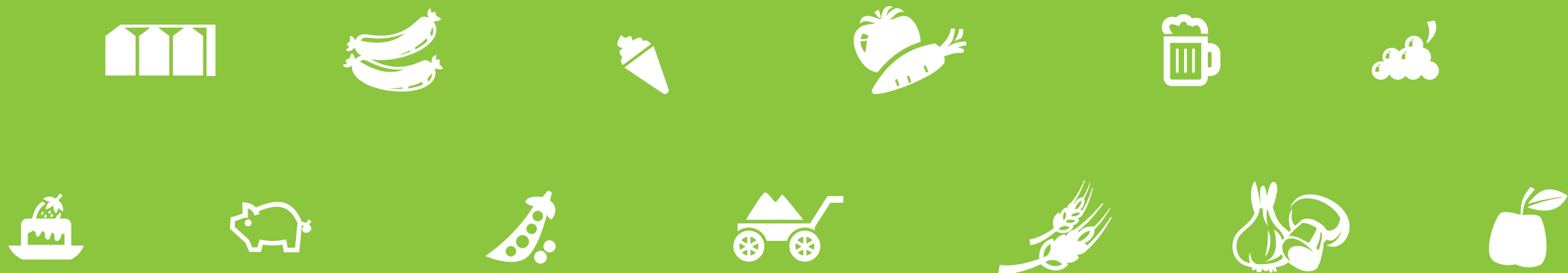




Živilskopredelovalna industrija v Sloveniji v letu 2017



Uvodni besedi

Spoštovani!

Preteklih nekaj let lahko označimo kot leta razvoja in rasti. Pozitivno vzdušje in gospodarska rast se odražata v celotni družbi, kar generira potrošnjo, rast proizvodnje in pozitivno vpliva na investicije. Beležimo tudi rast števila delovnih mest ter s tem zmanjšanje brezposelnosti.

Večino pridelane in predelane hrane prodamo na domačem trgu, zato je pozitivna podoba celotne verige preskrbe s hrano, od pridelovalcev, predelovalne industrije do trgovine, pomemben dejavnik pri zagotavljanju zaupanja potrošnikov v kakovost lokalne hrane. K dvigu zavedanja je gotovo pripomogla tudi nova shema kakovosti in zaščitni znak »Izbrana kakovost Slovenija«, kot prva sta v shemo kakovosti vstopila sektorja mleka in mesa ter označila svoje kakovostne proizvode s tem znakom. V Sloveniji pridelani in predelani proizvodi mesa in mleka so dokaz, da je povezovanje vseh členov v verigi preskrbe s hrano ključ do uspeha. Intenzivna promocija in ozaveščanje imata za posledico dvig zaupanja potrošnikov v slovensko hrano in večje poseganje po lokalnih proizvodih.

Pomemben dejavnik rasti gospodarstva je tudi povečevanje izvoza, ki je posledica aktivnosti na področju internacionalizacije slovenskega kmetijstva in živilstva. Z izvozom se zmanjšuje odvisnost od domačega oz. evropskega trga ter krepi stabilnost celotne verige preskrbe s hrano. Na tem mestu bi želel omeniti, da je ena od prioritet našega ministrstva pomoč podjetjem pri prodoru na nove trge ter s tem spodbujanje izvoza visokokakovostnih kmetijskih in živilskih proizvodov, ki jih lahko s ponosom ponudimo tudi bolj oddaljenim trgom. Izvozna usmerjenost živilskopredelovalne industrije se je v letu 2017 v primerjavi s preteklim letom povečala za 12,6 % in je v skupnih prihodkih od prodaje preseгла 27 %. To kaže na dejstvo, da podjetja živilskopredelovalne industrije uspešno osvajajo nove trge. Na tem področju je bilo v zadnjih letih že opravljenih precej aktivnosti, cilju pa bomo sledili tudi v prihodnje.

Spoštovani, dobro se zavedamo pomena živilskopredelovalne industrije in njenega multiplikativnega učinka na slovensko gospodarstvo, zato upam, da bomo nadaljevali z dobrim sodelovanjem za uspešne poslovne rezultate!

mag. Dejan Židan,
minister za kmetijstvo, gozdarstvo in prehrano



Foto: Ministrstvo za kmetijstvo, gozdarstvo in prehrano

Spoštovani,

kar je nam domačinom že zelo dobro poznano, turistom, ki oddih preživljajo na sončni strani Alp pa čedalje bolj, je dejstvo, da Slovenijo odlikuje bogata kulinarčna pestrost. Za to se lahko zahvalimo predvsem družinskemu izročilu, babicam, mamam in hčeram ter kulturnemu izročilu naroda, našim velikim piscem, ki so se še kako zavedali pomembnosti vsakodnevne prehrane kot dela narodne identitete. Dejstvo, da Slovenci cenimo in vsakodnevno uživamo naše domače jedi, je v današnjem času globalizacije še kako pomembno. V času, polnem hitenja, stresa in pomanjkanja časa, pomembno vlogo pri zagotavljanju ohranjanja družinskih navad in običajev odigra slovenska živilskopredelovalna industrija, ki ji zaupa vse več slovenskih potrošnikov. Slovensko živilstvo se lahko pohvali tudi z visoko stopnjo izvozne aktivnosti. V letu 2017 smo več kot četrť prihodkov od prodaje ustvarili zunaj meja Slovenije, kar nas nadvse veseli, saj je to potrditev, da pri nakupu slovenskih živilskih proizvodov ne gre zgolj za sentimentalno navezanost, temveč da potrošniki vedno bolj prepoznavajo kakovost in okusnost naših izdelkov.

Živilska industrija na vsakem koraku piše nacionalno zgodovino, zato si prizadevamo, da ohranjamo tradicionalne recepte, ki jih prilagajamo željam in potrebam sodobnega potrošnika. Naj bo to priročnejša embalaža, izdelki z manj sladkorja, maščobe ali soli oz. nov, inovativen okus. Vse naše poteze so usmerjene v zadovoljstvo, predvsem pa zdravje naših potrošnikov. V slovenski živilskopredelovalni industriji je registriranih 27 sektorjev, kar nam omogoča, da slovenskega potrošnika preskrbimo z vsem, kar potrebuje za uravnotežene dnevne obroke. Prizadevamo si, da so naši proizvodi izdelani iz visokokakovostnih surovin, ki jih zagotavlja raznolika slovenska pokrajina, zato ne preseneča dejstvo, da so živilskopredelovalni obrati enakomerno razporejeni po vsej državi. S tem pripomoremo k ohranjanju in razvoju slovenskega podeželja ter k decentralizaciji zaposlovanja. Z našimi izdelki je tako neposredno povezano več tisoč ljudi, upamo in prizadevamo pa si, da se bomo čim pogosteje znašli tudi na vaših vsakdanjih in prazničnih mizah. Verjamem, da bo publikacija, ki je pred vami, pripomogla k še učinkovitejši promociji slovenske živilskopredelovalne industrije, tako doma kot po svetu.

Anka Miklavič Lipušček,
predsednica GZS - Zbornice kmetijskih in živilskih podjetij



Foto: Tadej Kretf

Osebna izkaznica živilskih podjetij



Število podjetij

733



Število zaposlenih

13.683



Dodana vrednost

499 mio €



Dodana vrednost na zaposlenega

36.472 €



Čisti prihodki od prodaje

2,2 mrd €



Čisti prihodki od prodaje na tujem trgu

599 mio €



Delež prodaje na tujem trgu

27,8 %



Neto čisti dobiček/izguba

81 mio €

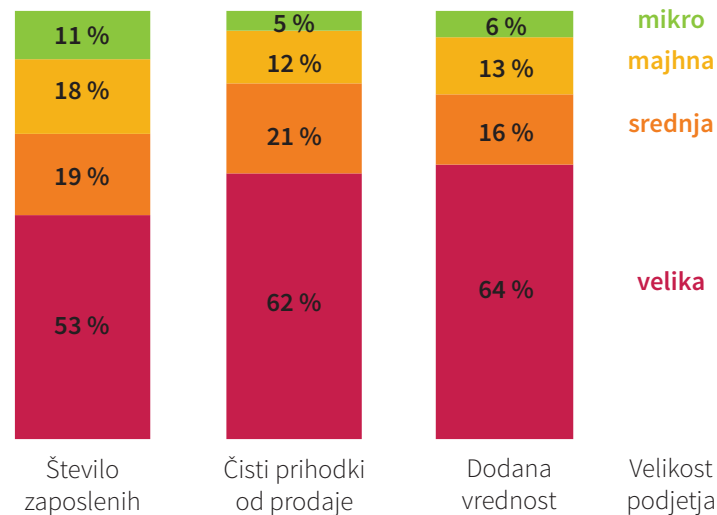
V letu 2017 je bilo
v živilskopredelovalni industriji registriranih

733 podjetij

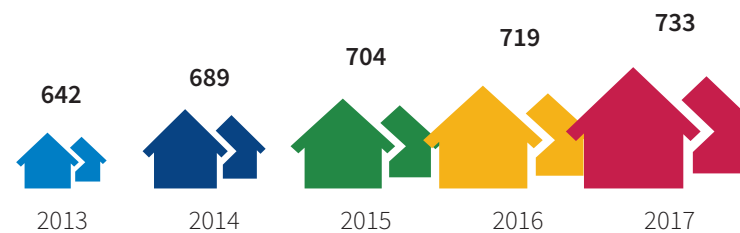


- Število podjetij v živilskopredelovalni industriji iz leta v leto narašča. V obdobju 2013-2017 beležimo največje povečanje števila registriranih podjetij v letu 2014, od takrat do leta 2017 pa se je število podjetij zgolj povečevalo.
- Kljub temu, da velika podjetja predstavljajo zgolj 2 % vseh podjetij v živilskopredelovalni industriji, pripomorejo k največjemu deležu zaposlenosti (53 %), dodani vrednosti (64 %) in čistim prihodkom od prodaje (62 %).

