ROMANIA

DRS-Pulse Syndicated Study

Tracking shoppers' attitudes & behaviours in the DRS context

Consumer Panel Romania GfK

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What’s inside

Module 1

Short FMCG market overview

Macro-economic Outlook

Lower inflation, rising real disposable incomes and easing financial conditions are set to support private consumption further

GDP

Q1 2024	H1 2024	2024
+0.1%	+0.7%	+3.3%
		forecast

vs. previous year

Sources: INS, Forecast: European Commission

Inflation Rate

Mar 2024	Jun 2024	2024
+6.61%	+4.94%	+4.0%
		forecast

vs. previous year

Source: INS, Forecast: BNR

Budget Deficit

Q1 2024	Jun 2024	2024
2.06%	3.6%	>7.0%
		expectations

Source: Finance Ministry, Forecast: Consiliul Fiscal

Unemployment rate*

Mar 2024	Jun 2024	2024
5.3%	5.5%	5.5%
		forecast

*seasonally adjusted

Source: INS, Forecast: European Commission

Average Salary

Mar 2024	Jun 2024
+13.9%	+12.5%

vs. previous year

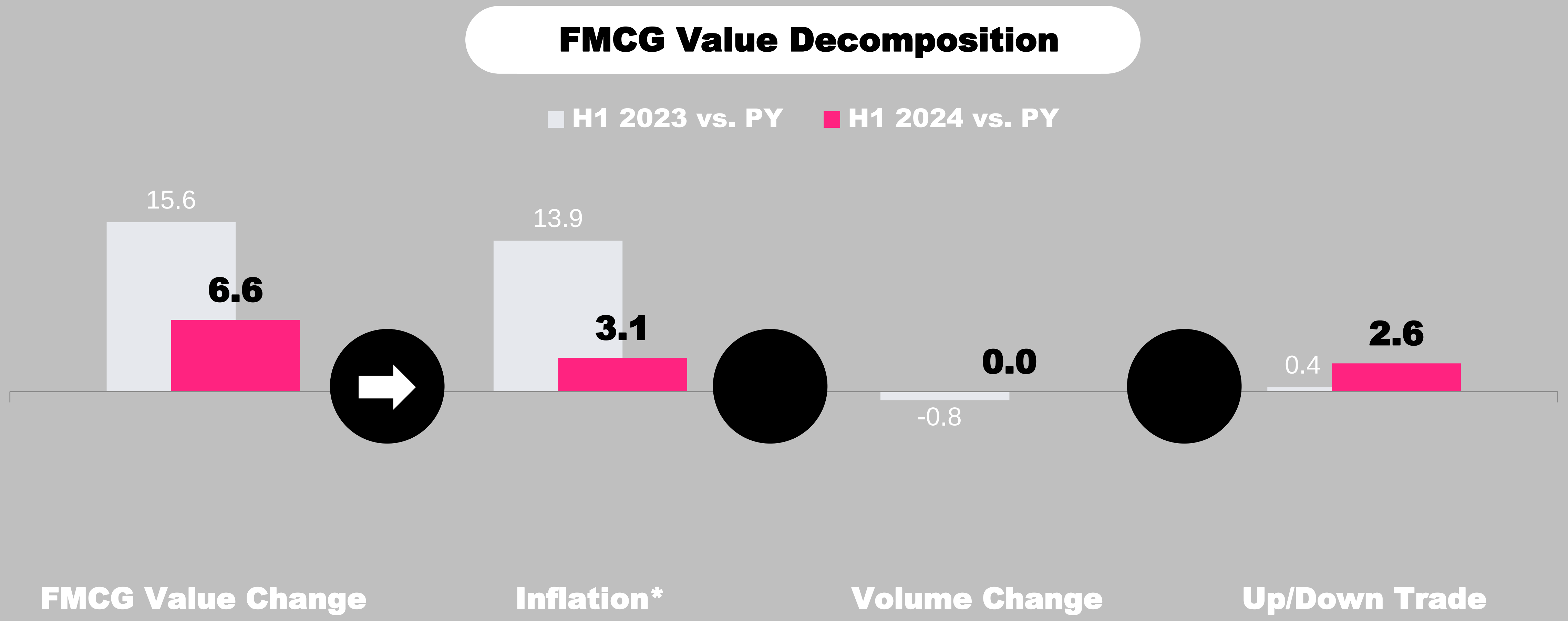
Source: INS

Pension Point

Jan 2024	Sep 2024
+13.8%	+26.65%
	82,56% of pensions

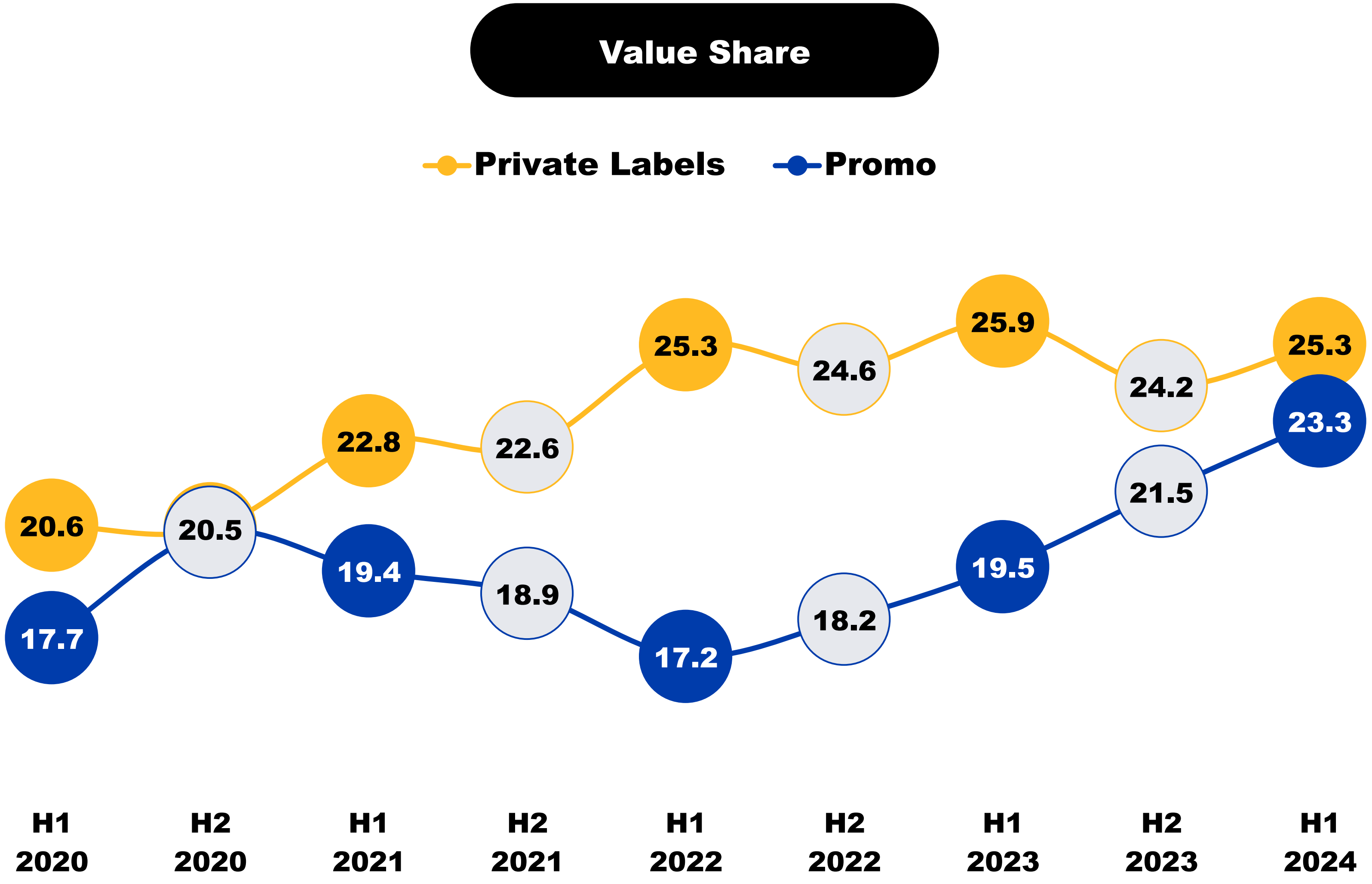
Source: CNPP

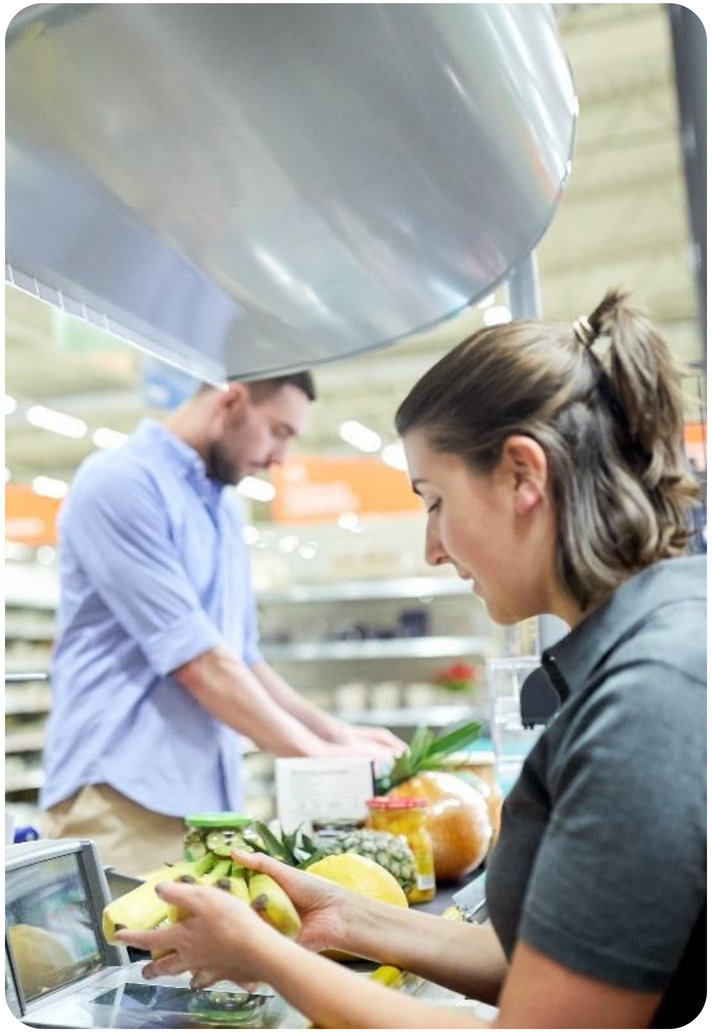
At total FMCG level, the inflation was considerably lower, while volumes were constant. Up-trade intensified compared to last year



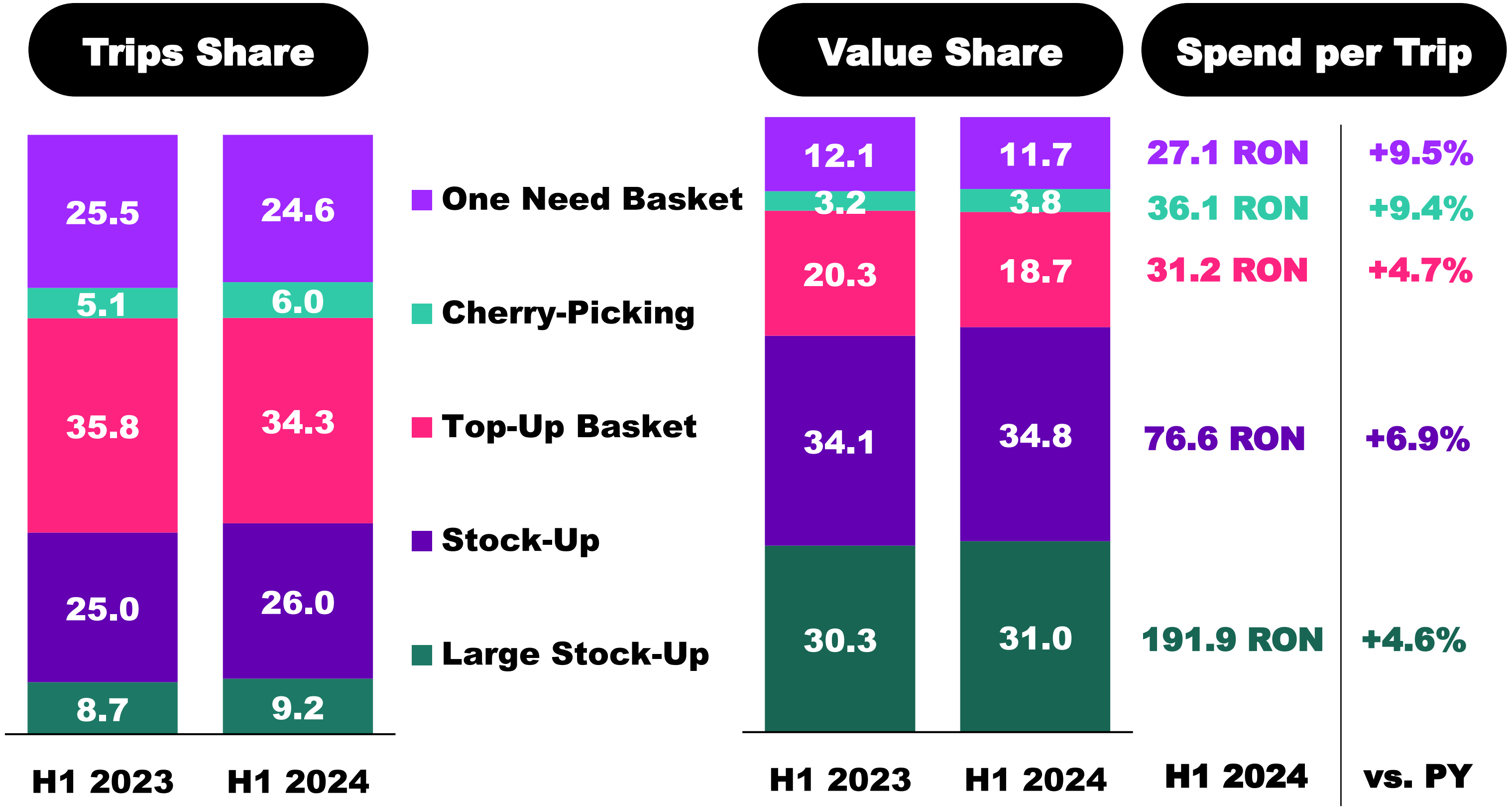
Promotions continue to increase importance, reaching this semester 23.3% of total FMCG in-home purchases.

On the other hand, compared to H1 2023, Private Labels were slightly losing ground towards Branded products.





