



ECONOMIC ANALYSIS OF THE GASTRONOMY SECTOR IN BRAZIL, THE NORTHEAST REGION AND THE STATE OF PARAÍBA: CONTRIBUTION OF THE SECTOR TO THE ECONOMY AND THE LABOR MARKET

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ABSTRACT

The objective of this research was to analyze the food sector in Brazil, the Northeast Region and in the State of Paraíba from the economic perspective, seeking to systematize information about the sector, as these have been contributing to the growth of the Brazilian economy and the profile of the Brazilian market work. The main source of data collection was the Brazilian Institute of Geography and Statistics. The main variables obtained were the number of local units, total employed people, wages and other salaries, with geographic coverage of Brazil, the Northeast region and the state of Paraíba, and historical series from 2007 to 2015. With data collected, it is possible to affirm that the housing and food sector represented, in 2015, 2.38% of what was produced by the companies to make up the Gross Value Added (GVA) of the country. Speaking specifically about food companies, these corresponded to 3.60% of the total staff employed, but only to 1.63% of salaries paid, demonstrating a need for greater appreciation of the professional of the area. In dealing specifically with the Northeast and Paraíba, it is concluded that, in general, the food sector grew more in the region and state than in the national average, except for wages.

PALAVRAS-CHAVE

Economic analysis

Food Sector

Job market

Info do artigo:

Aceito 28/Mai/2019
Publicado 12/Mar/2020

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DOI: <http://dx.doi.org/10.14210/at.v5n1.p01-15>





INTRODUCTION

The act of feeding is not only a basic need of human beings, but it is also a prime factor in the routine of humanity since its absence causes diseases as a consequence of the lack of nutrients present in foods that are essential to the proper functioning of the human body.

In Brazil, the emergence of the first restaurants occurred at the time of the transfer of the Portuguese Court to the country in 1808. The refined taste formed by the European Royalty habits associated with the opening of ports (providing the arrival of new ingredients and spices) had their importance in the development of this sector. It was precisely at the court, located in the city of Rio de Janeiro, that the first restaurants appeared, initially inside the hotels, and later as independent enterprises, called dairy or pastry shops (Melo, 2000).

Until the 1950s, in Brazil, for most of the population, eating out of home was still synonymous with some great family, professional or commemorative event. In general, Brazilian families were fed exclusively at home. From the industrialization process, intensified in the second half of the twentieth century, profound changes in the society and behavior of Brazilians, such as the absence of women from homes due to outside work (in the need to seek an income that would complement the family budget), with the consequent reduction in their availability to prepare meals in their own home, have generated a new set of market changes in the out of home food sector (Ribeiro, 2012).

With this new demand of people increasingly seeking and consuming the products and services offered by restaurants, we can see an expansion of fast food services, with standardized and simplified meals, which eventually changed, even more, the consumption behavior of Brazilian families. Eating out of the home has, therefore, become a habit for the population, whether they are workers that eat in a self-service restaurant or children in a school canteen, according to each profile and financial possibility. Eating out of home is no longer a special occasion and has become daily and routine (Ribeiro, 2012).

According to the Consumer Reports on Eating Share Trends (CREST) survey conducted by GS & NPD for the Foodservice Brazil Institute (Mercado e Consumo, 2019), Brazilian consumers increased their spending on feeding away from home in 5% in the first quarter of 2019, compared to the same quarter of 2018, while the number of weekday meals out of home increased by 8% over the same period.

Although there is research about the foodservice sector, which includes most of the gastronomy market, there is no detailed systematization of the exist-

ing market information and how representative it is in the current context of the Brazilian economy. Thus, it is justified to carry out this research, which focuses on an economic analysis of the gastronomy sector, seeking to demonstrate its relevance to the Brazilian economy, the Northeast region and the state of Paraíba, both through Gross Value Added generated by companies and by the number of existing jobs.

LITERATURE REVIEW

Economic Analysis of the Gastronomy Sector

The gastronomy sector is a highlight among Brazilian enterprises and specifically in the service sector, as it has been accompanying the development of the Brazilian economy (Arbache & Teles, 2006). According to Valor Econômico (2015), 20% of companies in the service sector are from the food sector, which is the activity with the largest proportional number of companies in the service sector and also with the largest proportion of employees.

According to the Brazilian Association of Bars and Restaurants (Abrasel, 2016), since the beginning of the last decade, Brazil has developed a commercial and cultural model of food in which Brazilian cuisine was reformulated as gastronomy and culminated in a more commercial format aimed to move a not very developed market in the country. The government policy developed at the beginning of the 21st century placed the population at a higher level of consumption, visibly increasing their purchasing power, characterized by changing consumer habits, which was no longer content to bring only basic products such as cereals and vegetables, but also began to buy new foods that began to fit in the family budget.

The worker income and the urbanization process are responsible for much of the positive numbers obtained in the gastronomy market, such as the foodservice market, which moved over R\$ 260 billion in 2013, registering a growth of over 12 % per year in the last decade, placing the estimated growth of the foodservice market at 3%, compared to 0.3% of the Brazilian Gross Domestic Product (GDP) in 2015 (Abrasel, 2016). According to Terzian (2015), eating out of home already represents 32% of family budget spending, a number significantly higher than the 20% recorded in previous years. Taking into account the slowdown in urbanization at the moment, the economic estimate is that there will be an average growth in the foodservice market of between 6% and 7% per year, representing about 75 million meals realized out of the home.

The latest survey from the Brazilian Food Industry Association (ABIA, 2017) reports that Brazilian food industry revenues reached R\$ 614.3 billion in 2016, re-



presenting a growth of 9.3% over 2015, compared to the production sector in general, that had a 2.9% decrease in the same period. The same survey also highlights the sales sector, which remained stable with a 0.63% drop, and the export sector, which increased by 3.4% in 2016.

In 2016, the volume of investments in the foodservice sector was R\$ 9 billion, which represented a 14.3% decrease compared to R\$ 10.5 billion in 2015. On the other hand, there was a significant increase in investments in the sector of mergers and acquisitions, growing 25.7% in 2016, which corresponded to R\$ 11.6 billion (ABIA, 2017).