Razčlenitev podjetij po različnih indikatorjih

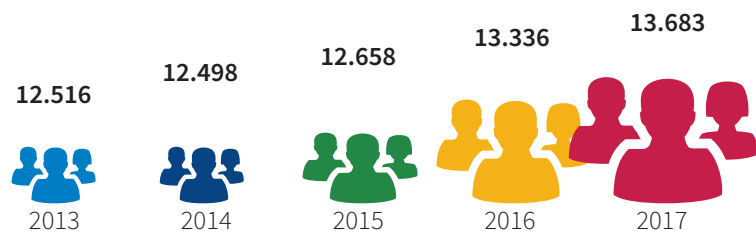


Število podjetij v živilskopredelovalni industriji narašča



Živilskopredelovalna industrija kot zaposlovalec

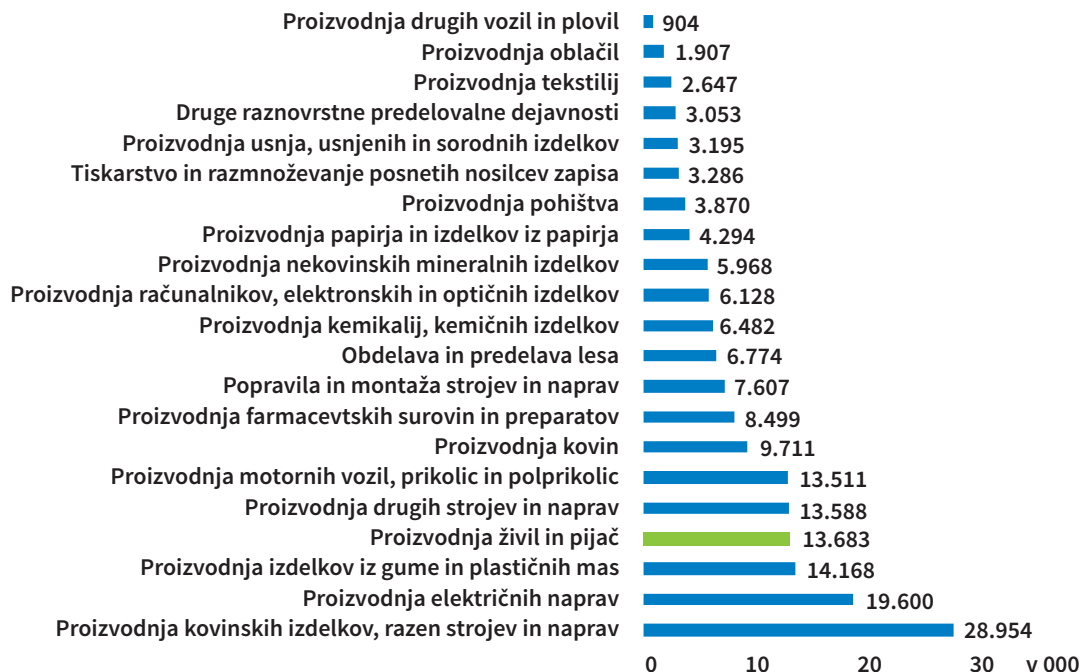
Število zaposlenih v živilskopredelovalni industriji se povečuje



TOP 5 ZAPOSLOVALCEV

1. Perutnina Ptuj d.d.
2. Žito d.o.o.
3. Pivovarna Laško Union d.o.o.
4. Ljubljanske mlekarne d.d.
5. Mlinotest d.d.

Število zaposlenih v predelovalnih dejavnostih



Število zaposlenih v živilskopredelovalni industriji



- Največ zaposlujejo podjetja, ki se ukvarjajo s proizvodnjo pekarskih izdelkov in testenin. Znotraj te dejavnosti je registriranih tudi največ mikro podjetij in 4 velika podjetja, ki zaposlujejo 39 % vseh zaposlenih v tej dejavnosti.
- Na drugem mestu so podjetja, ki se ukvarjajo s proizvodnjo mesa in mesnih izdelkov, od katerih največ ljudi zaposlujejo podjetja, ki se ukvarjata s proizvodnjo perutninskega mesa.
- Podjetja, ki se ukvarjajo s predelavo mleka, so po številu zaposlenih na tretjem mestu.

Število podjetij po sektorjih



Živilskopredelovalno industrijo po SKD 2008 v grobem razdelimo na C 10 - Proizvodnja živil in C 11- Proizvodnja pijač, natančneje pa na 27 levo navedenih sektorjev.

- Največji delež (44 %) vseh podjetij v živilskopredelovalni industriji predstavljajo podjetja, ki se ukvarjajo s proizvodnjo kruha, svežega peciva in slaščic, sledijo podjetja, ki se ukvarjajo s proizvodnjo mesnih izdelkov in podjetja, ki se ukvarjajo s proizvodnjo mesa (razen perutninskega).

Čisti prihodki od prodaje



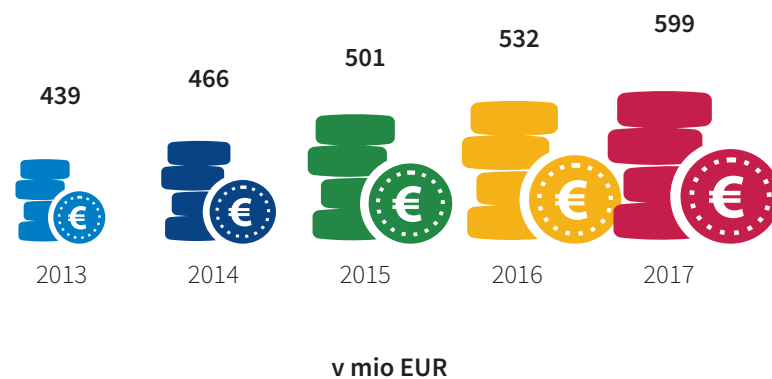
Dodana vrednost



- V letu 2017 so največ čistih prihodkov od prodaje ustvarila podjetja, ki se ukvarjajo s proizvodnjo mesa in mesnih izdelkov.
- Na drugem mestu so podjetja, ki se ukvarjajo s proizvodnjo pekarskih izdelkov in testenin.
- Podjetja, ki se ukvarjajo s predelavo mleka, so po čistih prihodkih od prodaje na tretjem mestu.

- Leta 2017 so največjo dodano vrednost ustvarila podjetja, ki se ukvarjajo s proizvodnjo pekarskih izdelkov in testenin.
- Na drugem mestu so podjetja, ki se ukvarjajo s proizvodnjo mesa in mesnih izdelkov.
- Podjetja, ki se ukvarjajo s proizvodnjo pijač, so po dodani vrednosti na tretjem mestu.

Čisti prihodki od prodaje na tujih trgih



- Živilska podjetja izkazujejo odlične rezultate tudi na tujih trgih.
- V zadnjih petih letih se čisti prihodki od prodaje živilskih podjetij na tujem trgu gibljejo med 400 in 600 milijoni evrov.
- Največje povišanje v primerjavi s predhodnim letom beležimo v letu 2017, ko so se čisti prihodki od prodaje na tujem trgu zvišali za skoraj 13 % oz. za več kot 65 milijonov evrov.

TOP 5 IZVOZNIH PODJETIJ

1. Droga Kolinska d.d.
2. Perutnina Ptuj d.d.
3. Ljubljanske mlekarne d.d.
4. Incom d.o.o.
5. Pivovarna Laško Union d.o.o.

