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# MARKET TRENDS IN THE EUROPEAN UNION BEVERAGE INDUSTRY

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***Abstract***

*The aim of this paper is to analyze the significant changes within the European beverage industry between 2011 and 2020. This period was characterized by a complex interplay of economic, technological, and socio-cultural factors that influenced the sector. During this decade, there were notable shifts in employment structures, market trends, production innovations, and responses to both global and regional economic challenges. Different national strategies led to workforce expansion in Malta and reductions in Poland and Denmark. Technological advancements, changing consumer preferences, and increased awareness of sustainability prompted strategic adaptations, production restructuring, and the creation of new market segments. Significant changes in the top 10 countries by the number of active companies include growth in Spain, France, Italy, and the Czech Republic. The financial performance across countries such as Germany, Italy, and Romania highlight a dynamic and evolving market landscape. This analysis underscores the resilience and adaptability of the European beverage industry in the face of varying national responses and market conditions.*

**Key words**: *beverages, market trends, economic challenges, consumer preferences*

## INTRODUCTION

The early 21st century was known as the age of information, but we now observe changes in technology, beliefs, and activities. Some renowned economists now refer to the current era as the age of entrepreneurship [1].

The beverage sector represents a significant and extensive segment of the food industry, encompassing a diverse array of sub-categories and drink types, each varying in complexity in terms of production and quality evaluation [3]. Enhancing product quality positively impacts profitability, labor productivity, and competitiveness [5,11].

Across countries in Europe, packaged food and non-alcoholic beverage product markets have shown to be moderately to highly concentrated with a low number of unique companies [15].

The global COVID-19 outbreak has altered the trajectory but not the core content of consumer trends in the food industry [14]. At the same time, as consumers enjoy increasing prosperity and technological advancements, the food sector stands out by focusing on creating connections beyond the product itself and emphasizing the story behind it [6].

Another approach is presented by Witther and Anderson (2020), who highlight the global interaction of the beverage market, emphasizing changes in consumer preferences [17]. Kokole et al. (2021) noted an increase in interest in low-alcohol or alcohol-free beverages because of health awareness [4]. Toma, Năstase and Cojocaru (2022) presented how the labor market in the EU continues to be influenced by the evolution of the beverage industry, emphasizing changes in labor demand as well as the skills needed in this sector [15].

According to Soava, Mehedintu and Sterpu (2022) it has been observed a notable increase in online trade at EU level, including in the drinks sector, fact that clearly suggests the industry's adaptation to digital technology but also consumer preferences in terms of making purchases online [11].

In this context, the beverage industry in the European Union experienced a period of significant transformations between 2011 and 2020, marking a defining era for the sector. [13] This decade was characterized by a complex dynamic, influenced by economic, technological, and socio-cultural factors [9]. The analysis of the evolution of the average number of employees per enterprise in the beverage industry reveals major changes in the workforce structure and adaptations to market trends, production, and consumption innovations, as well as responses to global and regional economic challenges.

Each member state of the European Union made unique contributions to this diverse landscape, from the impressive workforce expansion in Malta to the significant reduction in the number of employees per enterprise in Poland and Denmark. These variations reflect different national strategies and responses to global market demands, as well as internal developments.

Additionally, the EU beverage industry has been shaped by technological innovations, changes in consumer preferences, and an increase in sustainability awareness. The impact of these factors has led to strategic adaptations, production and marketing restructurings, and the emergence of new market segments [16].

The aim of this paper is to analyze the significant changes within the European beverage industry between 2011 and 2020, when a complex interplay of economic, technological, and socio-cultural factors influenced the sector.