Also according to ABIA (2017), the movement of the food industry is one function of changes in investments, which according to management strategies, corporations are not investing in new plants, but buying other already in operation, which does not provide new job creation, but shows that the sector is holding steady in the market, with projections ranging from 0.6% to 1.2% increase in production, 0.7% to 1.5% increase in the sector sales and a real increase of 0.63% in total sales.

Sales in the foodservice sector in Brazil was R\$ 154.2 billion in 2016, an increase of 7.08% compared to 2015 (R\$ 144.0 billion), and the revenue has been growing continuously since 2010 (ABIA, 2017).

To compare how much the revenue of the gastronomy sector represents the Gross Domestic Product - GDP, it is first necessary to conceptualize what it means and how GDP is calculated. According to Blanchard (2011, p. 18), GDP is "the value of the final goods and services produced in an economy in a given period".

Also according to Blanchard (2011), GDP can be measured by the sum of Consumption (goods and services purchased by consumers) with Fixed Investments (both business and residential) and Government spending (goods and services purchased by governments, in all areas), adding to this the value of exports and subtracting the value of imports.

According to the newspaper *Estadão* (2011), GDP can be calculated in two ways. One is the that has already been presented, which is from the perspective of demand, that is, who buys the riches produced in the country. In this case, family consumption, government consumption, government, and private company investments, and exports and imports are considered.

Regarding the other way, from the supply perspective, Nogami (2016) understands this calculation as the entire added value of all final goods and services produced in the economic territory of the country, regardless of the owner's nationality of the units producing these goods and services, measured at market prices.

Starting from the official methodology of calculating GDP from the supply perspective, the Brazilian Institute of Geography and Statistics - IBGE (2009) says that the first step is to calculate Gross Value Added - GVA at

basic prices, which is obtained "by the difference between gross value of production at basic prices and intermediate consumption at consumer prices by economic activity".

Pessoa (2017) complements informing that "the Gross Value Added (GVA) is the value that each sector of the economy (agriculture, industry, and services) plus to the final value of everything that was produced in a region".

Thus, it demonstrates how much each economic sector adds (in basic prices) to intermediate goods to prepare goods (by economic activity) intended for final consumption. Therefore, "Gross Domestic Product (GDP) is the sum of sector's GVAs and taxes" (Pessoa, 2017) so that each tax levied on certain goods or services is added to GVAs, thus totaling GDP.

According to the IBGE, Brazilian GDP at current prices was R\$ 6.266 trillion in 2016. Excluding the effects of inflation and calculating GDP annually with the base price of 1995, it can be said that GDP decreased by 3.6% when compared to 2015. Since GDP had already retracted 3.8% in 2015 compared to 2014, it is possible to say that Brazil is in recession for having had two consecutive retractions (IBGE, 2017).

Concerning the state of Paraíba, according to Paraíba Online (2017) - an Economy, Market and Business channel - GDP in current values was R\$ 56.140 billion in 2015, of which R\$ 50.104 billion refer to Gross Value Added (GVA) and the remainder to Taxes.

Regarding the share of these components in Paraíba's GDP composition, GVA increased from 88.8% in 2014 to 89.2% of the total in 2015, while taxes declined from 11.2% in 2014 to 10.8% in 2015 (Paraíba Online, 2017).

Thus, the calculation methodology developed here will be used to identify how much the gastronomy sector contributes to the GDP of Brazil, the Northeast region, and the State of Paraíba when there is data by geographic area.

Labor Market in Gastronomy

The first colleges of gastronomy were created in Brazil in the 90s and since then have trained thousands of professionals, according to the *Mundo Vestibular* (s.d.). According to *Guia do Estudante* (2012), the gastronomy professional should know about planning and preparing menus, food hygiene and safety, as well as preparation skills and even specialize in one of the areas of the foodservice market.

The field of work goes far beyond executing recipes, leaving professionals with a mission of wide variability. The professional can be a kitchen assistant, as explained by the Aires Scavone School of Gastronomy (n.d.), being responsible for the preparation, clea-



ning, and organization of various kitchen sectors; Cook, with responsibility for the mise-en-place organization (operations that are before food preparation), execution and storage of preparations; Sub-chef, supervising and coordinating the team, as well as replacing the Chef in his/her absence; and Chef of cuisine, where he/she is committed to creating and preparing dishes and menus, supervising and guiding the team as well as the preparing the final assembly, among other functions; The pastry chef is responsible for creating and executing recipes of bread, sweets, cakes, fillings, cookies, ice cream and desserts in general.

The gastronomy professional can also act as a consultant - providing advice for opening and improving bars and restaurants - and as a personal chef, working independently at the customer's location. Also, there is a food security area, where he/she can perform inspections of the food industry and restaurants, as well as hospitals, hotels, restaurants, buffets, cafeterias, industrial facilities, bars, airlines, schools, and universities (Guia do Estudante, 2011).

The Aires Scavone School of Gastronomy (sd) explains that because of an increasingly demanding public, the bar and restaurant sector has begun to prioritize the selection of professionals who already have experience and qualification so that these professionals can add quality services through techniques, food safety, and hygiene, thus contributing to the sector's salary appreciation, which varies according to position, qualifications and professional experience.

According to data from the Foodservice Conjunction Survey conducted by the Brazilian Association of Bars and Restaurants (Abrasel, 2016), in partnership with FISPAL, the number of jobs in the sector was affected by the economical crisis. While in the first quarter of 2016, 64% of the companies made reductions in their staff, in the second quarter of the same year the reduction was made by 47% of the companies. In the Northeast region, companies suffered an average reduction of 6.38% of their jobs (Abrasel, 2016).

Regarding remuneration, the site salario.com.br (sd) presented in August 2018 and updated data of the sectors with the best salaries, salary floor, average salary, and salaries according to the professional level, according to the Brazilian Classification of Occupations (CBO), from November/2017 to June/2018, according to official salary data informed by the companies to the Ministry of Labor.

The Brazilian salary floor for a Gastrologist (Gastronomic Technologist CBO 271110) is R\$ 1,497.62, for a workweek of 41 hours per week, while the average salary for a Chef (CBO 271105) is R\$ 2,011.48, on a journey of 44 hours per week. Thus, there is a need for regulation on professions to purpose salary equalization according to educational level.