TOP 5 IZVOZNIH DRŽAV

1. Italija
2. Hrvaška
3. Avstrija
4. Bosna in Hercegovina
5. Nemčija

Čisti prihodki od prodaje na tujem trgu



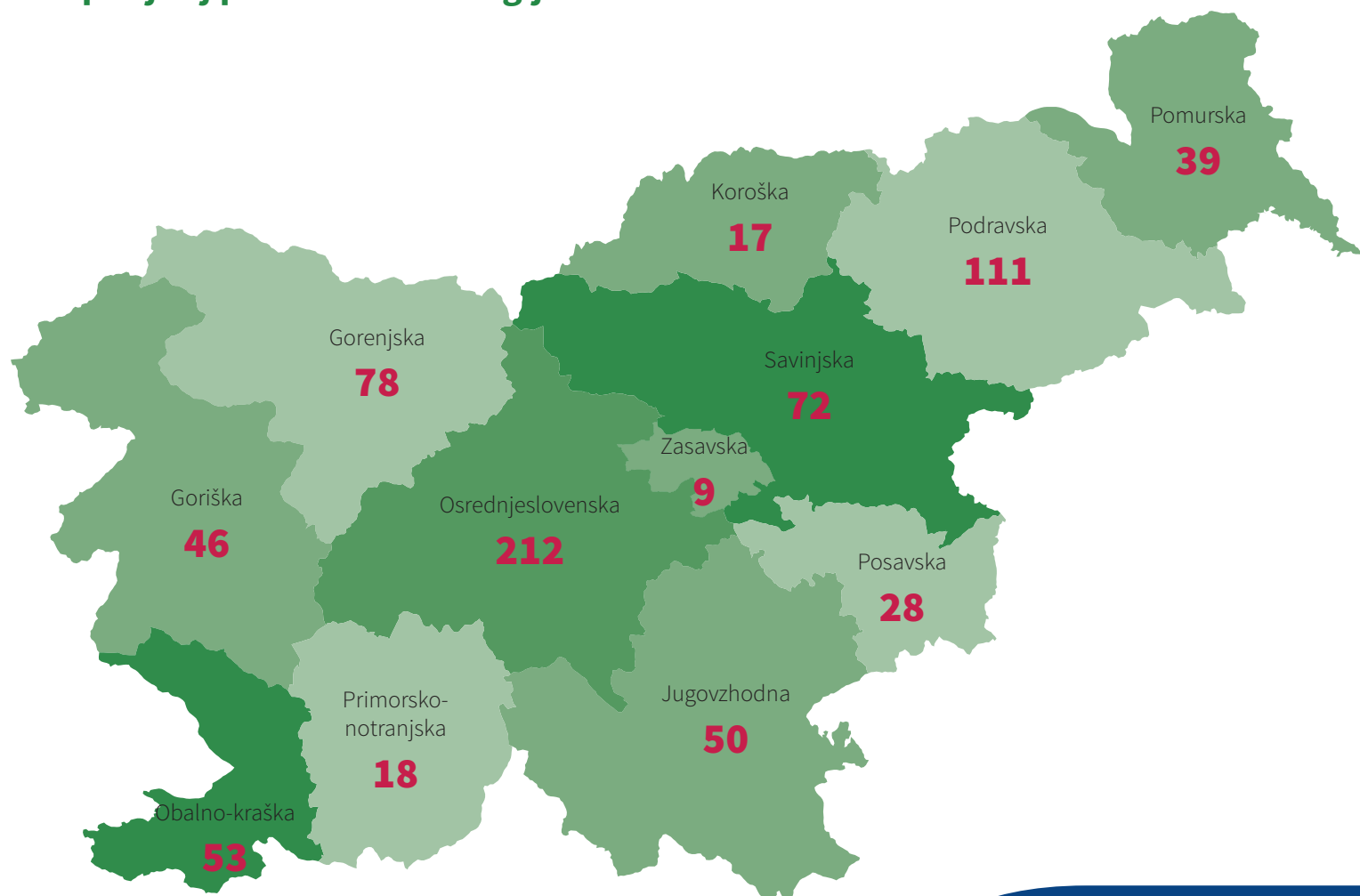
Delež prodaje na tujem trgu



- Največ čistih prihodkov od prodaje na tujem trgu ustvarijo podjetja, ki se ukvarjajo s proizvodnjo drugih prehrabnih izdelkov.
- Na drugem mestu po čistih prihodkih od prodaje na tujih trgih so podjetja, ki se ukvarjajo s proizvodnjo mesa in mesnih izdelkov
- Podjetja, ki se ukvarjajo s predelavo mleka so po čistih prihodkih od prodaje na tujem trgu na tretjem mestu.

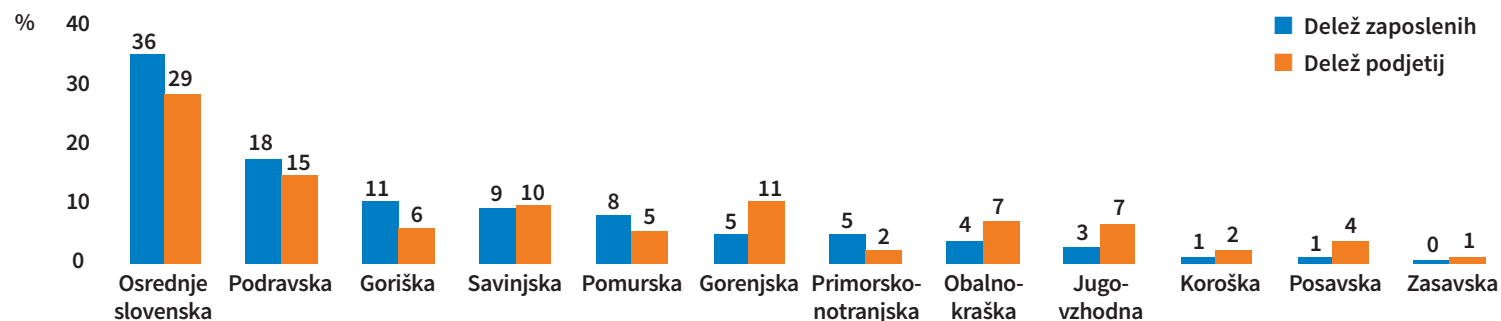
- Največji delež prodaje na tujem trgu ustvarijo podjetja, ki se ukvarjajo s proizvodnjo drugih prehrabnih izdelkov, ta na tujem trgu ustvarijo 58 % celotne prodaje.
- Na drugem mestu so podjetja, ki se ukvarjajo s predelavo mleka, njihov delež prodaje na tujem trgu znaša skoraj 39 %.
- Podjetja, ki se ukvarjajo s predelavo in konzerviranjem sadja in zelenjave, zasedajo tretje mesto. Njihov delež prodaje na tujem trgu znaša 34 %..

Število podjetij po statističnih regijah

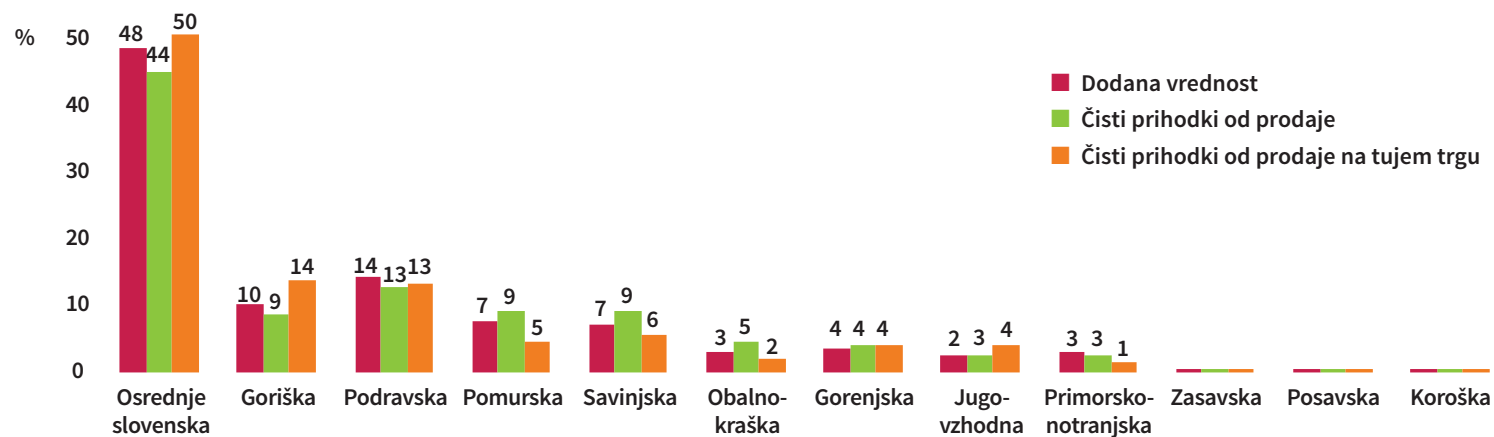


- Slovenska živilskopredelovalna industrija je zastopana v vseh slovenskih statističnih regijah.
- Najuspešnejša je živilskopredelovalna industrija osrednjeslovenske regije.
- Nadpovprečne rezultate dosegajo še pomurska, podravska, savinjska in goriška statistična regija.

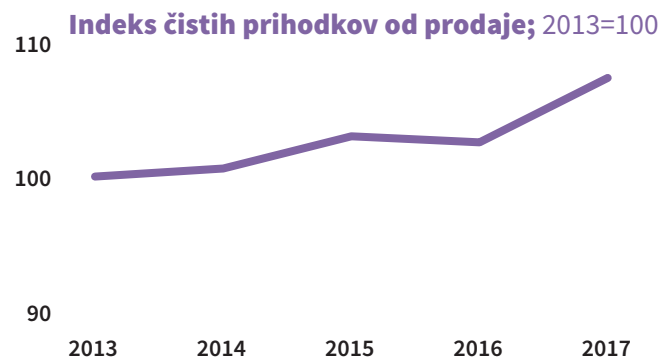
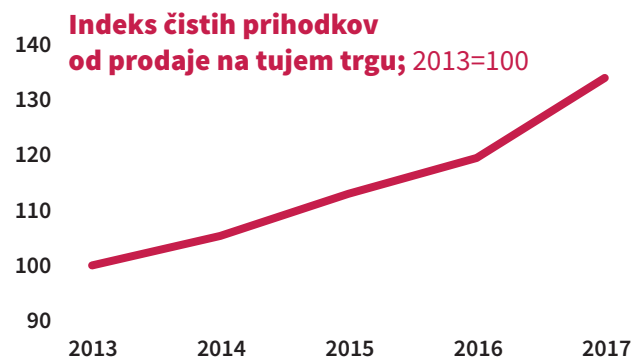
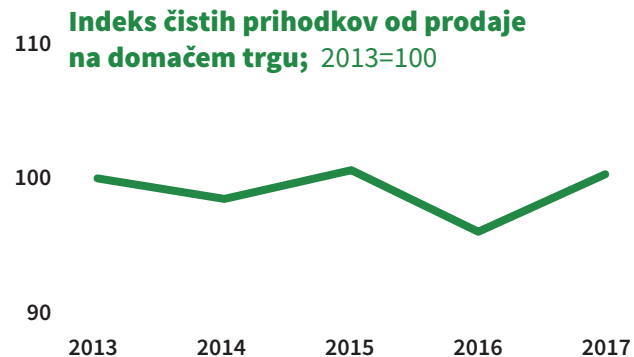
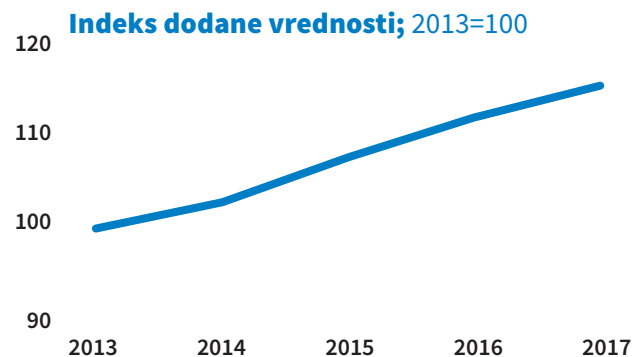
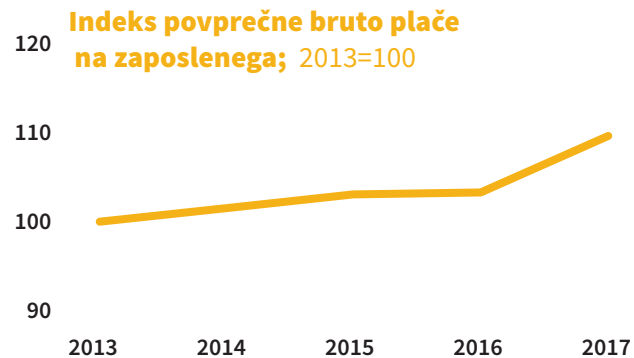
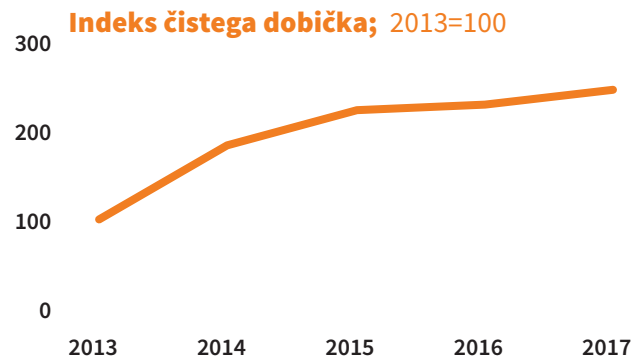
Delež podjetij in zaposlenih v statističnih regijah (SLO=100 %)