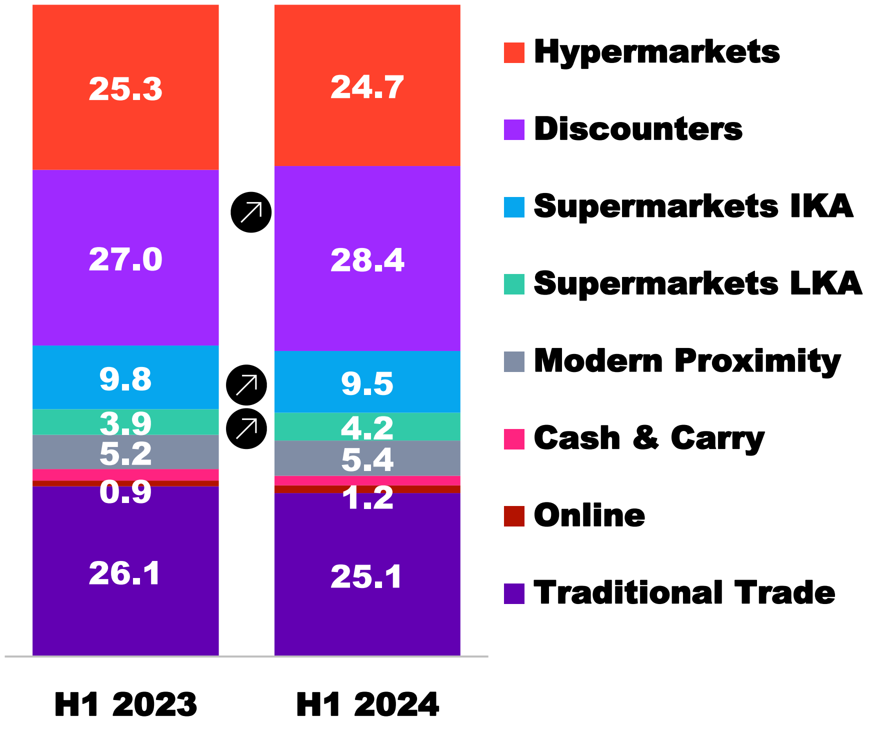
Overall FMCG and in all retail channels, Cherry Picking was gaining share, but also large missions [Stock-Up and Large Stock-up]



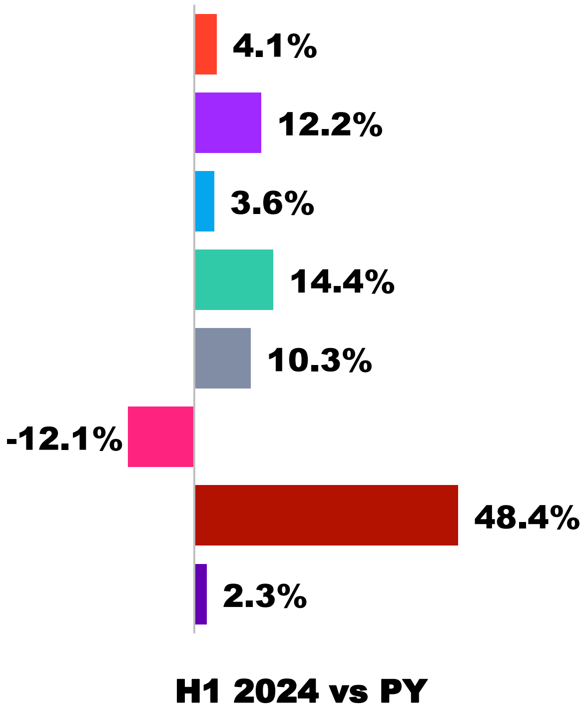
Consumer Panel Romania GfK | One Need Basket 1-3 categories, Promo Share <=50%; Cherry Picking 1-3 categories, Promo Share >50%; Top-Up Basket 1-7 categories, Fresh Share >40%; Stock-Up 4-11 categories; Large Stock-Up 12+ categories.

Within brick-and-mortar channels, Supermarkets LKA had the highest sales increase, followed closely by Discounters which continued to distance from Hypermarkets in terms of market share. The only channel with a negative development for in-home purchases was Cash & Carry. Online shops grew by almost 50% vs H1 2023