METHODOLOGY

Method

For this study applied exploratory and quantitative research. According to Malhotra (2001), studies of a theme that has been not sufficiently explored can be characterized as exploratory research. According to what was contextualized in the introduction and theoretic reference of this study, there are scarce studies within the economic perspective of the gastronomy sector.

The research is considered quantitative, since it intends to use secondary databases for data collection and analysis, following the literature review.

Data Collection

The main data source has been the Geography and Statistic Brazilian Institute – IBGE. The main surveys carried out by the IBGE used for the data collection are:

a) National and Regional Accounts: The IBGE national and regional accounts research presents information about generation, distribution, and use of the income in Brazil.

- Variables obtained: Gross Domestic Product – GDP and Gross Value Added – GVA, for percentage calculation of the gastronomy sector production as compared to the total of all sectors.
- Geographic Coverage: Brazil, the Northeast Region and the state of Paraíba.
- Historic Series: data obtained from 2007 to 2015.

b) Services Annual Research: according to the IBGE, this survey aims "to identify basic structural characteristics of service provision activities and their changes over the time, allowing to estimate and to build indicators of sector performance; in the detailing of this study it is possible to obtain data from the food sector only:

- Variables obtained: Liquid Operational Revenue of Companies by Economic Activities National Classification – CNAE 2.0.
- Geographic Coverage: Brazil.
- Historic Series: data obtained from 2007 to 2015.

c) Central Register of Companies: it is the best source to collect information of companies and other IBGE formal organizations, gathering information of diverse annual surveys made by this institute and by the Ministry of Labor.

- Variables obtained: Number of Local Units, total



of employed people, salaries and other remunerations, and monthly average salary.

- Geographic Coverage: Brazil, Northeast Region, and the state of Paraíba.
- Historic Series: Data obtained from 2007 to 2015.

All data have been collected from the platform of the Geography and Statistic Brazilian Institute – IBGE. Although each one of these three sources has more data and details in terms of geographic coverage, the available data free to the public is restricted. Combining the three surveys, the obtained historic series has been from 2007 to 2015.

Besides, it was only possible to collect data from the Services Annual Research at the national level (Brazil). For the other two surveys (National / Regional Accounts and Central Business Register), besides Brazil, data from the Northeast region and the state of Paraíba were also obtained. All data were tabulated and systematized in spreadsheets in Microsoft Excel 2010, one for each variable of each survey.

Data Analysis

After data collection, the variables constructed were calculated according to the expected results. The first variable to be constructed was based on Gross Value Added (GVA), seeking to demonstrate the relationship between the GVA of the Hospitality and Food Service sector (maximum detail available in the free database) and the total GVA of all sectors. It is important to clarify that it will not be possible to arrive at the sector's GDP value, considering that the tax data were not found separated by sector. The created variable is represented in equation 1 below.

Hospitality and food sector share (%) in GVA Total = $[(\text{Hospitality and food sector GVA}) / (\text{Total GVA})] * 100$ (1)

The second constructed variable is based on the Net Operating Revenue, available in the Annual Service Survey, and consists of knowing which part of the total net operating revenue of the service companies was generated by the food services sector, represented in equation 2, below.

Food Service Sector Share (%) on Total Net Operating Revenue of Services Companies = $[(\text{Net Operating Revenue of Food Service Sector}) / (\text{Total Net Operating Revenue of Brazilian Service Companies})] * 100$ (2)

In addition to these variables, many others were found in the Central Business Register, such as the number of local units and salaries. They will follow the same logic as equation 2, demonstrating the share of the food

sector compared to the total of all sectors.

Even if it is the same logic, the equation related to the part of the population that is employed in the food sector is described, as it refers to one of the specific objectives of this research. Therefore, follows equation 3, which is based on Central Business Registry data:

Share (%) of employed people in the foodservice sector in total = $[(\text{Employed people in the Food Sector}) / (\text{Total Employed people})] * 100$ (3)

In addition to these variables, all those collected directly from the mentioned databases were analyzed in this project, seeking to build, in the future, a performance indicator of companies in the gastronomy sector that includes revenues, profitability, expenses, salaries, and employed people. Results were presented in graphs and tables prepared with the help of Microsoft Excel 2010.

ANALYSIS AND RESULTS DISCUSSIONS

Although the three surveys carried out by the IBGE were analyzed, the results presented here are not subdivided by sources. The first section presents the data related to the Gross Value Added of the Hospitality and Food sector, showing how this sector contributed to the Brazilian, the Northeast region, and the state of Paraíba economies. In the second section, the data concerned with the job market was analyzed, such as the quantity of occupied personal and average monthly salary. In the fourth, last section, the results obtained are shown to contribute to society and the academy.

Contribution of the Hospitality and Food Sector to the Brazilian Economy

Remembering what was defined in the literature review, in this study the variable of the Gross Value Added (GVA) is being used, which is the set of produced worth by firms in that period, aggregated by sector. To arrive in the Gross Domestic Product (GDB), it is sufficient to add the taxes to the GVA. Once was not possible to obtain the data of taxes by sector, this research only analyzed the GVA as the contribution of the production measure of the determined sector to the economy. Table 01 brings the data of Total Gross Value Added (of all sectors), presented for Brazil (BR), the Northeast region (NE), and the state of Paraíba (PB), in 2007 and 2015.

According to Table 01, in 2015, the Total Gross Value Added of Brazil was higher than R\$ 5 trillion, and the state of Paraíba more than duplicated this value in

eight years, from R\$ 20,571 million in 2007 to R\$ 50,104 million in 2015.

It was not possible to detail the GVA for specific sectors, such as restaurants; it was only possible to obtain the details for the Hospitality and Food Sector. That is, stay enlightened that in this section are presented data much wider than only the Gastronomy Sector, involving also accommodation, linked to the tourism sector. Table 02 demonstrates the GVA of the Hospitality and Food Sector.

When looking at Table 02, it was verified that the GVA of the Hospitality and Food Sector in Brazil more than duplicated in these eight years. In the state of Paraíba, it reached the level of more than one billion Brazilian Reals in 2012, reaching R\$ 1,323 billion in 2015.