Prispevek statističnih regij k posameznim kazalnikom poslovanja (SLO=100 %)



Kazalniki poslovanja slovenske živilskopredelovalne industrije



Povzetek

- Od leta 2013 do leta 2017 se je število podjetij v živilskopredelovalni industriji povečalo.
- Povečuje se tudi število zaposlenih.
- Rasteta dodana vrednost in čisti prihodki od prodaje.
- Prav tako narašča izvozna aktivnost – čisti prihodki od prodaje na tujem trgu so se v zadnjih petih letih povečali za 36 %.
- Delež prodaje na tujem trgu je iz 22 % v letu 2013 narasel na 28 % v letu 2017.

Prikazi na grafikonih temeljijo na indeksu s stalno osnovo v letu 2013.

PO ŠTEVILU ZAPOSLENIH

1. Perutnina Ptuj d.d.
2. Žito d.o.o.
3. Pivovarna Laško Union d.o.o.
4. Ljubljanske mlekarne d.d.
5. Mlinotest d.d.
6. Droga Kolinska d.d.
7. Pivka perutninarstvo d.d.
8. Celjske mesnine d.o.o.
9. Pekarna Pečjak d.o.o.
10. Don Don d.o.o.

PO ČISTIH PRIHODKIH OD PRODAJE

1. Droga Kolinska d.d.
2. Ljubljanske mlekarne d.d.
3. Perutnina Ptuj d.d.
4. Pivovarna Laško Union d.o.o.
5. Žito d.o.o.
6. Celjske mesnine d.o.o.
7. Mlekarna Celeia d.o.o.
8. Panvita MIR d.o.o.
9. Jata Emona d.o.o.
10. Mlinotest d.d.

PO DODANI VREDNOSTI

1. Pivovarna Laško Union d.o.o.
2. Perutnina Ptuj d.d.
3. Droga Kolinska d.d.
4. Ljubljanske mlekarne d.d.
5. Žito d.o.o.
6. Radenska d.o.o.
7. Fructal d.o.o.
8. Mlinotest d.d.
9. Pekarna Pečjak d.o.o.
10. Jata Emona d.o.o.

PO ČISTIH PRIHODKIH OD PRODAJE NA TUJIH TRGIH

1. Droga Kolinska d.d.
2. Perutnina Ptuj d.d.
3. Ljubljanske mlekarne d.d.
4. Incom d.o.o.
5. Pivovarna Laško Union d.o.o.
6. Žito d.o.o.
7. Hočevnar d.o.o.
8. Fructal d.o.o.
9. Mercator-Emba d.d.
10. Mlekarna Celeia d.o.o.

Program razvoja podeželja Republike Slovenije za obdobje 2014–2020 (v nadaljevanju: PRP 2014–2020) je skupni programski dokument posamezne države članice in Evropske komisije, ki predstavlja programsko osnovo za črpanje finančnih sredstev iz Evropskega kmetijskega sklada za razvoj podeželja (EKSRP). Program odraža nacionalne prednostne naloge, ki jih država članica opredeli na podlagi analize stanja kmetijstva, živilstva in gozdarstva.

PRP 2014–2020 se osredotoča na tri glavna področja, s katerimi bo Slovenija zagotavljala izboljšanje biodiverzitete, stanje voda in tal, konkurenčnost kmetijskega sektorja in socialno vključenost ter lokalni razvoj podeželskih območij, s čimer v največji meri odraža nacionalne prednostne naloge, ki jih je Slovenija opredelila na podlagi analize danosti in stanja kmetijstva, živilstva in gozdarstva, pa tudi vpetosti teh gospodarskih panog v dogajanje na podeželju in celotnem prostoru.

Za razvoj podeželskih območij je pomembna tudi stabilna živilskopredelovalna industrija, zato je podpora s strani PRP 2014–2020 namenjena tudi tej gospodarski panogi. Za živilskopredelovalno industrijo so tako namenjena sredstva iz naslednjih ukrepov PRP 2014–2020:

Ukrep 3: Sheme kakovosti za kmetijske proizvode in živila

Cilj ukrepa je večja vključenost kmetijskih gospodarstev v sheme kakovosti in s tem povečati dodano vrednost kmetijskih proizvodov in povečati količino proizvodov iz shem kakovosti na trgu.

Ukrep 4: Naložbe v osnovna sredstva

Ukrep je namenjen razvoju kmetijstva, predelave in trženja kmetijskih in živilskih proizvodov ter kmetijske in gozdarske infrastrukture.

Ukrep 6: Razvoj kmetij in podjetij

Namen ukrepa je vzpostavitev in razvoj kmetij ter nekmetijskih dejavnosti na podeželju. S spodbudami želi PRP prispevati k aktivaciji endogenih potencialov lokalnega okolja, katerih posledica bodo krepitev podeželskega gospodarstva, nova delovna mesta in višja dodana vrednost.

Ukrep 16: Sodelovanje

Ukrep podpira raznovrstne oblike sodelovanja, s katerimi bo akterjem na podeželskih območjih omogočeno lažje premagovanje gospodarskih, okoljskih in drugih omejitev, s katerimi se ti soočajo zaradi razdrobljenosti in nepovezanosti.



Evropski kmetijski sklad za razvoj podeželja: Evropa investira v podeželje



Zbornica kmetijskih in živilskih podjetij

Avtorici besedila: Nina Barbara Križnik, Tjaša Gorjanc

Oblikovanje: Samo Grčman

Izdalo: Ministrstvo za kmetijstvo, gozdarstvo in prehrano, Dunajska 22, 1000 Ljubljana

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Food processing industry in Slovenia in 2017



Introduction

Dear Sir/Madam,

the past few years have seen growth and development. A positive atmosphere and economic growth are reflected in the whole of society, which generates consumption and production, and positively affects investments. More jobs and lower unemployment have also been recorded.

Most produced and processed food is sold on the domestic market, therefore a positive image of the whole food supply chain, from producers, the processing industry to shops, is an important factor in developing consumers' trust in the quality of local food. A new quality scheme and the "Selected Quality Slovenia" trademark also helped raise awareness; the first two sectors to enter the quality scheme were milk and meat, which put this trademark on their quality products. Slovenian meat and milk products prove that connections between all links in the food supply chain is the key to success. Intensive promotion and awareness raising boost consumers' trust in Slovenian food and increasing demand for local products.

Another important factor in economic growth is an increase in exports, which is the result of activities in the internationalisation of Slovenian agriculture and food industry. Exports reduces dependency on domestic and European markets, and strengthen the stability of the whole food supply chain. I would also like to mention that one of our ministry's priorities is to assist enterprises to enter new markets, promoting exports of high-quality agricultural and food products which may be proudly supplied to more distant markets. The export orientation of the food processing industry grew by 12.6 per cent in 2017 compared to 2016, and exceeded 27 per cent of total sales revenue. This shows that food processing enterprises have been successfully entering new markets. In this field, many activities have been undertaken in recent years, an objective we will pursue in the future.

Dear Sir/Madam, we are well aware of the importance of the food processing industry and its multiplier effect on the Slovenian economy. We hope we will continue with this positive collaboration for successful business results in the future.

mag. Dejan Židan,
Minister of Agriculture, Forestry and Food



Photo: Ministry of Agriculture, Forestry and Food

Dear Sir/Madam,

a fact we locals have known for many years, and tourists spending holidays on the sunny side of the Alps have learned is that Slovenia is distinguished by a rich culinary diversity. This is particularly due to family traditions, grandmothers, mother and daughters, the cultural traditions of the nation, and our great writers, who were well aware of the importance of people's daily diet as a part of national identity. The fact that Slovenians appreciate and enjoy home-made dishes every day is very important in this time of globalisation. In this time of haste, stress and lack of time, the Slovenian food processing industry, which is trusted by more and more Slovenian consumers, plays an important role in preserving family habits and customs. The Slovenian food processing industry also boasts a high level of export activity. In 2017, over a quarter of sales revenue was generated outside Slovenia, about which we are very pleased, as it confirms that Slovenian food products are not bought only because of a sentimental attachment, but also because consumers are more frequently recognising the quality and taste of our products.

