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Healthy lifestyle as a factor influencing the change of consumers' trends in the Polish brewery market

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Key words: Market niche, grocery categories, brewery market, consumption, consumers' behavior,

Abstract

The aim of this article is to demonstrate the change in shopping trends in brewery markets in Poland, in the recent years, which is a result of growing awareness in the field of leading a healthy lifestyle by the consumers. Furthermore, the article is to present the reaction of the producers to new marketing trends through introducing new products, as well as introducing the innovations in already existing products in order to meet the needs of the consumers. Secondary sources used and analyzed by the author in the research conducted include: scientific literature, professional literature, external and internal publications of Polish brewery producers. The author has been involved in brewery market for many years as a member of managing board of two brewery factories, hence the use of his expertise based on numerous interviews with other business representatives.

INTRODUCTION

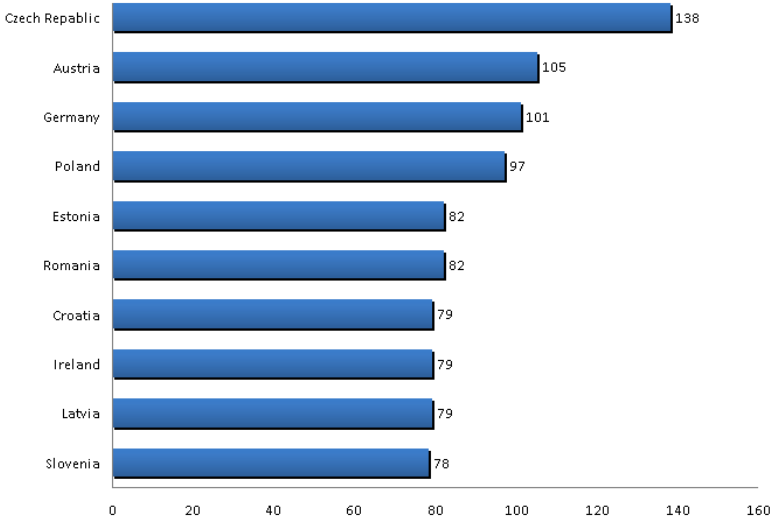
Poland is third in Europe, following Germany and Great Britain, and fifth in the world brewery market. Outside Europe, only the United States and Australia have greater beer production than our country.

Data published in The Brewers of Europe (Beer Statistics, 2018 p.10) shows that statically a Pole drinks almost 100 liters of beer a year, which places us fourth in Europe.

Annually, more beer is drunk only by the Czech (138 liters), the Austrians (105 liters) and the Germans (101 liters).

Among 10 countries characterized by the highest consumption of beer per citizen one can find Estonia (82 liters), Romania (82 liters), Croatia (79 liters), Latvia (79 liters) and Slovenia (78 liters).

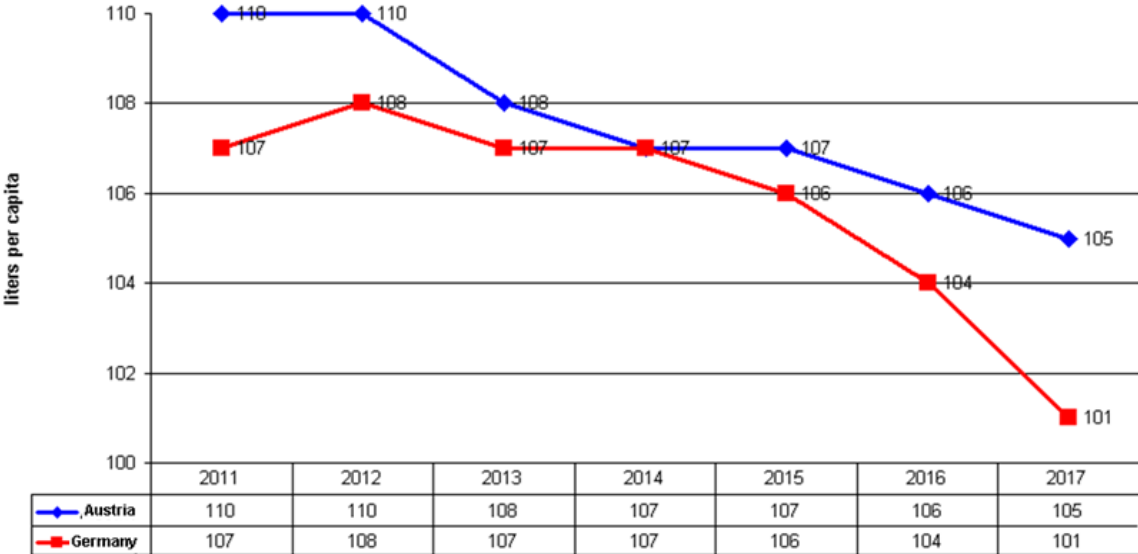
Fig 1. European countries by the highest consumption of beer per citizen (Data from 2017 presented in liters)