## MATERIALS AND METHODS

The study utilizes a comprehensive approach to analyze the evolution of the beverage industry in the European Union (EU) from 2011 to 2020, drawing on data from multiple sources, including Eurostat databases, market research reports, and peer-reviewed journal articles. Data on the number of employees per enterprise, financial performance metrics, and company numbers were extracted from Eurostat to assess changes in workforce structure, market trends, and economic performance across different EU member states. Additionally, market research reports and journal articles provided insights into shifts in consumer preferences, particularly the rising interest in low-alcohol and non-alcoholic beverages, and the impact of technological advancements on production processes and product offerings. Descriptive and time-series analyses were employed to identify trends, while content analysis of reports and articles highlighted regulatory impacts and sustainability practices. Comparative analyses across EU countries underscored differences in industry evolution, with data visualizations such as graphs and charts illustrating key trends and performance variations. This methodical approach ensures a robust understanding of the dynamic and evolving beverage industry in the EU during the specified period.

## RESULTS AND DISCUSSIONS

Food supply chains and the assurance of food quality and safety have become major public concerns worldwide, driven by the unprecedented rapid economic growth [7]. Data on the beverage industry in EU member countries in the period 2011-2020 show various trends both in terms of growth and development.

Germany saw a healthy growth of 30.61%, with the number of companies increasing from 2,019 to 2,637.

At the opposite pole was Hungary, which faced challenges, thus registering a slight decrease of 8.10%, with the number of companies falling from 2,334 to 2,145.

As for Portugal's situation, it has demonstrated a truly impressive growth, with an increase of 61.89% starting from 1,215 and reaching 1,967 companies, thus placing itself among the first competitors.

The Netherlands stood out from the others, registering an amazing increase of 550.79%, the number of companies thus increasing from 189 to 1,041.

The number of companies in Slovakia almost tripled, increasing by 133.56% from 441 to 1,030. if we talk about the situation in Romania, the beverage sector registered an

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increase of only 5.38%, the number of companies increasing from 651 to 686.

Table 1. Evolution of the top 10 EU member countries in terms of the number of companies in the beverage industry and Romania's position

| Rank | Country | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2020/2011 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | **Spain** | 4,557 | 4,617 | 4,500 | 4,889 | 4,761 | 4,908 | 5,061 | 5,061 | 5,206 | 4,863 | 106.71 |
| 2 | **France** | 2,959 | 3,117 | 3,125 | 3,051 | 4,113 | 3,946 | 3,853 | 3,755 | 4,137 | 4,466 | 150.93 |
| 3 | **Italy** | 2,871 | 2,891 | 2,949 | 3,191 | 3,219 | 3,390 | 3,348 | 3,281 | 3,234 | 3,202 | 111.53 |
| 4 | **Czech Republic** | 1,263 | 1,222 | 1,266 | 1,613 | 1,815 | 2,077 | 2,237 | 2,412 | 2,544 | 2,691 | 213.06 |
| 5 | **Germany** | 2,019 | 2,002 | 1,932 | 1,977 | 2,142 | 2,166 | 2,033 | 2,257 | 2,435 | 2,637 | 130.61 |
| 6 | **Hungary** | 2,334 | 2,295 | 2,251 | 2,238 | 2,287 | 2,245 | 2,229 | 2,161 | 2,178 | 2,145 | 91.90 |
| 7 | **Portugal** | 1,215 | 1,223 | 1,441 | 1,659 | 1,754 | 1,793 | 1,885 | 1,981 | 2,023 | 1,967 | 161.89 |
| 8 | **Greece** | 893 | 795 | 755 | 1,137 | 1,013 | 1,097 | 1,123 | 1,101 | 1,150 | 1,147 | 128.44 |
| 9 | **Netherlands** | 189 | 208 | 290 | 338 | 450 | 563 | 687 | 836 | 956 | 1,041 | 550.79 |
| 10 | **Slovakia** | 441 | 421 | 419 | 497 | 492 | 619 | 755 | 884 | 894 | 1,030 | 233.56 |
| 13 | **Romania** | 651 | 664 | 678 | 678 | 677 | 677 | 676 | 684 | 646 | 686 | 105.38 |

Source: Eurostat, 2024 [2].

