- Partly because of the strength of leading retailers and the existence of buying groups, independent wholesalers appear to have a relatively minor role in the food chain

As an illustration, Table 6.11 reproduces a listing of the 20 largest European "grocery wholesalers. The striking feature of this Table is its heterogeneous nature. Note, for example, the leading role of the wholesaling activity of the French cigarette manufacturer (SEITA), the leading position of Nestle (a manufacturer), the relatively low ranking of UK wholesalers (in spite of the size of UK retailing). This is all suggestive of the fact that wholesaling generally lacks the very large independent operators which are commonly found in other forms of retailing on the one hand, and manufacturing on the other hand.

Table 6.11: EU's top 20 grocery wholesalers

	Country of origin	Sales (bn ecus)
Nestle	Switzerland	38.2
Food Ingredients Specialities	Switzerland	38.1
Rewe	Germany	14.6
Sandoz Nutrition	Switzerland	10.7
Casino Guichard Perrachon	France	9.5
Coop Valais	Switzerland	7.3
Spar Handels	Germany	6.9
Edeka	Germany	6.3
Faellesforenigen for Danmarks	Denmark	3.0
Booker Belmont	UK	2.9
SEITA	France	2.4
Nurdin & Peacock	UK	2.0
Merkur	Switzerland	2.0
Ramsvita	Switzerland	2.0
Tengelmann	Germany	1.8
Hofer & Curti	Switzerland	1.7
Systeme U Centre Regional Ouest	France	1.6
Schuitema	Netherlands	1.4
Skandinavisk Holding	Denmark	1.3
Fyffes	Ireland	1.1

Source: Panorama of EU Industry, 1997, p.21-8, table 6. All figures relate to 1994, except Edeka (1993).

Turning to the food manufacturing sector, the EU is dominated by some of the world's leading multinational firms (see the next chapter). Nevertheless, it is sometimes argued that even these firms are losing bargaining muscle vis-a-vis the leading retailers with the latter's expansion in recent years. As testament to this, AIM (1995) for example, shows that the sales turnover of the EU's 10 leading retailers far exceeds the FMCG turnover of the EU's 10 leading manufacturers. Although this is a striking statistic, it is misleading in at least two respects. First, necessarily, the turnover of a given retailer (A) buying exclusively from a given manufacturer (B) must always be the greater simply because of the retail mark