



# Concentrates in Romania

December 2025

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## Concentrates in Romania - Category analysis

### 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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#### 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

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