In what concerns the turnover indicator, France shows the leader position in the beverage industry, doubling its value, from 25,125.7 million euros in 2011 to a peak of 46,841.7 million euros in 2017, then stabilizing the value at 29,258.2 million euros in 2020, marking a growth of 116.45%. Regarding the situation of Germany, a constant and at the same time balanced growth is clearly showed, the growth rate being 127.59%, starting from 20,118.4 million euros in 2011, ending with 25,669.1 million euros in 2020. The beverage industry in Italy managed a smooth growth, from 18.908.3 million euros in 2011 to 20,234.6million euros, the growth rate being only 107.01%.

For two of the analyzed countries, namely Spain and Portugal, the growth rate is very similar. Spain recorded 107.07% while Portugal recorded 107.19%. Poland, being an emerging economy in the EU, showed an increase of approximately one million euros, from 7,282.1 million euros to 8,231.8 million euros, the growth rate being 113.04%.

By far, in percentage terms, the biggest increase was evident in Austria and Belgium, with rates of 143.08% and 143.48%, respectively. The Netherlands maintained a relatively constant turnover in the beverage industry, being the only country among those analyzed that showed a slight decrease from 4,742.6 million euros to 4,736.0 million euros, the rate being 99.86%.

Romania amazes this time, managing to present an impressive increase from 2,087.9 million euros to 2,818.1 million euros, with a growth rate of 134.97%.

Table 2. Evolution of the top 10 EU member countries in terms of turnover in the beverage industry (million euros)

| Rank | Country | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2020/ 2011 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | **France** | 25,125.7 | 26,637.3 | 28,117.6 | 27,709.7 | 29,934.1 | 29,447.1 | 46,841.7 | 32,842.0 | 31,502.7 | 29,258.2 | 116.45 |
| 2 | **Germany** | 20,118.4 | 20,386.9 | 20,300.3 | 20,811.4 | 20,227.3 | 21,146.7 | 20,634.9 | 25,926.6 | 25,980.8 | 25,669.1 | 127.59 |
| 3 | **Italy** | 18,908.3 | 17,103.0 | 17,038.8 | 17,697.8 | 18,424.4 | 19,721.2 | 20,870.9 | 21,797.0 | 22,103.8 | 20,234.6 | 107.01 |
| 4 | **Spain** | 15,795.6 | 15,981.9 | 15,991.8 | 15,616.3 | 16,149.4 | 16,530.4 | 17,256.1 | 20,327.5 | 19,580.7 | 16,911.9 | 107.07 |
| 5 | **Poland** | 7,282.1 | 7,415.8 | 7,671.4 | 7,316.0 | 7,636.1 | 7,130.6 | 7,298.3 | 8,294.4 | 8,176.2 | 8,231.8 | 113.04 |
| 6 | **Austria** | 4,873.1 | 5,370.1 | 5,215.4 | 5,392.1 | 6,111.2 | 6,225.7 | 6,127.8 | 6,487.3 | 6,885.7 | 6,972.3 | 143.08 |
| 7 | **Belgium** | 4,810.8 | 4,776.3 | 4,801.9 | 4,598.9 | 4,540.3 | 5,219.9 | 5,578.4 | 6,259.8 | 7,589.8 | 6,902.7 | 143.48 |
| 8 | **Netherlands** | 4,742.6 | 4,846.1 | 4,872.9 | 4,900.9 | 5,140.4 | 5,085.5 | 5,392.2 | 5,268.5 | 5,241.2 | 4,736.0 | 99.86 |
| 9 | **Portugal** | 2,991.9 | 2,973.9 | 3,014.6 | 3,099.4 | 3,135.5 | 3,242.6 | 3,362.3 | 3,404.3 | 3,565.7 | 3,206.9 | 107.19 |
| 10 | **Romania** | 2,087.9 | 2,197.6 | 2,165.6 | 2,100.4 | 2,410.3 | 2,545.9 | 2,627.4 | 2,854.6 | 2,967.7 | 2,818.1 | 134.97 |

Source: Eurostat, 2024 [2].