The food industry is constantly making national history, so we should strive to preserve traditional recipes adjusted to the desires and needs of modern consumers, whether this takes the form of convenient packaging, products that contain less sugar, fat or salt, or new, innovative flavours. All our activities are aimed at the satisfaction and, particularly, the health of our consumers. The Slovenian food processing industry comprises 27 registered sectors, which enables us to provide Slovenian consumers with everything they need for balanced meals. We strive to make our products with high-quality ingredients provided by the diverse Slovenian landscapes, and it is not surprising that food processing plants are equally distributed around the country. This supports the preservation and development of Slovenian rural areas and the decentralisation of employment. Several thousand people are thus directly connected with the food industry, and we hope and strive to have our products on your daily and holiday tables more frequently. I believe that the publication you are reading will contribute to the more effective promotion of the Slovenian food processing industry at home and worldwide.

Anka Miklavič Lipušček,
President of the Chamber of Agriculture and Food Enterprises
at the CCIS



Photo: Tadej Kreft

Identity card of food enterprises



Number of enterprises

733



Number of employees

13,683



Added value

EUR 499 million



Added value per employee

EUR 36,472



Net sales revenue

EUR 2.2 billion



Net sales revenue in foreign markets

EUR 599 million



Share of sale in foreign markets

27.8%



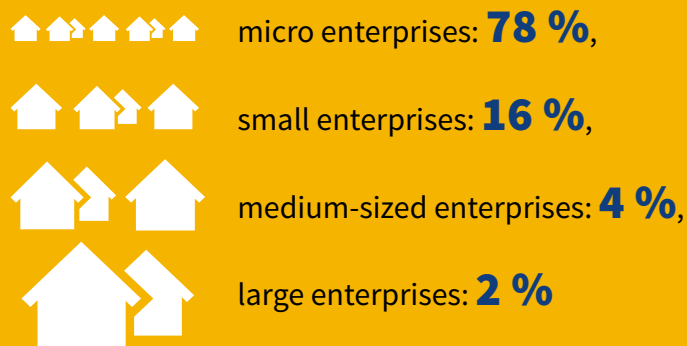
Net profit/loss

EUR 81 million

Characteristics of food processing enterprises in Slovenia

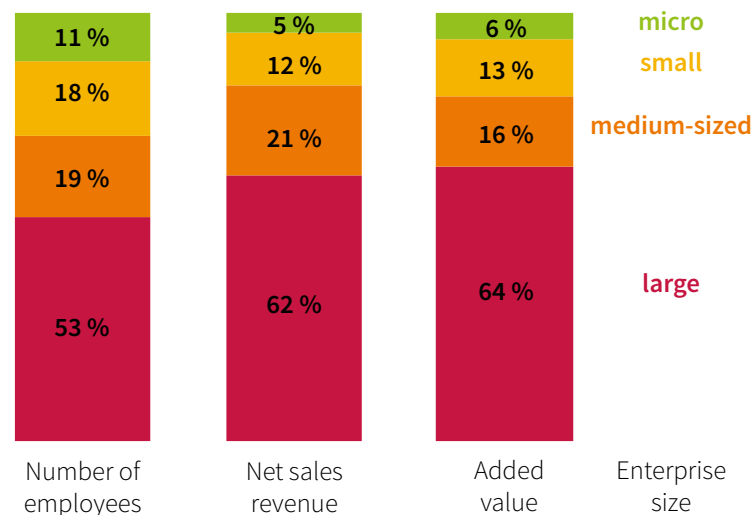
In 2017 there were

733 registered food processing enterprises

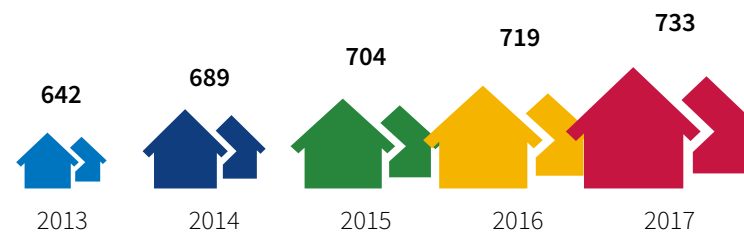


- The number of food processing enterprises has been growing every year. Between 2013 and 2017, the highest rise in the number of registered enterprises was recorded in 2014, and between 2014 and 2017, the number of enterprises increased.
- Despite the fact that large enterprises constitute a mere 2 per cent of all food processing enterprises, they contribute significantly to the highest share of employment (53 per cent), added value (64 per cent) and net sales revenue (62 per cent).

