



# Tea in Romania

December 2025

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## Tea in Romania - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Tea demand softens as coffee regains its social role and health positioning alone proves insufficient

#### INDUSTRY PERFORMANCE

Tea volume declines as it fails to become a mass everyday drink in a coffee-centric culture

Health-positioned green and herbal teas remain dynamic as wellbeing claims drive trading up

#### WHAT'S NEXT?

Tea expected to grow as consumption shifts from sickness relief to daily wellbeing rituals

Fruit and herbal teas will anchor innovation as domestic producers extend reach and platforms

Home-made and unpackaged herbal teas challenge packaged brands through price and perceived naturalness

#### COMPETITIVE LANDSCAPE

Domestic specialists lead tea through heritage, pricing and deep expertise in fruit and herbal blends

Kalpo accelerates growth via capacity investment, segmented branding and digital expansion

#### CHANNELS

Modern retailing dominates tea distribution as private label and wide assortments support affordability

E-commerce emerges as the most dynamic channel as producers and retailers build strong online ecosystems

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## Hot Drinks in Romania - Industry Overview

### EXECUTIVE SUMMARY

Hot drinks growth is constrained by cost-of-living pressures but supported by coffee's entrenched role in daily life

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

At-home café culture supports fresh beans while traditional ground coffee loses relevance

Health and wellbeing trends enhance the functional perception of coffee and sustain demand for fruit/herbal tea

#### WHAT'S NEXT?

Easing inflation and improving purchasing power are expected to support steady value and volume growth

Café culture and busier urban lifestyles will sustain on-trade hot drinks consumption

International players are set to retain leadership while premium tea specialists enrich the competitive landscape

#### COMPETITIVE LANDSCAPE

Jacobs Douwe Egberts RO remains the leading hot drinks company in 2025

Cafea Fortuna emerges as the most dynamic top-five player thanks to local roots and wider distribution

Private label gains share as shoppers trade down and manufacturers increase promotional support

## CHANNELS

Modern grocery retailers consolidate their leadership as consumers seek low prices and promotions

E-commerce is the most dynamic channel as rapid-delivery partnerships scale up

Small local grocers retain relevance through proximity and personal relationships

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