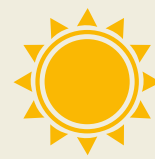
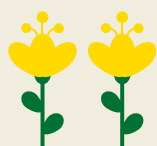


# Food security – why Primary Food Processors matter

Depending on the specific activity, between 45% and 90% of the ingredients processed by the industry end up in food, making it an essential contributor to food security in the EU. The remaining part of the output from the industry provides essential inputs to animal feed, the energy sector and pharmaceutical and cosmetic industries, as well as a multitude of industrial uses.



## Vegetable oils and meals



**Raw materials:** Rapeseed, soya, sunflower seed, linseed, palm, coconut

**End products:** Vegetable oils used in food (e.g., margarine, bottled oil) and non-food (e.g. biodiesel, biochemicals). Protein meal which is produced is used as feed.

## Vegetable proteins



**Raw materials:** Wheat, soya, peas, potato, rice, legumes

**End products:** Protein flours, isolates and concentrates sold to secondary processors that produce plant-based protein goods (e.g., meat and dairy alternatives) and animal feed.

## Flour milling



**Raw materials:** Wheat, rye, oats

**End products:** Different types of flours sold in bulk to secondary processors, bakeries, and feed producers.

## Starch



**Raw materials:** Wheat, corn, potato, peas, rice, oats

**End products:** Starches and derivatives, proteins and fibres, which are then used as key ingredients in a multitude of food, feed and industrial applications.

## Sugar



**Raw materials:** Sugar beets (mainly from France, Germany and Poland)

**End products:** Sugar for food and industrial use, animal feed, molasses, bioethanol and biomethane.

## Cocoa



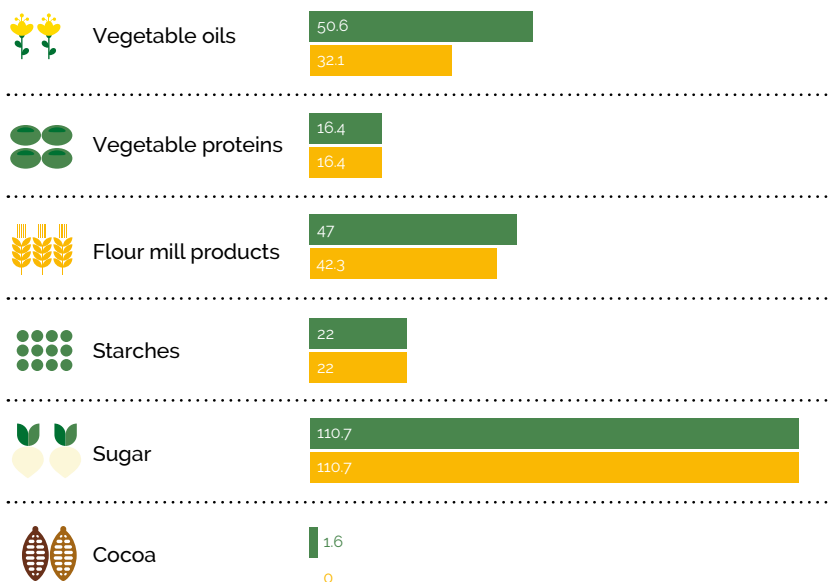
**Raw materials:** Cocoa beans, 100% imported (mainly from smallholders from West Africa)

**End products:** Paste, powder and butter, which are after made into chocolate and other confectionary products.

## 01 Volume of processed raw materials

As a major channel for the processing of plant-based agricultural commodities, the total volume processed annually reached nearly **250m tonnes** in **2024**. The industry processed over 550 kg of raw agricultural inputs per EU inhabitant.

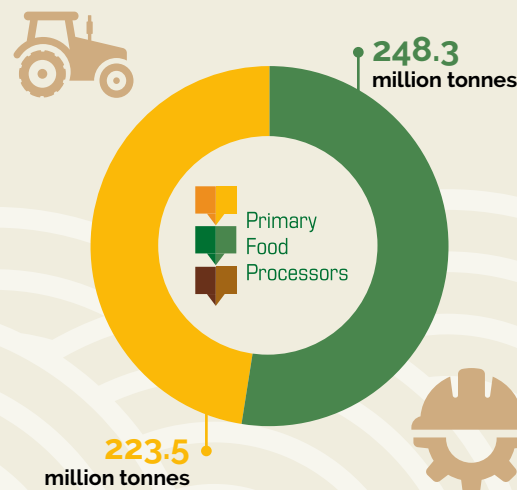
Volume of processed raw materials, and its share in primary food processing total, by industry (2024) in million tonnes



■ Raw commodities processed, in million tonnes, in 2024 a)

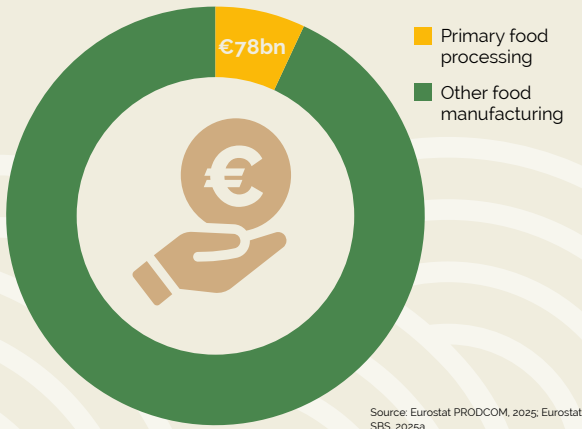
■ Of which sourced from EU, in million tonnes b)