From the Table 02, it is possible to observe how important to the national GVA is the Hospitality and food sector, once that the Gross Value Added growth gradually from 2007 to 2014, taking to monetary reflexes in the economy. Only in 2015, the Sector GVA suffer a slight fall, but in general, the GVA more than duplicated between 2007 and 2015.

What was also verified, in local terms, was that the GVA of the Paraíba Hospitality and Food Sector grew more than the Northeast region and Brazil, whose value almost triplicated in 2014 (when compared to 2007). In general, the hospitality and food sector also grew more in the Northeast region than in Brazil.

To find out how much the hospitality and food sector represents in relation to all sectors, an equation has been applied. This equation was presented in the methodology, calculating the percent share of the GVA of the hospitality and food sector compared to the GVA of all sectors. The results are demonstrated in Figure 01 below.

Firstly analyzing in the national scope, in 2007 the GVA of the Hospitality and Food sector represented 2.00% of the Total GVA, having achieved its maximum value in 2014 (2.51%), falling to 2.38% in 2015. Already when it refers to the Northeast region, since the start of the period, this percentual is bigger than that of Brazil, having surpassed 3.00% in 2013 and 2014, closing in 2015 with a participation of 2.94% of the northeast region GVA of all sectors. In the state of Paraíba, the GVA of the Hospitality and Food Sector represented, in 2007, 2.20% of the Total State GVA, achieving the level of 2.87% in 2014, and falling to 2.64% in 2015.

The variation of the Hospitality and Food sector GVA between 2.00% and 3.00% of the total GVA might appear to be small, but it has its relevance. Analyzing specifically the state of Paraíba, knowing that the Farming, Manufacturing and Public Administration sectors together represent about 55% of the State GVA, and sectors of automotive services and real estate activities together represent more than 25%, with only 20% of the GVA remaining to be divided between many other sectors. To have an idea, the hospitality, and food sec-

tor has more representativeness than transport and storage, and information and communication. Besides that, it has the same representativeness of private education, health sector, and financial activities (IBGE, 2017).

To verify the representativeness of the Northeast Region of Brazil and the state of Paraíba, Figure 02 was created. It demonstrates the participation of the Hospitality and Food Sector GVA of the Northeast region and the state of Paraíba compared to the Hospitality and Food Sector GVA in Brazil.

According to Figure 02, the Northeast region makes up, in 2015, about 18% of the Hospitality and Food Sector GVA, while the representativeness of the state of Paraíba was 1.08% of the Sector GVA in Brazil. In general, the graphic demonstrates that these values become stable over time, with small variations.

The next section brings data related to the performance of the food sector firms, in terms of numbers of local units and of liquid operational revenue, data obtained through Services Annual Research and Central Register of Companies.

Performance of the Food Sector Companies

This section of the analysis of the results brings the data related to several local units and liquid operational revenue of the food sector companies. While the data of the liquid operational revenue come from IBGE Annual Research Services, the data related to the number of local units comes from the Central Register of Companies, research also carried out by the IBGE.

The Annual Research Services only has been made available at the Brazilian level, while the central register of companies is available for the Northeast region and the state of Paraíba as well. Both analyzed surveys have their data detailed according to Economic Activities National Classification – CNAE 2.0, being possible to obtain data only for the Food Sector and for its subdivisions.

Starting the analysis by the Annual Research Services,

Table 01 - Gross Value Added of all sectors, in 2007 and 2015, by geographic coverage

BR, NE e PB	Gross Value Added (1 000 000 R\$)	
	2007	2015
Brazil	2,319,528	5,155,601
Northeast	309,280	748,066
Paraíba	20,571	50,104

Source: Geography and Statistics Brazilian Institute - IBGE (Regional Accounts System)

Table 03 brings the Liquid Operational Revenue of Service Companies, with services provided to the families,

according to the Economic Activities National Classification – CNAE 2.0, from 2007 to 2015.

The analysis of Table 03 allows to verify that, in Brazil, the liquid operational revenue of service companies more than triplicated between 2007 and 2015, and the Food Sector follows this same growth rhythm. The companies of this sector had a liquid operational revenue of more than R\$ 63 billion in 2015. Already the Figure 03, presented to follow, demonstrate the percentual of participation of the liquid operational revenue of Food Service Sector and its subdivisions in relation to the total of liquid operational revenue of services companies.

Figure 03 shows that values do not change significantly over time, but the food services sector has much representativeness and was responsible, in 2015, for 38.18% of the total liquid operational revenue of services provided to the families. Of them, 27.20% are from restaurants and 10.98% from catering services.

When it comes to the number of local units, Table 04

Table 02 - Gross Value Added of Hospitality and Food Sector (2007 to 2015) by geographic coverage

Gross Value Added (1 000 000 R\$)	BR, NE e PB		
	Brazil	Northeast	Paraíba
2007	46,393	7,63	452
2008	46,237	7,994	506
2009	57,126	10,445	10,445
2010	70,204	12,154	777
2011	82,354	14,889	899
2012	94,232	16,659	1,057
2013	108,067	19,245	1,158
2014	124,932	22,199	1,349
2015	122,632	22,018	1,323

Source: Geography and Statistics Brazilian Institute - IBGE (Regional Accounts System)

brings the data of IBGE Central Register of Companies, detailed for Brazil, the Northeast region, and the state of Paraíba. According to the IBGE Central Register of Companies, there were 4,768,784 local units of enterprises in Brazil in 2007. In 2015, this number reached the level of 5,603,592. Of this figure, 299,158 are restaurants and other services related to foods and drinks. It is worth highlighting the state of Paraíba, in 2015 there were 2,297 local units of the food companies, being 2,094 restaurants.

