PwC's Voice of the Consumer Survey 2025

Consumer preferences analysis

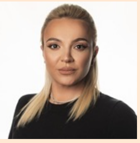
Romania, 2025

About The Voice of the Consumer Survey

What defines the modern Romanian consumer and what drives their purchasing decisions in today's evolving market? Our latest report addresses these critical questions, providing valuable insights for both consumers and businesses. Romanian consumers are increasingly price-sensitive while simultaneously raising their expectations for quality, health, and convenience. This shift presents both challenges and opportunities for manufacturers and retailers aiming to effectively engage with consumers amid changing preferences.

The 2025 edition of our survey is particularly relevant given the significant changes over the past year. Inflation concerns and geopolitical tensions are impacting consumer sentiment, making financial considerations a top priority in purchasing behavior. Despite focus on prices, Romanian consumers are becoming more discerning, actively seeking high-quality products that align with their values. Sustainability is another key theme in consumer preferences, although progress remains slow. Health and convenience continue to gain importance, particularly among younger consumers. A shift from brand loyalty to preferences for fresh, seasonal products indicates a fundamental change towards healthier eating habits.

Our research delves into the driving forces behind these trends and the uncertainties that will shape consumer behaviour in Romania. This report leverages extensive survey data to empower retailers and manufacturers as they navigate Romanian's dynamic market. We invite you to explore our findings in “Voice of the Consumer | 2025.” This comprehensive analysis aims to equip industry leaders with essential tools to identify growth opportunities and meet the demands of Romanian consumers effectively.



Ruxandra Târlescu

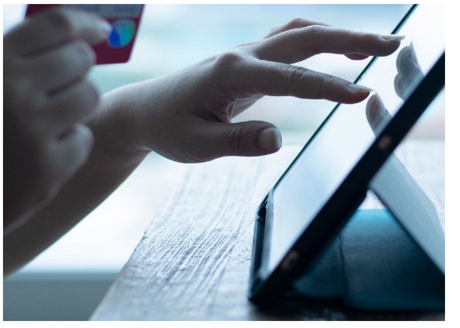
Consumer Markets Leader and TLP Leader,
PwC Romania

In Romania, purchasing behaviour is shaped by inflation and rising living costs, driving consumers to be more cautious, focus on essentials, and manage budgets carefully. The cost of living is seen as the main risk over the next year, especially as fiscal measures to reduce the budget deficit may impact prices. Romanians are adopting money-saving habits, like using leftovers and seeking promotions, yet they differ from global trends: 53% prefer to buy local food, even at higher prices, while 47% choose cheaper international options. This evolving consumer landscape creates both challenges and opportunities for retailers and food producers. PwC's Voice of the Consumer 2025 report highlights the need for businesses to focus on affordability, while also responding to the rising demand for local, healthy, and convenient products.

Key conclusions

Executive summary

Around **58%** of consumers are still concerned about inflation, while fears around macroeconomic volatility are rising in CEE – 6 pp. increase vs 2024



Concerns over climate change among Romanian consumers have fallen from 66% in 2024 to **63%** in 2025

Health risks are a major concern for consumers, over **60%** are worried about the risks of ultra-processed foods and use of pesticides in products, even more than food costs

Romanian consumers on average choose eating out on-the-go or ready to eat meals as frequently as consumers in other CEE countries with around **35%** choosing prepared food at least once a week

Daniel Anghel

Country Managing Partner

PwC Romania

Food companies today are navigating a highly complex structural and macroeconomic environment, defined by supply chain pressures, shrinking margins, trade disruptions, and growing climate risks to agricultural output. At the same time, empowered consumers are becoming key agents of change, driving demand for food that aligns with their values around health, convenience, and sustainability. However, escalating food prices and broader cost-of-living challenges often limit their ability to act on these aspirations. Against this backdrop, the global food system is undergoing profound reinvention, with innovation, technology and cross-sector collaboration reshaping value creation. Our latest research shows that by 2035, this evolving ”How we feed” ecosystem could generate a baseline gross value added of nearly USD 10 trillion, offering unprecedented opportunities for businesses that can adapt to informed, aspirational and increasingly sustainability-focused consumer expectations.

The Romanian consumer in 2025 prioritises price alongside rising quality expectations, values health and convenience and is gradually shifting towards sustainability

VOTC report main theses

Consumer worldview: an ongoing shift

- **Consumer concerns** in Romania are **shifting**, with **inflation** and **geopolitical conflict declining** as top worries, while **fears** around **macroeconomic volatility** are **rising in CEE**
- **Financial considerations** (especially price) drive **purchasing behaviour** in Romania but **taste** remains **vital** — **retailers** must **balance competitive pricing** with **high-quality offerings** to win consumers
- **Over third** of consumers expect to **increase their spending** on **fresh products**, while cutting back **alcohol** and **snacks**, creating **new pockets of value** for manufacturers and retailers amid **shifting category demands**

Manufacturers: rising product expectations

- **Financial benefits and** taste are most likely **to drive brand switching** behavior. However, **health benefits** are **on the rise** and **driving** consumer **choices** – **over 60%** are worried **about food risks** of **ultra-processed foods** and use of **pesticides** in products, even **more than food costs**
- **Romanians** prioritise **freshness** and **seasonality over brand tier**, driven by the **rising quality** and **appeal of private labels** evolving into **private brands**
- **Half of consumers** trust Fast-Moving Consumer Goods (**FMCG**) producers as **facilitators of healthy eating**; manufacturers should enhance their value proposition by offering **tailored** health **products** with **better nutritional content** and **lower-calorie options**

Sustainability: still a long way to go

- **Concerns** over **climate change** among Romanian consumers **have fallen** from **66%** in 2024 **to 63%,** with **only a third willing to pay** a premium for sustainable goods
- To **reduce their impact** on climate change 4 in 10 consumers are **changing their purchasing habits** by being **more considerate consumers**
- **Pesticide-free** and **locally produced** are the key **sustainability metrics** for consumers **in Romania and CEE,** emphasising the **opportunity for manufacturers** to **adopt targeted and lean sustainability efforts** instead of a broad approach

Lifestyle: growing health and convenience focus

- **35%** of **Romanians** consumers rate their **general health** as **excellent** or **very good**, emphasising an ongoing **trend** of **growing health consciousness** and **rising affluence** among consumers
- **Romanians** prefer **eating out**, **on-the-go** and **ready-to-eat as much as** those in other CEE countries
- **Millennials** in Romania are at the **forefront** of the **no-cooking trend**, while **Gen Z prioritise health tech** and **Gen AI on the rise** for balanced and healthy **meal planning** and **menu suggestions**

1

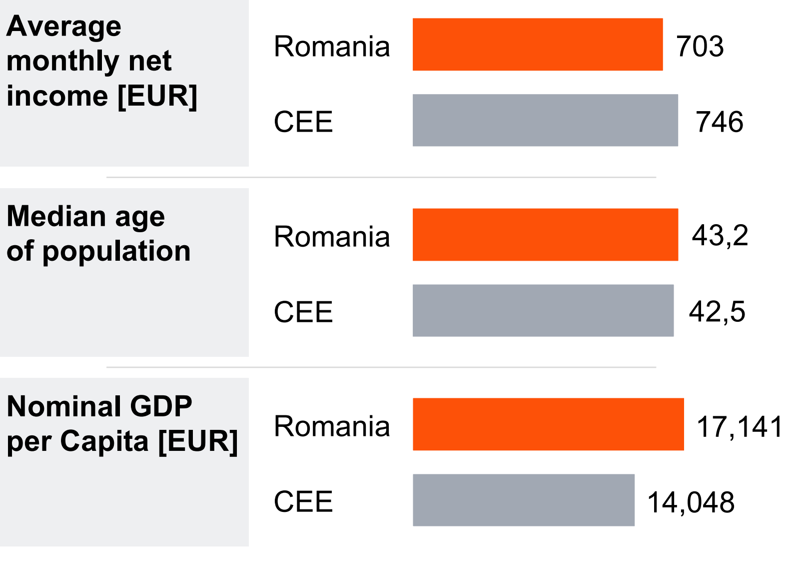
Consumer worldview: an ongoing shift

Romanian consumers tend to be marginally less wealthy on average than their CEE counterparts, although slightly more Romanians feel financially secure than the CEE average

46%

Of all global customers are financially secure, while 40% are ‘financially coping’, with a further 12% that are ‘financially insecure’ and struggling to pay bills at least some of the time

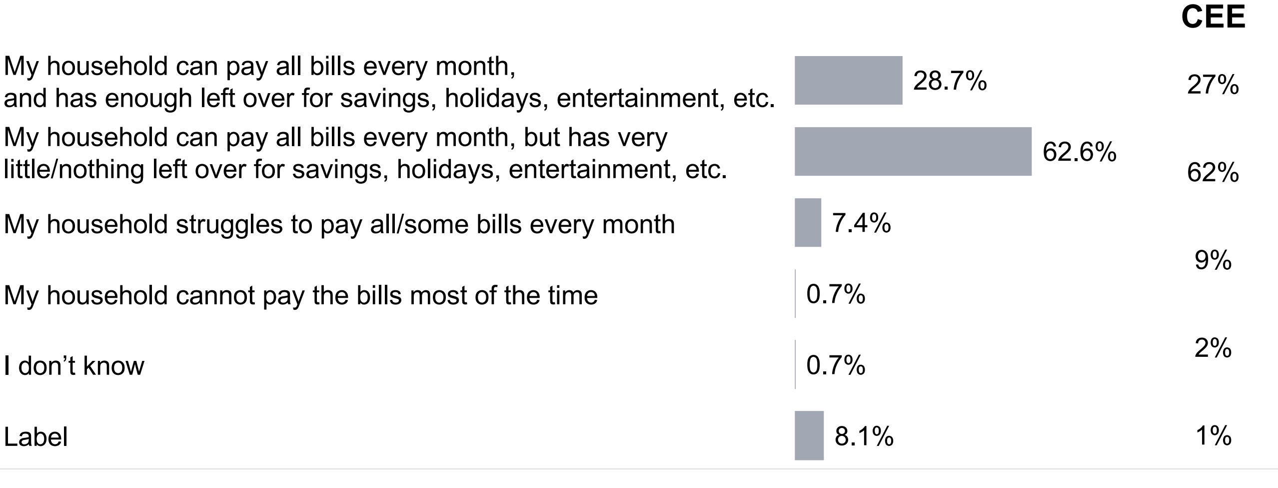
Overview of Romanian customer profile



Which of the following best describes your current financial situation?
Source: Eurostat, Statista, Central Statistical Office

