

CZU 663.5(478)

<https://doi.org/10.52507/2345-1106.2026-1.36>

**RECENT TRENDS IN THE DEVELOPMENT OF THE BEVERAGE MANUFACTURING INDUSTRY IN
THE REPUBLIC OF MOLDOVA***

* *The research was performed within the framework of Subprogram 030101 „Strengthening the resilience, competitiveness, and sustainability of the economy of the Republic of Moldova in the context of the accession process to the European Union”, institutional funding.*

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SUMMARY

This paper examines recent trends in the development of the beverage manufacturing industry in the Republic of Moldova during the period 2019-2024 and identify the main challenges and advantages of the sector. The analysis focuses on the structural dynamics of the sector, encompassing key economic indicators, enterprise size distribution, production evolution, and market orientation patterns. The findings reveal that the beverage manufacturing sector (C11) demonstrates resilience and moderate growth, with industrial production value increasing by 46.4% over the analyzed period, outpacing the overall manufacturing industry growth rate. The sector maintains a stable contribution of approximately 10.7% to total manufacturing output. However, the analysis identifies a pronounced structural polarization: large enterprises, representing only 7.8% of the total, concentrate 62.3% of revenues and 51.2% of employment, while micro and small enterprises (80.2% of all firms) contribute minimally to overall economic performance. Wine production from grapes remains the dominant subsector (56.7% of total production value in 2024), though its relative share has declined as other segments have expanded more rapidly. A notable shift in market orientation is observed from 2021 onward, with domestic deliveries surpassing exports for the first time, reaching 52.3% of total production in 2024, compared to the export-dominated structure of 2019-2020. The research reveals that while large enterprises have strengthened their profitability (94.7% profitable in 2024), small and medium-sized enterprises face increasing financial vulnerability, with micro-enterprises particularly affected - only one-third achieving profitability in 2024. Sustained sectoral growth requires strategic investments in modernization, technological advancement, quality enhancement, and national brand development to maintain competitive positioning in both domestic and international markets.

Key words: beverage manufacturing industry, Republic of Moldova, industrial production, wine sector, competitiveness, export orientation.

TENDINȚE RECENTE ÎN DEZVOLTAREA INDUSTRIEI DE FABRICARE A BĂUTURILOR ÎN REPUBLICA MOLDOVA

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REZUMAT

Lucrarea examinează tendințele recente în dezvoltarea industriei de fabricare a băuturilor în Republica Moldova în perioada 2019-2024, identificând principalele provocări și avantaje ale sectorului. Analiza se concentrează pe dinamica structurală a sectorului, incluzând principalii indicatori economici, distribuția pe mărimi de întreprinderi, evoluția producției și structura producției livrate. Rezultatele arată că sectorul de fabricare a băuturilor (C11) demonstrează reziliență și o creștere moderată, valoarea producției industriale crescând cu 46,4% pe parcursul perioadei analizate, depășind rata de creștere a industriei prelucrătoare în ansamblu. Sectorul menține o contribuție stabilă de aproximativ 10,7% la producția totală din industria prelucrătoare. Totuși, analiza identifică o polarizare structurală pronunțată: întreprinderile mari, care reprezintă doar 7,8% din total, concentrează 62,3% din venituri și 51,2% din ocupare, în timp ce întreprinderile micro și mici (80,2% din toate firmele) contribuie minimal la performanța economică generală. Producția vinului din struguri rămâne subsectorul dominant (56,7% din valoarea totală a producției în 2024), deși ponderea sa relativă a scăzut pe măsură ce alte segmente s-au extins mai rapid. Se observă o schimbare notabilă în orientarea pieței începând cu 2021, când livrările pe piața internă depășesc pentru prima dată exporturile, ajungând la 52,3% din producția totală în 2024, comparativ cu structura orientată spre export din 2019-2020. Cercetarea arată că, în timp ce întreprinderile mari și-au consolidat profitabilitatea (94,7% profitabile în 2024), întreprinderile mici și mijlocii se confruntă cu o vulnerabilitate financiară în creștere, microîntreprinderile fiind afectate în mod particular - doar o treime fiind profitabile în 2024. Creșterea sustenabilă a sectorului necesită investiții strategice în modernizare, avans tehnologic, creșterea calității și dezvoltarea brandului național pentru menținerea unei poziționări competitive atât pe piața internă, cât și pe piețele internaționale.