Total FMCG - Value Share

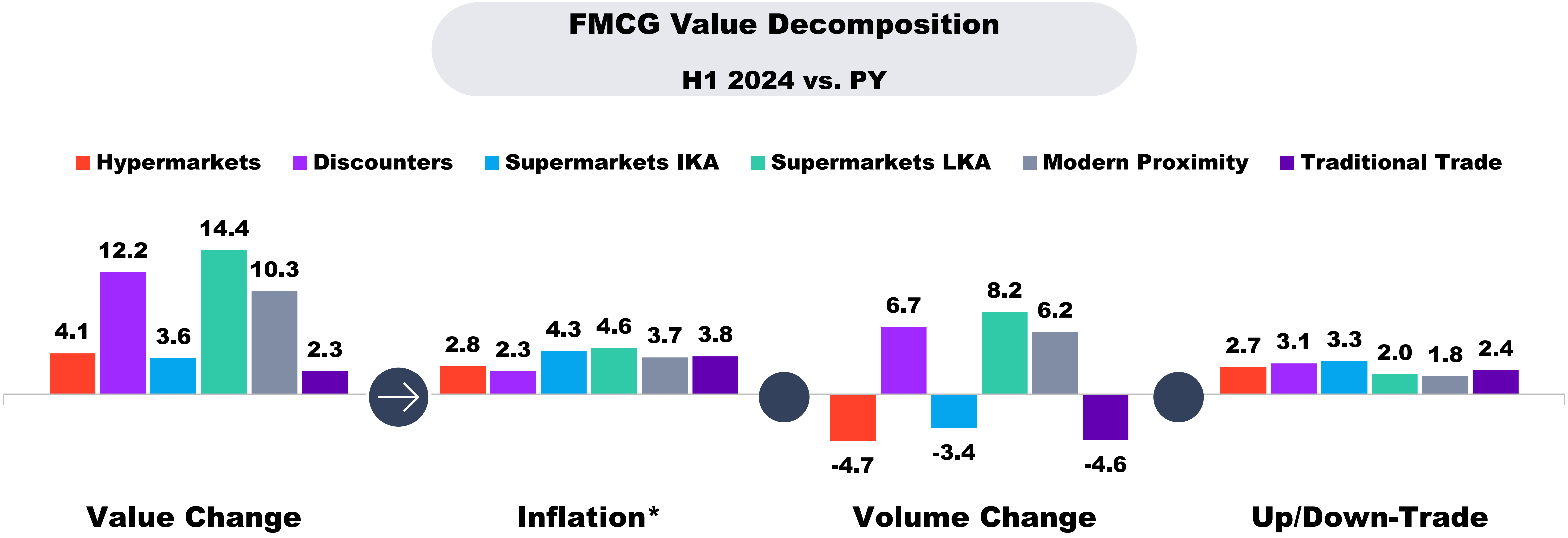


Value Change



Consumer Panel Romania GfK

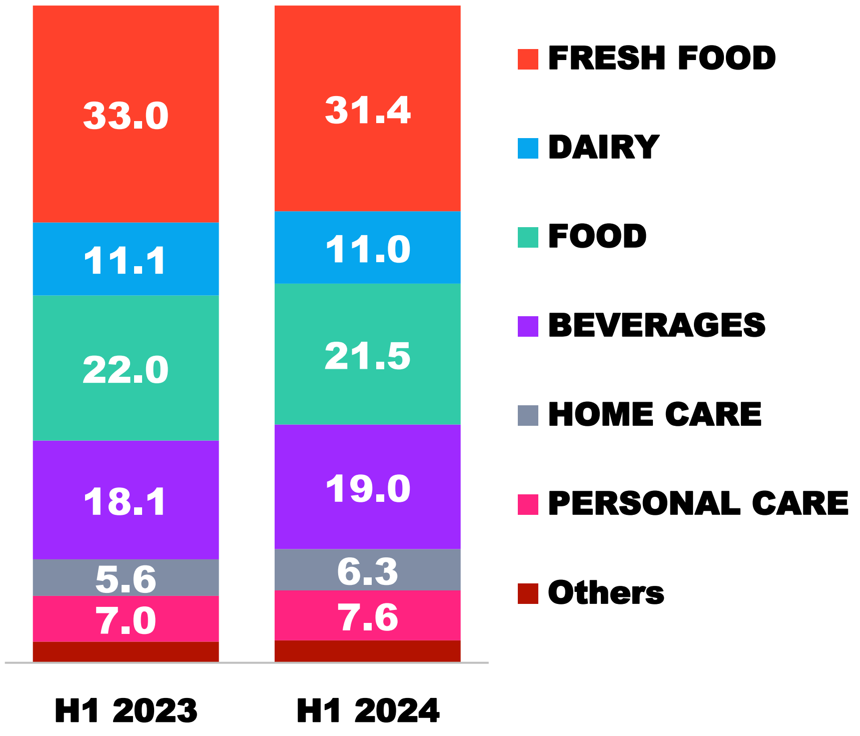
Supermarkets LKA registered the biggest inflation rate, having at the same time the highest volume uplift. Up-trade is the most present in Supermarkets IKA and Discounters



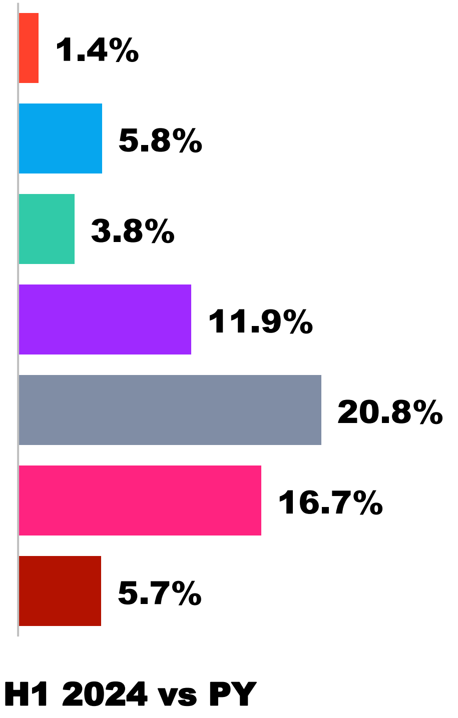
Consumer Panel Romania GfK | *Inflation according to CPS Inflation Tracker Syndicated Study

In terms of value development, Home Care, Personal Care and Pet Food had the biggest uplift during H1 2024, while Fresh Food and Food increased only marginally

Value Share

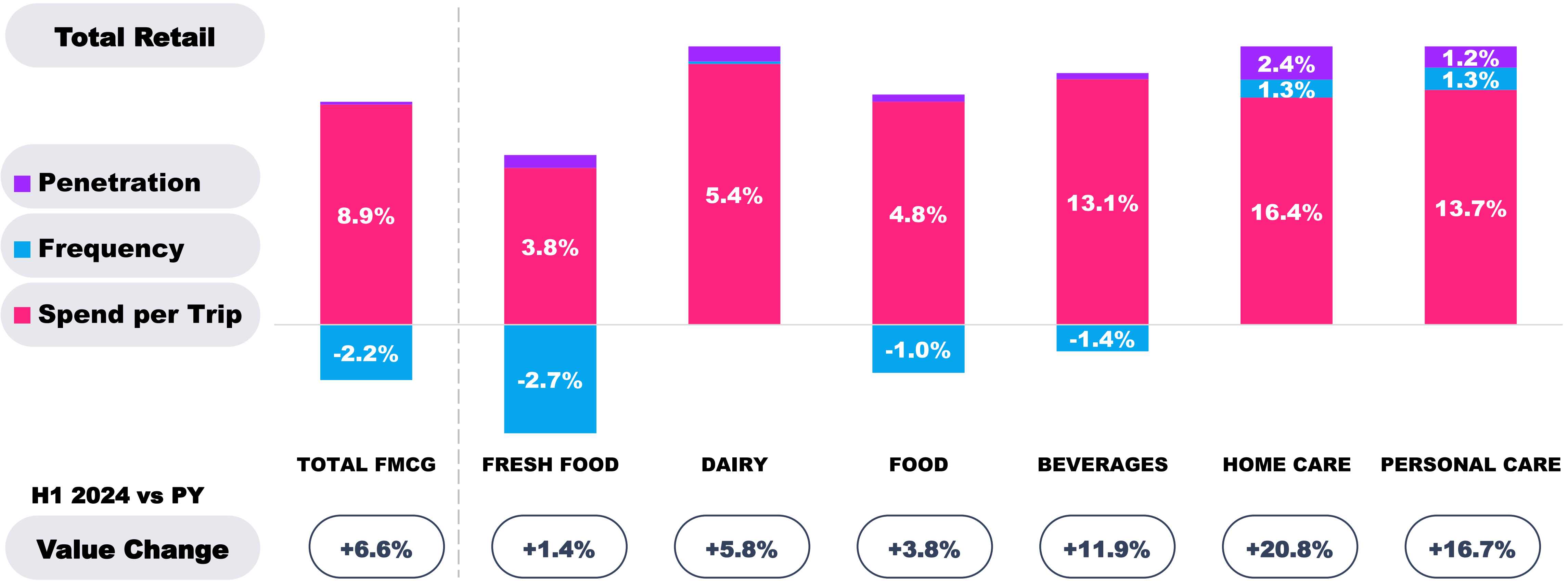


Value Change



Consumer Panel Romania GfK | Other incl. Pet food, Baby Food etc

Spend per trip growth was the biggest contributor behind all the macro-categories development, with the highest increase for Home Care, Personal Care and Beverages



DRS is accompanied not only by the previously shown FMCG dynamics, but also by the larger economic context.

All these forces impact shoppers' behaviors, perceptions and attitudes we show bellow.

Economic pressure on the Romanian households is far from coming to an end, as opposed to the ease felt by others in the rest of Europe. In July, consumer confidence has taken a downward trend in Romania, as opposed to EU average.

Some economic interventions may have been intended to bring an ease. Food inflation decelerated by expanding the cap on trade surplus for essentials.

On the other hand, many products in the shoppers' baskets have been impacted by revised or additional taxation, together with new taxation on HHs revenues:

- VAT increase for bio foods, foods with added sugar and Non-Alco Beer;
- Tax on added-sugar beverages;
- Taxation of meal vouchers.

Against this backdrop, shoppers are developing diverse coping strategies from promo hunting, checking store offers beforehand, shopping around to find best prices to the polarization between premium and economy or PL.

Producers and retailers are also forced to find their own coping mechanisms, as inflation-inducing and cost-increasing governmental interventions are in full swing:

- Higher minimum wage starting with July 2024;
- Expected minimum wage increase in January 2025 to align with a possible European minimum wage;
- Pension indexation;
- Negative revisions of budget deficits estimates and economic slow-down.

The minimum wage increase is a bad news both for FMCG industry, as one with a high share of such wages, but also for low-skilled and young shoppers, who will find it more difficult to find employment and their financials will keep deteriorating. In this context, it is no wonder that for some DRS is actually ... an occupational opportunity.