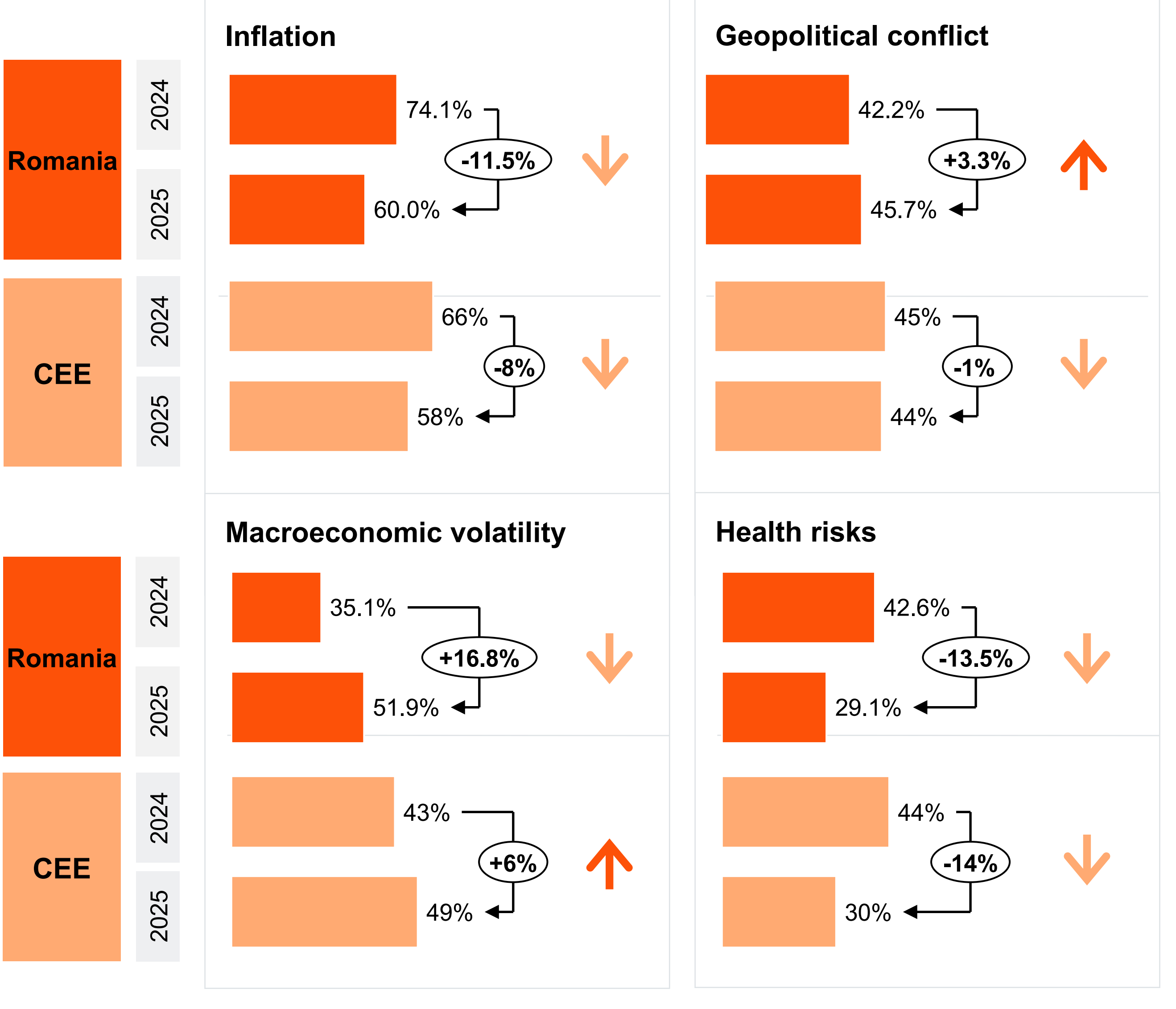
Financial situation

In Romania, 28.7 % of population is financially secure, while in CEE it’s 27%



Romanian consumer concerns are shifting, with inflation and geopolitical conflict declining, while fears around macroeconomic volatility are rising in CEE

The greatest threats perceived by Romanian consumers



Which of the following potential threats/risks do you feel could impact your country most in the next 12 months? (Ranked in top three)

Analysis

Despite continued agreement among consumers globally, and in Central and Eastern Europe and Romania, that inflation remains the top risk, the onset of 2025 was largely perceived as a stabilising period by Romanian consumers.

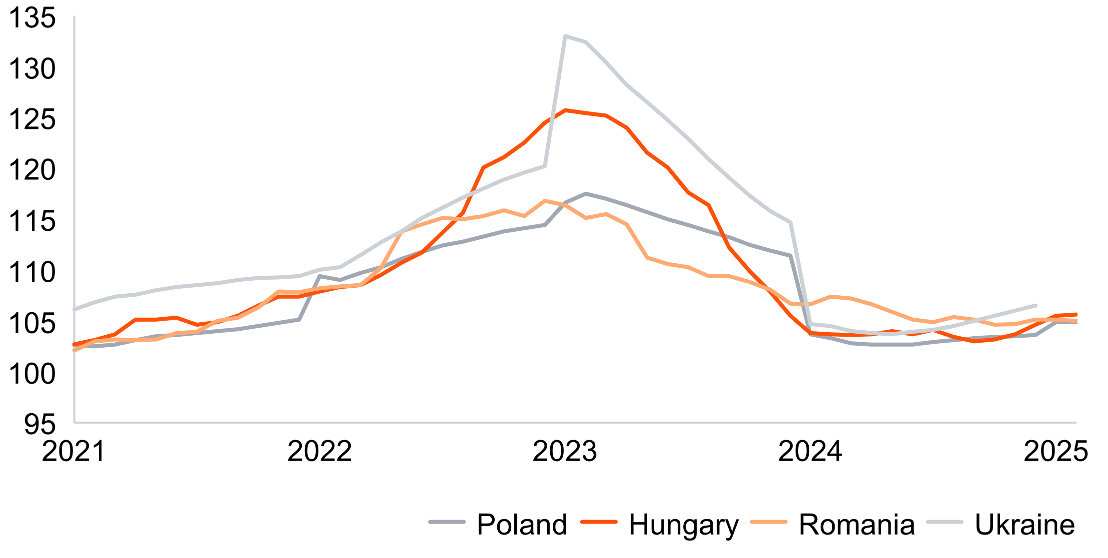
Global economic signals remain mixed, with high uncertainty stemming from trade policy shifts, geopolitical disruptions and political transitions. These dynamics have contributed to rising macroeconomic uncertainty in the CEE region, already showing a 6% increase compared to 2024.

Across all generations and countries in CEE, inflation is still identified as the greatest concern, followed by macroeconomic volatility and geopolitical uncertainty

Potential risks and threats in the next 12 months across generation

% ranked in top 3	Generation Z	Millennials	Generation X	Romania	CEE
1st	Inflation (47%)	Inflation (65%)	Inflation (68%)	Inflation (63%)	Inflation (58%)
2nd	Macroeconomic volatility (38%)	Macroeconomic volatility (52%)	Macroeconomic volatility (59%)	Macroeconomic volatility (52%)	Macroeconomic volatility (49%)
3rd	Climate change (26%)	Geopolitical conflict (42%)	Geopolitical conflict (53%)	Geopolitical conflict (46%)	Geopolitical conflict (44%)

Inflation in CEE (CPI, monthly %)



- Across **all generations**, **concerns** about **inflation** and **high living costs still persist** due to historically high rates from 2022 to 2023. While **inflation** has **eased** throughout 2024 and consumer confidence increased, **ongoing macroeconomic shifts** suggest a **potential uncertainty resurgence**, keeping **consumer worries still heightened** as we move through 2025.
- The subsequent positions of declared threats differ significantly between generations. **Younger generations value risks related to climate change much more** than **the rest of the generations, who are more afraid of macroeconomic volatility** and **geopolitical conflicts**.
- Throughout 2024, inflation slowed down and the Consumer Price Index (CPI) across CEE countries was comparable with gradual decline into the end of the year. However, due to heightened uncertainty stemming from **geopolitical tensions** and **trade policy changes**, **CPI is projected to fluctuate in 2025, with Romania, Poland and Hungary closely matched in CPI values so far this year.**

Which of the following potential threats/risks do you feel could have the greatest impact on your country in the next 12 months? (Ranked in top three)

Over one-third of consumers plan to increase spending on fresh products, while cutting back on alcohol and snacks, creating pockets of value amid shifting category demands

Consumption trends – Grocery

Predictions about grocery spending over the next six months

	CEE	Decrease	The same	Increase	CEE
Fresh fruit and vegetables	9%	6%	34%	60%	51%
Dairy	13%	10%	46%	43%	31%
Fresh poultry	11%	8%	46%	44%	33%
Fresh red meat	19%	13%	51%	34%	27%
Fresh seafood	16%	16%	38%	31%	24%
Prepared foods	29%	25%	41%	27%	21%
Packaged foods	23%	23%	55%	24%	20%
Snacks	37%	35%	41%	26%	20%
Non-alcoholic beverages	22%	23%	44%	29%	22%
Alcoholic beverages	30%	30%	48%	24%	17%
Grains	13%	14%	56%	30%	25%
Dietary supplements	13%	10%	44%	40%	34%

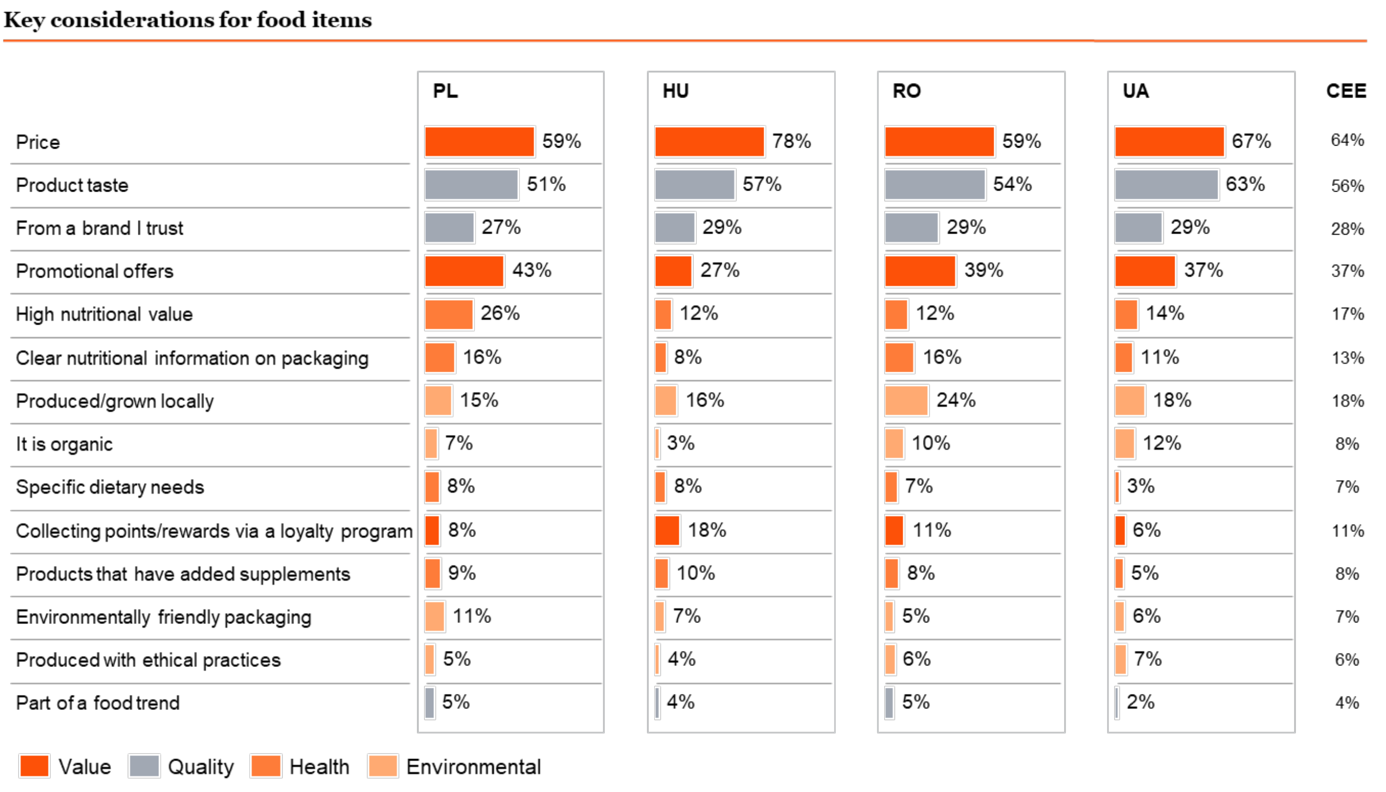
Do you expect any change over the next six months in the amount you eat from the following categories?