Cuvinte-cheie: industria de fabricare a băuturilor, Republica Moldova, producție industrială, sector vitivinicol, competitivitate, orientare spre export.

Introduction. The manufacturing industry constitutes an important pillar of the Republic of	Moldova's economy, contributing significantly to gross value added, employment, and national exports. Within
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this sector, the beverage manufacturing branch holds a distinctive position, owing to its well-established historical traditions, consistent contribution to the trade balance and competitive potential in foreign markets. Over the past decade, the sector has undergone a series of structural transformations influenced by changes in the domestic economic environment, developments in external demand, adaptation to new technological and commercial conditions.

The development of the beverage manufacturing industry in the Republic of Moldova is closely correlated with factors that influence enterprise competitiveness: technological modernization, product range diversification, raw material quality, trade policies, and the capacity to adapt to market requirements. The sector's trajectory has been fundamentally shaped by Moldova's strategic reorientation following the signing and provisional application of the EU-Moldova Association Agreement and Deep and Comprehensive Free Trade Area (DCFTA) in 2014. This framework marked a decisive shift away from historical dependence on post-Soviet markets. It has created new opportunities for regulatory alignment and preferential market access. The transition gained urgency following the Russian embargoes of 2006 and 2013, which exposed the vulnerabilities of concentrated export dependence, and was further accelerated by the Russian invasion of Ukraine in 2022, which disrupted established trade routes and energy supplies across the region.

The DCFTA's provisions for mutual market opening have proven transformative for Moldova's beverage sector. Industrial goods, including beverages, gained duty-free access to EU markets beginning in 2016, while Moldovan tariffs on EU products were gradually eliminated over subsequent years. By 2024, the EU accounted for 67% of Moldova's total exports and over 50% of its imports, with bilateral trade more than doubling since 2016 to reach EUR 7.6 billion [2]. Within this expanded trade framework, processed foods and beverages have emerged as a significant export category. Alcoholic beverages constituted 6.8% of Moldova's commodity exports in the first half of 2025. This highlights the sector's sustained relevance to the national export portfolio despite geopolitical pressures and market diversification efforts [7].

On the domestic front, the industry faces a series of persistent challenges, including the depreciation of equipment and production infrastructure, high operating costs, limited access to financing for investment and innovation, reduced competitiveness of domestic products, negative impact of the war, reduced supply of agricultural raw materials affected by the consequences of last year's drought [3]. Simultaneously, evident opportunities exist: a tradition in wine and spirits production, the presence of quality natural resources, growing demand for products with local identity, and the expansion of export channels through trade agreements with the European Union.

The analysis of the beverage manufacturing sector is relevant not only from the perspective of its economic contribution but also through its capacity to reflect the structural transformations of the manufacturing industry

as a whole. The evolution in the number of enterprises, changes in the structure by size classes, the dynamics of industrial production volume, and the orientation of deliveries toward the domestic or external market provide a comprehensive picture of recent trends and development directions within the sector.

The purpose of this article is to analyze recent trends in the development of the beverage manufacturing industry in the Republic of Moldova during the period 2019-2024, based on official statistical data and their interpretation from a structural and economic perspective. The specific objectives of the research are:

- to examine the evolution of the sector's main indicators in recent years;
- to analyze the structure of enterprises by size and economic performance;
- to highlight market orientation and the degree of dependence on exports;
- to identify the main challenges and advantages that influence the sector's competitiveness.

The results obtained contribute to forming an updated picture of the state of the beverage manufacturing industry and can serve as analytical support for the development of public policies aimed at stimulating the development and modernization of this branch of the national economy.

