.7
WMP	4,357	0.2	17.7	3,729	-2.5	20.7
<b>SUGAR</b>						
White sugar	539	-2.1	-34.4	439	-12.3	-16.4
				USD/T	% change	% change
<b>OILS AND OIL CROPS</b>						
Soybean oil				1,154	10.6	17
Soybean				413	1.1	-14.5
Soybean meal				360	-1.3	-22.2
Rapeseed				561	2.6	13.6
Rape oil				1231	7.9	15.7
Palm oil				946	-11.5	6.3
<b>COFFEE AND COCOA</b>						
Cocoa				8,520	-10.5	-1.8
Coffee				7,093	-4.6	48

Sources: World prices: FAO (cereals and oils), CIAL (dairy), USDA (sugar), ICCO (cocoa), ICO (coffee), World Bank (oils); EU prices: DG AGRI; own calculations

## Retail trade

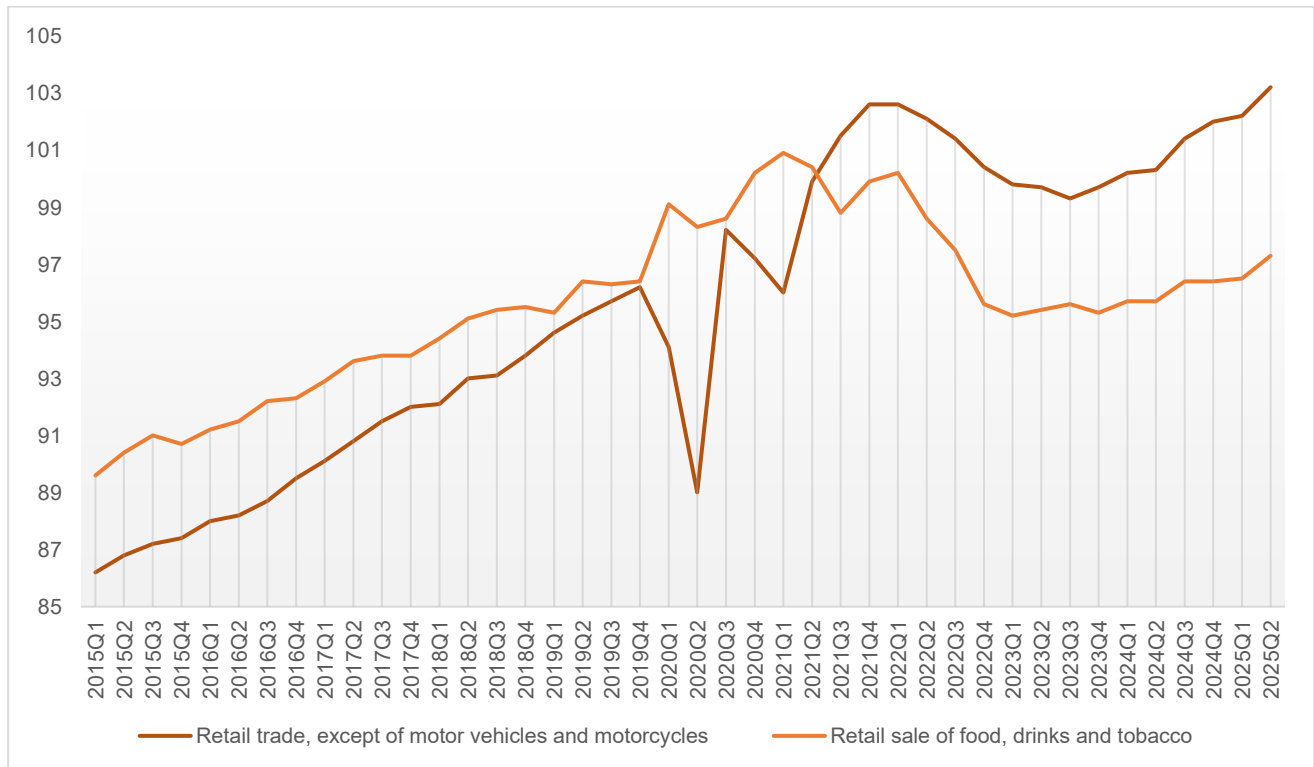
### Retail sales index (2021=100)