Analysis

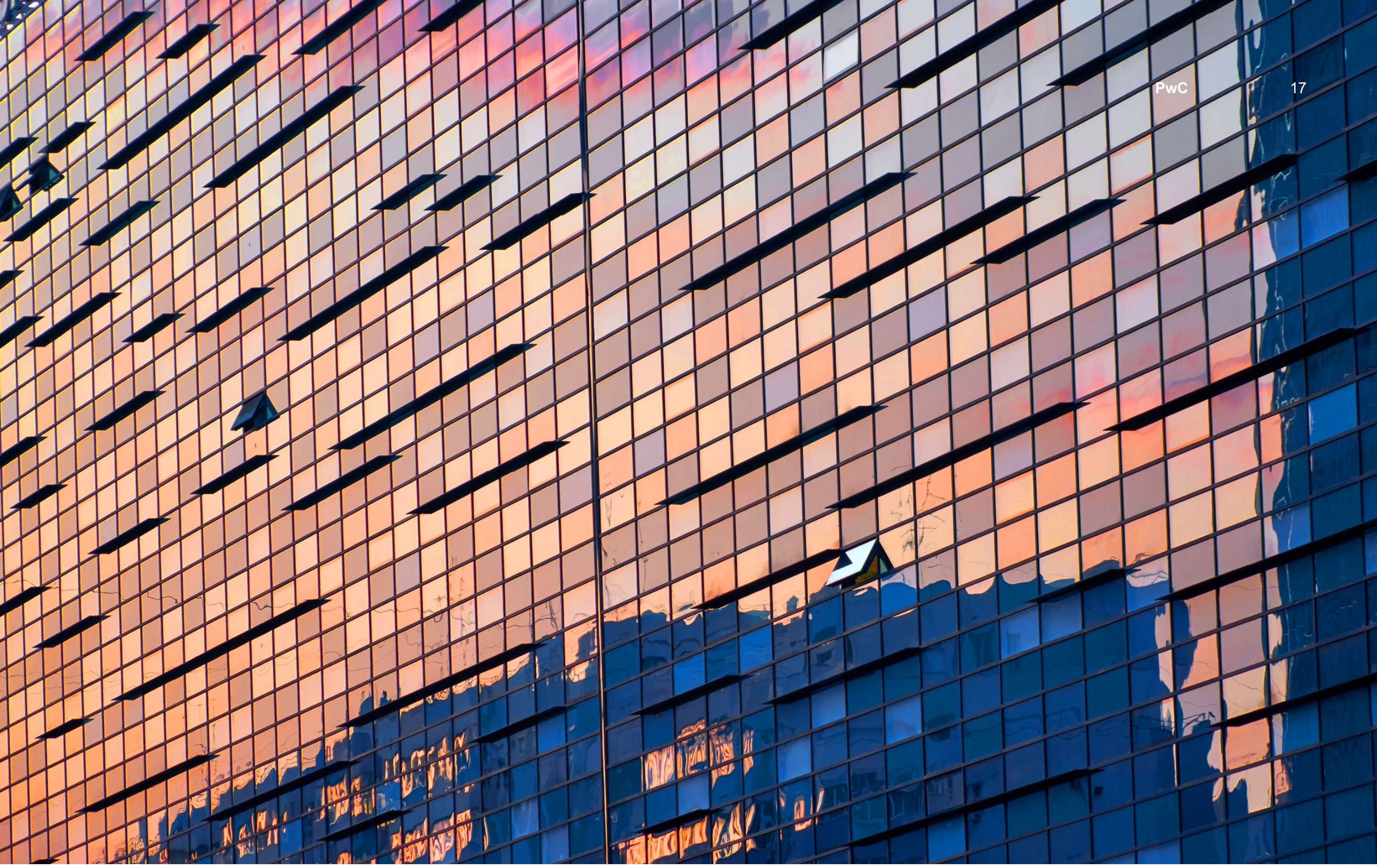
- The anticipated significant **rise in food expenditure** among Romanian consumers will primarily target **fresh** and **healthy** products, particularly fruit, vegetables, dairy and grains. This signals a **health-driven shift** with **spending levels** expected to surpass the CEE average. The rising interest in **dietary supplements** also highlights consumers' broader **commitment to health-oriented choices**.
- **Romanian** consumers are set to **reduce spending** on **snacks**, **alcohol** and **ultra-processed foods**, a trend that is similarly observed **across CEE.** This **shifting demand** poses a **significant challenge** for **FMCG manufacturers.** However, it also creates **pockets of value** in **categories, such as the adjustment of product portfolio** with evolving consumer preferences, for instance **healthier snacks** with increased **protein** and **reduced sugar**, develop **nutrient-rich prepared meals** and encourage **moderation in alcoholic beverage consumption**.

Financial considerations shape purchasing behaviour in Romania, but taste also remains vital, so retailers must balance competitive pricing with high-quality offerings

Key purchasing criteria



When you're choosing which food items to buy, which factors are most important to you?



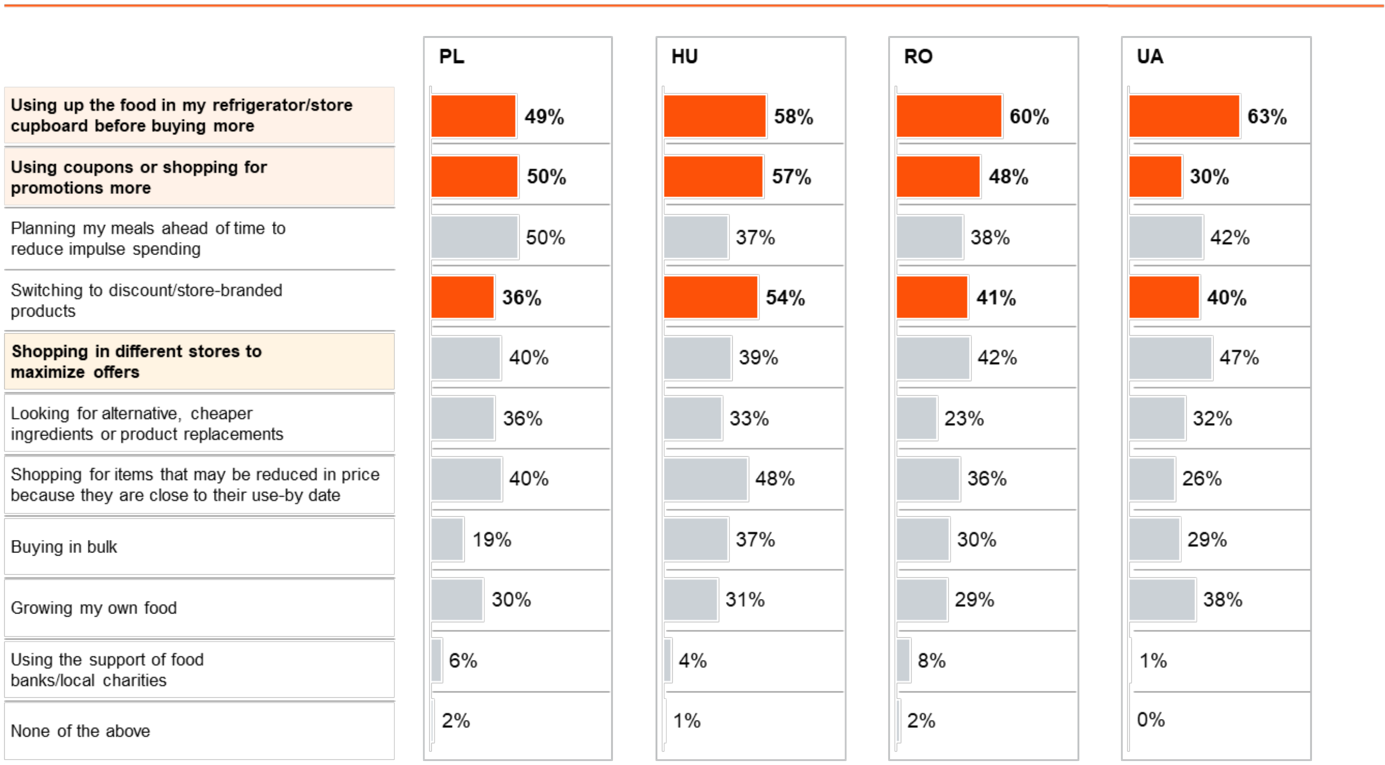
Analysis

- The **primary factor** that guides **Romanian** consumers when choosing food preferences is the **financial aspect**, second is **product taste**. **Environmental concerns are significantly less influential**.
- **Financial considerations** like price and promotions are crucial for **value seeking consumers** focused on cost, often making **purchasing** at **discount** retailers and looking for **value-driven promotions**.
- **Quality focused** consumers value **taste**, **nutritional value** and **brands**, often paying a **premium** for trusted products made **within their country**.
- Health and eco conscious consumers are focused on **health benefits**, traceability, and sustainable practices, often investing in supplements or **paying a premium environmentally friendly options**.

Romanian consumers, like their CEE counterparts, manage food costs by maximising the use of existing supplies, leveraging promotions and switching to private labels and/or different retailers

Customer trends – taking action to reduce food costs

Actions undertaken to reduce or offset food cost effects



What actions, if any, are you taking to reduce or offset the effects of food cost?

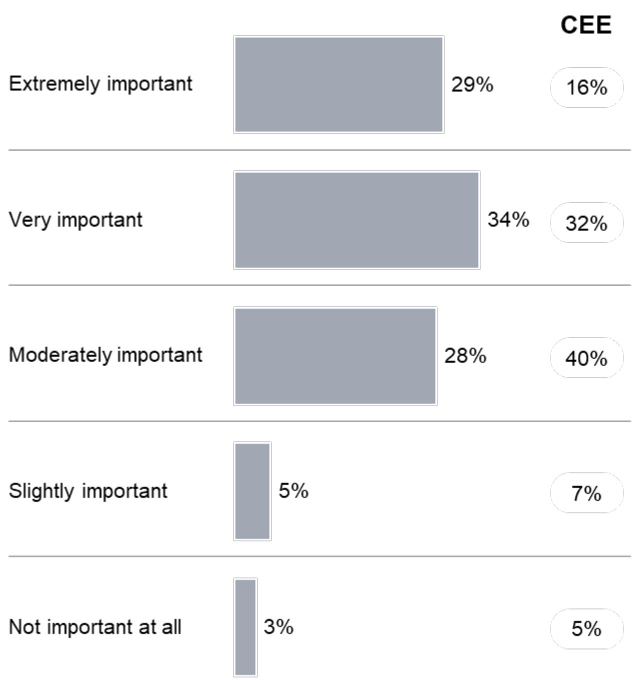
Analysis

- **Romanian** consumers are **proactive** in **managing food costs**, with **60% using existing supplies at home before making purchases**.
- **48%** of Romanian consumers **leverage coupons** and **promotions**, indicating a strong inclination towards **savings**, comparable to behaviours **in Poland**.
- The shift in consumer preferences in CEE towards discount and store-branded products presents **an opportunity for FMCG companies to broaden their range of affordable options**. By improving the quality of their private label products offering products that match the quality of leading brands companies can gain a larger share of the market

Around 90% of respondents consider loyalty programmes crucial in their retailer choice, prompting leaders to reinvent offerings to deliver a unique and personalised customer experience

Loyalty programme considerations

How important are reward and loyalty programmes when choosing a grocery shop?



Which benefits in loyalty programmes are the most encouraging to choose one retailer over the other?