Materials and methods. The beverage manufacturing industry is part of the manufacturing sector of the national economy and is classified, according to the Classification of Economic Activities in the Republic of Moldova (CAEM Rev. 2), under Section C - Manufacturing Industry, Division 11 - Manufacture of Beverages. This division includes the manufacture of beverages such as non-alcoholic beverages and mineral water, the manufacture of alcoholic beverages obtained primarily through fermentation, beer and wine, and the manufacture of distilled alcoholic beverages. This division excludes: the manufacture of fruit and vegetable juices, the manufacture of milk-based beverages, and the manufacture of coffee, tea, and maté products.

The internal structure of the sector is diversified, comprising several specialized subsectors, each with its own technological and commercial particularities. The main subsectors analyzed in this study are:

- C1101 - Distilling, refining, and blending of spirits;
- C1102 - Manufacture of wine from grapes;
- C1105 - Manufacture of beer;
- C1107 - Manufacture of soft drinks; production of mineral waters and other bottled waters.

These activities constitute the core of the beverage manufacturing industry in the Republic of Moldova, and are representative both in terms of industrial production value and the degree of integration with related branches (agriculture, transport, trade, wine tourism, etc.).

The empirical analysis conducted in this study is based exclusively on official statistical data provided by the National Bureau of Statistics of the Republic of Moldova (NBS) through the Statbank platform. This contains aggregated information at the economic branch level, derived from financial reports submitted by enterprises operating in the territory of the Republic of

Moldova. The data cover the period 2019-2024, which allows for the examination of recent trends in the sector's evolution.

To achieve the research objectives, a descriptive and structural analysis of the industry's main indicators was applied, complemented by qualitative interpretation of the observed developments. We have examined the following aspects:

- dynamics of the sector's main economic indicators (number of enterprises, industrial production, turnover, number of employees);
- structure of enterprises according to size class (micro, small, medium, large);
- distribution of profitable enterprises and those recording losses;
- structure of industrial production deliveries - domestic market vs. external market;
- value of industrial production manufactured in the main subsectors (C1101, C1102, C1105, C1107).

Results and discussions. Evolution of main indicators in the beverage manufacturing industry. The analysis of the beverage manufacturing sector (C11) reveals moderate dynamics during the period 2020-2024. The number of enterprises varied slightly, between 228 and 243 units, indicating structural stability within the sector. The share of these enterprises in the total manufacturing industry remained constant, around 4.6%.

The industry's workforce experienced a decline of 5.2% during the analyzed period, from 7,937 employees in 2020 to 7,523 in 2024. Although the reduction is moderate, it signals a slight compression of production capacity and a possible increase in productivity through operational efficiency improvements. The share of personnel from this sector in the total manufacturing industry remained stable at approximately 8%.

Sales revenues recorded significant growth of 61.1% during the period 2020-2024, reaching 8,871.6 million lei. This positive evolution was accompanied by a doubling of gross financial results, indicating improved profitability and post-pandemic recovery.

Table 1. Evolution of main indicators for the beverage manufacturing industry, 2020-2024

	2020	2021	2022	2023	2024	Index 2024/2023, %	Index 2024/2020, %
Number of enterprises, un.	228	231	238	228	243	106.6	106.6
Average number of personnel, employees	7937	7804	7766	7717	7523	97.5	94.8
Sales revenues, million lei	5506.8	6608.33	7213.42	7536.22	8871.63	117.7	161.1
Financial result before taxation. Profit (+) Loss (-), million lei	459.25	638.15	665.28	514.51	1117.06	217.1	243.2

Source: own calculations based on NBS data [4], Statbank

Sector structure according to enterprise size. The structure by size classes confirms a high degree of economic concentration. Although micro-enterprises hold the largest numerical share (63.4%), their contribution to total sales revenues is modest (4.9%). This imbalance reflects limited production capacity and restricted access to technological and financial resources.