Source: Beer Statistics, 2018 Edition, The Brewers of Europe, December 2018

Within the past few years a decrease in beer consumptions has been observed in countries such as Austria and Germany, which seems to be the result of the changes in consumers' behavior, who pay more and more attention to healthy lifestyle.

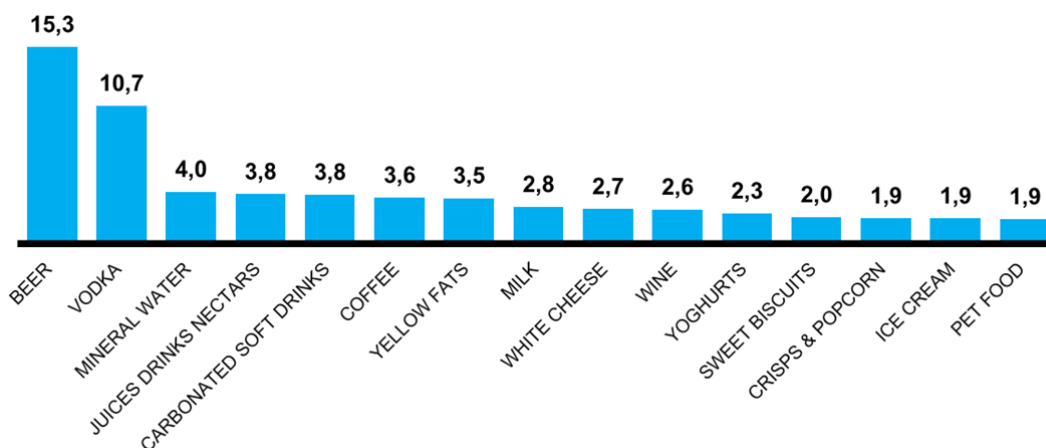
Fig 2. The decrease in beer consumption, in the years 2011-2017, based on Austrian and German example. (Data presented in liters)



Source: personal analysis based on Beer Statistics, 2018 Edition, The Brewers of Europe, December 2018

In Poland, “beer” is the largest grocery category, which among other categories such as: vodka, mineral water, juice and nectar sector or fizzy drinks has the highest sales rate. Fig 3. Presents sales of 15 largest grocery categories in Poland in 2017 (AC Nielsen, 2017)

Fig 3. Grocery categories in Poland in 2017 in terms of sales worth (Data presented in billions PLN)

