



RTD Coffee in Romania

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation, coffee culture expansion and mobility-driven consumption stimulate strong category growth

INDUSTRY PERFORMANCE

Shifting consumer habits and premium expectations underpin strong uptake of RTD coffee

WHAT'S NEXT?

- Dynamic lifestyles and sustained demand for convenience to drive continued category expansion
- Digitalisation, e-commerce expansion and social media engagement to shape competitive dynamics
- Sustainability and ethical sourcing to guide purchasing decisions and innovation priorities

COMPETITIVE LANDSCAPE

- Starbucks Corp consolidates leadership through strong brand equity, premium positioning and wide distribution
- 5 to go Concept SRL emerges as the fastest-growing player through brand popularity and strategic diversification

CHANNELS

- Hypermarkets lead sales due to breadth of assortment, strong pricing and private label expansion
- E-commerce accelerates as consumers embrace convenience, rapid delivery and diversified product portfolios

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Soft Drinks in Romania - Industry Overview

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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