Analysis

- **Loyalty programmes** hold significant sway for consumers in **Romania and CEE**, with **88%** finding them at least moderately **important** when **selecting a grocery retailer**, emphasising the value placed on **customer retention strategies**.
- **Cashback options** (57%) and **Discounts on future purchases** (55%) are leading **motivators** for Romanian consumers, highlighting the importance of **financial incentives** in driving consumer choice within loyalty programs.
- **Leading retailers** in **CEE** are **reinventing loyalty programs** by **integrating** them with **pricing strategies** and **tailoring promotions** to individual preferences, thereby **enhancing engagement** and **profit margins**. To capitalise on this opportunity, players are increasingly turning to **AI for high levels of personalisation**, which is crucial for **fostering customer loyalty** in a shifting economic environment

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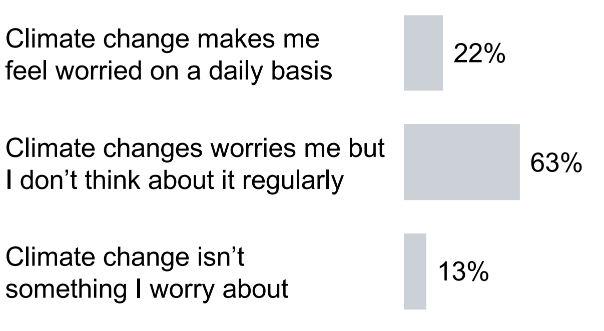
Sustainability: still a long way to go

85% of Romanian consumers are concerned about climate change than CEE averages and almost half are willing to pay a premium for sustainable goods

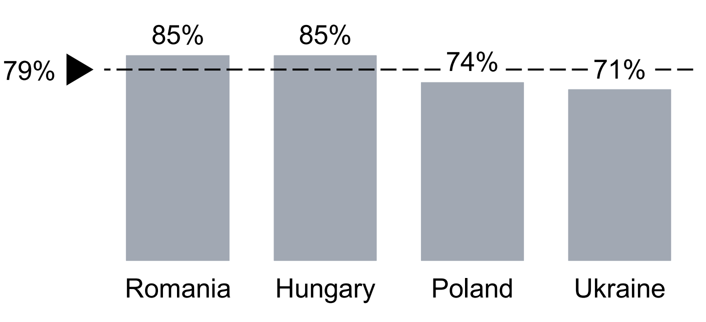
Climate change perception

How consumers feel about climate change

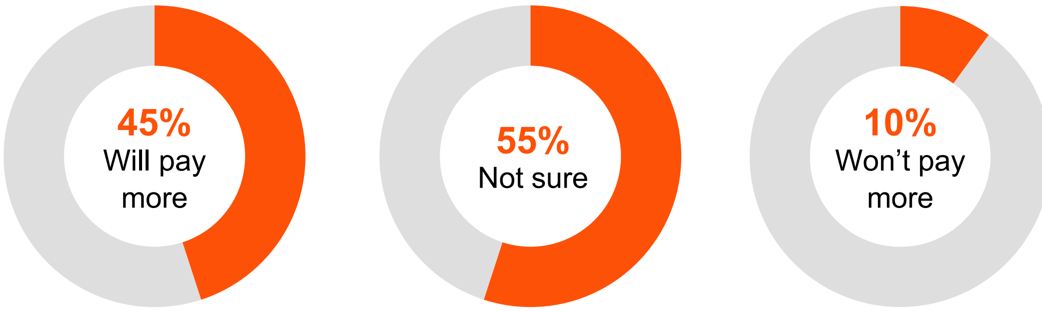


85% are worried about climate change to some degree

In CEE region 79% of consumers are worried about climate change with Romania and Hungary leading at 85%

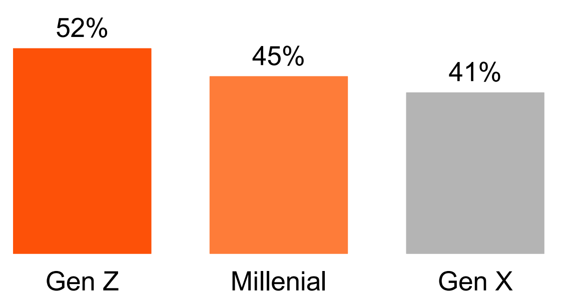


Willingness to pay more for ecologically-produced products



In Romania 45% are willing **to pay a premium for products that protect the environment**, more than the **CEE region average of 35%**

Gen Z consumers in Romania are at least 10% more willing to pay a premium for sustainable goods than Millennials and Gen X

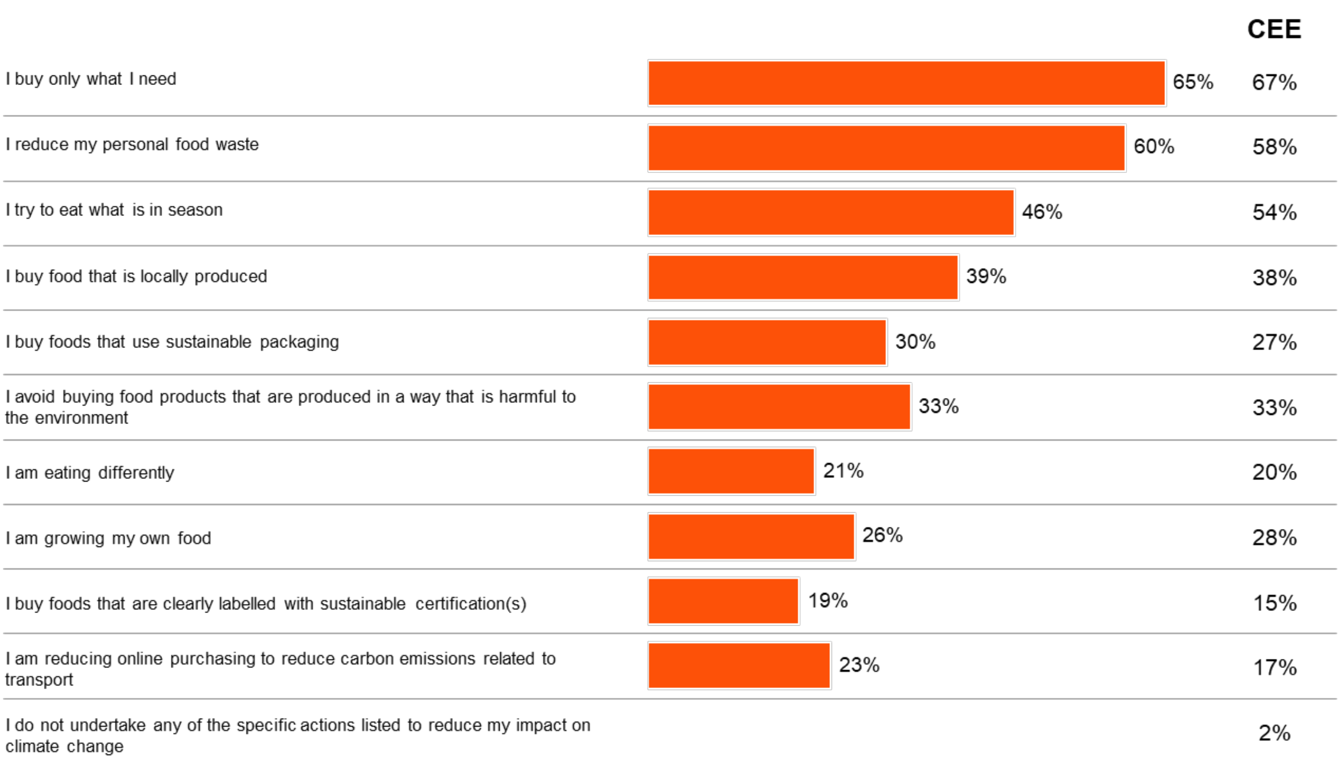


Thinking about climate change, which of the following statements best describe you? Actions taken to improve the health of the land and the environment, can result in higher costs for food producers. Which of the following statements best represents your opinion on your willingness to support these actions?

To reduce their impact on climate change, half of consumers in Romania and CEE are changing their purchasing habits and being more considerate in consumption

Personal actions taken to reduce impact on climate change through consumption

Percentage of those declaring taking pro-environmental actions in purchases



Have you taken any of the following actions to reduce your impact on climate change with the food that you buy and eat?

Analysis

- Consumers in Romania and CEE prioritise sustainability by **buying only essential items** and **reducing food waste**, with **67%** actively taking steps to lessen their environmental impact. **Retailers** could establish **dedicated areas in stores** for **near-expiration products to minimise waste** and **enhance appeal to eco-conscious** consumers, while exploring **partnerships** with **food rescue platforms** to further maximise inventory efficiency.
- **Romanian consumers** exhibit a strong preference for **locally** and **seasonally produced foods**, with 46% prioritising these choices. Retailers can leverage this preference by **expanding regional offerings** and **highlighting seasonal produce** in marketing campaigns or store layouts to enhance customer attraction.
- Very few Romanian respondents (2%) say they don't **take any pro-environmental actions** through consumption decisions.

Pesticide-free and locally produced are the most important sustainability metrics for the consumers in Romania and CEE

Product sustainability metrics that incentivise greater consumption

		CEE
The product is free of pesticides	54%	52%
The product is made locally in the country	46%	46%
The product uses minimal or environmentally friendly packaging	30%	34%
The manufacturer supports local environmental initiatives	36%	29%
The manufacturer has a reputation for ethical practices	25%	23%
The manufacturer supports fair wages and good working conditions for all employees	18%	18%
The product has a low carbon footprint or benefits from carbon offset programs	22%	17%
The product is fairtrade certified	9%	17%
The manufacturer has a reputation for diversity and inclusion practices	14%	14%
The product originates from land that has not been deforested	12%	15%
None of these are important to me when buying food products	2%	4%

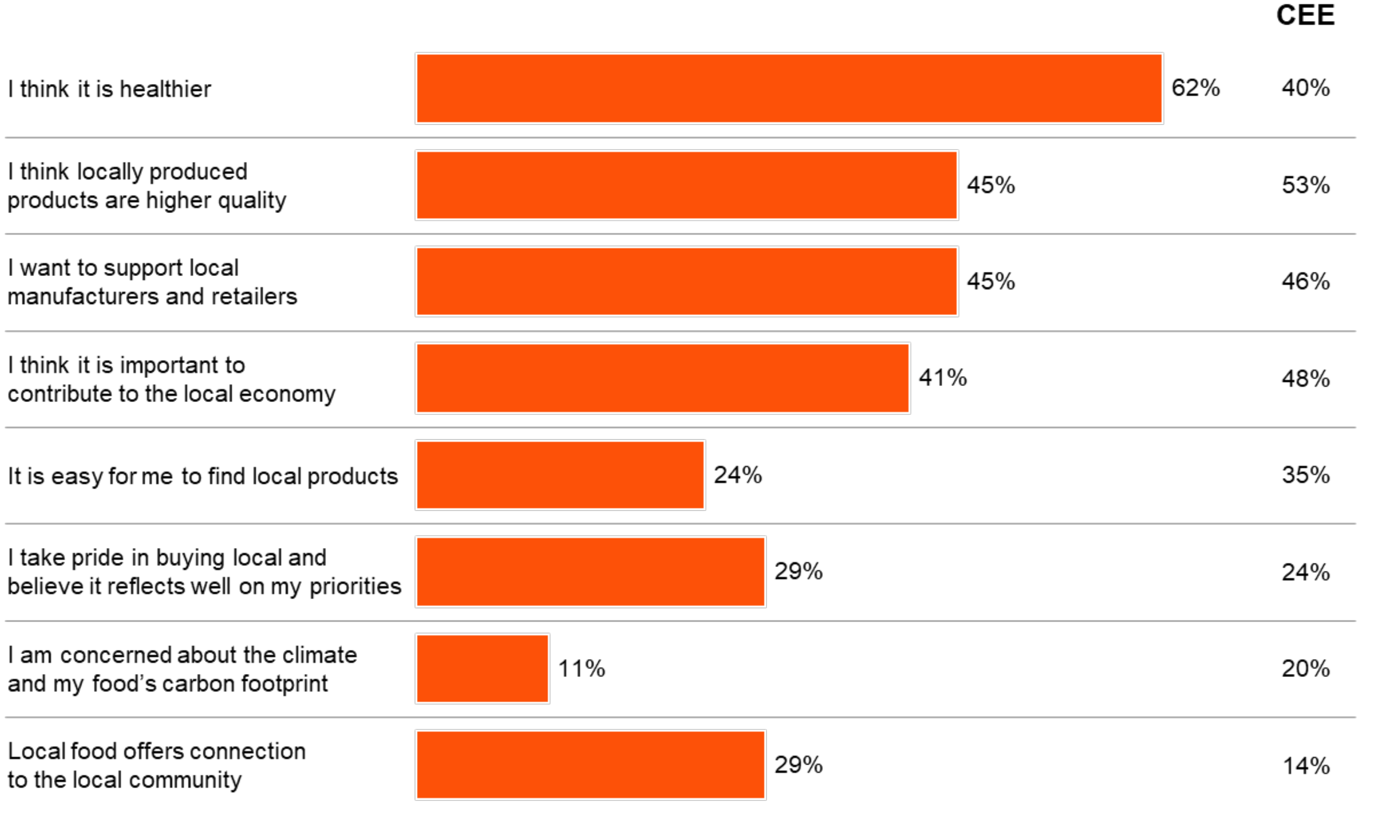
When you buy food products, which of the following sustainable practices are most important to you?