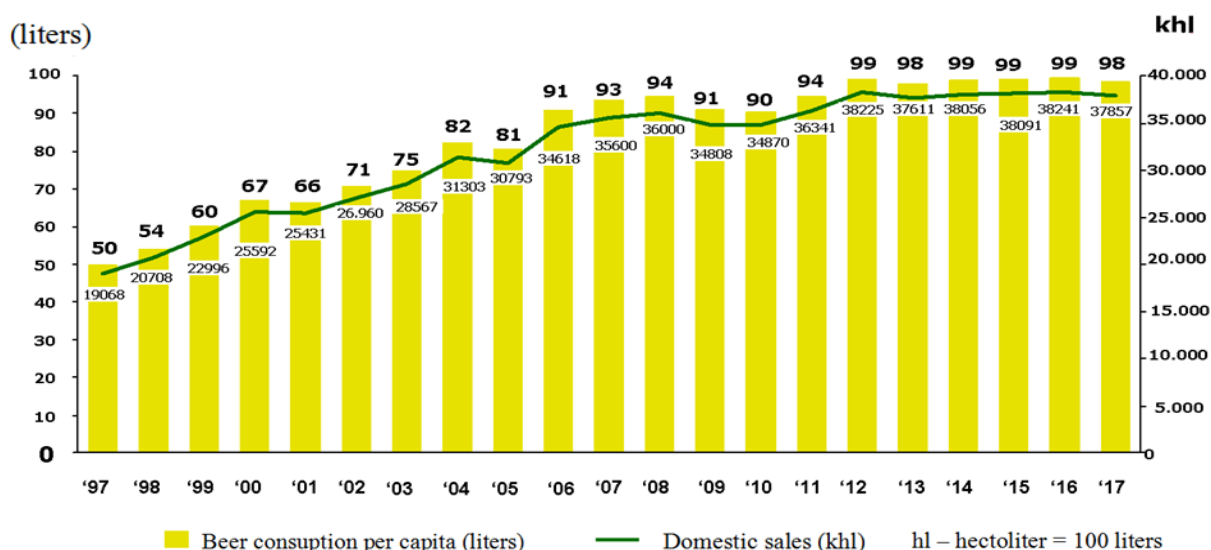


Source: AC Nielsen Report 2017

Beer sector value in Poland reaches over 15,3 billion PLN per year. That makes nearly 50% more in comparison to the second sector “vodka” and nearly 4 times higher than other grocery categories such as mineral water or juices and nectar sector. Brewery market has almost doubled within the past 20 years in Poland. Since 2012 beer market has been very stable in terms of the amount of beer sold. Currently, national sales reach 37,9 million hectoliters of beer a year. One hectoliter equals 100 liters.

On the basis of data published by Państwowa Agencja Rozwiązywania Problemów Alkoholowych (PARPA) brewery market developed in the years 1997-2017 as follows: (PARPA, 2017)

Fig 4. Polish Brewery market in the years 1997-2017



Source: personal analysis based on data found in: PARPA (Państwowa Agencja Rozwiązywania Problemów Alkoholowych)

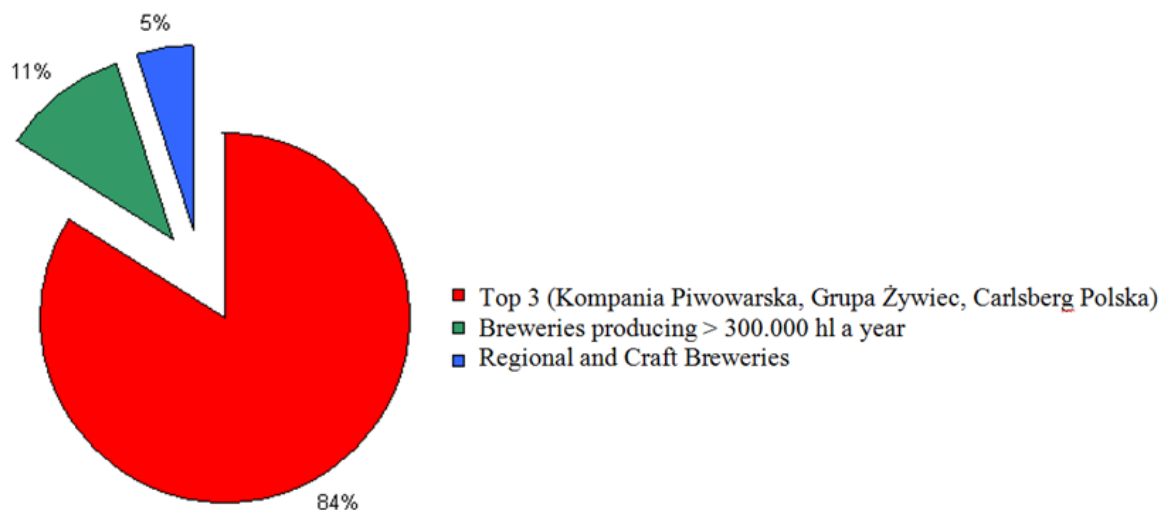
In Poland, there are three main beer producers so called *Top 3*, who hold overall 84% of the market.