Small enterprises represent 16.9% of the total, playing a more visible role in employment (13.2%) and making a moderate contribution to revenues (10.8%). Medium-sized enterprises, with a share of 11.9%,

generate 22% of revenues and 31% of personnel, positioning them as a stabilizing pillar between the micro segment and large companies. In contrast, large enterprises-only 7.8% of the total-concentrate more than half of the personnel (51.2%) and nearly two-thirds of sales revenues (62.3%), demonstrating strong concentration of capital and production (Fig.1).

Overall, the sector is characterized by robust revenue and profitability growth, but with pronounced structural polarization between large companies and smaller-scale enterprises.

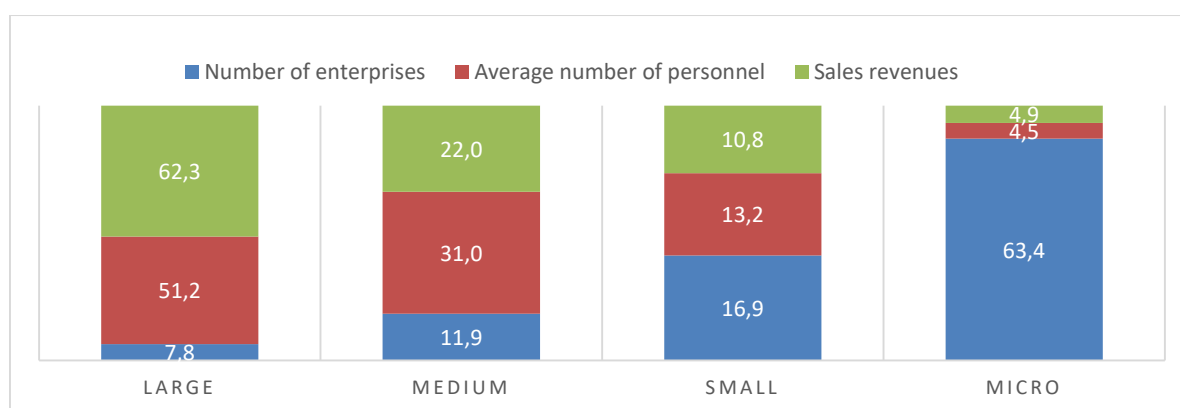


Figure 1. Structure of main indicators of enterprises in the beverage manufacturing industry by size classes, %, 2024

Source: own calculations based on NBS data [4], Statbank

Evolution of enterprises in the beverage manufacturing industry that recorded profits or losses.

The table presents the evolution of the number of enterprises that generated profit and those that incurred losses during the period 2021-2024, highlighting significant differences between large enterprises and those classified as SMEs.

General evolution of profitability shows that:

- The share of profitable enterprises declined from 52.8% in 2021 to 48.1% in 2024 (-4.7 percentage points).

- The share of enterprises that registered losses increased from 37.2% to 40.7% (by 3.5 percentage points), indicating a general deterioration in profitability across the sector.

This trend suggests increasing economic difficulties for enterprises in the beverage manufacturing sector, largely due to rising production costs.

Table 2. Structure of enterprises in the beverage manufacturing industry that recorded profits or losses, 2021–2024, %

	Enterprises with Profit		Enterprises with Losses		Change 2024/2021 (Losses)
	2021	2024	2021	2024	
Total	52.8	48.1	37.2	40.7	3.5
Large	76.2	94.7	23.8	5.3	-18.5
SMEs	50.5	44.2	38.6	43.8	5.2
Medium	82.1	75.9	17.9	24.1	6.3
Small	70.9	63.4	29.1	34.1	5.1
Micro	34.6	33.1	47.2	50.0	2.8

Source: own calculations based on NBS data [4], Statbank

Large enterprises in the beverage manufacturing industry recorded a significant improvement in financial performance between 2021 and 2024. The share of profitable large enterprises increased from 76.2% in 2021 to 94.7% in 2024, while the proportion of those incurring losses declined sharply from 23.8% to 5.3%. This trend reflects the consolidation of large enterprises' market position, which can be explained by their competitive advantages over smaller firms. Easier access to foreign markets, stronger financial resources, and the ability to optimize production costs through economies of scale are key factors contributing to this performance.

