



Soft Drinks in Romania

December 2025

Table of Contents

Soft Drinks in Romania

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

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

- Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
 Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
 Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
 Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
 Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
 Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
 Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
 Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
 Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Romania

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Romania

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

- Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
 Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
 Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
 Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
 Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
 Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
 Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
 Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
 Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
 Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
 Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
 Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Romania

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

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Romania

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability concerns and shifting consumption habits shape a modest but stabilising category performance

INDUSTRY PERFORMANCE

Economic pressures reinforce the relevance of concentrates but category perception still limits broader adoption

Powder concentrates outperform due to specialised sports formats and rising fitness engagement

COMPETITIVE LANDSCAPE

Laurul SA strengthens leadership through heritage positioning and portfolio expansion into cocktail-centric syrups

Decathlon SA continues to outpace competitors through strong demand for sports powders and expanding nationwide presence

CHANNELS

Hypermarkets retain dominance due to assortment breadth, competitive pricing and private label expansion

E-commerce accelerates as consumers embrace convenience, locker networks and flexible delivery options

WHAT'S NEXT?

Category set for slight growth as sports powders expand and natural syrups gain traction

Modernisation of production and logistics to improve efficiency as e-commerce gains further importance

Health and wellness trends to shape premiumisation and encourage bio and natural formulations

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Romania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice benefits from health-driven substitution, value strategies and innovation despite economic headwinds

INDUSTRY PERFORMANCE

Health positioning and aggressive discounting underpin growth in a strained economic climate

Not-from-concentrate juices gain momentum as consumers increasingly favour natural and functional options

WHAT'S NEXT?

Juice set to expand as health and wellness trends strengthen and sugar taxation reshapes category dynamics

The competitive landscape will intensify as local and digital-first players expand through innovation and agile distribution
Sustainability and eco-friendly manufacturing will shape future product and operational strategies

COMPETITIVE LANDSCAPE

Tymbark-Maspex Romania strengthens its leadership through innovation, portfolio depth and youth-oriented marketing
Rauch Romania accelerates growth through strong value positioning and expanding category presence

CHANNELS

Hypermarkets retain category leadership through strong assortments, value formats and in-store innovation
E-commerce gains relevance as direct-to-consumer brands and omnichannel retailers strengthen their digital capabilities

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in Romania

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

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Tea in Romania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health-driven migration from carbonates boosts RTD tea, but economic pressures temper overall momentum

INDUSTRY PERFORMANCE

Health perceptions strengthen demand, though rising prices limit the full potential of category growth

Reduced sugar RTD tea outperforms amid growing health consciousness and favourable price positioning

WHAT'S NEXT?

Rising health and ethical expectations will propel steady growth and more premium RTD tea offerings

Sustainability and automation set to reshape manufacturing, packaging and supply chains

Strong demand for natural, sustainable and eco-friendly RTD tea to shape future category innovation

COMPETITIVE LANDSCAPE

Coca-Cola HBC Romania SRL consolidates leadership through strong brand equity and innovations in reduced sugar RTD tea

Hell Energy SRL expands rapidly as Xixo gains distribution and awareness in a growing market

CHANNELS

Small local grocers lead due to convenience, impulse purchases and strong rural penetration

E-commerce accelerates as mobile shopping, rapid delivery and locker networks reshape buying behaviour

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Romania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Regulatory pressures, negative health perceptions and rising prices weigh heavily on category performance

INDUSTRY PERFORMANCE

Regulation and shifting health attitudes drive a notable decline in category demand

Reduced sugar energy drinks outperform as consumers seek lighter, more permissible functionality

WHAT'S NEXT?

Category expected to gradually recover as cocktail culture expands and adult consumption stabilises

Digital engagement, co-branding partnerships and manufacturing innovation to shape category strategies

Regulation and health perceptions to limit future potential while encouraging recipe optimisation

COMPETITIVE LANDSCAPE

Hell Energy strengthens leadership through innovation, distribution depth and functional upgrades

Monster Beverage Corp remains the most dynamic player through bold marketing and strong consumer engagement

CHANNELS

Small local grocers retain leadership due to proximity, impulse purchasing and rural coverage

E-commerce expands rapidly as consumers embrace convenience and bulk purchasing

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Romania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Active lifestyles, product diversification and health-driven choices underpin the steady growth of sports drinks

INDUSTRY PERFORMANCE

Health consciousness and an expanding sports culture drive category growth despite economic pressures

Reduced sugar sports drinks lead growth as wellness priorities reshape consumption

WHAT'S NEXT?

Sports drinks expected to continue expanding as awareness, education and product availability increase

Technological developments, digitalisation and social media engagement to shape market evolution

Sustainability and health concerns to guide product reformulation and packaging choices

COMPETITIVE LANDSCAPE

Quadrant-Amroq Beverages consolidates leadership through brand recognition and extensive distribution

Decathlon strengthens its momentum as sports participation and private label credibility accelerate growth

CHANNELS

Hypermarkets maintain leadership as consumers seek convenience, assortment and value

E-commerce grows rapidly as convenience, expanded assortment and rapid delivery attract active consumers

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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