Among the *Top 3* beer producers in Poland one can find: *Kompania Piwowarska* part of Japanese company Asahi, the owner of brands such as Tyskie, Żubr, Lech. *Kompania Piwowarska* is the market leader and holds 34% of the Polish market. Second largest Polish beer producer is *Grupa Żywiec* that belongs to Dutch consortium *Heineken*, they offer brands such as Żywiec, Warka, Tatra and hold 31 % of the Polish market. The remaining 19% of Polish beer market belongs to Carlsberg a Danish company, which is the owner of brands such as Okocim, Kasztelan, Harnaś.

Another group of beer producers are the breweries that produce over 300.000 hectoliters of beer yearly. This group holds overall 11% of the beer market in Poland. Producers such as *Van Pur* – the owner of brands Łomża, Brok, Podkarpackie; *Browary Lubelskie* – the owner of Perła; *Browar Namysłów* – producing Namysłów, Braniewo and Zamkowe beer and last but not least *Browar Amber* – selling brands like Żywe, Złote Lwy, Johannes make the abovementioned group.

The last and the smallest, in terms of shares in the market, group of beer producers are local breweries to name a few *Browar Kormoran* from Olsztyn, *Browar Czarnków* or *Browar Krajana* from Nakło and many more craft and contracted beers. This group holds 5% of the market shares and shows dynamic growth.

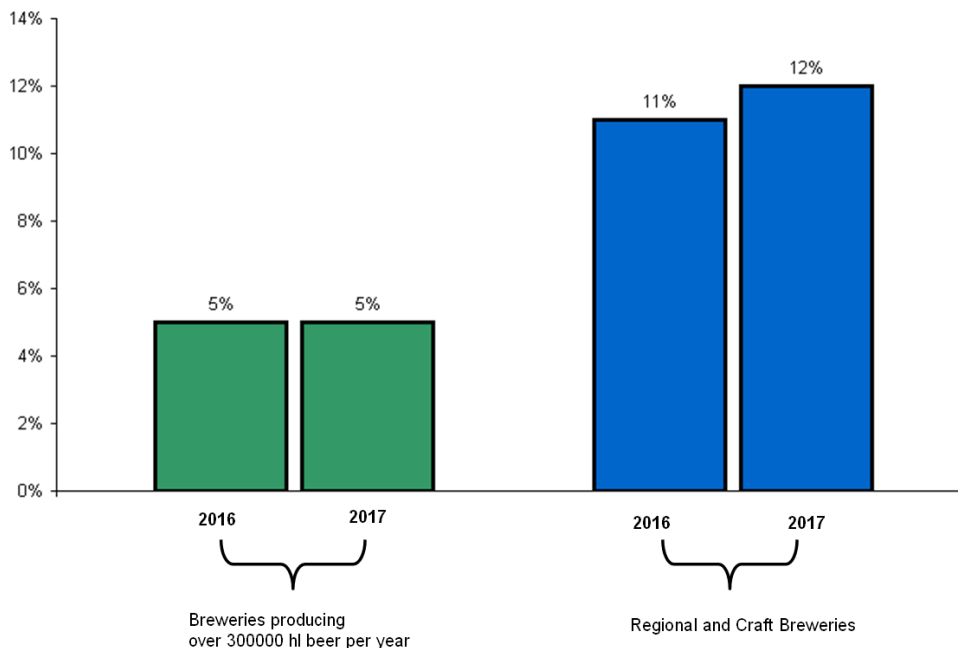
Fig 5. Polish Brewery market. Market shares in 2017.



Source: AC Nielsen, May 2017

Breweries producing over 300 000 hectoliters of beer per year, as well as regional and craft breweries develop dynamically introducing numerous new products to the market.

