



Bottled Water in Romania

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water strengthens its position as health concerns, climate pressures and sustainability habits reshape demand

INDUSTRY PERFORMANCE

Bottled water sees continued growth as safety perceptions, wellness trends and extreme weather amplify consumer reliance on packaged hydration
Functional water emerges as a key growth engine as consumers embrace added-value hydration

WHAT'S NEXT?

Category growth set to continue as natural resources, climate pressures and shifting consumption habits sustain strong bottled water demand
Technological advancement to accelerate as producers invest in automation, capacity expansion and efficiency upgrades
Sustainability and changing consumption norms to influence bottled water choices across retail and foodservice

COMPETITIVE LANDSCAPE

Romaqua Group consolidates leadership through brand strength, heritage and widespread market presence
OSHEE leads dynamic performance as multifunctional hydration gains traction

CHANNELS

Small local grocers retain leadership, supported by coverage advantages and habitual purchasing patterns
E-commerce continues to build momentum as logistics efficiencies and consumer convenience fuel adoption

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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