The agri-food sector is a key component of the European Union's economy, essential for supporting its population and contributing significantly to the EU's economic stability and health [10, 12].

At the same time, labor productivity is determined by a large range of factors [8]. Germany stands out as a leader in the industry, with a substantial increase in the number of employees from 70,492 in 2011 to 85,705 in 2020, representing a growth of 121.58%. This increase demonstrates the strength and expansion of the beverage sector in Germany. Spain recorded impressive growth, with the number of employees rising from 47,800 in 2011 to 58,678 in 2020, an increase of 122.76%. This reflects an active labor market and an expanding beverage industry. France experienced notable fluctuations in the number of employees, from 44,128 in 2011 to 55,157 in 2020, with a growth rate of 124.99%. This indicates the industry's adaptability and dynamism. Italy's beverage industry showed moderate but steady growth, with the number of employees increasing from 35,878 in 2011 to 41,997 in 2020, a growth rate of 117.06%. The number of employees in Poland's beverage industry slightly declined from 27,048 in 2011 to 24,950 in 2020, indicating a small decrease of 92.24%.

Romania maintained relative stability, with a slight decrease in the number of employees from 22,309 in 2011 to 21,772 in 2020, a rate of 97.59%. Both the Czech Republic and Portugal saw consistent growth, with rates of 114.26% and 114.52% respectively, indicating healthy and expanding markets. Hungary had a relatively stable evolution, with a slight increase from 13,716 employees in 2011 to 13,947 in 2020, a growth rate of 101.68%. Belgium showed an impressive increase in the number of employees, from 10,454 in 2011 to 13,052 in 2020, with a growth rate of 124.85%.

The evolution of the number of employees in the beverage industry across the EU reflects a dynamic and diverse sector. Significant growth in countries like Germany and Spain demonstrates industry expansion, while the stability observed in countries like Romania and Hungary highlights different approaches and challenges in local markets.

Table 3. Evolution of the Top 10 EU member countries in terms of number of employees in the beverage industry

| Rank | Country | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2020/2011 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **1** | **Germany** | 70,492 | 70,398 | 70,354 | 68,696 | 68,951 | 70,107 | 70,654 | 82,444 | 89,115 | 85,705 | 121.58 |
| **2** | **Spain** | 47,800 | 47,051 | 45,469 | 44,932 | 46,697 | 50,917 | 51,496 | 56,862 | 59,799 | 58,678 | 122.76 |
| **3** | **France** | 44,128 | 51,694 | 70,440 | 50,526 | 58,383 | 47,338 | 84,739 | 51,771 | 54,378 | 55,157 | 124.99 |
| **4** | **Italy** | 35,878 | 35,768 | 35,343 | 37,869 | 37,345 | 40,108 | 41,790 | 42,882 | 43,529 | 41,997 | 117.06 |
| **5** | **Poland** | 27,048 | 25,651 | 24,662 | 24,568 | 24,867 | 23,488 | 23,522 | 24,578 | 26,185 | 24,950 | 92.24 |
| **6** | **Romania** | 22,309 | 20,937 | 20,565 | 18,286 | 18,848 | 19,950 | 20,190 | 21,131 | 21,941 | 21,772 | 97.59 |
| **7** | **Czech Republic** | 15,106 | 14,898 | 14,709 | 14,957 | 15,301 | 15,779 | 16,426 | 16,986 | 17,463 | 17,260 | 114.26 |
| **8** | **Portugal** | 14,980 | 14,560 | 14,481 | 14,844 | 15,197 | 15,235 | 15,789 | 16,609 | 17,535 | 17,155 | 114.52 |
| **9** | **Hungary** | 13,716 | 13,193 | 13,087 | 13,189 | 13,305 | 12,963 | 13,130 | 13,463 | 14,100 | 13,947 | 101.68 |
| **10** | **Belgium** | 10,454 | 10,125 | 10,214 | 9,795 | 9,827 | 10,113 | 10,606 | 12,384 | 12,890 | 13,052 | 124.85 |

Source: Eurostat, 2024 [2].

