



Coffee in Romania

December 2025

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Coffee in Romania - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee growth in 2025 is driven by evolving home café habits amid rising prices

INDUSTRY PERFORMANCE

Home café culture and reduced per capita consumption underpin volume growth

Fresh coffee beans outperform thanks to broader household penetration and value-for-money perception

WHAT'S NEXT?

Coffee growth will be sustained by entrenched habits, machine ownership and moderating inflation

Pods and beans will lead innovation while standard ground coffee stabilises through renewal

Vending expansion and foodservice recovery will diversify out-of-home coffee occasions

COMPETITIVE LANDSCAPE

Jacobs Douwe Egberts Romania retains leadership through broad coverage and strong brands

Coca-Cola HBC and Cafea Fortuna drive dynamism through innovation, branding and local roots

CHANNELS

Modern grocery retailers remain the core distribution platform as variety and value converge

E-commerce accelerates as brands and retailers use online to support mid-priced and premium offerings

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Hot Drinks in Romania - Industry Overview

EXECUTIVE SUMMARY

Hot drinks growth is constrained by cost-of-living pressures but supported by coffee's entrenched role in daily life

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

At-home café culture supports fresh beans while traditional ground coffee loses relevance

Health and wellbeing trends enhance the functional perception of coffee and sustain demand for fruit/herbal tea

WHAT'S NEXT?

Easing inflation and improving purchasing power are expected to support steady value and volume growth

Café culture and busier urban lifestyles will sustain on-trade hot drinks consumption

International players are set to retain leadership while premium tea specialists enrich the competitive landscape

COMPETITIVE LANDSCAPE

Jacobs Douwe Egberts RO remains the leading hot drinks company in 2025

Cafea Fortuna emerges as the most dynamic top-five player thanks to local roots and wider distribution

Private label gains share as shoppers trade down and manufacturers increase promotional support

CHANNELS

Modern grocery retailers consolidate their leadership as consumers seek low prices and promotions

E-commerce is the most dynamic channel as rapid-delivery partnerships scale up

Small local grocers retain relevance through proximity and personal relationships

FOODSERVICE VS RETAIL SPLIT

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