Analysis

- **54% of consumers** prioritise **pesticide-free products**, while **46%** seek locally **produced items**, indicating strong **preferences for health-related** and **local sourcing attributes**. Manufacturers should highlight **pesticide-free attributes** and **local sourcing** in their **marketing to better resonate with consumer choices**.
- **Only every third consumer** in **Romania** values minimal or **eco-friendly packaging**, indicating that while it's **not currently a critical purchasing factor**, manufacturers can **gradually incorporate sustainable materials** in response to shifting consumer preferences.
- **Romanian** consumers **prioritise working practices in purchase decisions as much as their** CEE counterparts – **25%** of consumers value manufacturers with **ethical practices** and **18%** emphasise **fair wages** and good working conditions. This creates an opportunity to **strengthen brand trust** by **communicating** responsible business conduct and **commitment to ethical practices**

Consumers prefer local products as they are perceived to be healthier and support the local economy, with 53% of Romanians willing to pay a premium

Reasons for buying locally produced foods (ranked 1-3)



You have noted that you typically buy food that is locally produced. What are the main reasons for that choice?

Analysis

- The **main motivations** for consumers purchasing locally produced foods are perceptions of **health benefits** and **higher quality**, with 62% and 45% of Romanian respondents respectively citing these reasons. **Retailers and manufacturers** should **capitalise** on this trend by highlighting the health and quality attributes of local products in their marketing efforts, fostering a **narrative that resonates with health-conscious consumers**.
- A **strong desire** to **support local manufacturers** and contribute to the economy is evident, with 45% of respondents indicating this as key reasons for their purchasing decisions. To harness this sentiment, retailers should **emphasise sourcing** from **local producers** and transparently **communicate how purchases support the community**, thus fostering deeper connections with consumers.
- While **climate concern** and **community connection** rank lower in priority at 11% and 29% respectively, they highlight an **emerging ESG-related theme.** Retailers and manufacturers should **gradually start integrating ESG practices** into their **strategies**, as these topics, although not top priorities currently, are **likely** to **resonate more** with consumers **in the future**.

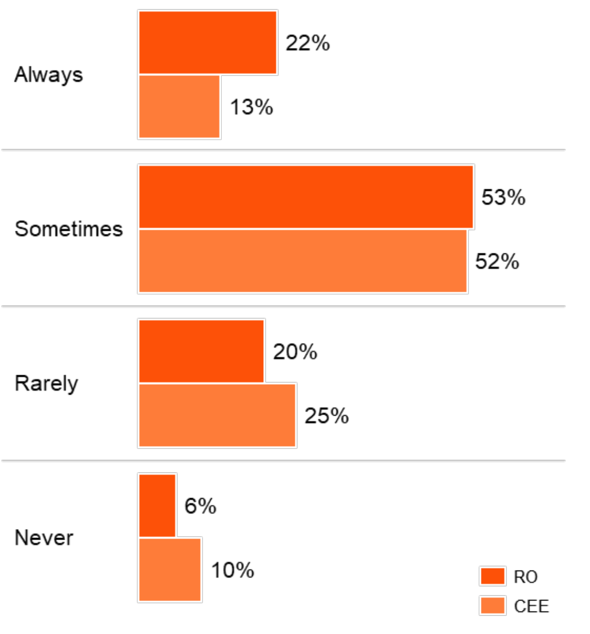
53% of Romanians prefer purchasing a more expensive local product over a cheaper foreign alternative

Romanian consumers primarily learn about product sustainability through social media, yet over half do not consistently seek this information, highlighting the need for a targeted approach

Reasons for buying locally produced foods (ranked 1-3)

Sources of information about climate initiatives	Romania	CEE
Social media	53%	57%
Traditional media	52%	48%
Product packaging/labelling	34%	37%
Company website	37%	35%
Information from friends and family	33%	31%
Retail store displays	17%	17%
Podcasts	29%	20%
Schools and universities	15%	12%
Other	1%	0%

How often do you seek to understand/learn about brand climate and sustainability initiatives?



What sources do you typically learn information about a company's climate and sustainability initiatives from?

Analysis

- With **53% of consumers relying on social media** as their primary source for climate initiative information, it serves as a **critical avenue** for retailers and manufacturers **to connect with their audience**. **Brands** should **enhance their presence** on social media platforms with engaging **content focused on sustainability initiatives** to effectively reach environmentally-conscious consumers.
- While **traditional media** (52%) and product **packaging/labeling** (34%) are also **significant sources** of information, there's a **noticeable gap** in the **effectiveness of other channels** such as **retail displays** or **podcasts**.
- **Over one-fifth** of consumers **consistently seek information** about brands' **climate initiatives**, while **53%** do so **only sometimes**. **Retailers** and **manufacturers** should adopt a **more tailored approach** to communication, utilising **data-driven campaigns** and **loyalty incentives** to target specific audiences.

3

Manufacturers: growing product expectations

Brand switching is mainly driven by financial benefits and seeking superior taste, with over 3 in 10 consumers seeking better value for money. Health benefits are also influential in driving consumer choice.

Analysis

- Half of consumers (54%) are willing to **switch brands** for **superior taste** and 35% for **better value for money**. Retailers and manufacturers should emphasise product quality and affordability in their marketing strategies.
- **37%** of consumers prioritise **value health benefits and local brands**. **Manufacturers** should **highlight nutritional value** and develop **appropriate portion sizes** in their **packaging** to appeal to **health-conscious consumers**.
- With **36%** of consumers **swayed by promotional offers**, this factor is vital in attracting consumers. **Targeted promotional** campaigns to effectively engage **diverse consumer interest** and foster brand loyalty should be a priority for leading CPG companies.

Factors that can entice consumers away from their established favourite brands

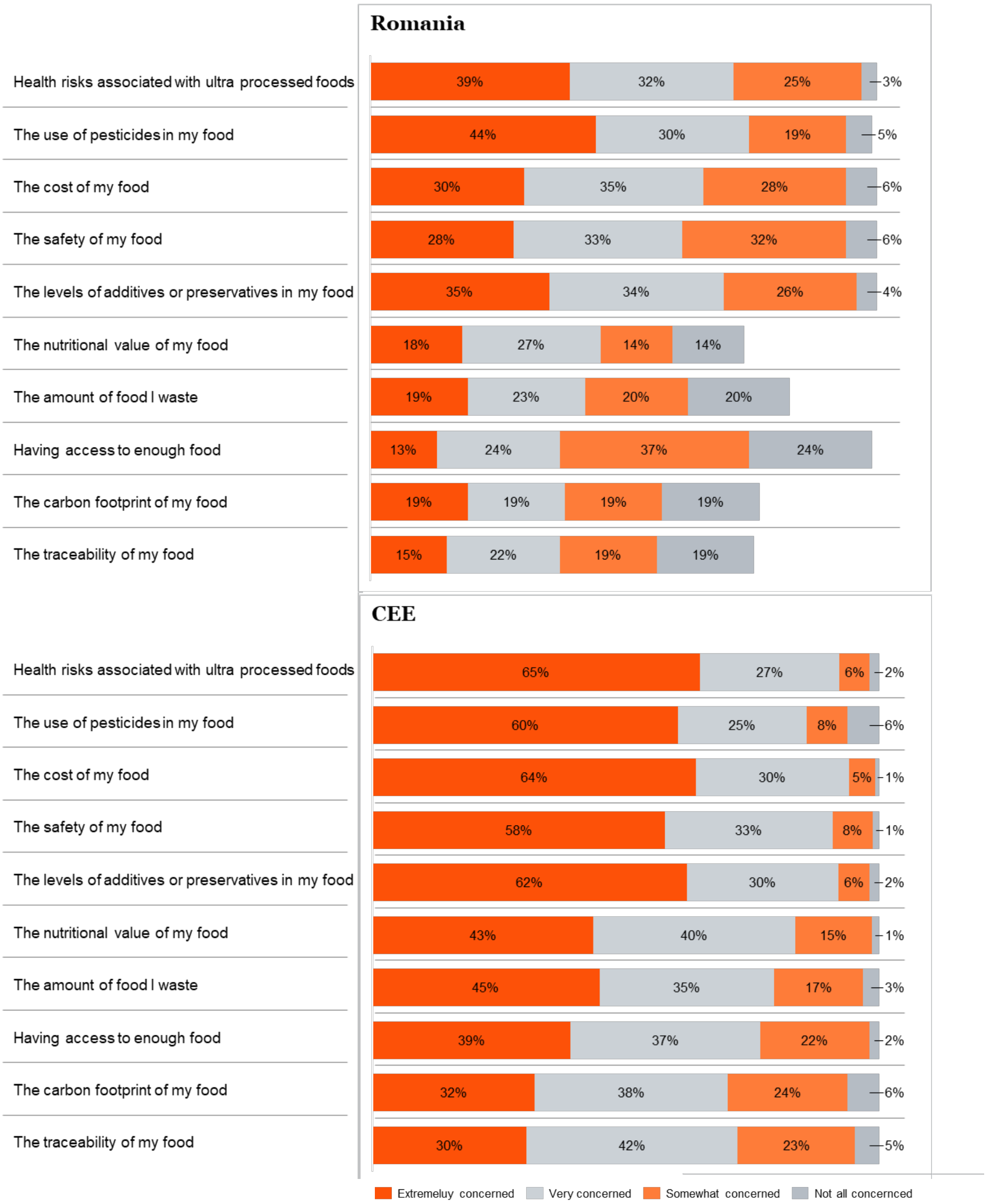
	Romania	CEE	
Better taste	54%	50%	
Better value for money	35%	51%	Financial
Promotional offers	36%	31%	Financial
Health benefits	37%	36%	
It is a local brand	20%	24%	
Opportunity to try out new or international culinary foods	15%	21%	
Reputation as a trendsetter, leading the way with new products/offerings	28%	18%	
Positive reviews or recommendations from family and/or friends	21%	16%	
Evidence of a positive impact and/or contribution to society/environments	9%	11%	
Innovative product	16%	10%	
Engaging digital content	4%	4%	
Reputation as a trendsetter, leading the way with new products/offerings	28%	4%	
None of the above	1%	1%	

Which of the following factors, if any, would encourage you to switch from a food brand you usually buy to a different brand?

Health risks are a major concern for consumers, even more than food costs. Over 60% are worried about the risks of ultra-processed foods and use of pesticides in products

Consumer concerns around food

To what extent do you make the following health-related choices in your diet?



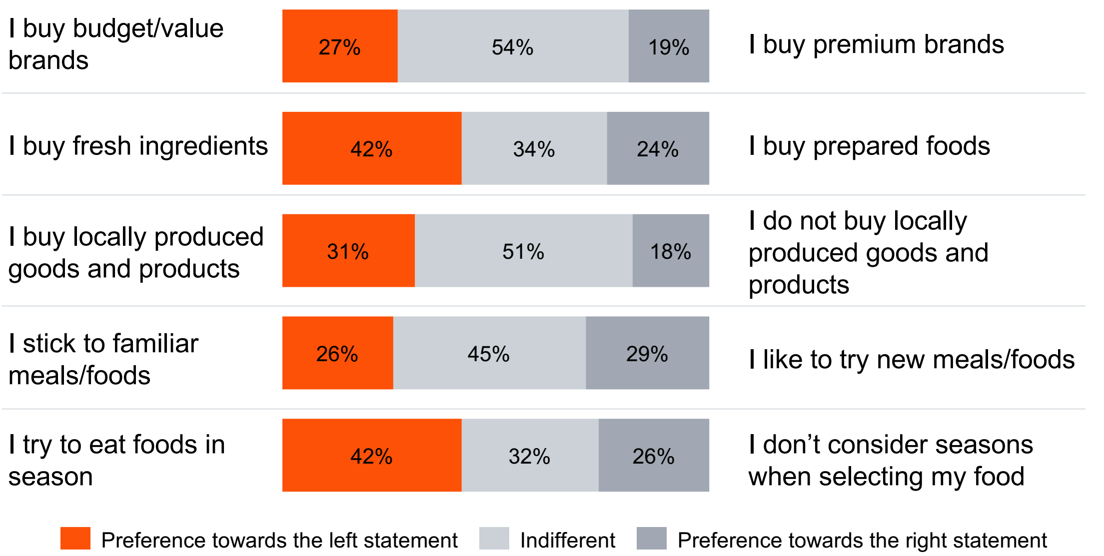
Analysis

- There are notably low numbers of respondents adhere to **vegetarian or vegan diets**, only **10% of Romanians** and **8% of consumers in CEE.** This signals significant **growth potential** for businesses to **promote plant-based options** and educate consumers on their benefits, especially considering the 60% **never consume alternative meat products**.
- **Romanian consumers** are **more likely** to **avoid ultra-processed foods** (41% vs. 37% in CEE), highlighting an opportunity for **retailers** to expand their offerings of **natural and whole food products** that cater to the demand for cleaner, **healthier ingredients**.
- **Romania** demonstrates a slight **advantage over CEE averages** in **reducing alcohol consumption**. Alcohol producers should seek **new growth avenues** to adapt to these evolving consumer preferences.

