



# Concentrates in Romania

December 2025

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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  
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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

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