Module 2

In-home Shopper Behavior Pre and Post DRS Launch

Sparkling Soft Drinks

Beer Regular

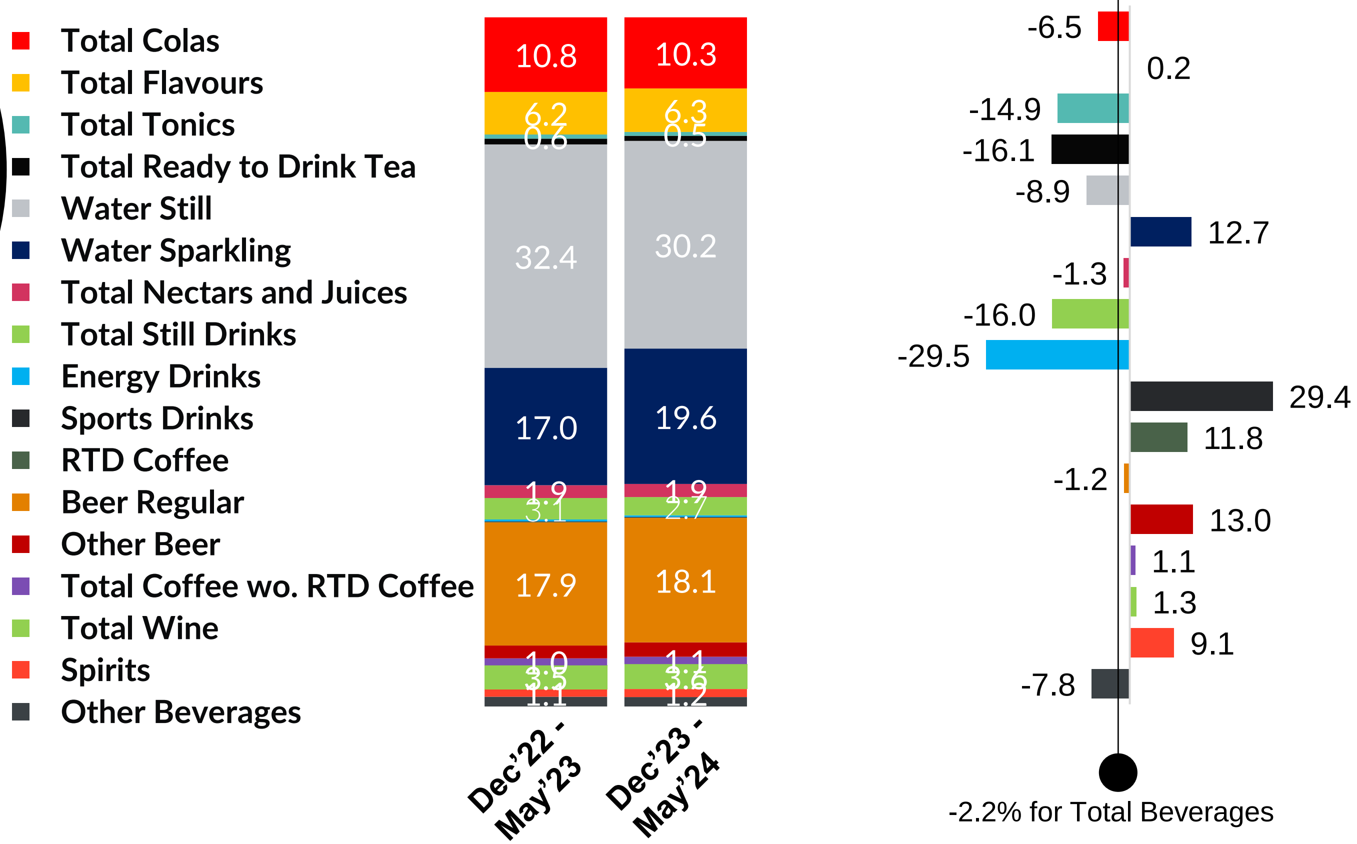
Water Total

Overall beverages, volumes are declining by 2.2% vs. PY in Dec’23 – May’24. contraction was steeper in sparkling soft drinks [especially colas and tonics] and for water still

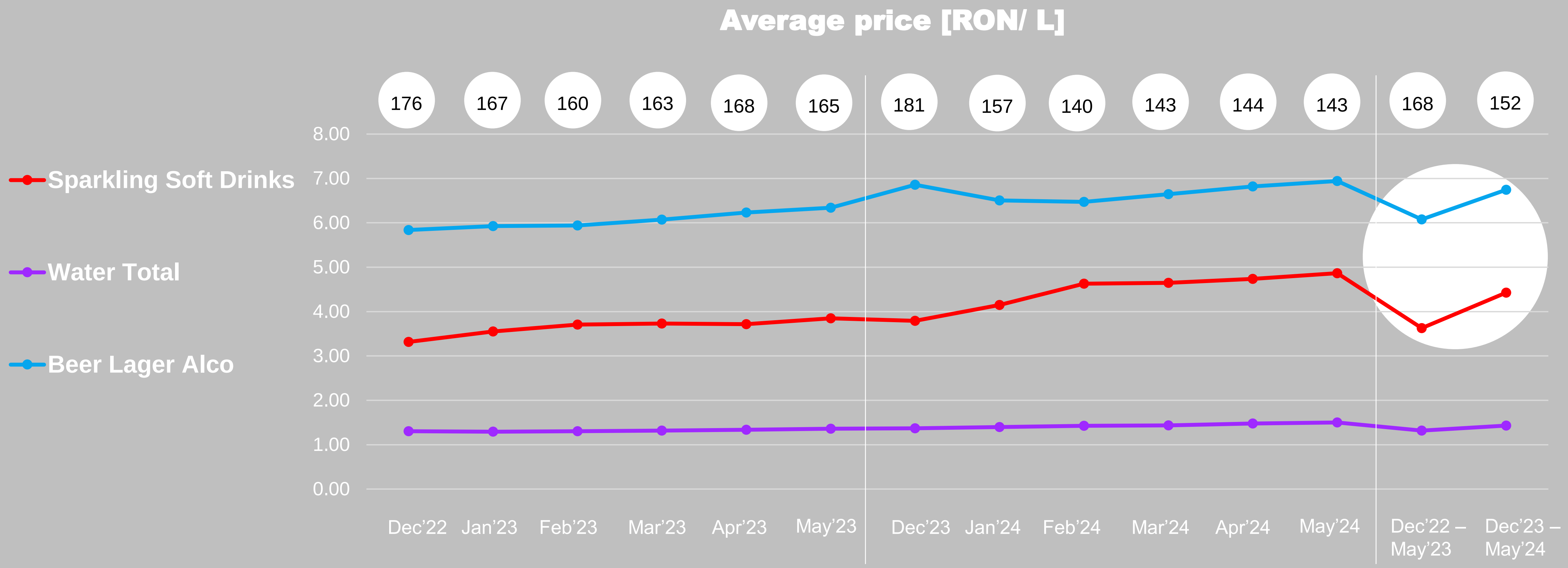
10.8%

from Total FMCG spendings of the Romanian families for in home consumption went to SSD, Beer Regular & Water [and 18.7% for Beverages in general]