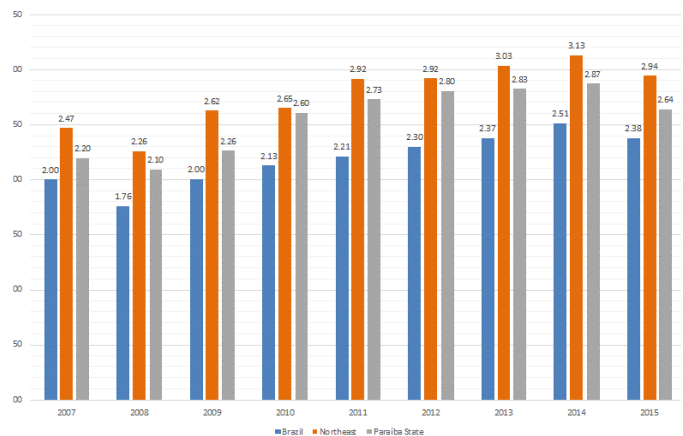
Figure 04 shows the relationship (in%) between the number of local units of groups and subgroups of the

food services and the number of total local units in the 2015 year, to identify how much the food sector represents at the total in terms of company's number.

According to presented in Figure 04, in 2015, the firms of food sector represented 5.34% of the Brazilian Companies, being 4.82% of this percentual composed by restaurants and other services of food and drinks, and 0.52% services enterprises of catering, buffet and other services of prepared food. Confronting with data of Gross Value Added (Figure 01), in 2015 the accommodation and food sector represented 2.38% of the total GVA.

So in terms of enterprises, the sector has higher participation (5.34%), but when dealing with Gross Value

Figure 01 - Participation of the Hospitality and Food Sector Gross Value Added in the Total Gross Value Added (in %), from 2007 to 2015, by Geographic Coverage



Source: created by the authors, based on the Regional Account System Data of the IBGE

Added alone, this percentual of representativeness falls (2.38%), demonstrating that the average of revenue/profit per unit of sector food is smaller than that of other sectors, characterizing the existence of many units of small size in the food sector. The same behavior occurs with the Northeast region and the state of Paraíba, and in Paraíba 3.67% of the local units identified are of the food sector.

Figure 05 analyzes the relationship (in %) between the number of total local units and of the groups and subgroups of the Northeast region and the state of Paraíba food services, and the number of total local units in the same groups and subgroups in Brazil in 2015, to identify the region and state representativeness in terms of local number units.

It's observed that of the total local units in Brazil, 15.36% are in the Northeast region and 1.12% in the state of Paraíba. In the food sector, 12.8% are in the Northeast region and 0.77% in the state of Paraíba. Restaurants and other services of the Northeast region

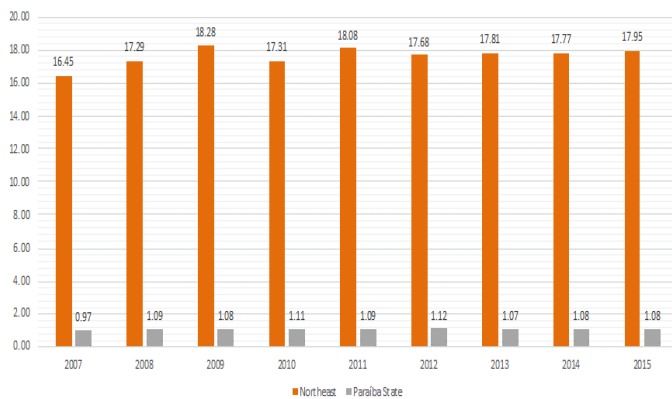
correspond to 12.77% of the Brazilian total, while in the Paraíba the value is 0.78% in relation to the nation. This demonstrates that, in the Northeast region and Paraíba, the food sector has a smaller quantity smaller of local units than firms in other sectors.

In this section, it is possible to conclude that there was a growth of the food sector in Brazil, but this growth was only accompanied the Brazilian economic growth, not raising the representativeness of the sector in a significant way. It is worth mentioning that there was a more expressive growth of the catering subsector. However, as it corresponds to a small percentual of the whole sector, it did not bring significantly changes.

on the other hand, in the Northeast region and Paraíba, the food sector grew more than other sectors in the period from 2007 to 2015. The next section continues to bring the Central Register of Companies data, but now in terms of employed people and salaries.

Employed People and Salaries in the Food Sector

Figure 02 - Participation of the Hospitality and Food Sector Gross Value Added of the Northeast region and the state of Paraíba compared to the Hospitality and Food Sector GVA in Brazil, from 2007 to 2015



Source: Own Elaboration, based on the Regional Account System Data of the IBGE

The data of the IBGE central register of companies demonstrate the variable employed people in two ways: the total employed people, including those that have no salary (partners and volunteers employed), and the employed people with salary. Table 05 brings the results of total employed people for the years of 2007 and 2015. In Brazil, the total employed people grew from 42,641,175 in 2007 to 53,451,695 in 2015, or a growth of 25.56%. Already in the food sector and its subgroups, the growth of the total employed people in the same period is approximately 50%.

In the Northeast region, the growth of the total employed people in all sectors was 32.86% in the eight years, while in the food sector in the same period it was

75.84%. Specifically, in the catering services, buffet, and other services of prepared food, the same services achieve a growth of 79.77% of the total employed people.

Analyzing specifically the state of Paraíba, almost duplicated the total employed people from 2007 to 2015 (from 8,588 people to 16,774 people) in the food sector, this growth was more representative in the subgroup of restaurants and other services compared to catering services, buffet and other services of prepared food.

The Figure 06, to follow, demonstrate the relationship (in %) between the total employed people of the food services groups and subgroups, and the total employed people of all the sectors in the 2015 year, to identify how much the food sector represents in terms of busy people, in total.

According to Figure 06, 3.6% of Brazil's total employed people work in the food sector. In the Northeast region and the state of Paraíba, this percent of participation falls. Confronting the results with the number of local units (Figure 04), the participation of the food sector in terms of total employed people is smaller than the participation of the local units number in all groups, confirming the profile of small size firms. Although there is an expressive growth of the Total Employed People in the Northeast region and Paraíba, proportionality it continues to represent less than the average of the food sector in all Brazil.

Table 06 shows now only the Salaried Employed People

Table 03 – Liquid Operational Revenue of the Service Companies in Brazil, with Service Provided to Families (in millions of Brazilian Reals), from 2007 to 2015.