	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Total retail trade</b>	100.3	101.4	102	102.2	103.2	
<b>% change</b>	0.1	1.1	0.6	0.2	1	2.9
<b>Food, drinks and tobacco</b>	95.7	96.4	96.4	96.5	97.3	
<b>% change</b>	0	0.7	0	0.1	0.8	1.7

Source: Eurostat

The index of the volume of retail trade measures the evolution of the turnover in retail trade, adjusted for price changes (deflated), i.e. the evolution of the total amount of goods sold, based on data adjusted for calendar and seasonal effects.

### EU turnover in retail trade by economic activity, 2015-2025 (2021=100)

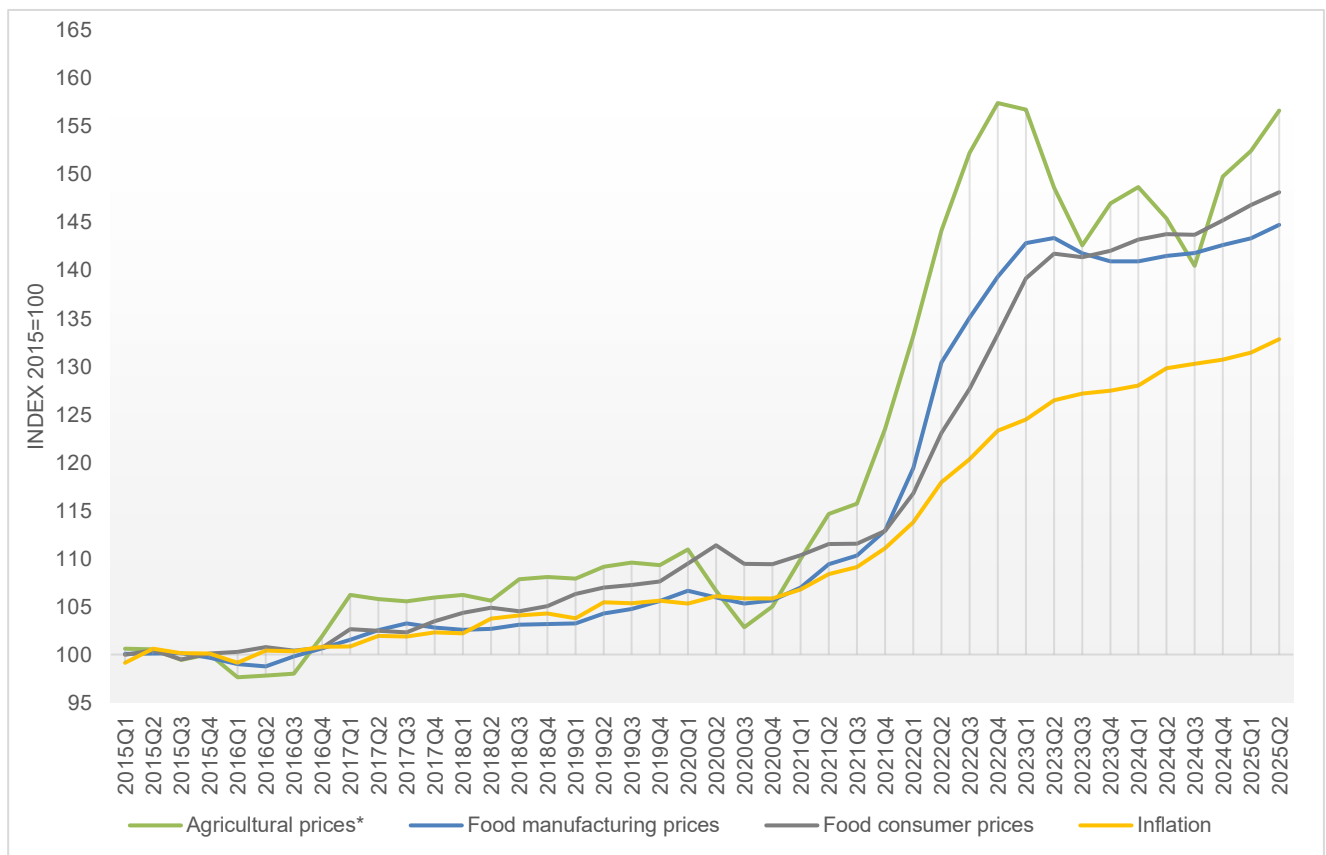


Source: Eurostat

## Price developments along the EU food chain

### Price developments (% change)

	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	y-o-y
<b>Agricultural prices*</b>	-2.2	-3.4	6.6	1.8	2.7	7.7
<b>Food manufacturing prices</b>	0.4	0.2	0.6	0.5	1	2.3
<b>Food consumer prices</b>	0.4	0	1	1.1	0.9	3
<b>Inflation</b>	1.4	0.4	0.3	0.6	1.1	2.3



\* The European Statistics Office Eurostat computes these indices since 2015 on the basis of a weighted basket taking the 12 months of the 2015 as a basis. Historic farmer prices for the period 2007-2014 were estimated by experts at DG AGRI.

Sources: Eurostat and DG Agriculture and Rural Development; own calculations

## Focus on ...



October 2025

### Food and drink producer prices, consumer prices and inflation

- In June 2025, EU food and drink producer prices increased by 2.3% compared to June 2024.
- Consumer food prices registered a 3.1% increase compared to June 2024.
- Inflation was up by 2.3% in June 2025 compared to June 2024.

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### Energy prices

#### Crude oil and natural gas

- In June 2025, average crude oil prices were down 14% compared to June 2024.
- EU natural gas prices were up 14% compared to June 2024.

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### Transport costs

#### Global shipping and air freight

- The global container freight rate index decreased by 20% between June 2024 and June 2025.
- Air freight rates were down by 5% compared to June 2024.

