



FOOD & BEVERAGE EXCELLENCE IN CENTRAL EASTERN EUROPE

Market dynamics and key challenges

EFESO
MANAGEMENT CONSULTANTS

FOOD & BEVERAGE
INSIGHT

Overview of Food & Beverage industry in Central Eastern Europa



The Food & Beverage sector is growing with new trends & technologies on the rise



F&B figures – global situation

- **F&B industry** projected to reach **\$9 trillion by 2026** (>8.7% p.a.)
- **Bio products** segment showing exceptional performance > **9.6% p.a.**
- **Online F&B delivery** market projected to reach **\$220 billion by 2027**
- **Personalized nutrition** market projected to reach **\$35 billion by 2030**



F&B figures in Central Eastern Europe

+ €1.2 billion
turnover

Leading manufacturing
sector in the EU

+ 1.9%
Value added

of EU gross value added

+ €182 billion
external trade

Exports

+ €102 billion
internal trade

Imports



This demand gains increasing relevance as the following breakdown of some key trends continues to evolve.

Game-changing trends challenge the Food & Beverage industry to future-proof their business

🎯 Market trends

BIO Polarized food world
Consumer needs are diverging: indulgent, enjoyable products coexist with clean, healthy and functional food choices

🍏 Personalized complexity
Consumers expect tailored offerings and transparency – from personalized nutrition to clear ingredient and origin information

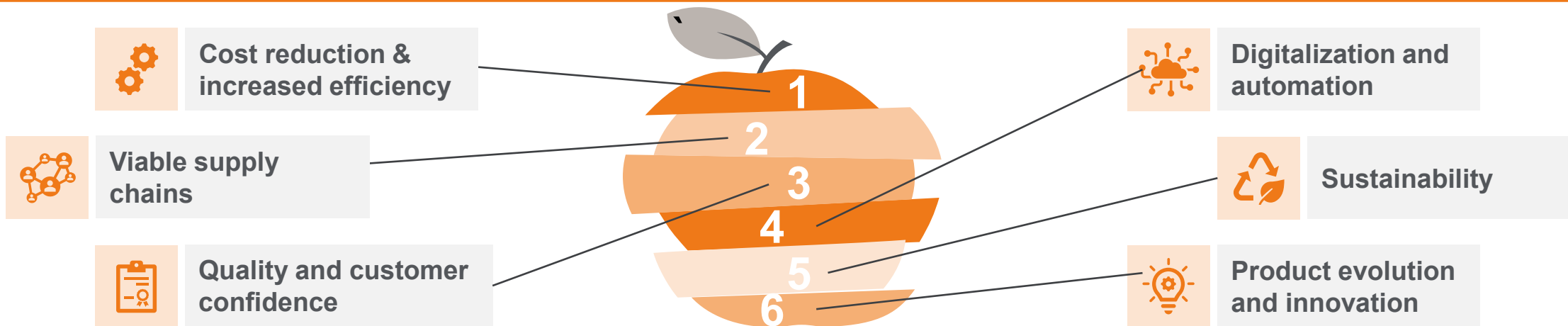
🛡️ Food compliance paradigm
Stricter regulations demand transparent, traceable, and digitally supported processes

🔬 Smart products & packaging
Digitalized, sustainable packaging and sensor-based solutions increase product interaction, traceability, and efficiency

🍷 Farm-to-fork sustainability
Sustainability is key along the entire value chain – from regenerative sourcing to low-impact production and logistics

🚚 Agile food distribution
E-commerce and quick delivery require agile, tech-enabled fulfillment and flexible supply chains

📊 Industry challenges



Cost reduction & increased efficiency – consistently leveraging cost and efficiency potentials while focusing resources and capacities on growth opportunities



HOW does optimizing production and supply chains impact financials?

WHAT KPIs and processes are necessary for effective cost and operational efficiency?



Viable supply chains – increasing the resilience and performance of supply networks



Is your manufacturing strategy location and footprint face today’s challenges and mitigate risks?