Total Romania – Share of throat for at home Volume % and abs. volume change

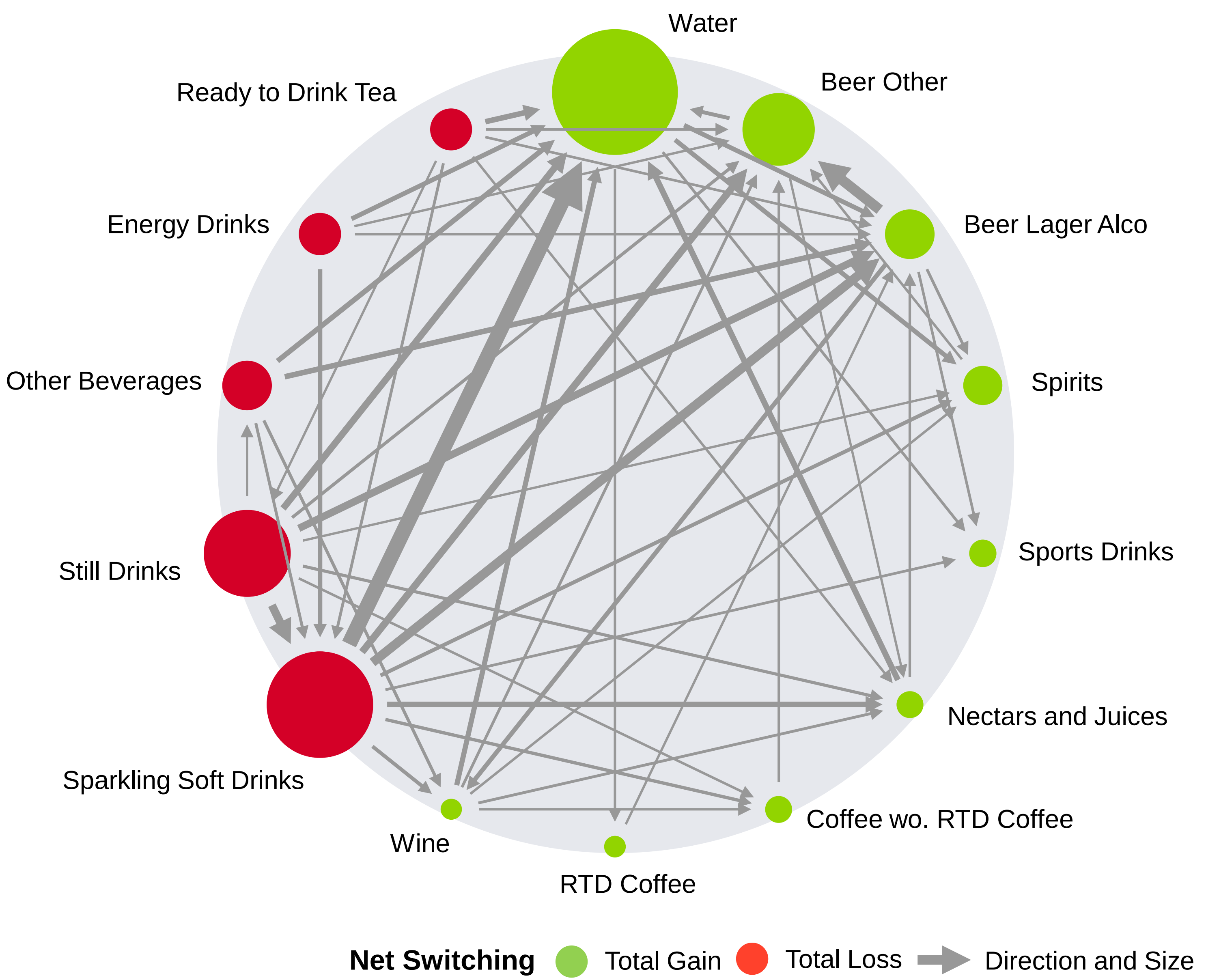


Beyond DRS issue, sparkling soft drinks had one of the steepest price increase in past years, lowering competitivity with categories like beer lager alco [price index dropped constantly]. Water was most constant



Consumer Panel Romania GfK | In bubble index Beer Lager Alco vs. SSD

Most notable change from recent previous moments in time is that Beer Lager Alco is now among winning categories. Sparkling Soft Drinks contracts most intense, losses to Water Total and Beer in general being the highest



Take-aways

Sparkling Soft Drinks

Dec’23 – May’24

Category status at **total market level**

- 87.9% of sparkling soft drinks packages purchased by May 2024 were registered in DRS (PET over-indexed / Glass Bottle under-indexed).
- Category volumes declined by 4.5%, with a stable penetration at 85%, but a decreasing frequency [not only during the cumulated period, but also month by month]. Half of the volume were lost due to a drop in consumption, while 40% of switching to other beverages [especially water, beer, nectars & juices].
- Repeaters are 89.2%, generating 99% of the volume, but decreasing loyalty. New shoppers of category replaced the lost ones, but new ones were slightly more loyal.
- **Pack sizes:** PET 1.5L and PET 2L increased volumes (adding share in detriment of 2.5L). For in-home, the highest penetration and consumption are for big PETs. Smaller pack sizes/ types that build penetration in recent year, now on a reversing trend. Most shoppers lost on CAN, most recruited by PET 1.5L. None improved frequency. PET 1.5L won from almost all others [especially from PET 2.5L], while PET 2L attracted from all except GB Total and PET 1.25L. Other with a positive balance: GB Total and PET 1.25L, but in a smaller degree. PET 2.5L leaked the most towards smaller sizes/ formats.
- **Pack types:** Multi Serve Multi-Pack is the only one with a positive volume development, adding market share, while DRS detracted Single Serve Multi-Pack most. Multi Serve Single-Pack had the highest penetration, but it contributed most to category losses in abs. volume terms [due to a frequency drop].