Austria ranks first, with a relatively stable turnover per employee, increasing slightly from 542.8 thousand euros in 2011 to 648.6 thousand euros in 2020. France experienced significant fluctuations, starting at 569.4 thousand euros in 2011 and reaching 530.5 thousand euros in 2020, showing adaptation to market conditions. Belgium maintained a stable turnover per employee, beginning at 460.2 thousand euros in 2011 and reaching 528.9 thousand euros in 2020. The Netherlands recorded an impressive figure, although it decreased from 675.5 thousand euros in 2011 to 519.9 thousand euros in 2020, remaining efficient. Italy maintained a relatively constant level, with a slight decrease from 527.0 thousand euros to 481.8 thousand euros over the period. Sweden and Poland showed stable development, with

Sweden experiencing a slight increase, while Poland recorded a modest rise from 269.2. thousand euros in 2011 to 329.9 thousand euros in 2020. Luxembourg and Germany had relatively stable evolutions, with Luxembourg starting at 350.2 thousand euros and ending at 320.2 thousand euros, and Germany remaining around 300 thousand euros.

Denmark showed variations, starting at 289.6 thousand euros, and reaching 294.6 thousand euros in 2020.

Romania, although still below the EU average, showed a consistent increase from 93.6 thousand euros to 129.4 thousand euros, indicating growth potential.

This analysis highlights the efficiency and adaptability of the EU beverage industry. Austria, France, and Belgium stand out for their high productivity, while Romania shows signs of growth, although it remains below the European average.

Table 4. Evolution of the top 10 EU member countries in terms of turnover per employee in the beverage industry and Romania's position (thousand euros)

| Rank | Country | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2020/2011 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | **Austria** | 542.8 | 594.1 | 586.6 | 607.6 | 671.4 | 673.2 | 674.3 | 605.8 | 648.2 | 648.6 | 119.49 |
| 2 | **France** | 569.4 | 515.3 | 399.2 | 548.4 | 512.7 | 622.1 | 552.8 | 634.4 | 579.3 | 530.5 | 93.17 |
| 3 | **Belgium** | 460.2 | 471.7 | 470.1 | 469.5 | 462.0 | 516.2 | 526.0 | 505.5 | 588.8 | 528.9 | 114.93 |
| 4 | **Netherlands** | 675.5 | 724.9 | 737.5 | 745.0 | 764.2 | 731.8 | 726.4 | 629.2 | 578.1 | 519.9 | 76.97 |
| 5 | **Italy** | 527.0 | 478.2 | 482.1 | 467.3 | 493.4 | 491.7 | 499.4 | 508.3 | 507.8 | 481.8 | 91.42 |
| 6 | **Sweden** | 330.9 | 358.6 | 351.3 | 326.3 | 329.5 | 331.7 | 316.3 | 355.8 | 349.6 | 354.8 | 107.22 |
| 7 | **Poland** | 269.2 | 289.1 | 311.1 | 297.8 | 307.1 | 303.6 | 310.3 | 337.5 | 312.2 | 329.9 | 122.55 |
| 8 | **Luxembourg** | 350.2 | 359.0 | 347.8 | 348.4 | 347.8 | 350.4 | 351.7 | 360.8 | 359.1 | 320.2 | 91.43 |
| 9 | **Germany** | 285.4 | 289.6 | 288.5 | 302.9 | 293.4 | 301.6 | 292.1 | 314.5 | 291.5 | 299.5 | 104.94 |
| 10 | **Denmark** | 289.6 | 301.3 | 323.7 | 318.7 | 272.0 | 390.3 | 307.5 | 298.9 | 305.9 | 294.6 | 101.73 |
| 19 | **Romania** | 93.6 | 105.0 | 105.3 | 114.9 | 127.9 | 127.6 | 130.1 | 135.1 | 135.3 | 129.4 | 138.25 |

Source: Eurostat, 2024 [2].