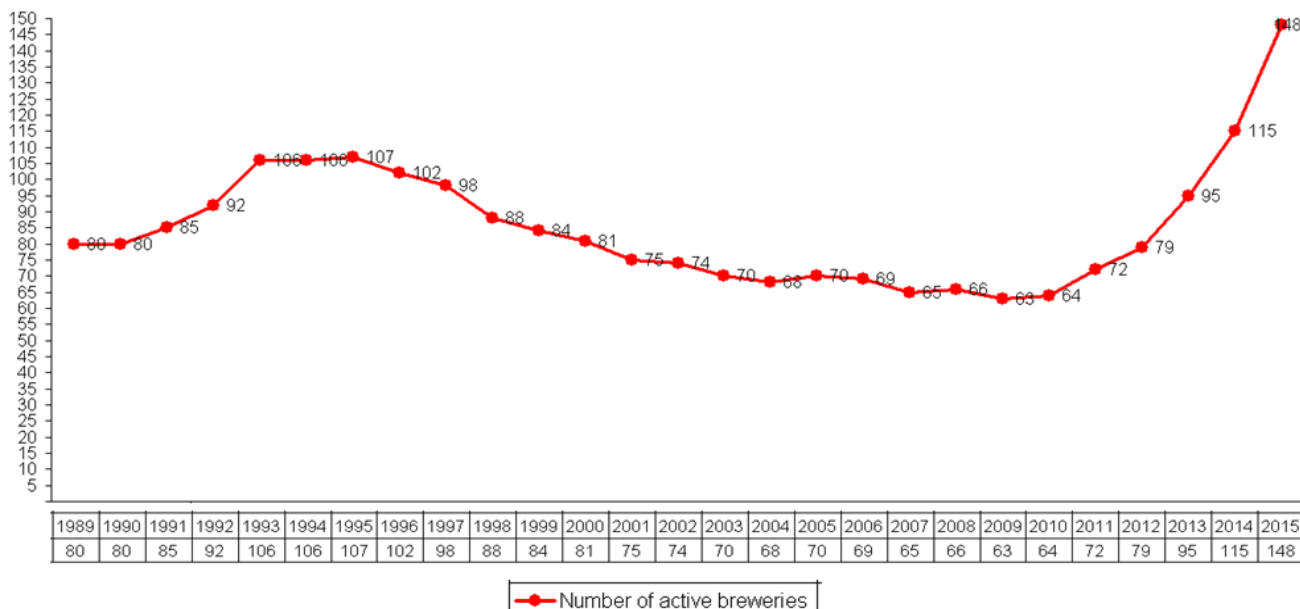
Fig 7. Polish Brewery market. Dynamics of market shares increase.



Source: Personal analysis based on data found in AC Nielsen 2017.

In recent years in Poland, a dynamic increase of the number of small, specialized breweries presenting various business models satisfying the needs of different market niche can be observed. (Łużak, 2017, p.100). A specific reactivation of old, inactive breweries such as *Browar Lwówek Śląski* with a great, long lasting brewery tradition, takes place.

Fig 8. Number of breweries in Poland producing beer in the years 1989-2015*



* except for over 50 contract brewerie active at the end of 2015

Source: Tomasz Łużak Zeszyt Naukowy 156/2017 SGH

In 2017 a number of 1653 new products has been introduced to the market by beer producers. New beer styles, unknown to Polish market have appeared. Polish consumers reach for new products yet having higher expectations in terms of the quality. The quality is understood as the use of natural ingredients as well as other extras like juices are also expected to be natural. The Poles are eager to pay more for a given product as long as it meets their expectations. The knowledge and the awareness of the use of natural ingredients together with the growing awareness of a healthy lifestyle among the consumers, create the market niche, which is quickly adopted by the producers who introduce a vast number of new products in a relatively short time. “See, Gołaś Z., Ścibek K., 2010, Analiza...¹”

The consumers look for certain products, supported by certain people, certain brewers and their own, based on natural brewing methods recipes. By market niche one understands a smaller number of consumers within one sector, looking for a specific set of benefits (Kotler, 2018, p.256).

Managing such a vast number of products sold relatively seldom or not even sold at all poses quite a challenge on the producers. (Podsiadło, 2009, p.124). Still, the producers are eager to search for new, interesting product solutions for their long term and new coming customers.