Take-aways

Sparkling Soft Drinks

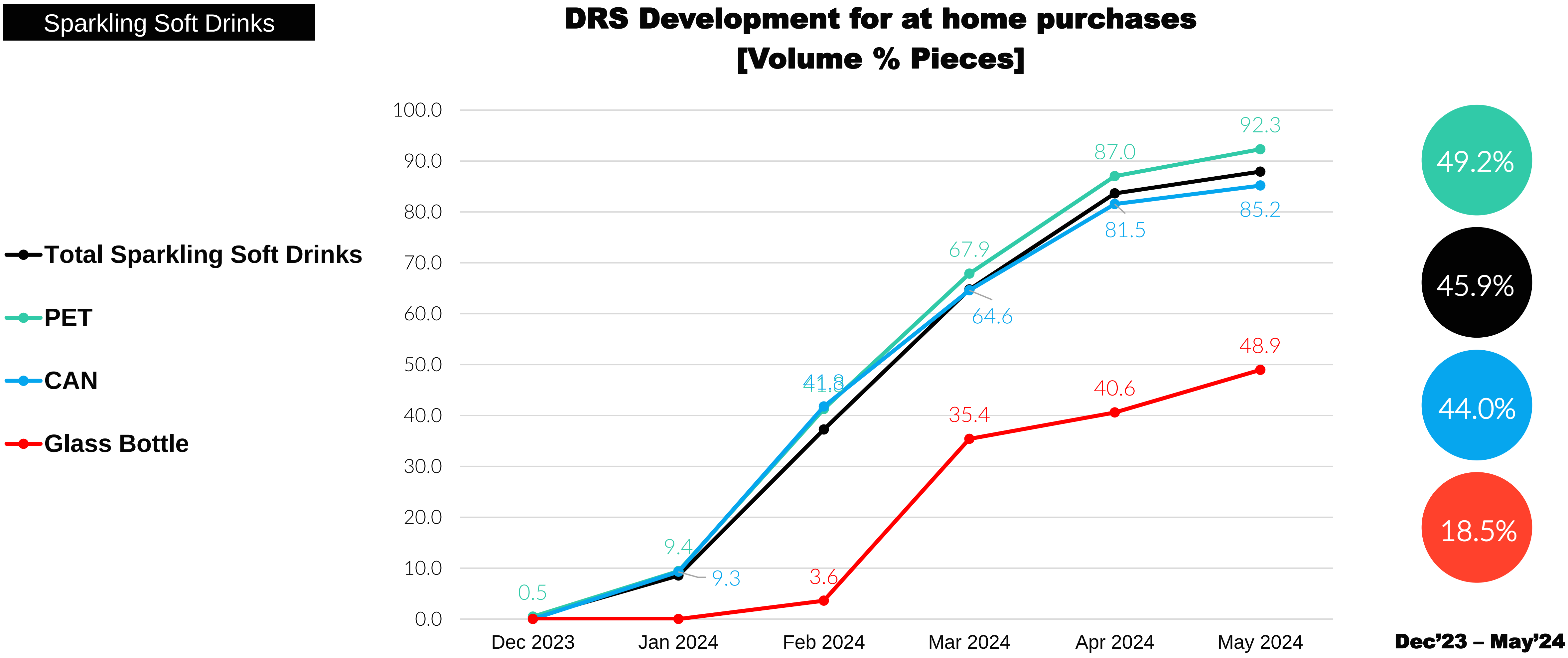
Dec'23 – May'24

Category status at **retail channels level**

- Discounters are now the most important channel for this category, attracting volumes from all other channels, except Modern Proximity [gaining from other stores being their main source of increase]. Their shopper base is the highest [51.2%, but recruited most from other channels, not incremental for the category].
- Hypermarkets are contracting most, their main source of decline being purchase intensity change [especially due to frequency], followed by losses towards other channels.
- Modern Proximity was the only channel gaining through all KPIs and all sources contributed positively to this gain [intensity change the most]
- Traditional Trade eroded [with most volumes due to a decrease in consumption], but it also lost shoppers.
- Supermarkets IKA decreased volumes, as intensity decrease, but there were positive gains from other channels [TT the most]. On the other hand, they are losing shoppers
- Supermarkets LKA increased through all sources, gaining the most from Hypermarkets and TT. New shoppers purchased from here.

By May'24, 87.9% of sparkling soft drinks packages purchased for in-home consumption were registered in DRS, with PET over indexed

Sparkling Soft Drinks



GfK | YouGov

Since the implementation [Dec'23], the category volumes declined in first 6 months by 4.5% vs. PY, with less purchase acts as main reason [-7.7%]. On the other hand, the silver lining is that penetration was rather stable at 85.4%

Sparkling Soft Drinks

Dec 22 - May 23 | Dec 23 - May 24

Period 1	Period 2
Value abs.	Value abs.
Change abs.	Change %

Value (000 RON)	
1.035.690,8	1.207.710,9
172.020,1	16,6%

Average Price (RON/L)	
3,62	4,42
0,80	22,1%

Volume (000 L)	
285.749,0	272.975,5
-12.773,5	-4,5%

Buyers (000)	
6.405	6.376
-29	-0,5%

Volume per Buyer (L)	
44,615	42,813
-1,802	-4,0%

Population (000 HH/Ind)	
7.470	7.470
-0	-0,0%

Penetration	
85,7	85,4
-0,4	-0,5%

Volume per Trip (L)	
3,390	3,501
0,111	3,3%

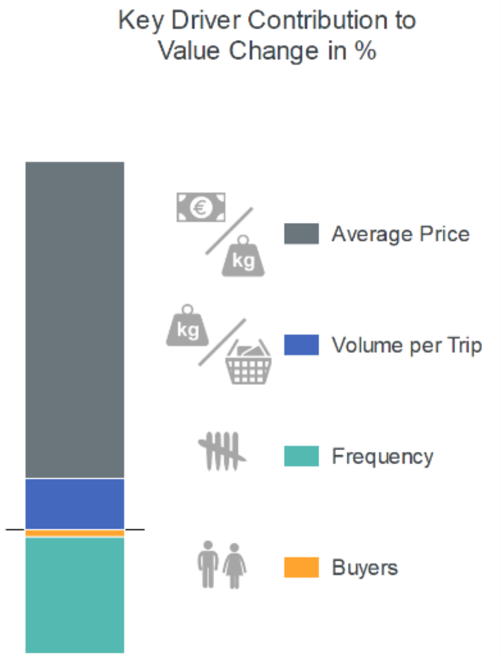
Frequency	
13,2	12,2
-0,9	-7,1%

Volume per Trip (Pieces)	
2,4	2,4
0,0	0,5%

Repeat Rate	
87,3	87,9
0,6	0,7%

Spend per Trip (RON)	
12,29	15,49
3,20	26,1%

Volume per Buyer (Pieces)	
31,7	29,6
-2,1	-6,6%

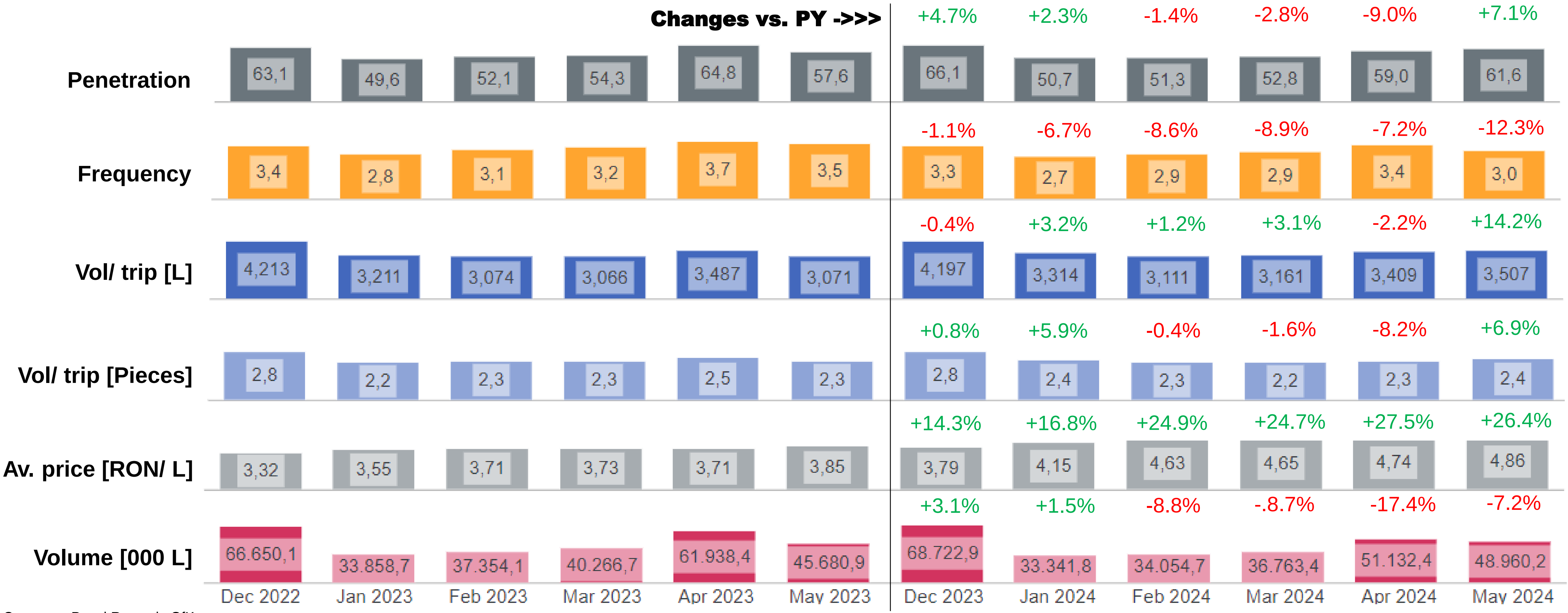


CSD
RO FMCG HH Scan 6000

Zooming on monthly level, penetration was challenged particularly in Apr'24 [influenced rather from different Easter time vs. PY], but frequency registered a constant drop. Average price spiked starting Feb'24