Break-down of enterprises by different indicators

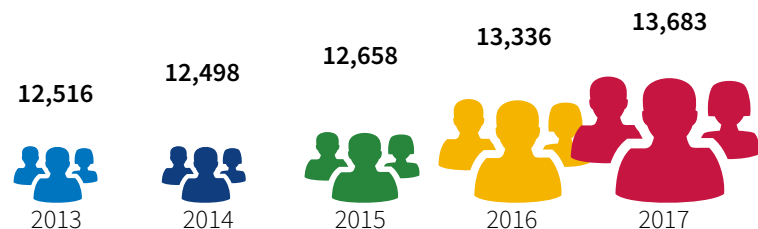


The number of enterprises has been growing



Food processing industry as an employer

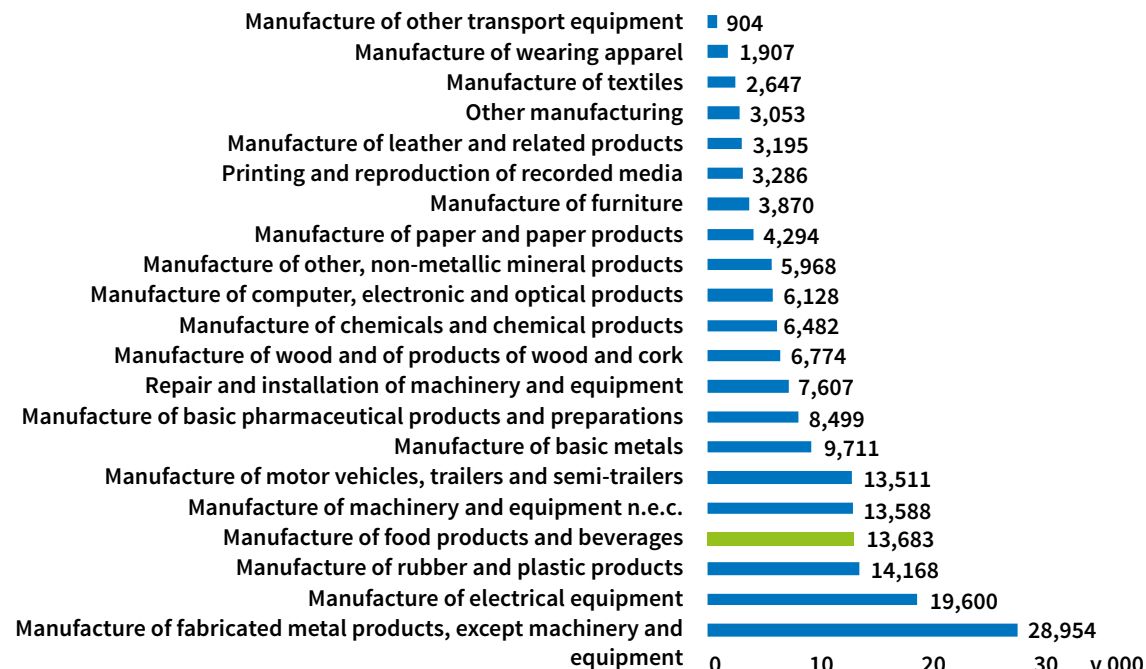
Number of employees has been growing



TOP 5 EMPLOYERS

1. Perutnina Ptuj d.d.
2. Žito d.o.o.
3. Pivovarna Laško Union d.o.o.
4. Ljubljanske mlekarne d.d.
5. Mlinotest d.d.

Number of employees in processing activities

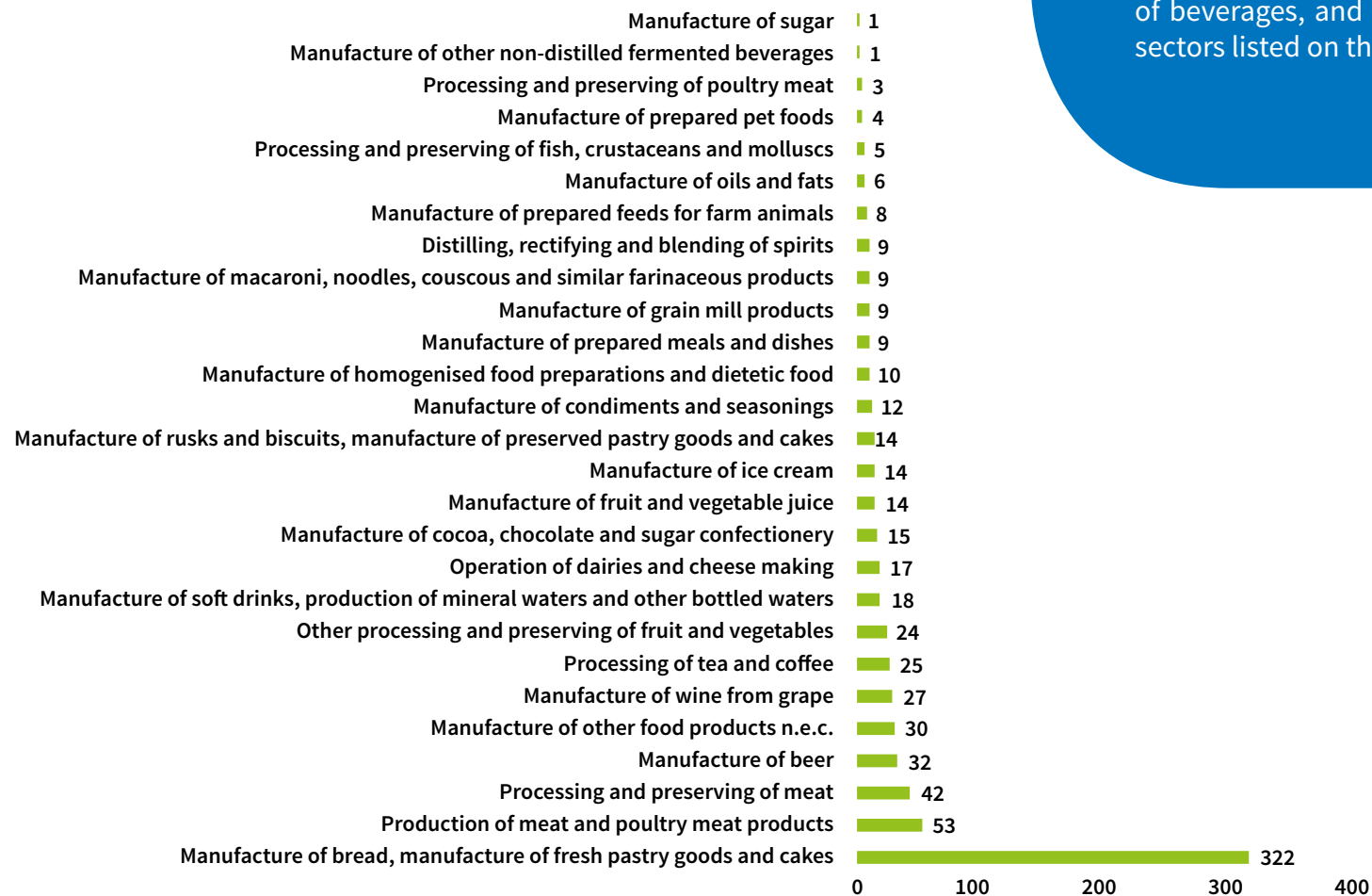


Number of employees in the food processing industry



- Enterprises that produce bakery and farinaceous products have the most employees. Most micro enterprises and only four large enterprises are registered for this sector. The four large enterprises employ 39 per cent of all employees in this sector.
- These are followed by enterprises that produce meat and meat products of which enterprises that produce poultry meat products have the most employees.
- Enterprises that produce dairy products ranked third according to the number of employees.

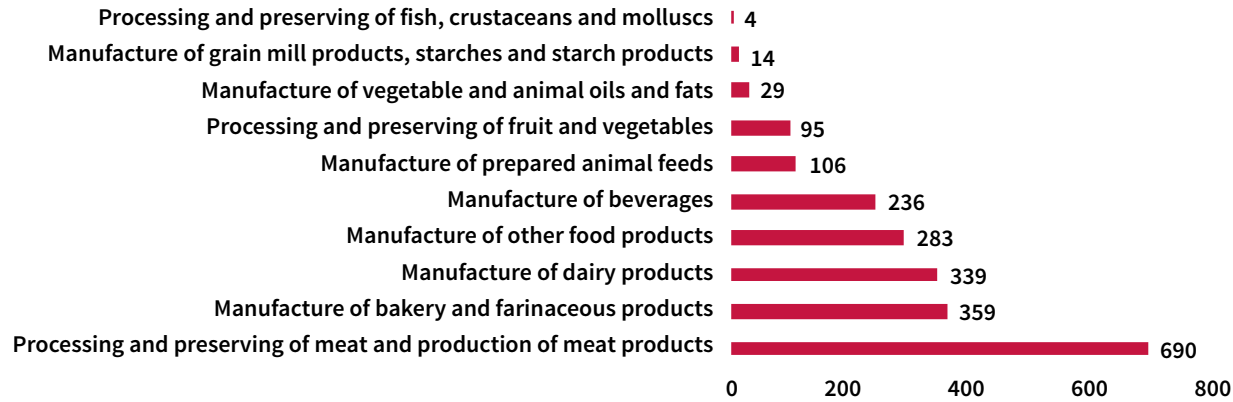
Number of enterprises by sectors



According to the Standard Classification of Activities 2008, the food processing industry may be roughly divided into C 10 – Manufacture of food products and C 11 – Manufacture of beverages, and in more detail, into the 27 sectors listed on the left.

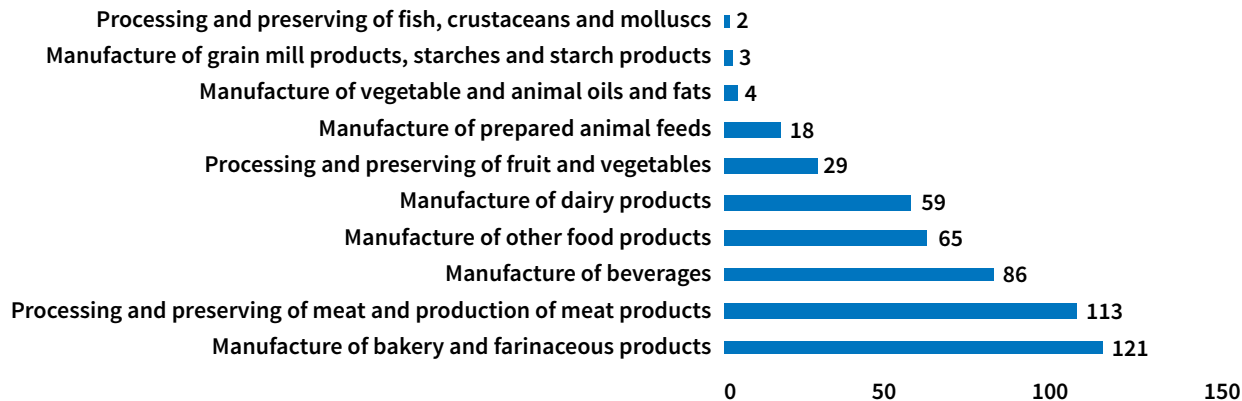
- The greatest share (44 per cent) of all food processing enterprises is constituted by enterprises that produce bread, fresh pastry goods and cakes, followed by enterprises that produce meat products and enterprises that produce meat (except poultry).

Net sales revenue (EUR million)



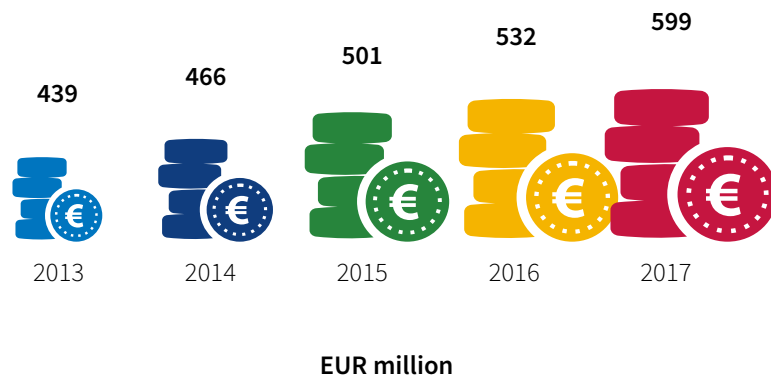
- In 2017, enterprises that produce meat and meat products generated the highest net sales revenue.
- These are followed by enterprises that produce bakery and farinaceous products.
- Enterprises that produce dairy products ranked third in terms of net sales revenue.

Added value (EUR million)



- In 2017, the highest added value was generated by enterprises that produce bakery and farinaceous products.
- These are followed by enterprises that produce meat and meat products.
- Enterprises that produce beverages ranked third in terms of added value.

Net sales revenue in foreign markets



- Food enterprises have also been achieving great results in foreign markets.
- In the last five years, the net sales revenue of food enterprises in foreign markets has been between EUR 400 and 600 million.
- The highest increase compared to the previous year was in 2017, when net sales revenue in foreign markets rose by almost 13 per cent or over EUR 65 million.

TOP 5 EXPORT ENTERPRISES

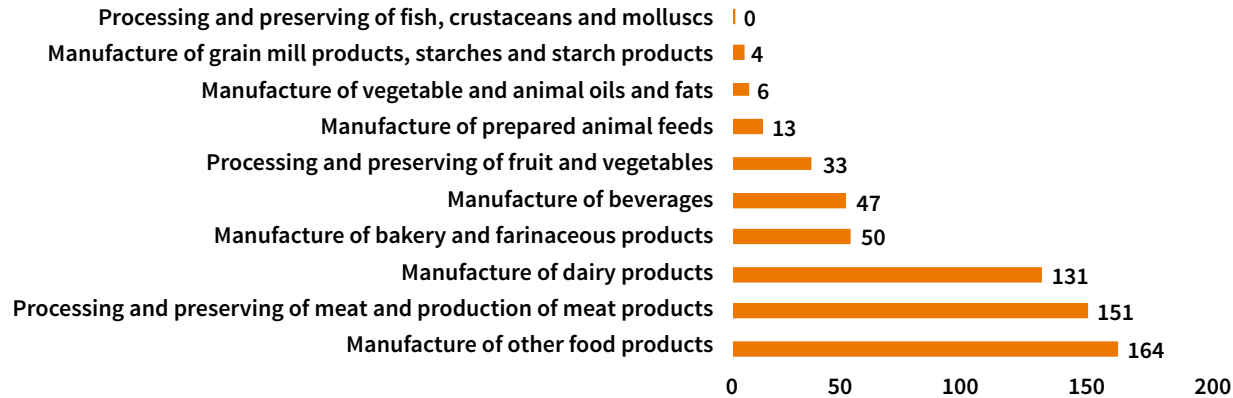
1. Droga Kolinska d.d.
2. Perutnina Ptuj d.d.
3. Ljubljanske mlekarne d.d.
4. Incom d.o.o.
5. Pivovarna Laško Union d.o.o.