Chart 1. New products introduced to the market in 2017 according to beer style.

Bear style	Number of new products 2017	
	Numbers of products	Share (%)
PALE ALE	389	23,5%
IPA	383	23,2%
STOUT	202	12,2%
PSZENICZNE	155	9,4%
KWAŚNE	135	8,2%
LAGER	102	6,2%
PORTER	100	6,0%
PILS	57	3,4%
BARLEYWINE/WHEATWINE	26	1,6%
KLASZTORNE	23	1,4%
KOŻLAK	17	1,0%
INNE	17	1,0%
GRODZISKIE	15	0,9%
BROWN/CREAM/MILD	12	0,7%
BRAGGOT	9	0,5%
HYBRYDY	6	0,4%
ALTBIER/KOLSCH	5	0,3%
TOTAL	1653	100,0%

Source: personal analysis based on data found in: <http://www.zwrotnica.com.pl>

¹ . Gołaś Z., Ścibek K., Analiza tendencji zmian na polskim rynku piwa, Uniwersytet Przyrodniczy w Poznaniu, „Journal of Agrobusiness and Rural Development” 2010, 1 (15)

Beer producers have also found a new market niche connected with a healthy lifestyle - non-alcohol beer. More and more Poles realize that being physically active plays an important role in our lives. An active lifestyle brings numerous benefits. People who do sports regularly are not only slimmer but also, due to better oxygenated brain, have better memory and can concentrate more easily. Especially beneficial to one's health's seems to be active outdoors.

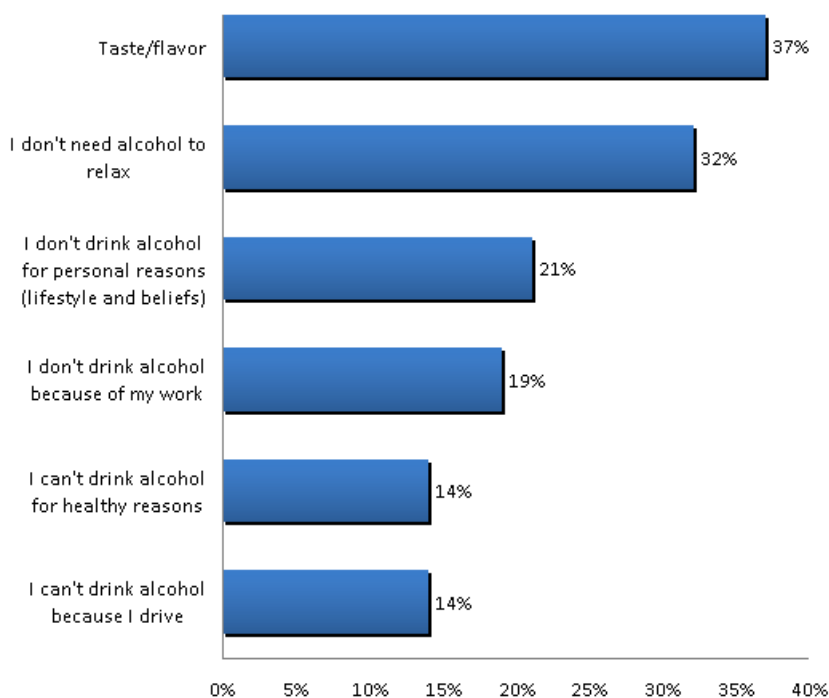
According to Polish legal regulations, non-alcohol beer has a defined alcohol percentage not exceeding 0.5% of the capacity. Many dieticians working with active sports people regard this kind of beer as isotonic drink, that can quickly fulfill electrolytes together with macro and microelements that revitalize the body after an enormous physical effort. They are energy boosters to one's body. Numerous researches prove the beneficial influence of polyphenolic compounds found in hop, present antioxidant, anti-inflammatory and anticancer effects. (Kołota, Oczkowski, Gromadzka-Ostrowska, 2014 p.279)

For this reason also, recent years have shown that during a number of sports events like running marathons, the organizers give the participants non-alcohol beer right after the finishing line. What is important, running-related events have become more and more popular in the recent years.