Romanian consumers prioritise freshness and seasonality over brands, driven by the rising quality and appeal of private labels, which are evolving into private brands

Consumption trends – Typical food habits (selected)

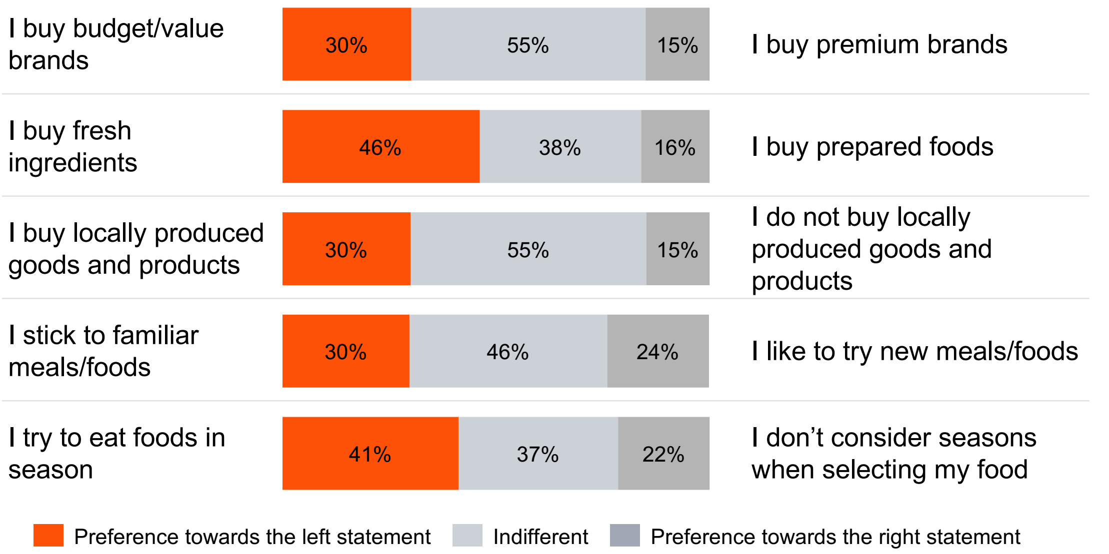
Romania



Analysis

- With **42%** of consumers in Romania **prioritising fresh** ingredients and **42%** seeking **seasonal** foods, there is a clear **appetite for healthier, fresh and seasonal options**. Retailers should enhance their **fresh offerings** and **reallocate space in stores accordingly**.
- **54%** of consumers are **indifferent** about **brands, as** rising **quality and appeal** of private labels highlights a **significant shift** on the market - **private labels are becoming private brands**. **Grocers** are developing **distinctive private brands** to differentiate their offering and drive growth.

CEE



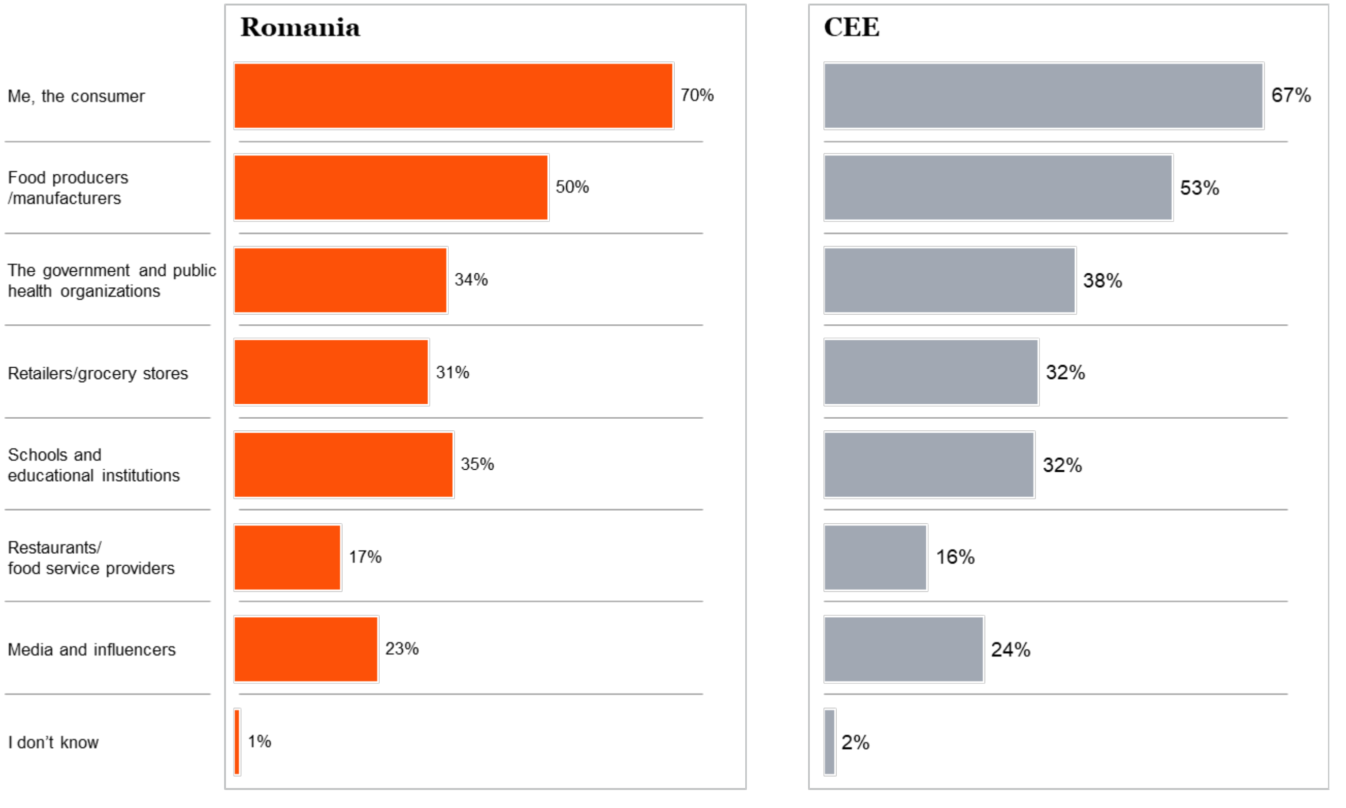
Analysis

- Much like in Romania, a **majority of consumers** in CEE (55%) exhibit **indifference toward brands.** This underscores the **necessity for manufacturers** to reassess their **product portfolio strategies**.
- To **align with retailers** and leverage increasing consumer preferences for differentiated, category-specific offerings, manufacturers should **integrate and treat private labels** as **distinct brands**.

Please select a point along the scale between the two options in each row that indicates your typical food habits/preferences most of the time

In Romania and CEE, nearly half of consumers trust food producers as key facilitators of healthy and nutritious eating, second only to their own choices

Responsibility for encouraging healthy and nutritious eating



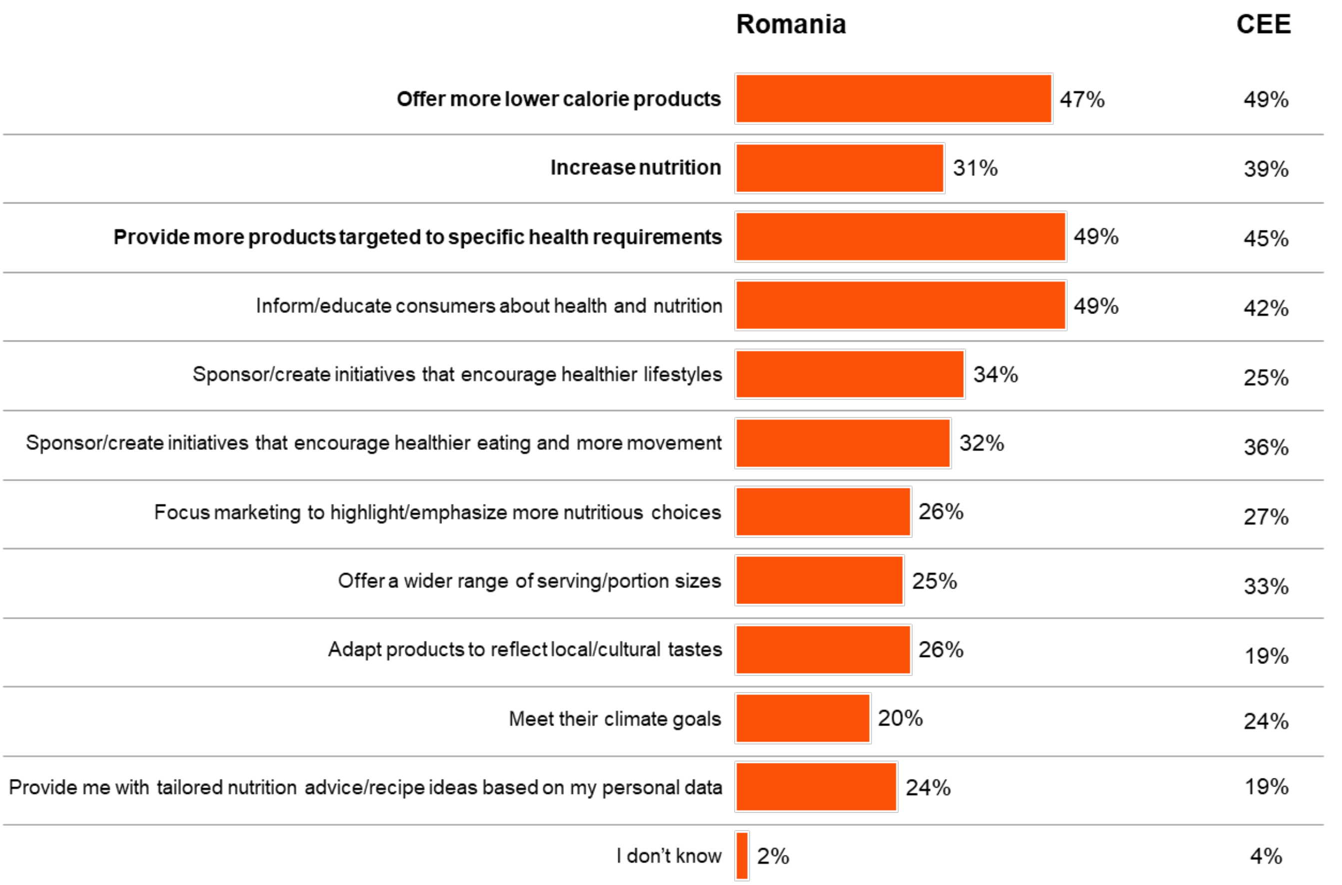
Who holds the primary responsibility to encourage and incentivize healthy and nutritious eating?