In contrast, the SME sector was considerably more affected by economic challenges. The share of profitable SMEs fell from 50.5% to 44.2%, while the share of those incurring losses increased by 5.2 percentage points, reaching 43.8% in 2024. Among SMEs, medium-sized

enterprises were the most affected, registering a notable decline in profitability and a corresponding increase in losses (+6.3 percentage points). This trend can be attributed to tighter financial constraints, lack of stable investment resources, and greater exposure to market fluctuations.

Small and microenterprises are in an even more vulnerable position. Only 33.1% of microenterprises were profitable in 2024, while the share of those that incurred losses rose to 50%, the highest rate in the beverage manufacturing industry. This demonstrates that smaller firms are the most exposed to economic shifts and market volatility, due to limited resources and a reduced capacity to withstand financial shocks.

Overall, the industry exhibits a growing polarization: large enterprises are consolidating and becoming more profitable, while SMEs and microenterprises are

struggling. This situation could have serious implications for the sector's structure in the future, potentially leading to higher market concentration in favor of large firms and a decline in the diversity of economic actors. To mitigate this phenomenon, support measures for SMEs are needed, including credit facilities, fiscal incentives, and internationalization programs that facilitate access to advantageous foreign markets. Without such interventions, the beverage manufacturing sector in the Republic of Moldova risks becoming increasingly dependent on a small number of large players, which may reduce its competitiveness and dynamism in the long run.

Evolution of industrial production manufactured and delivered in the beverage manufacturing sector. The analysis of the value of industrial production

manufactured reveals a generally upward trend in the manufacturing industry of the Republic of Moldova, including in the beverage manufacturing sector (C11). During the period 2019-2024, total production in the manufacturing industry increased by 43.8%, while production in the beverage sector advanced by 46.4%, from 5.2 billion lei to 7.6 billion lei (Table 3). This evolution places the branch among the dynamic sectors of industry, with a stable contribution to industrial value added.

The share of beverage manufacturing in total manufacturing industry increased slightly, from 10.5% in 2019 to 10.7% in 2024, indicating a consolidation of the sector's importance in the national industrial structure.

Table 3. Value of industrial production manufactured, by type of activity in the years 2019-2024, thousand lei

	2019	2020	2022	2023	2024	Index, 2019/2024, %	Index, 2024/2023, %
C11 Manufacture of beverages	5217025	4996076	6859173.9	7178178.5	7635415.5	146.4	106.4
C1101 Distilling, refining and blending of spirits	712813.4	616791.3	1151923.1	1335153.6	1359358.8	190.7	101.8
C1102 Manufacture of wine from grapes	3357388.1	3258251.7	4204336.1	4124630.2	4331269.7	129.0	105.0
C1105 Manufacture of beer	788265.9	794226.6	1082148.8	1226391.5	1416868	179.7	115.5
C1107 Production of soft drinks; production of mineral waters and other bottled waters	358557.6	326665	420765.8	492003.2	527738.9	147.2	107.3

Source: own calculations based on NBS data [6] (Statbank)

Structural analysis of industrial production manufactured. The internal structure of the sector shows a clear predominance of wine manufacturing, which generates over 56% of the total production value in the beverage industry, although its share has gradually declined compared to 2019 (64.4%). This relative reduction is driven by the accelerated growth of other segments, particularly spirits and beer.

The subsector Distilling, refining and blending of spirits (C1101) has nearly doubled its production in real terms during the period 2019-2024 (growth of 90.7%), advancing from 13.7% to 17.8% of the total sector.

The beer manufacturing segment (C1105) recorded one of the most dynamic growth rates (+79.7%) during the analyzed period, reaching 18.6% of total sector production. This reflects the beer industry's adaptation to local consumer preferences.