In the year 2016 there were about 4000 running events organized in Poland, which is almost twice as many as in the year 2012 and nearly three times more than in the year 2008. (Waskowski, Jasiulewicz, 2017 p.22)

As the research conducted by *Biofilia.org* shows, the main reasons for drinking non-alcohol beer are:

Fig 9. Reasons for non-alcohol beer consumption.

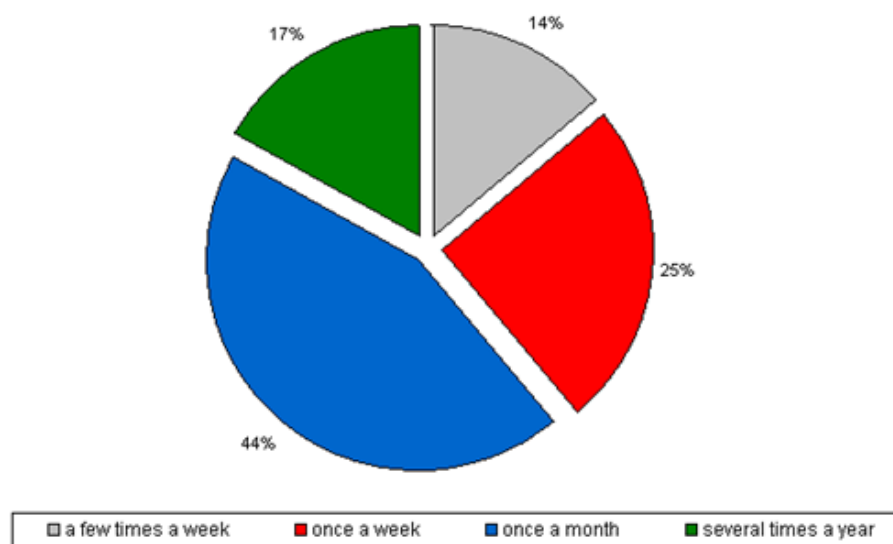


Source: personal analysis based on data found in: <http://www.biofilia.org>

Non-alcohol beer consumers do not want to give away the taste of beer they like, but for different reasons such as work or being a driver, as well as leading a healthy lifestyle or personal beliefs they do not want to drink beer with a higher percentage of alcohol.

The same research indicates that 25% of non-alcohol beer consumers drink this type of product once a week and 44% of consumers drink non-alcohol beer at least once a month. The group of consumers making 14% of the examined population, often called by the beer producers “heavy users”, drink the non-alcohol beer few times a week.

Fig 10. Frequency of non-alcohol beer consumption.



Source: personal analysis based on data found in: <http://www.biofilia.org>

Non-alcohol beer sales worth in Poland in 2017 was estimated about 180 million PLN, which makes about 1.2% entire beer market. That shows 30% increase in sales in comparison to the year 2016, when the sales worth was estimated 138 million PLN.

This sector of beer market is dominated by main producers in Poland such as *Grupa Żywiec*, *Kompania Piwowarska* and *Carlsberg*, the companies that offer non-alcohol products like: Lech Free (*Kompania Piwowarska*), Żywiec Bezalkoholowy, Heineken 0.0, Warka Radler 0.0 (*Grupa Żywiec*), Karmi, Birell, Okocim Radler 0.0 (*Carlsberg*). Some minor breweries, like fully incorporated to the Polish stock *Browar Czarnków S.A.*, are also visible in this sector. Non-alcohol Piwo Noteckie produced by this brewery reached double sale increase in the year 2017 in comparison to the previous year.

SUMMARY

Within the past few years new trends connected with a healthy lifestyle have been noticed in the brewery market in Poland. The high level of beer consumption in Poland, reaching nearly 100 liters per citizen a year has been stable. Yet, more and more consumers reach for naturally brewed, based on natural ingredients non-alcohol beer. Beer producers expect that

those trends, connected with a healthy lifestyle, will strongly influence shopping styles of the customers in the foreseeable future, which shall undoubtedly result in introducing more new products as well as numerous innovations of the already existing ones.

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