Austria stands out with a notable growth of 119.49%, indicating increased efficiency. France, with a ratio of 93.17%, shows a slight decline, possibly due to economic challenges or changes in efficiency. Belgium, with a growth of 114.93%, reflects positive dynamics in the beverage sector, suggesting improvements in performance or strategy. The Netherlands, with a ratio of 76.97%, indicates a significant decline, suggesting difficulties or recalibrations in the industry. Italy, with a ratio of 91.42%, shows a moderate decline, possibly due to changes in demand or operational efficiency. Sweden, with 107.22%, highlights moderate growth, suggesting adaptability and sector growth. Poland stands out with an impressive growth of 122.55%, indicating significant expansion or improvement in operational efficiency. Luxembourg registers a slight decline at 91.43%, indicating adjustments or changes in market conditions. Germany, with 104.94%, demonstrates modest growth, suggesting stability or positive development in the sector.

Denmark, with 101.73%, indicates slight growth, suggesting a stable industry.

Romania, with an extraordinary growth of 138.25%, illustrates significant expansion or major improvement in efficiency.

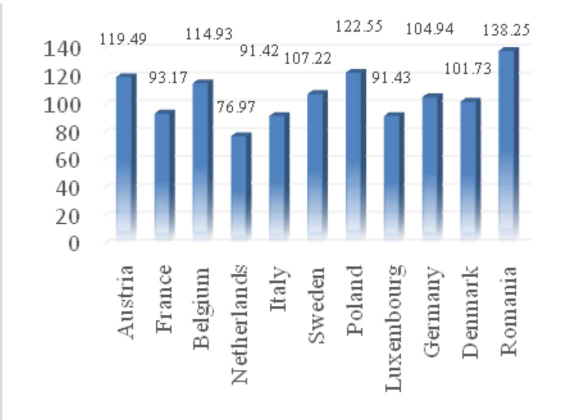


Fig. 1. The evolution from 2011 to 2020 of the top 10 EU member states from the perspective of turnover per employee in the beverage industry and Romania's position (thousand euros)

Source: Own projection based on data provided by Eurostat, 2024 [2].

Malta stands out with exponential growth, increasing from 43.8 to 66.9 employees per enterprise, highlighting an impressive progress of 152.74%. This trend may indicate substantial sector expansion, possibly driven by factors such as favorable economic policies or technological advancements. Poland reflects an opposite dynamic, with a decrease from 55.3 to 34.3 employees per enterprise, a decline of 62.03%. This suggests industry restructuring, possibly in the context of efficiency improvements or adaptation to a changing market. Germany presents relatively moderate fluctuation, decreasing from 34.9 to 32.5 employees per enterprise, a rate of 93.12%. This may indicate a trend of stabilization or optimization in a consolidated sector. Lithuania and Romania, with decreases to 84.99% and 92.42%, respectively, demonstrate gradual adjustments in workforce size, suggesting possible strategic recalibrations or responses to economic conditions. Austria, Belgium, Denmark, Latvia, and Luxembourg illustrate varying degrees of restructuring, ranging from minor modifications to significant changes in workforce structure.

In conclusion, these trends reflect a complex landscape of the beverage industry in Europe, highlighting diverse strategies for adapting to economic, technological, and market changes. It is essential to understand these trends within a broader framework of economic and social developments at the European level.

## CONCLUSIONS

The European beverage industry has shown adaptability and continuity from 2011 to 2020. This period presented substantial changes not only in workforce structures but also in market trends and production innovations. Austria and Romania presented an enhanced growth. In contrast, Netherlands encountered notable declines indicating in this way industry recalibrations while Germany and France exhibited moderate fluctuations but even that, has shown a balance between stability and adaptability.

Broadly, the industry's progression emphasizes its dynamic nature and the different strategies employed by EU member states to adapt to changing economic conditions and consumer preferences.

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