The production of soft drinks and bottled waters (C1107) increased by 47.2% over the past six years, maintaining a relatively constant share (6.9%) of the total sector. The growth is primarily associated with domestic market expansion, in the context of consumer orientation toward local products.

Table 4. Structure of production value in the beverage manufacturing industry by subsectors, %

Subsector	2019	2020	2021	2022	2023	2024
% of Beverage manufacturing in manufacturing industry (100)	10.5	10.0	9.5	9.3	9.8	10.7
C1101 Distilling, refining and blending of spirits	13.7	12.3	14.8	16.8	18.6	17.8
C1102 Manufacture of wine from grapes	64.4	65.2	62.9	61.3	57.5	56.7
C1105 Manufacture of beer	15.1	15.9	16.4	15.8	17.1	18.6

C1107 Production of soft drinks; production of mineral waters and other bottled waters	6.9	6.5	5.9	6.1	6.9	6.9
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Source: own calculations based on NBS data [6] (Statbank)

Data regarding the structure of deliveries to domestic and external markets indicate a gradual shift in production orientation. During the period 2019-2020, the beverage manufacturing sector had a slight predominance of exports over domestic sales. However, beginning in 2021, the balance reversed, and the domestic market became more important than the external market.

- In 2019 and 2020, exports represented approximately 51% of production, exceeding domestic deliveries.

- From 2021 to 2024, the domestic market share increased, reaching 54% in 2022 and 52.3% in 2024. This may be explained by increased domestic consumption or export difficulties (trade barriers, currency fluctuations, reduced external demand, etc.).

- In 2024, beverage industry exports constituted 13.6% of total manufacturing industry exports, confirming the important role of this sector in Moldova's economy.

Table 5. Structure of beverage manufacturing production deliveries: domestic market vs. export (%)

	Domestic market	External market
2019	49.1	50.9
2020	48.9	51.1
2021	52.3	47.7
2022	54.0	46.0
2023	52.4	47.6
2024	52.3	47.7

Source: own calculations based on NBS data [5](Statbank)

Challenges and advantages of the beverage manufacturing industry sector in the Republic of Moldova. The competitiveness of enterprises in the beverage manufacturing industry sector of the Republic of Moldova is influenced by a complex set of internal and external factors. On one hand, the sector benefits from

tradition, favorable natural resources, and preferential access to European markets; on the other hand, it is exposed to external pressures, structural constraints, and modernization difficulties. The following synthesizes the main challenges and advantages that define the current framework for the development of this sector.

Table 6. The main challenges and advantages of the beverage manufacturing industry sector

Challenges of the sector	Competitive advantages of the sector
Intense competition in domestic and external markets. Moldovan enterprises face intense competition from foreign producers, which necessitates constant investment in innovation, quality, and marketing to maintain market share.	Long-standing tradition and reputation in beverage production, especially wine. The Republic of Moldova possesses an extensive history in viticulture and winemaking, and its wines are internationally recognized.
Underutilized production capacities and outdated infrastructure. A considerable portion of enterprises use obsolete equipment and technologies, which reduces energy efficiency and limits productivity.	Alignment with EU standards has become a strategic advantage for the beverage industry. The wine and alcoholic beverage sector has implemented key reforms targeting compliance with the EU acquis, including the adoption of normative acts that bring wine and alcoholic beverages in line with European requirements. These measures strengthen consumer protection, raise product quality, and enhance the credibility of Moldovan producers, ultimately facilitating smoother access to the EU market and improving the sector's competitive position internationally [1].