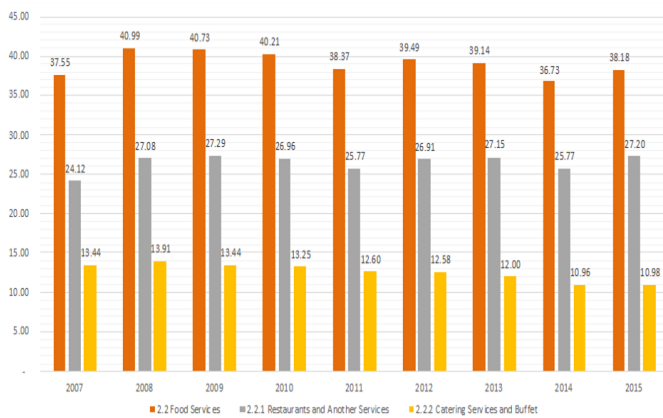
YEAR	CATEGORIES			
	1. Total	2.2 Food Services	2.2.1 Restaurants and Another Services	2.2.2 Catering Services and Buffet
2007	49,685	18,659	11,982	6,677
2008	57,253	23,467	15,502	7,966
2009	69,073	28,131	18,849	9,282
2010	82,55	33,191	22,257	10,934
2011	102,386	39,286	26,388	12,898
2012	118,086	46,63	31,777	14,853
2013	134,085	52,487	36,401	16,086
2014	162,704	59,76	41,935	17,825
2015	166,947	63,741	45,411	18,33

Source: created by the authors, based on the Annual Research Services of the IBGE

in the 2007 and 2015 years, by geographic level and by groups and subgroups of the food services, according to the Economic Activities National Classification. Although the absolute data is important for the job market dimension, in terms of percentual, the relations are much similar when compared with the Total Employed People. To demonstrate the relative ratio between them, the relationship between the Total Employed People and Employed People with salary is illustrated in Figure 07, as follows.

The main highlight of Figure 07 is the relationship fall between the Salaried Employed People and the Total Employed People when analyzing only the food sector: while for all sectors, in Brazil, this percentual is 86.95%,

Figure 03 - Participation of the Liquid Operational Revenue of the Brazilian companies of the groups and subgroups of activities related to the food services to Liquid Operational Revenue of the services companies (in %), from 2007 to 2015.



Source: Own Elaboration, based on the Regional Account System Data of the IBGE

in the food sector this percentual falls to 80.5%, and the same reduction happens with the Northeast region and the state of Paraíba.

In the subgroups of the food sector, the catering services have proportionally more salaried than restaurants, demonstrating the number of stagiaires voluntary in the restaurants and other services subgroup, profile that characterize the sector, saw the number of students in non-paid job placement jobs.

Table 07, presented below, shows the total of salaries and other remunerations paid to the analyzed firms in the Central Register of companies of the IBGE, by geographic coverage and by groups and subgroups, according to the CNAE 2.0. it can be seen that the inflation effect over salaries was not discounted.

In Brazil, the food sector paid R\$ 25.36 billion in salaries in 2015, a value of 251.93% higher than that of 2007. The Northeast region paid 3.18 billion in salaries in the food sector, a value of 315.94% higher than in

2007. For that, R\$ 176.45 million were paid in salaries in the state of Paraíba food sector in 2015, value 378.60% higher than in 2007.

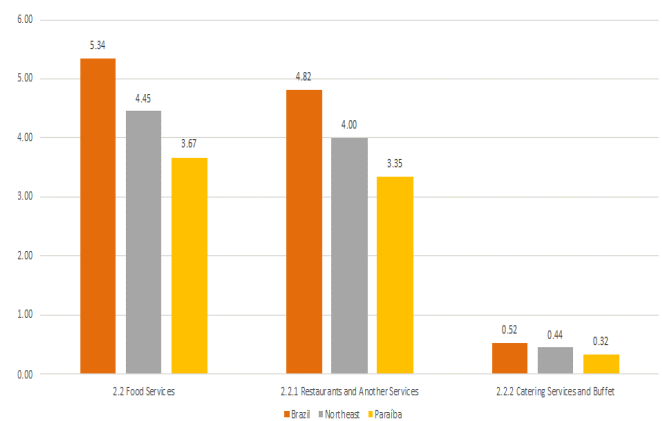
Table 04 - Number of Local Units for Brazil, the Northeast region and Paraíba, in 2007 and 2015, of the total companies and by sector and subsector of the food sector

LOC.	SECTOR ACCORDING TO CNAE 2.0	2007	2015
BR	1. Total	4,768,784	5,603,592
	2.2 Food	249,540	299,158
	2.2.1 Restaurants and other services	231,879	269,982
	2.2.2 Catering Services, buffet and others	17,661	29,176
NE	1. Total	749,310	860,960
	2.2 Food	25,520	38,302
	2.2.1 Restaurants and other services	23,384	34,476
	2.2.2 Catering Services, buffet and others	2,136	3,826
PB	1. Total	53,951	62,588
	2.2 Food	1,395	2,297
	2.2.1 Restaurants and other services	1,301	2,094
	2.2.2 Catering Services, buffet and others	94	203

Source: IBGE – Central Register of Companies

The data, at the same time, demonstrate the salary rise of the food sector professionals in the Northeast region

Figure 04- Relationship between the number of local units of the groups and subgroups of food services and the number of total local units (in %), in 2015, by geographic coverage.



Source: Own Elaboration, based on the data of Central Register of Companies of the IBGE

and the state of Paraíba. They also show that the rise in the total salary paid is explained by the rise of signings, according to Table 06. We verify whether there is this professional appreciation of the food sector at the highlighted relationship between the total of paid salaries in the sector and the paid salaries of all sectors, according to Figure 08, to follow.

When salaries are analyzed, the perspectives are disappointing: confronting the results with Figures 04 and 06, the food sector corresponds to 5.34% of the local units of Brazilian enterprises, 3.6% of the total employed people, but only to 1.63% of the paid salaries in 2015. This means that salaries are smaller than in other sectors average, for the sector has higher representativeness in the number of firms and of employed people than in salaries.

The same happens for the Northeast region and the state of Paraíba. In Paraíba, the food sector represents 3.67% of the local units, 2.31% of the total employed people, and only 1.16% of the salaries paid in 2015. This can be better illustrated in terms of monthly average salary, calculated in minimum salaries, according to Figure 09, that follows.