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### Packaging

#### Wood and paper

- June year-on-year, producer prices index of wooden containers increased by 2%, and returned to the value of August 2021, still remaining well above pre-COVID level.
- Producer price indices of pulp, paper and paperboard decreased by 2% compared to June 2024, and returned to the value of February 2022, still remaining well above pre-COVID level.

#### Plastics and metal

- The producer price index of plastic packing goods remained stable compared to June 2024, well above pre-COVID level.

- The June year-on-year comparison shows that the producer price index of light metal packaging increased by 3%.

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### Machinery for processing

- The producer price index of machinery for food and drink processing registered a 1% increase since June 2024.

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### Labour

#### Labour shortage easing

- The job vacancy rate in the EU manufacturing industry declined since Q4 2022 (Q2 2025/Q2 2024: -11%).
- In Q2 2025, variations in the job vacancy rate in total manufacturing across Member States ranged from 4% in the Netherlands to 0.5% in Spain.

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### Agricultural raw materials

- The FAO food price index was up 5.9% compared to June 2024.
- For further details, please see the table under this section.

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### Animal feed

- After reaching a plateau in the second half of 2022, producer prices of animal feed have trended downward until end of 2024.
- The June 2025 year-on-year comparison shows that the producer price index of animal feed was up 1%.

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### Fertilizers

- In June 2025 year-on-year, prices of diammonium phosphate, triple superphosphate and urea increased by 32%, 35% and 25% respectively. Compared to June 2021, prices for the three categories of fertilizers were up by 18%, 17% and 7% respectively.

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