TOP 5 EXPORT COUNTRIES

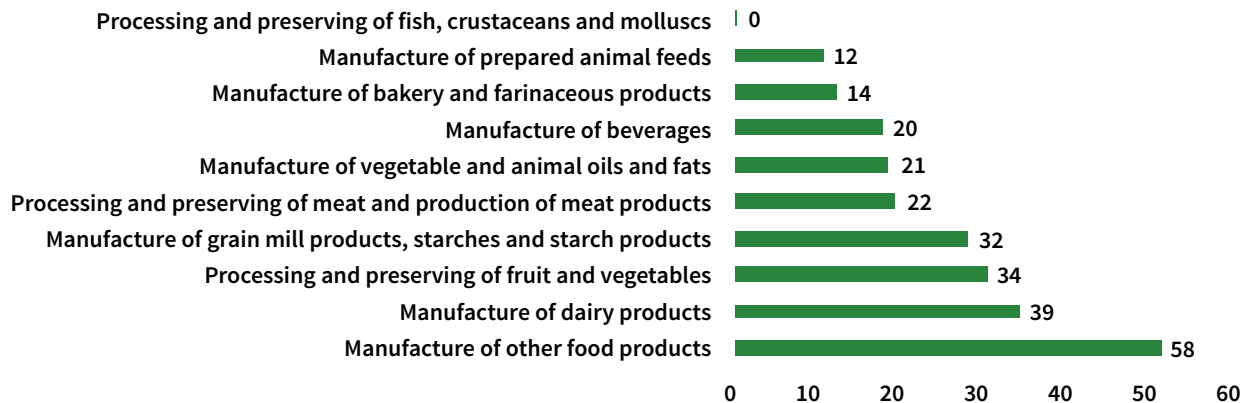
1. Italy
2. Croatia
3. Austria
4. Bosnia and Herzegovina
5. Germany

Source: SORS

Net sales revenue in foreign markets (EUR million)



Share of sales in foreign markets (%)

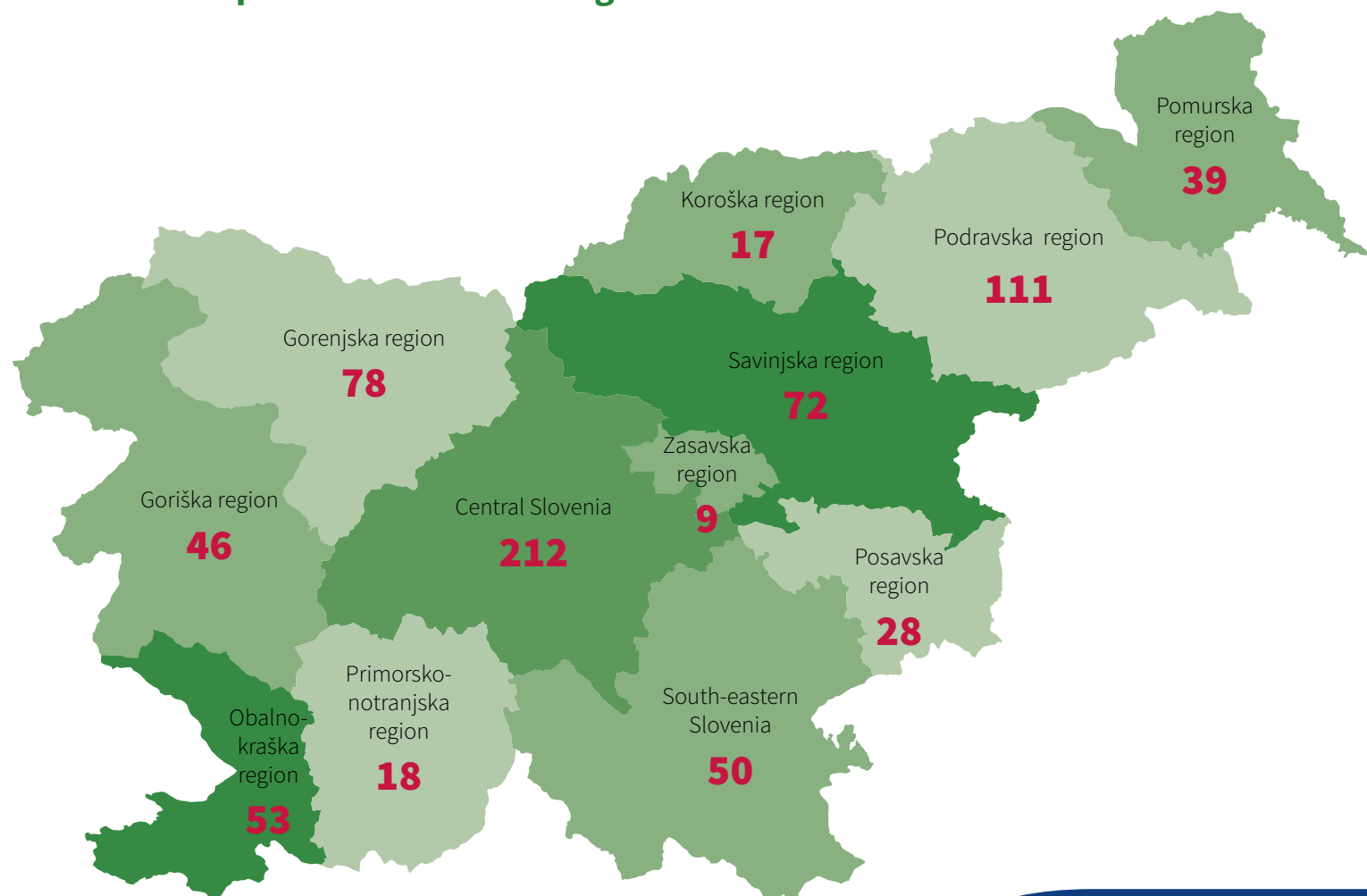


- Most net sales revenue in foreign markets is generated by enterprises that produce other food products.
- These are followed by enterprises that produce meat and meat products.
- Enterprises that produce dairy products rank third in terms of net sales revenue in foreign markets.

- The highest share of sales in foreign markets is generated by enterprises that produce other food products, which account for 58 per cent of all sales in foreign markets.
- Enterprises that produce dairy products rank second; their share of sales in foreign markets is almost 39 per cent.
- Enterprises that process and preserve fruits and vegetables rank third; their share of sales in foreign markets is 34 per cent.

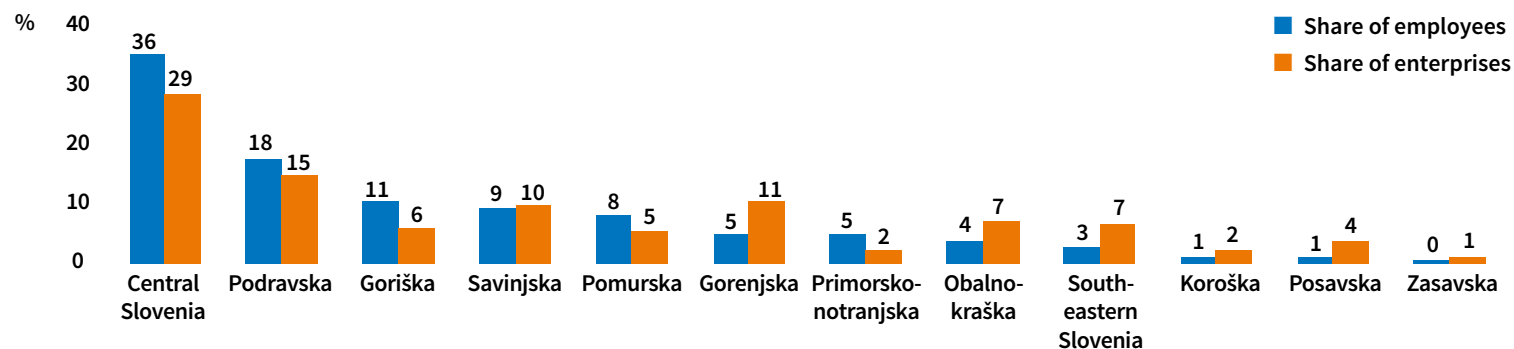
Regional characteristics of Slovenian food processing industry

Number of enterprises in statistical regions

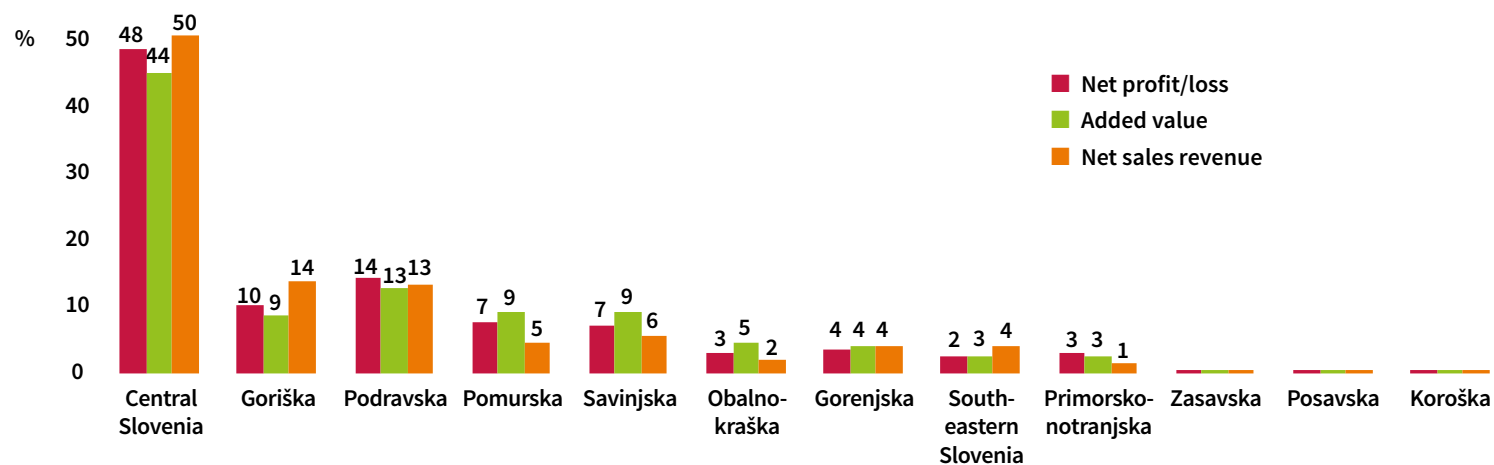


- The Slovenian food processing industry is represented in all Slovenian statistical regions.
- The food processing industry in Central Slovenia is the most successful.
- The food processing industries in Pomurska, Podravska, Savinjska and Goriška statistical regions also achieve above-average results.