## Primary food processing total



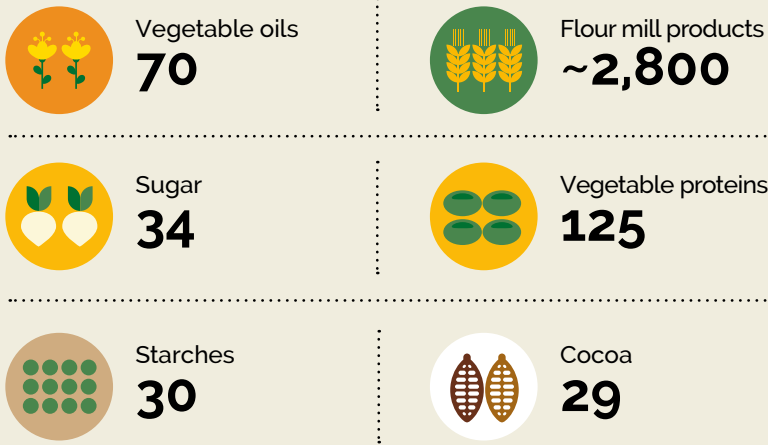
Production value

The total production value of the primary food processing industry was **€78bn** in 2023, **7%** of the total value created by the food processing industry.



Number of companies

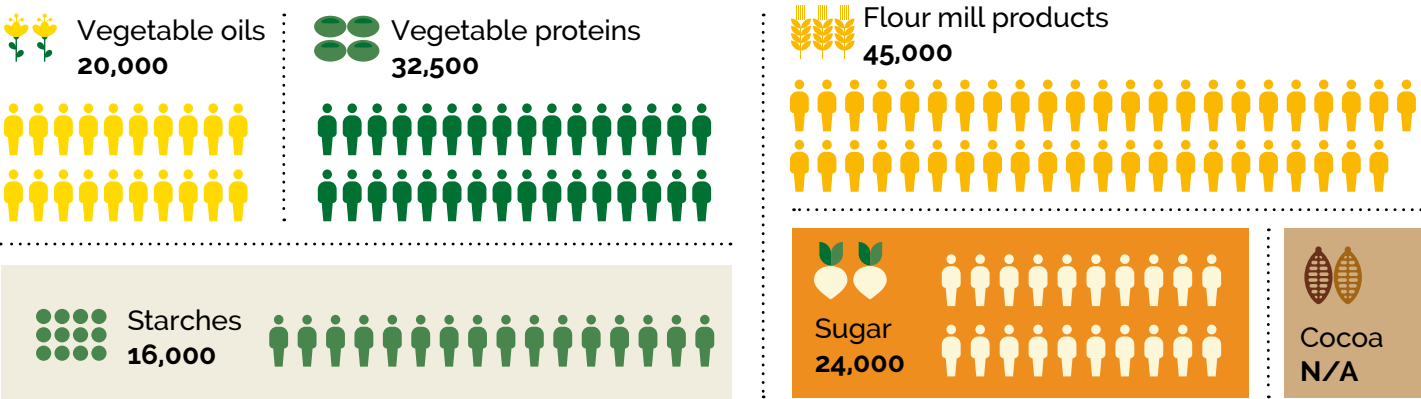
Estimated number of primary food processing companies by industry activity in the EU in 2024



Employment

There are close to **140,000** people working in the primary food processing industry, while the number of indirect farm level jobs created by the industry is almost 1.2m.

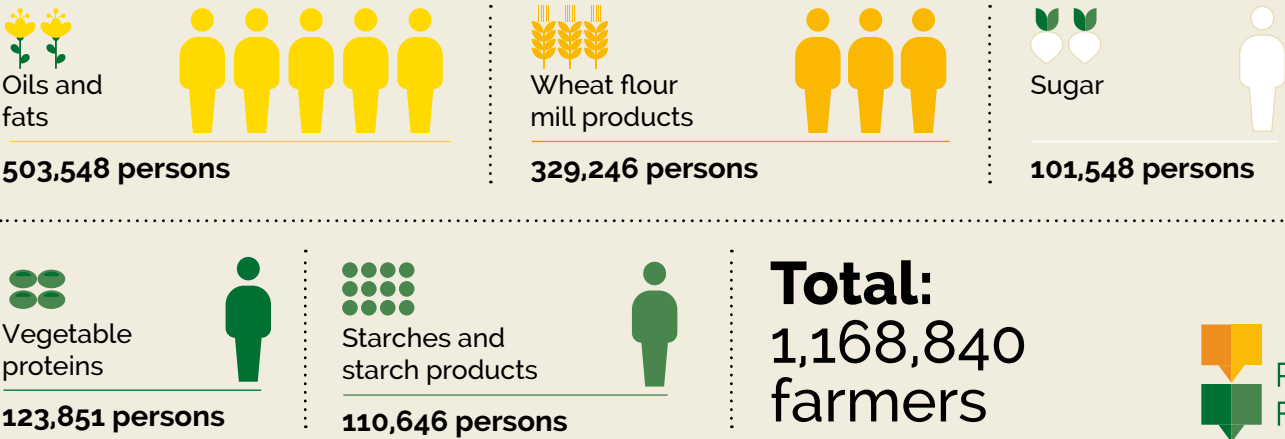
Number of employees employed directly in the primary food processing industry, 2022



Primary food processors total: 137,500 Direct jobs

Source: industry data of CEFS, ECA, EFM, EUVEPRO, FEDIOL, Starch Europe, 2025b.

Indirect employment in EU agriculture from the primary food processing industry a), 2023 (est.)



a) Cocoa is not produced in significant quantities within the European Union, with the exception of French Outermost Regions and Overseas Countries and Territories. Source: own calculation based on industry data for volumes of processed raw materials, FAO data for yields and Eurostat data for area, employment, FAOSTAT, 2025; Eurostat FSS, 2025a; Eurostat FSS, 2025b.