



RTD Tea in Romania

December 2025

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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

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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

CHANNELS

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E-commerce emerges as the fastest-growing channel as omnichannel players scale logistics

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