According to Figure 09, in Brazil, the total average salary of all sectors in 2015 was 3.10% minimum salaries, as opposed to an average of 1.50 minimum salaries in the food sector. That is, on average, in the food sector professionals earn half of that is earned in other sectors. In the Northeast region and Paraíba, the misvaluation is not that high due to the reflex of the smallest average salary average of the region, but at least it is more than half of the other sectors' average salary.

This way, it can be noticed a growth in the food sector in terms of operational revenue, the number of companies, and employed people, but without a correspond-

ing appreciation of professionals in terms of salary rise and other remunerations.

Discussion of Results

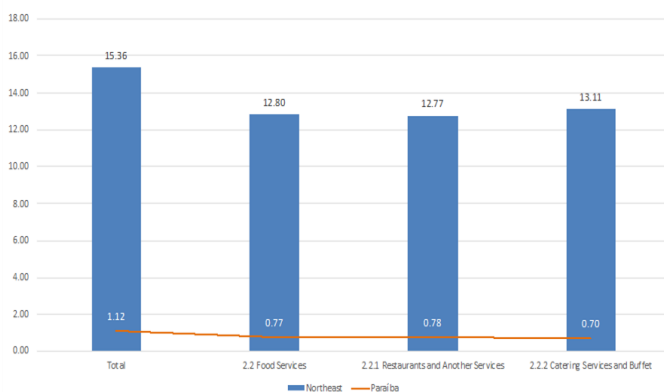
Being the main research results translated in variables that demonstrate in relative terms the participation of the food sector in the Brazilian Economy in terms of Gross Value Added (GVA), the number of enterprises, employed people and paid salaries, the results of this research are relevant to numerous audiences, such as entrepreneurs of the area, federal and state Government, students and researchers of the area. Let us consider the reasons.

For the entrepreneurs of the Gastronomy area, the results of this research bring the opportunity to carry out an analysis of the sector's scenario, with systematized results in terms of revenue, number of companies, and employed people. So, they are provided by information about the country's economy general context and the specific situation of their sector and can use the methodology here applied to analyze new data, to be later used in strategic decisions.

The research also brings important information to Federal and State Governments, so that they can define strategies and politics of development of the gastronomy sector, which generally are developed in a set with policies directed for the local and regional tourism incentive. For example, to know that, in 2015, 5.34% of the local units of Brazilian enterprises belonged to the food sector, but made up only 3.60% of the total employed people and only 1.63% of the paid salaries, demonstrates the need of professional appreciation of the sector, being possible to develop actions and public policies in this sense.

Concerning students and researchers of the area, this investigation had as a principal result the methodological approach of the research, which will be replicated with other databases and new information about the sector, being possible in future investigations to create even indicators by analyzing locally. The next session brings the conclusions and final considerations.

Figure 05 - Relationship between the number of local units of the groups and subgroups of the Northeast region and the state of Paraíba food services, and the number of local units in Brazil in 2015.



Source: created by the authors, based on the data of Central Register of Companies of the IBGE

CONCLUSIONS

The objective of this research was to carry out an analysis of the gastronomy sector in Brazil under the economic perspective, seeking to systematize information about the sector in the perspective of the area enterprises, their performance indicators, how they contribute for the Brazilian economy growth and which is the job market profile for this area.

It can be said this research fulfilled its objective, despite the difficulties inherent to the data collection.

From the collected data, it is possible to say that the

Table 05 - Total Employed People (in number of people), by geographic coverage, in 2007 and 2015

LOC.	CNAE 2.0	2007	2015
BR	1. Total	42,641,175	53,541,695
	2.2 Food	1,292,038	1,928,766
	2.2.1 Restaurant and other Services	1,082,405	1,619,537
	2.2.2 Catering Services, buffet and others	209,633	309,229
NE	1. Total	7,314,278	9,717,621
	2.2 Food	160,335	281,929
	2.2.1 Restaurant and other Services	137,168	240,281
	2.2.2 Catering Services, buffet and others	23,167	41,648
PB	1. Total	526,507	726,851
	2.2 Food	8,588	16,774
	2.2.1 Restaurant and other Services	7,695	15,119
	2.2.2 Catering Services, buffet and others	893	1,655

Source: created by the authors, based on the data of Central Register of Companies of the IBGE

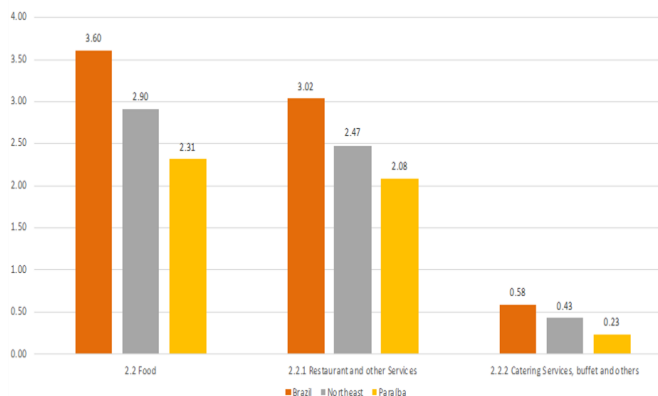
hospitality and food sector represented, in 2015, 2.38% of what was produced by enterprises to make up the Gross Value Added (GVA) of the country. Speaking specifically about food sector enterprises, these firms corresponded to the 5.34% of the Brazilian companies' local units, 3.6% of the total employed people, but only to 1.63% of the paid salaries in 2015, demonstrating a need of higher professional appreciation for this area.

The main limitation of this research is that it lacks standardization of data available to the public by the IBGE. While the Regional Accounts System and the Central Register of Companies made available as the Northeast region and state of Paraíba data, the Services Annual Research (SAR) is only made available at the national level. Furthermore, on the SAR, it is possible to compare the food sector with the total of "services provided to the families", while in other studies it has have been made using the comparison with all the sectors.