WHAT are key strategies for strengthening supply network resilience and performance?



Quality and customer confidence – designing cost-efficient and future-oriented quality and customer management



WHAT requirements are necessary to support evolving consumer expectations and quality?

WHAT solutions has the company implemented to improve transparency and sustainability?



Digitalization and automation – implementing digitalization projects, from automating single processes to global digital production and supply chain networks



HOW can the F&B industry enhance efficiency through digitalization & automation?



WHICH areas of your operations and supply chain hold potential for digitalization and automation?



Sustainability – operationalization of ambitious sustainability strategies



WHAT sustainability strategy is necessary to comply with dynamic regulations?

HOW can energy consumption and CO₂ footprint be reduced along the value chain?



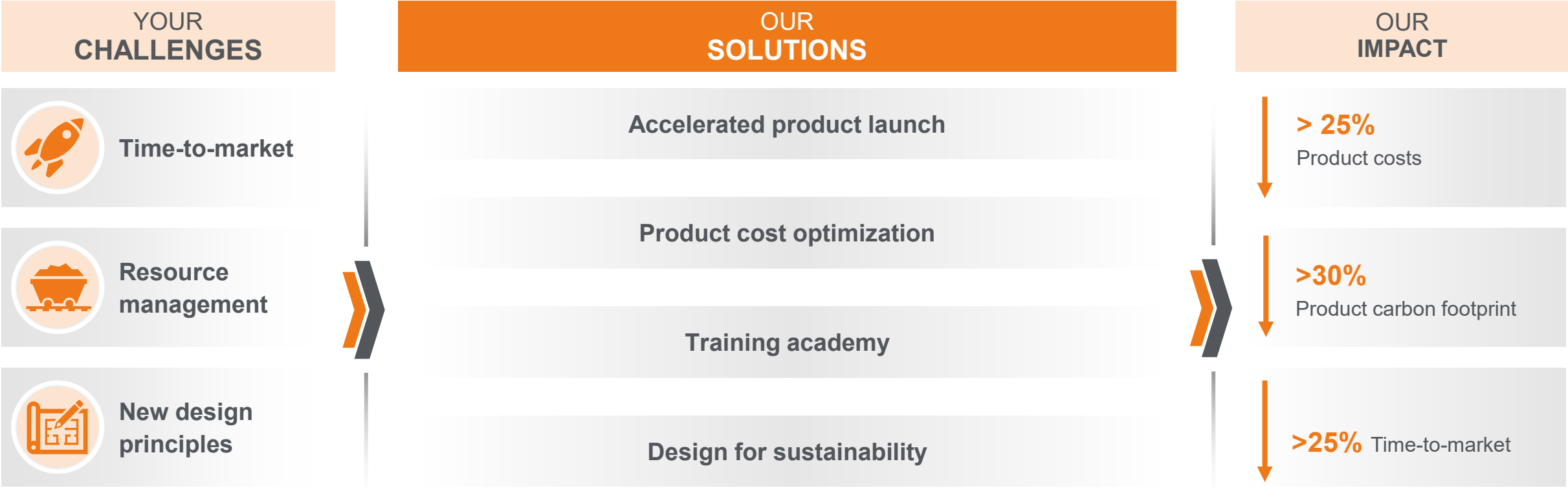
Product evolution and innovation – focused, integrated, and efficient design of innovation processes