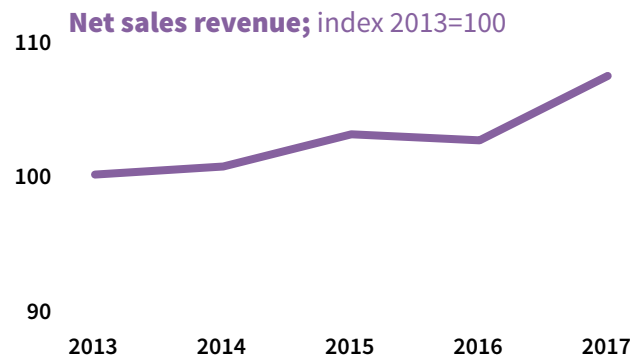
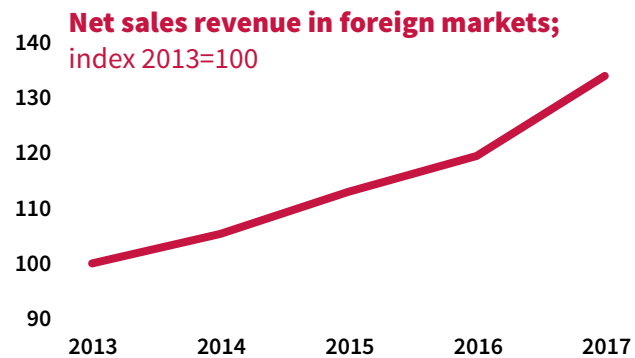
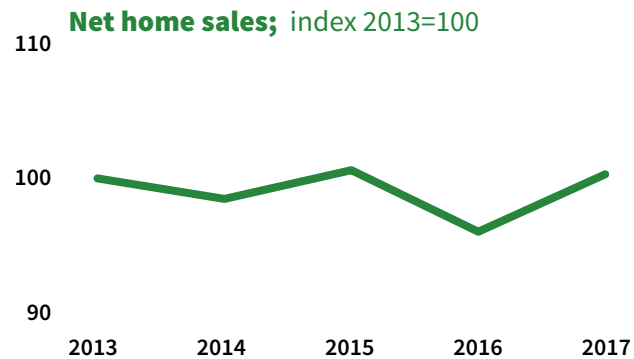
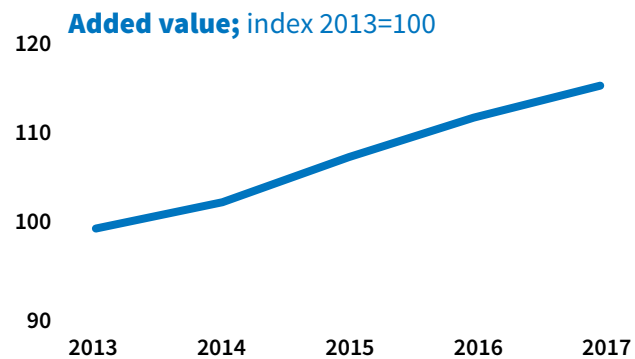
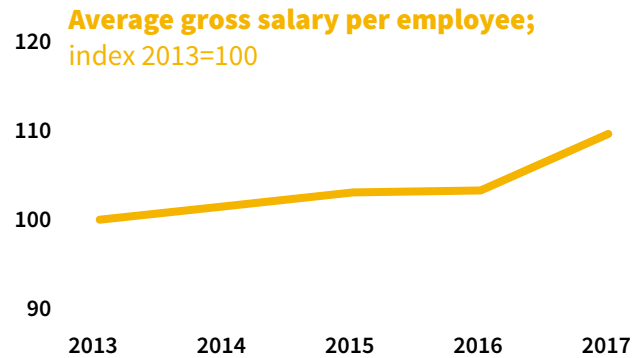
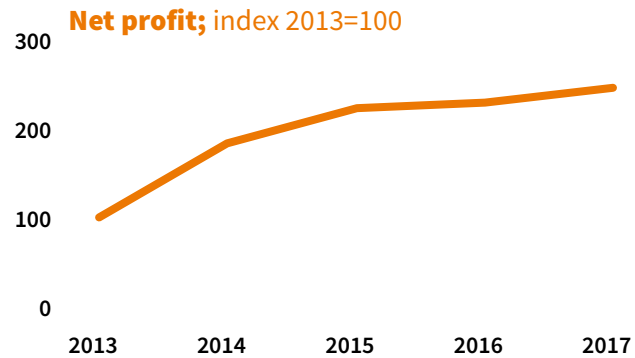
Share of enterprises and employees in statistical regions (SLO=100 %)



Contribution of statistical regions to economic indicators (SLO=100 %)



Economic indicators of Slovenian food processing industry



Summary

- The number of food processing enterprises rose between 2013 and 2017.
- The number of employees has been increasing.
- Added value and net sales revenue have also been on the rise.
- Exports have been growing as well: net sales revenue in foreign markets has grown by 36 per cent in the last five years.
- The share of sales in foreign markets grew from 22 per cent in 2013 to 28 per cent in 2017.

Diagrams are based on the fixed-base index in 2013.

Top 10 enterprises

BY NUMBER OF EMPLOYEES:

1. Perutnina Ptuj d.d.
2. Žito d.o.o.
3. Pivovarna Laško Union d.o.o.
4. Ljubljanske mlekarne d.d.
5. Mlinotest d.d.
6. Droga Kolinska d.d.
7. Pivka perutninarstvo d.d.
8. Celjske mesnine d.o.o.
9. Pekarna Pečjak d.o.o.
10. Don Don d.o.o.

BY NET SALES REVENUE:

1. Droga Kolinska d.d.
2. Ljubljanske mlekarne d.d.
3. Perutnina Ptuj d.d.
4. Pivovarna Laško Union d.o.o.
5. Žito d.o.o.
6. Celjske mesnine d.o.o.
7. Mlekarna Celeia d.o.o.
8. Panvita MIR d.o.o.
9. Jata Emona d.o.o.
10. Mlinotest d.d.

BY ADDED VALUE:

1. Pivovarna Laško Union d.o.o.
2. Perutnina Ptuj d.d.
3. Droga Kolinska d.d.
4. Ljubljanske mlekarne d.d.
5. Žito d.o.o.
6. Radenska d.o.o.
7. Fructal d.o.o.
8. Mlinotest d.d.
9. Pekarna Pečjak d.o.o.
10. Jata Emona d.o.o.

BY NET SALES REVENUE IN FOREIGN MARKETS:

1. Droga Kolinska d.d.
2. Perutnina Ptuj d.d.
3. Ljubljanske mlekarne d.d.
4. Incom d.o.o.
5. Pivovarna Laško Union d.o.o.
6. Žito d.o.o.
7. Hočevnar d.o.o.
8. Fructal d.o.o.
9. Mercator-Emba d.d.
10. Mlekarna Celeia d.o.o.

The Rural Development Programme of the Republic of Slovenia 2014–2020 (hereinafter: the RDP 2014–2020) is the common programme document of individual member States and the European Commission, which is the programme basis for drawing European funds from the European Agricultural Fund for Rural Development (EAFRD). The programme reflects the national priorities defined by Member States based on an analysis of the situation in agriculture, food production and forestry.

The RDP 2014–2020 focuses on three main areas with which Slovenia will improve biodiversity, the state of waters and soil, the competitiveness of the agricultural sector, and the social integration and local development of rural areas, which reflects, as much as possible, the national priorities defined by Slovenia on the basis of an analysis of resources and the situation in agriculture, food production and forestry, as well as the integration of these industries into developments in rural areas and throughout the territory.

A stable food processing industry is also important for the development of rural areas, so the support of RDP 2014–2020 is also intended for this industry. The food processing industry will be able to obtain funds particularly within the following measures of the RDP 2014–2020:

Measure 3: Quality schemes for agricultural products and foodstuffs

The objective of the measure is to include agricultural holdings in quality schemes, increasing the added value of agricultural products and the volume of products from quality schemes on the market.

Measure 4: Investments in physical assets

The measure is intended for the development of agriculture, the processing and marketing of agricultural and food products, and of agricultural and forest infrastructure.

Measure 6: Development of farms and business development

The purpose of the measure is to establish and develop farms and non-agricultural activities in rural areas. The RDP envisages to use incentives to contribute to activating endogenous potential in the local environment, which will strengthen the rural economy, create new jobs and raise added value.

Measure 16: Cooperation

This measure supports various forms of cooperation with which different actors in rural areas will be able to overcome the economic, environmental and other constraints which they face due to fragmentation and lack of connection.



Gospodarska
zbornica
Slovenije

Chamber of Commerce
and Industry of Slovenia

Chamber of Agricultural
and Food Enterprises

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