

Carbonates in Romania

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates struggle as price inflation, sugar taxation and health-driven substitution reshape demand

INDUSTRY PERFORMANCE

Health perceptions, sugar taxation and value concerns accelerate the decline of traditional carbonates
Tonic water and mixers gain momentum as cocktail culture and premium drinking rituals expand

WHAT'S NEXT?

Carbonates set to continue declining as consumers pivot towards healthier and more natural soft drinks
Sustainability, packaging innovation and manufacturing modernisation reshape future market dynamics
Health concerns prompt functional repositioning and experimentation with reduced sugar and prebiotic formulations

COMPETITIVE LANDSCAPE

Coca-Cola HBC Romania reinforces leadership through innovation, localisation and experiential branding
Merlins Beverages accelerates growth as Pop Cola positions itself as a local, natural and ethical alternative

CHANNELS

Small local grocers and modern grocery retailers maintain strong carbonates presence through accessibility and assortment breadth
E-commerce gains momentum as consumers seek convenience, wide assortments and competitive pricing

CATEGORY DATA

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EXECUTIVE SUMMARY

Soft drinks performance shaped by affordability pressures and shifting lifestyle preferences

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health-aligned beverages outperform as consumers reassess value and functionality

Deposit-Return System reshapes packaging dynamics and encourages operational efficiencies

WHAT'S NEXT?

Soft drinks demand set to rise gradually despite economic constraints

E-commerce acceleration driven by convenience, automation and omnichannel expansion

Technological investment to strengthen domestic production and supply chain resilience

COMPETITIVE LANDSCAPE

Coca-Cola HBC Romania maintains leadership through scale, visibility and operational investment

Emerging beverage brands gain momentum as they diversify portfolios and leverage lifestyle trends

CHANNELS

Hypermarkets consolidate leadership through scale, assortment and value-led strategies

E-commerce emerges as the fastest-growing channel as omnichannel players scale logistics

FOODSERVICE VS RETAIL SPLIT

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