Comments

- In **Romania**, **50%** of consumers trust food **FMCG manufacturers** as **facilitators of healthy eating**, a figure that is slightly lower than the **53%** seen in the broader **CEE region**. This suggests a valuable opportunity for **manufacturers** to **enhance their brand visibility** and trust within the Romanian market by **creating healthier products** and clearly showcase these improvements through effective marketing campaigns.
- **70% of Romanian** consumers indicate that their **own efforts** influence their trust, surpassing the influence of food producers. This highlights the importance for **manufacturers** to not only promote their products but also **educate consumers on healthy eating practices** and how their **products contribute to them**, potentially enhancing consumer loyalty.

Manufacturers should enhance their value proposition by offering tailored health products with improved nutritional content and lower-calorie options to better cater to evolving consumer needs

How could large FMCG manufacturers contribute to improving the health and wellness of consumers?



In your opinion, how could big food/beverage companies, contribute to improving the health and wellness of consumers?

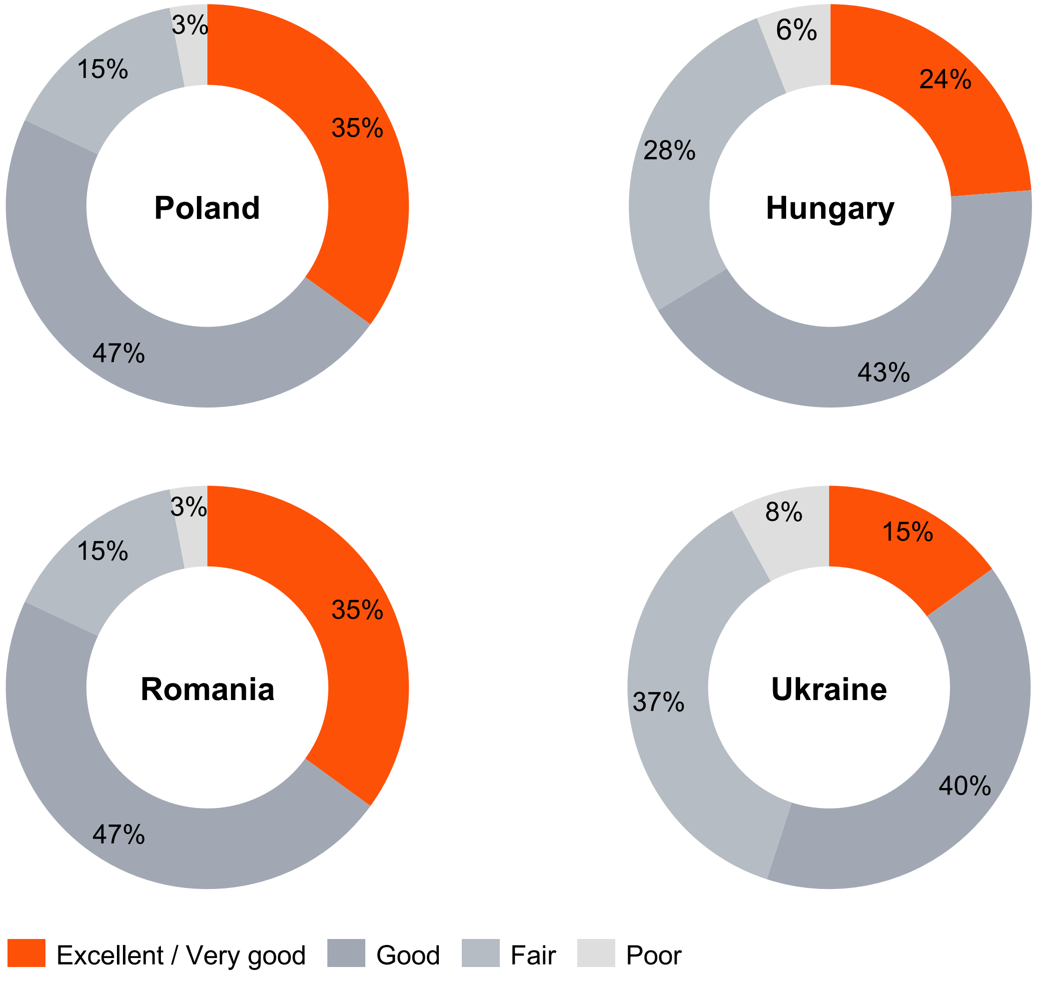
4

Lifestyle: a growing health and convenience focus

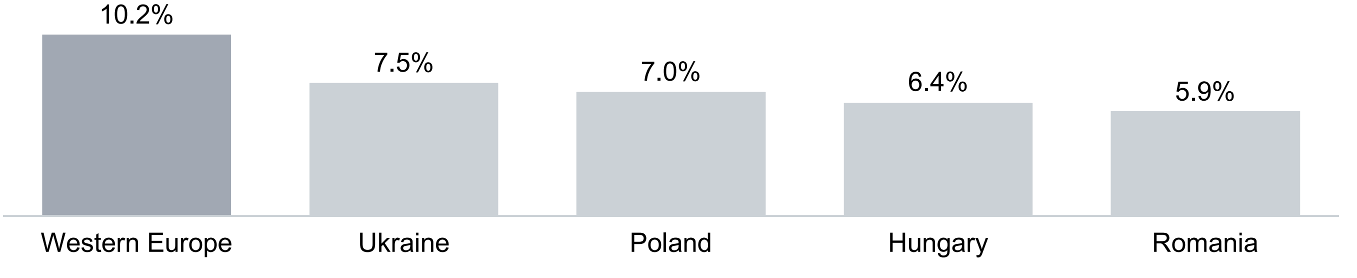
35% of Romanian consumers rate their general health as excellent or very good, emphasising an ongoing trend of growing health consciousness and rising affluence

Health situation in Romania and CEE

How would you rate your general health?



Health expenditure as percentage of GDP (%, 2023)

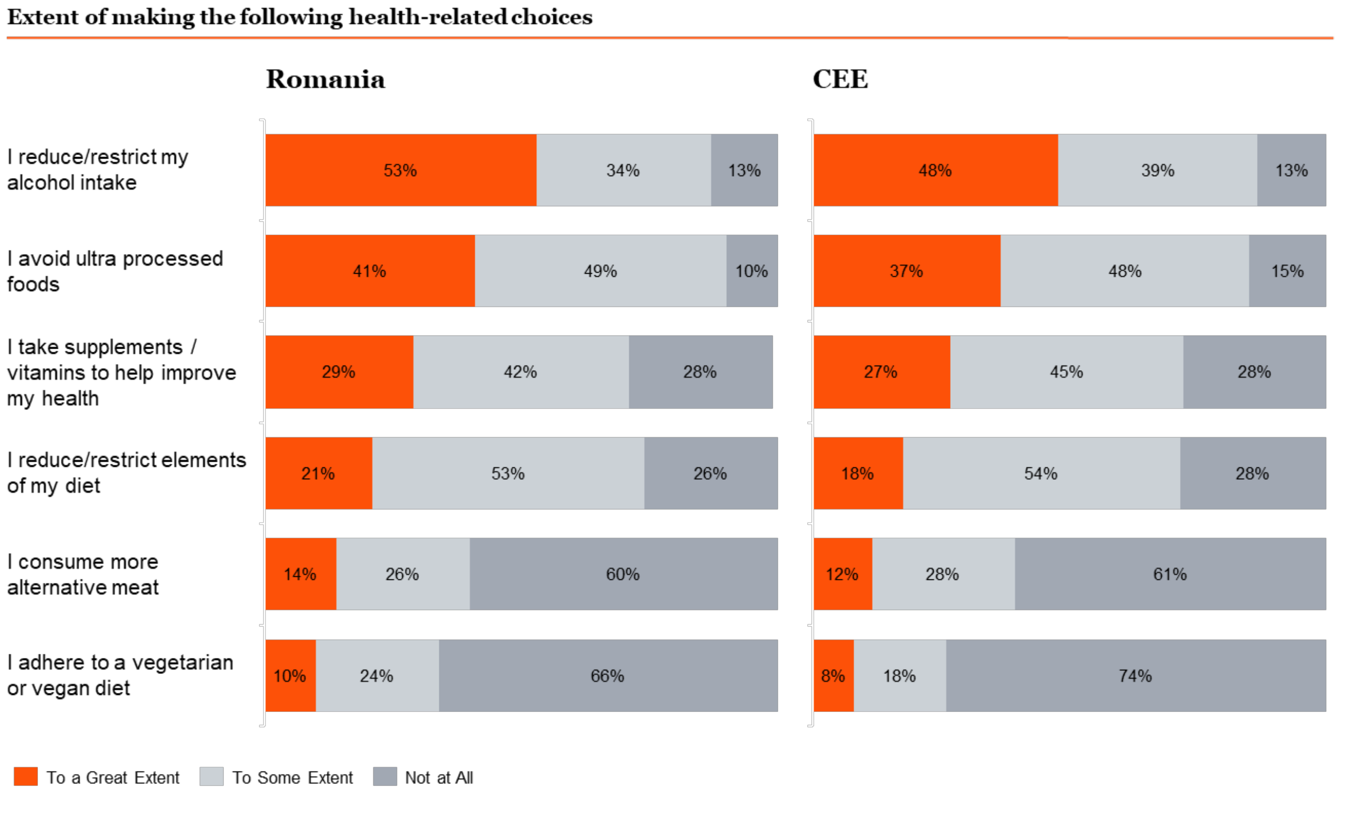


CEE countries still lag behind Western European peers in health spending, but they are gradually converging towards these levels due to increasing affluence and governmental goals

How would you rate your general health (considering e.g., your diet, fitness level and overall well-being
Source: OECD

Romanian consumers demonstrate a stronger commitment to conscious health choices than their CEE counterparts across all areas

Raising awareness and conscious choices



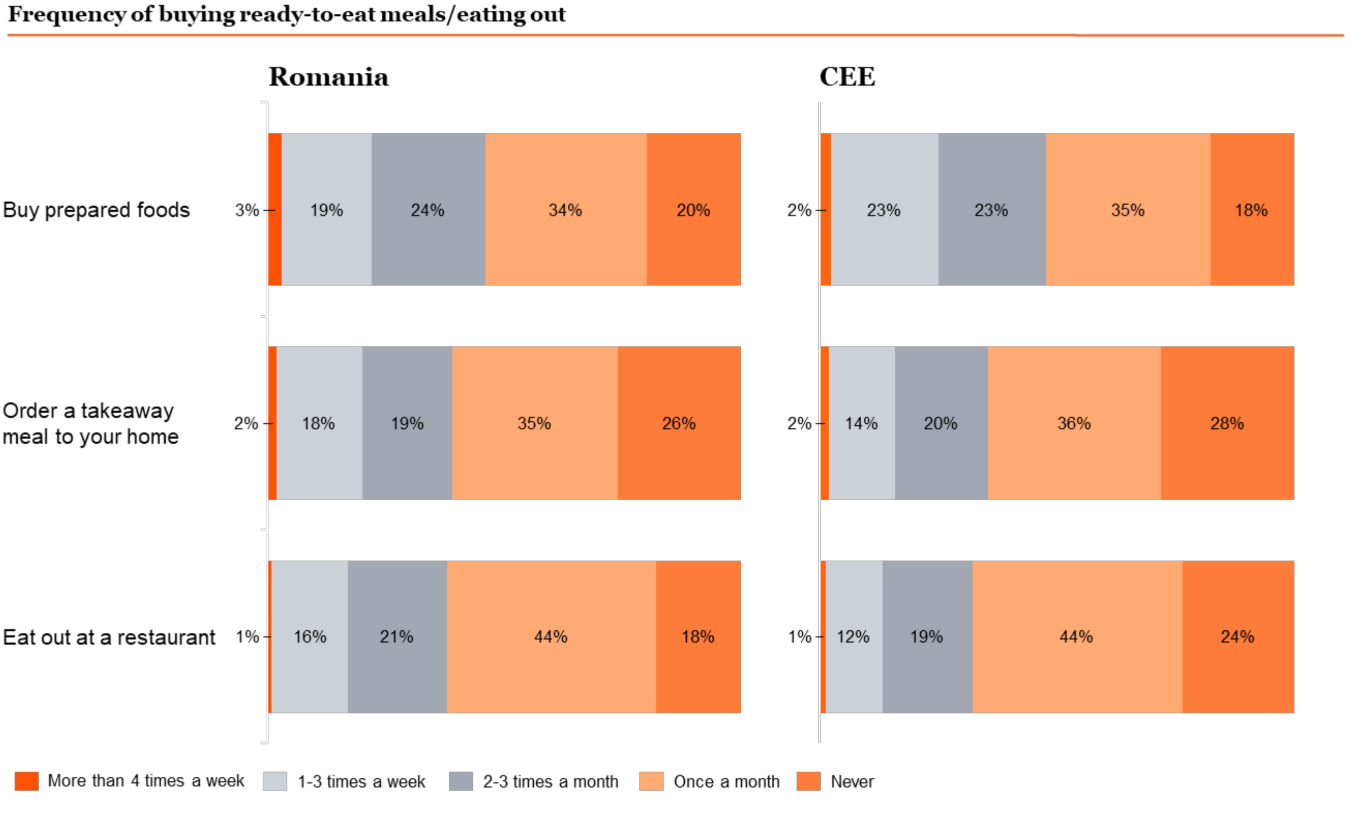
To what extent do you make the following health-related choices in your diet?