Treating specifically about the Regional Accounts System research, it was not found disaggregated data according to the CNAE 2.0, being impossible to analyze the food sector isolated, but only in the group with the hospitality activities. Furthermore, even being the group "Hospitality and Food", taxes were not found disaggregated from this category, in a way to calculate its GDP. Thus, this research has only calculated the GVA and the sector's participation.

As future research ideas, to continue this same research

Figure 06 - Relationship between the Total Employed People of the groups and subgroups of food services and the Total Employed People of all sectors (in %), in 2015, by geographic coverage.



Source: created by the authors, based on the data of Central Register of Companies of the IBGE

line, updating the data for more recent years, in a way to build a historic series of 10 years, and carrying out a better standardization of the data trough seeking research microdata, stressing that possibly are paid. Furthermore, it was concluded that the idea of mapping the gastronomy sector enterprises in the state of

Table 06 - Salaried Employed People (in number of people), 2007 and 2015, by geographic coverage.

LOC.	CNAE 2.0	2007	2015
BR	1. Total	36,658,326	46,557,150
	2.2 Food	977,328	1,552,661
	2.2.1 Restaurants and other services	788,210	1,276,083
	2.2.2 Catering Services, buffet and others	189,118	276,578
NE	1. Total	6,457,848	8,712,664
	2.2 Food	130,767	237,351
	2.2.1 Restaurants and other services	109,871	199,836
	2.2.2 Catering Services, buffet and others	20,896	37,515
PB	1. Total	463,322	654,855
	2.2 Food	6,902	14,078
	2.2.1 Restaurants and other services	6,130	12,651
	2.2.2 Catering Services, buffet and others	772	1,427

Source: created by the authors, with based on the IBGE – Central Register of Companies

Paraíba, together with the number of companies, employed people, operational revenue and salaries, creating a sector growth index. This way, the gastronomy sector in the Paraíba could be periodically supervised.

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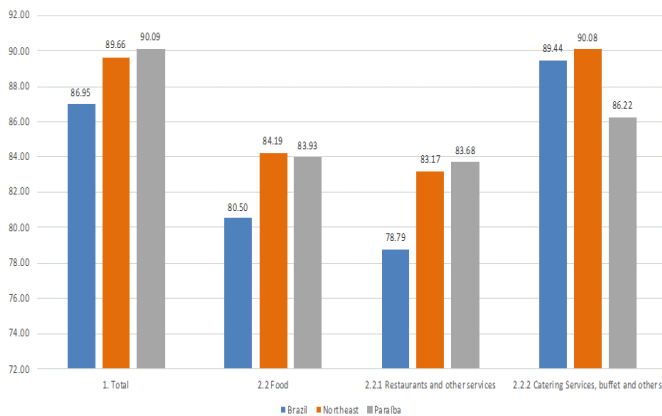
Table 07- Salaries and Other Remunerations, in 2007 and 2015, by geographic coverage.

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Figure 07 - Relationship between the Salaried Employed People and the Total Employed People (in %), in 2015, by geographic coverage.



Source: created by the authors, based on the data of Central Register of Companies of the IBGE

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LOC.	CNAE 2.0	2007 (R\$ 1.000)	2015 (R\$ 1.000)
BR	1. Total	602,812,132,00	1,559,193,355,00
	2.2 Food	7,204,911,00	25,356,331,00
	2.2.1 Restaurants and other services	5,582,654,00	20,044,533,00
	2.2.2 Catering Services, buffet and others	1,622,257,00	5,311,799,00
NE	1. Total	78,052,560,00	227,127,923,00
	2.2 Food	764,011,00	3,177,831,00
	2.2.1 Restaurants and other services	611,065,00	2,587,675,00
	2.2.2 Catering Services, buffet and others	152,946,00	590,157,00
PB	1. Total	5,077,395,00	15,191,831,00
	2.2 Food	36,867,00	176,446,00
	2.2.1 Restaurants and other services	32,224,00	156,574,00
	2.2.2 Catering Services, buffet and others	4,644,00	19,872,00

Source: created by the authors, based on the IBGE – Central Register of Companies

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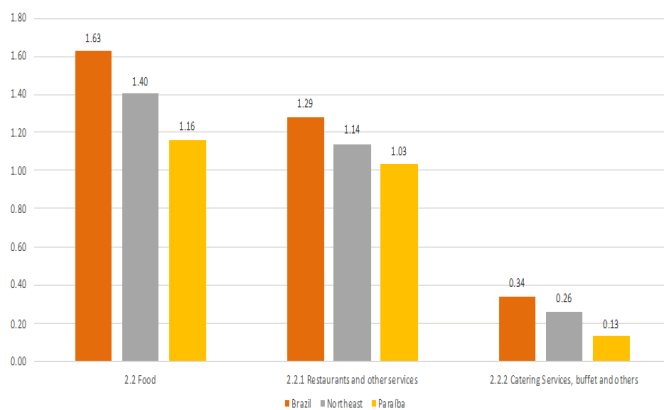
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Figure 08 - Relationship between Salaries and other Remunerations of food services groups and subgroups, and Total Salaries and Other remunerations (in %), in 2015, by geographic coverage.



Source: created by the authors, based on the data of Central Register of Companies of the IBGE

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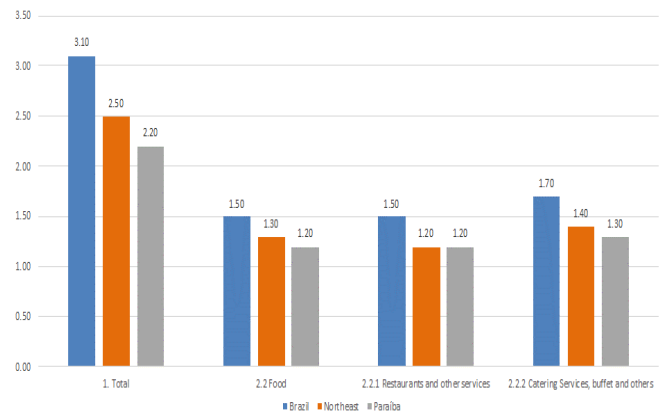
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Figure 09 - Monthly Average Salary (in Minimum Salaries), in 2015, by geographic coverage.



Source: created by the authors, based on the data of Central Register of Companies of the IBGE

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