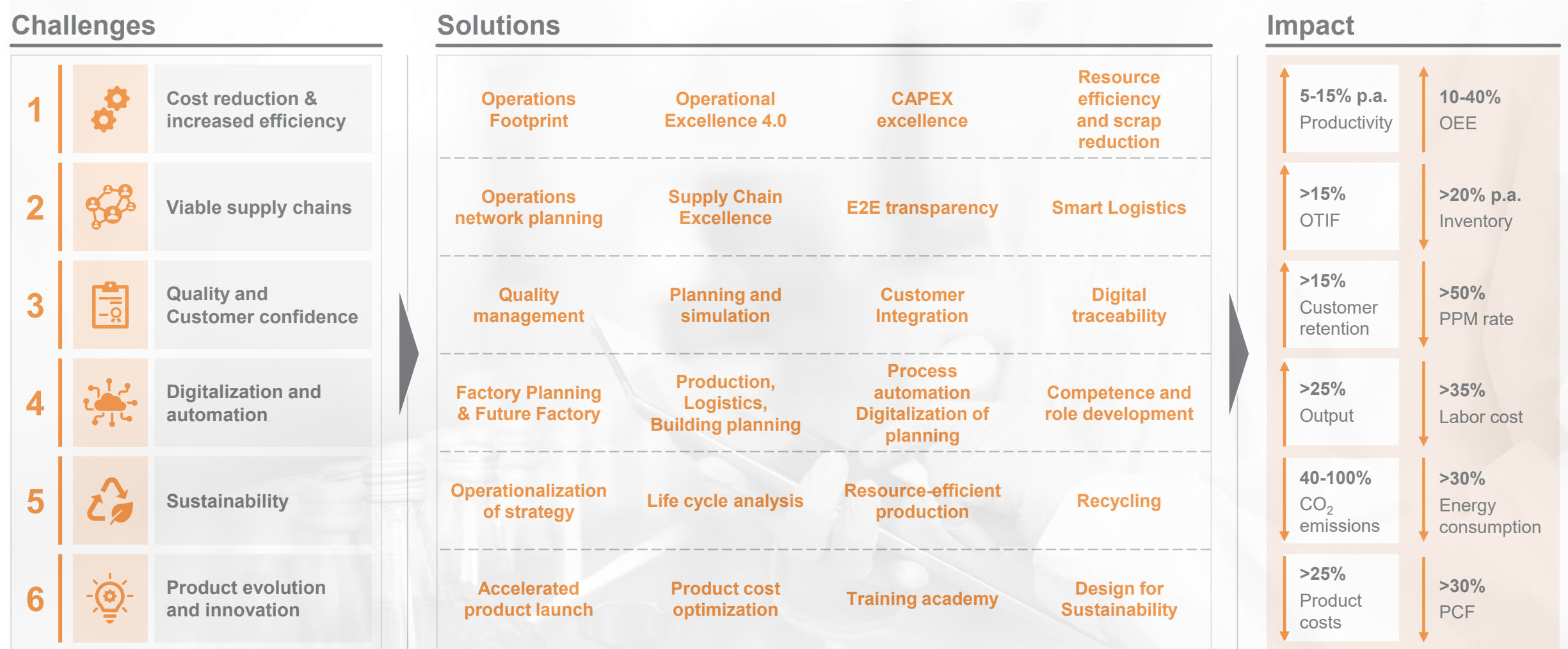
HOW can food and beverage companies streamline the product innovation process?



WHAT are the best practices for achieving both speed and efficiency in bringing new products to market?



Whatever your challenges, EFESO will find a tailored approach with you, offering specific impactful solutions



EFESO has a specific 40+ years of experience in the F&B industry



DRINKS
(NON / ALCOHOLIC)



DAIRY PRODUCTS &
ALTERNATIVES



FRUITS &
VEGETABLES



BAKERY PRODUCTS,
BISCUITS & CEREALS



PROCESSED &
PACKAGED PRODUCTS



INGREDIENTS &
RAW MATERIALS



AGRICULTURAL
PROCESSING



MEAT PRODUCTS
PROTEINS

Worked with 30 among the top 100 Food & Beverage companies

> 500 successful projects completed globally in the last three years

“ We were impressed by how quickly the EFESO consultants were able to understand the peculiarities of our various labs. Their ability to engage with our people and guide them to develop innovative tailored solutions was excellent. These solutions quickly delivered significant productivity improvements and with EFESO’s support we were also able to fully ‘internalize’ the learnings ”

Says a global leader of the beer industry