Analysis

- In **Romania**, **50%** of consumers trust food **FMCG manufacturers** as **facilitators of healthy eating**, a figure that is slightly lower than the **53%** seen in the broader **CEE region**. This suggests a valuable opportunity for **manufacturers** to **enhance their brand visibility** and trust within the Romanian market by **creating healthier products** and clearly showcase these improvements through effective marketing campaigns.
- **70% of Romanian** consumers indicate that their **own efforts** influence their trust, surpassing the influence of food producers. This highlights the importance for **manufacturers** to not only promote their products but also **educate consumers on healthy eating practices** and how their **products contribute to them**, potentially enhancing consumer loyalty.

Romanian consumers prefer eating out, on-the-go and ready-to-eat meals in line with CEE averages, with young consumers driving the convenience trend

Consumer eating habits



On average, how often do you do the following?

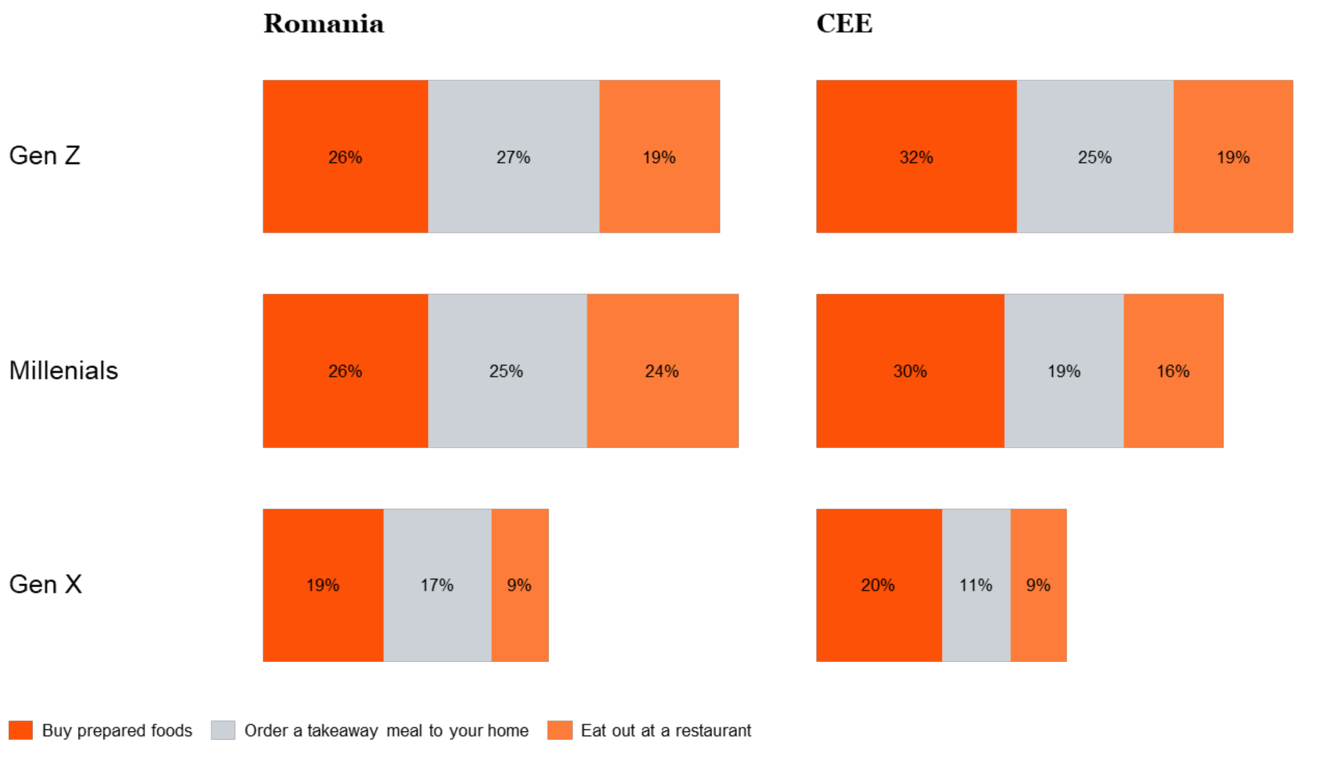
Analysis

- **Higher percentages** of **Romanian consumers** opt for **ready-to-eat meals**, takeaways and dining out at least once a month (80%, 74%, 72% respectively) broadly similarly to their **CEE** counterparts (82%, 72% and 76%). This underscores **Romania's growing taste for convenience foods**
- The **demand** for nutritious on-the-go, ready-to-eat and ready-to-heat options presents significant **opportunities** for **uptrading to consumers**, especially **younger** Gen Z customers, who are at the **forefront of this trend.** Capturing this demographic will be crucial for **winning future customers**.
- As the **demand** for **convenience grows**, emphasising the **quality** and **nutritional benefits** of **ready-to-eat and takeaway options will be essential**. Leveraging marketing campaigns communicating these attributes can help brands differentiate themselves to **attract health-conscious consumers**.

Millennials in Romania lead the no-cooking trend, with 24% dining out at least once a week compared to only 9% of Gen X in CEE

Consumer eating habits – a generational overview

Percentage of frequent[1] eating out, takeaway orders or buying prepared foods by generation



1) Frequent defined as once a week or more

Analysis

- While **Millennials lead in dining out**, **Gen Z** and **Gen X** also are influential in the no-cooking trend, particularly in Romania, with 43% and 36% frequently **purchasing prepared foods** and **takeaways**. This suggests that there's an opportunity for **food producers** and **retailers** to develop **products** that **appeal across generations**, focusing on **convenience** and **quality** to attract a broader customer base.
- With **increasing demand** for **nutritious** and **convenient** meal solutions, there's a clear opportunity for **manufacturers** to innovate by **developing healthy, on-the-go options** targeted at **younger** consumers, while also **appealing to older generations** increasingly **seeking convenience** in their food choices. This strategic focus can foster brand loyalty and **align with evolving** consumer **expectations** for **nutritious convenience**

Romanians are slightly less progressive in health tech and GenAI adoption compared to CEE peers, with 40% using GenAI for meal planning and menu suggestions

The future of health – health tech and GenAI

Key health and technology trends in Romania

87%

of Romanians believe health apps and wearables changed their daily activities and behaviours

71%

of Romanian take supplements to improve their health

58%

of Romanians are aware of weight-loss prescription drugs

62%

of people believe locally produced food is healthier

Comfort in using GenAI for health-related activities

	Romania	CEE
Supporting meal planning and menu suggestions	40%	43%
Creating personalized nutrition and diet plans	39%	39%
Creating personal training and exercise regimes, based on my vital statistics	41%	40%
Supporting grocery and food budgeting based on current habits	29%	34%
Providing predictive grocery shopping lists based on previous ordering/habits	31%	32%
Connecting with smart kitchen appliances to suggest meal ideas and recipes based on ingredients currently on-hand	27%	29%
Providing a medical diagnosis and/or treatment recommendations	28%	28%
None of the above	20%	17%

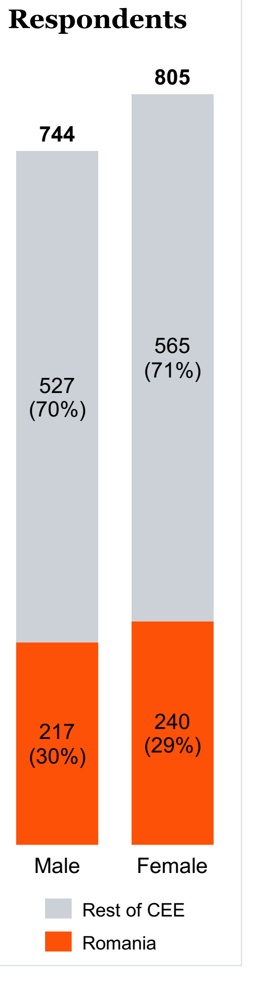
Which of the following activities would you be comfortable allowing GenAI to perform?

5

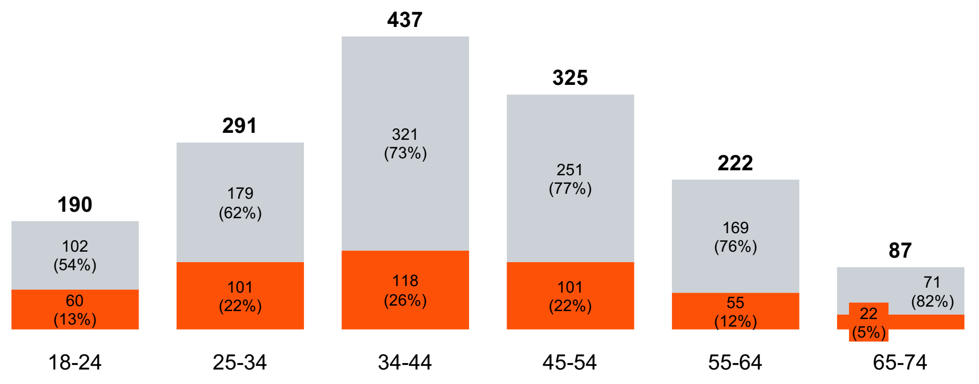
Appendix

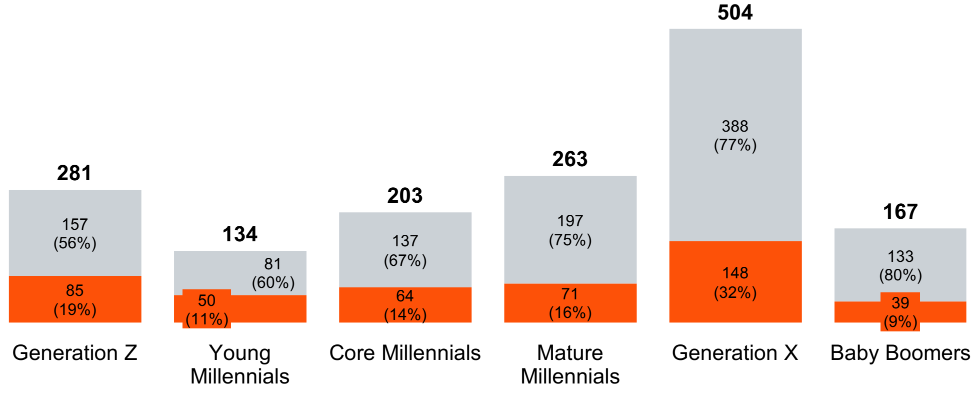
All representative samples in the report are statistically significant and aim for comprehensive representation across key demographics

Demographics of respondents



Generation and age





General

1 549

No. of respondents

457

No. of Romanian respondents

1 122

No. of rest CEE respondents

The rest of CEE region consists of:

- Hungary
- Poland
- Ukraine

Contact

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