Limited access to financing and investment. Insufficient financing hinders the implementation of modernization projects, adoption of advanced technologies, and expansion into new markets.	Favorable agro-climatic conditions for viticulture and other raw materials. The temperate-continental climate and fertile soils provide ideal conditions for obtaining high-quality grapes and fruits used in beverage production.
Exodus of skilled labor force. The departure of specialized personnel affects production quality and innovation capacity, amplifying the sector's vulnerability to labor market changes.	Growth opportunities in European and Western markets. The DCFTA offers preferential access to the European Union market, allowing Moldovan producers to diversify their exports and orient themselves toward segments with higher added value. For example, wine products were exported to 73 countries, most of which were oriented towards European countries. The volume of wine exports increased significantly in 2024, registering an increase in volume of 17% and in value of 22% [1].
Need for alignment with European Union standards. In the context of the Association Agreement and the Deep and Comprehensive Free Trade Area (DCFTA), producers are required to comply with European norms regarding quality and food safety, which generates additional costs.	Competitive production costs. Reduced labor costs, combined with a decent level of professional qualification, can constitute a comparative advantage relative to producers from EU member states.
Dependence on the agricultural sector. The beverage industry, particularly wine production, is closely correlated with agricultural performance, being affected by weather conditions, plant diseases, and raw material quality.	Development of geographical indications and country brands. Initiatives such as "Wine of Moldova. A Living Legend" contribute to strengthening the image and competitiveness of Moldovan wines in external markets [8].
	Capacity to produce beverages with high added value. The trend toward premium bottled wines and artisanal beverages allows for portfolio diversification and increased profit margins.

Conclusions. The beverage manufacturing industry in the Republic of Moldova finds itself in a complex stage, confronting significant challenges while also benefiting from important advantages. Capitalizing on tradition, favorable natural conditions, and opportunities offered by trade agreements, combined with strategic investments and adaptation to international standards, are essential for enhancing the competitiveness of enterprises in this sector.

- The beverage manufacturing industry is dominated by a few large enterprises (7.8%), which generate the majority of revenues (62.3%) and employ half of the sector's workforce (51.2%).

- Micro and small enterprises are numerous (80.2%), but their economic contribution is more limited, suggesting restricted expansion capacity and difficult access to external markets.

- The role of medium-sized enterprises is significant, though not as dominant as that of large enterprises. Medium-sized enterprises represent 11.9% of total enterprises, accounting for 31% of the average number of personnel and 22% of sales revenues, making them an important segment from both employment and revenue perspectives.

- Large enterprises have consolidated their market position. During the period 2021-2024, the percentage of these enterprises that achieved profit increased from 76.2% in 2021 to 94.7% in 2024, while the number of those suffering losses decreased from 23.8% to 5.3%. This advancement is attributable to significant structural

advantages: access to external markets, stable financing, and efficiency through economies of scale.

- SMEs, particularly medium-sized ones, have been most exposed to economic risks. The percentage of profitable SMEs declined, while the number of enterprises with losses intensified. These enterprises experienced visible deterioration in financial performance, caused by lack of investment capital and vulnerability to external shocks.

- Micro-enterprises are the most affected and most vulnerable. Only one-third of micro-enterprises managed to be profitable in 2024, while over half recorded losses. Their situation reflects severe structural limitations: reduced resources, low adaptability, and high risk of failure under unfavorable economic conditions.

- The beverage manufacturing sector recorded nearly 50% growth in production value over the past five years, exceeding the manufacturing industry average.

- Winemaking remains the sector's main pillar, but with a trend toward gradual restructuring and declining relative dominance, which may reflect domestic market maturation and orientation toward products with higher added value.

- Exports are strategic for the beverage manufacturing sector. Even though domestic deliveries have become slightly dominant, the beverage industry continues to play a significant role in foreign trade, contributing 13.6% to total manufacturing industry exports in 2024.

- The structure of beverage manufacturing production deliveries between domestic market and export is fairly balanced. Since 2021, beverage producers in Moldova have begun delivering more to the domestic market than for export, reversing the trend from previous years.

The positive evolution of the entire sector indicates sustainable post-pandemic recovery and competitive adaptation capacity; however, maintaining the growth rate requires continuous investment in modern technologies, quality, and national branding.

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