Sparkling Soft Drinks

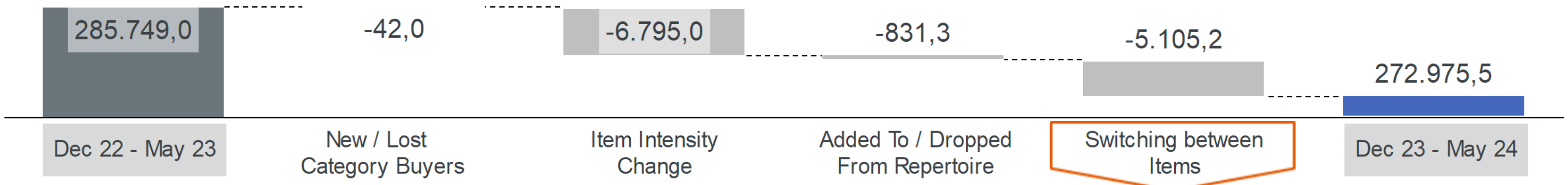
Monthly shopper behavior development starting DRS implementation



Consumer Panel Romania GfK

Around half of the volume lost in Dec’23 – May’24 was due to a drop in consumption, while 40% of switching to other beverages. Here, most of net switching losses went to water [39%, more than expected], followed by beer [35.9%] and Nectars and Juices [10.5%]

Sparkling Soft Drinks



Volume (000 L/tonnes)

Change:
-12.773,5
-4,5%

Losses to: 150.426 / Gains from: 145.320

Losses to / Gains from	Losses	Gains	Aff.
Still Drinks	-8.412	9.698	106
Energy Drinks	-755	1.245	131
Other Beverages	-3.322	3.486	85
Ready to Drink Tea	-2.394	2.541	105
RTD Coffee	-97	94	85
Water	-80.427	77.615	120
Beer Regular	-33.046	31.525	85
Beer Other	-4.865	3.810	76
Nectars and Juices	-4.906	4.151	82
Spirits	-2.492	2.135	66

Total switching: -5.105

	Net switching	Aff.
Still Drinks	1.286	106
Energy Drinks	490	131
Other Beverages	165	85
Ready to Drink Tea	146	105
RTD Coffee	-3	85
Water	-2.812	120
Beer Regular	-1.522	85
Beer Other	-1.055	76
Nectars and Juices	-755	82
Spirits	-357	66

Beverages
RO FMCG HH Scan 6000

Volume (000 L/tonnes)
Gain & Loss (RP PA)

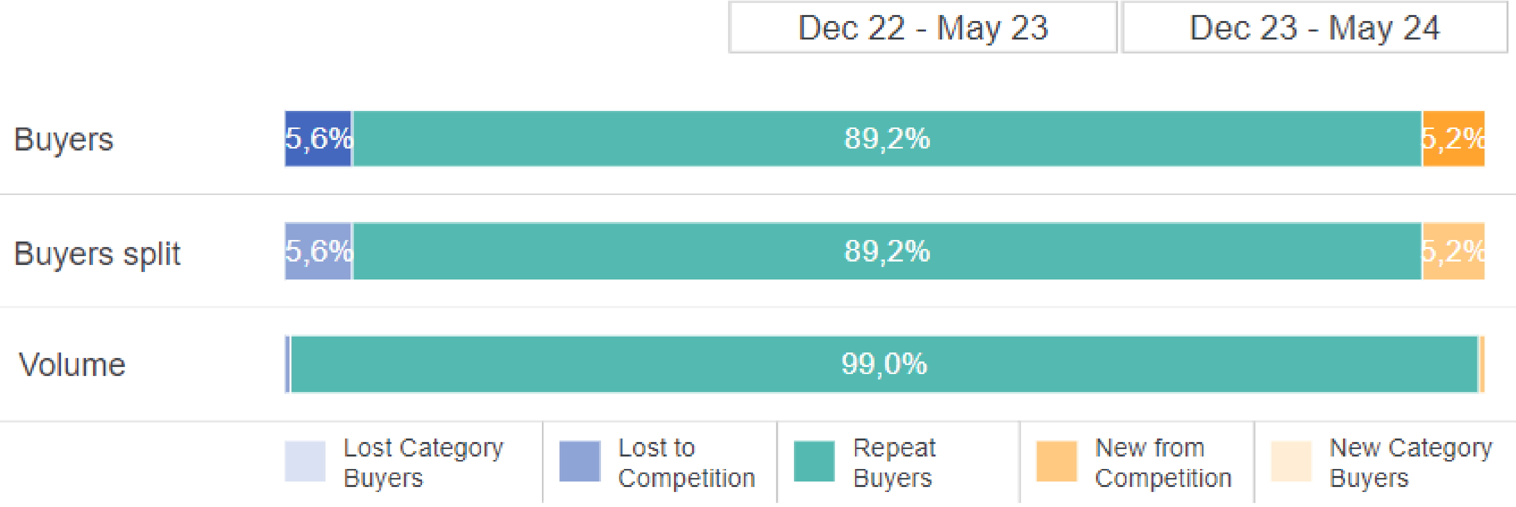
Consumer Panel Romania GfK | Affinity Index measure for exchange relationships between two items, if above 100 is higher than expected

Blu

GfK | YouGov

Sparkling Soft Drinks new shoppers replaced the lost ones [5.6% vs. 5.2%]. New ones are slightly more loyal [7.2% vs. 6.2% for lost], purchasing more volume per trip [but less often]

Repeaters are 89.2%, generating 99% of category volume, and here loyalty should be nurtured as it is on a decreasing trend



	Volume per trip		Frequency		Volume per buyer		Loyalty Volume	
	P1	P2	P1	P2	P1	P2	P1	P2
Total	3,39	3,50	13,2	12,2	44,61	42,81	17,9	17,7
New Buyers		2,89		2,7		7,81		7,2
Repeat Buyers	3,40	3,51	13,8	12,8	46,95	44,86	18,3	18,0
Lost buyers	2,65		2,9		7,69		6,2	

Lost buyers increase consumption most for wine, beer in general and spirits. But these are the same categories for which new shoppers decreased

Sparkling Soft Drinks

Dec 22 - May 23 | Dec 23 - May 24

	Lost Buyers %		Repeat Buyers %		New Buyers %	
Buyers %	5,6		89,2		5,2	
Loyalty Rate (Measure)	6,2		18,3	18,0		7,2
others = 100%, measure %	P1	P2	P1	P2	P1	P2
Total Beverages	100,0	100,0	100,0	100,0	100,0	100,0
Water	70,9	68,3	61,4	61,4	63,5	66,3
Beer Regular	12,0	13,0	19,3	19,5	16,5	15,4
Beer Other	1,2	1,7	1,7	2,0	1,6	1,3
Ready to Drink Tea	0,9	0,5	1,4	1,2	0,5	0,6
Nectars and Juices	1,5	1,1	1,8	1,8	1,5	2,0
Still Drinks	2,2	1,9	4,2	3,5	1,8	1,3
Energy Drinks	0,1	0,1	0,5	0,3	0,0	0,1
Sports Drinks	0,1	0,1	0,2	0,2	0,1	0,1
RTD Coffee	0,0	0,0	0,1	0,1	0,1	0,1
Coffee wo. RTD Coffee	1,9	2,0	1,5	1,6	2,2	1,8
Wine	5,6	7,5	4,4	4,6	7,7	6,9
Spirits	1,3	1,6	1,5	1,8	2,2	1,4
Other Beverages	2,1	2,0	2,2	1,9	2,3	2,7

Beverages — Volume (000 L/tonnes)

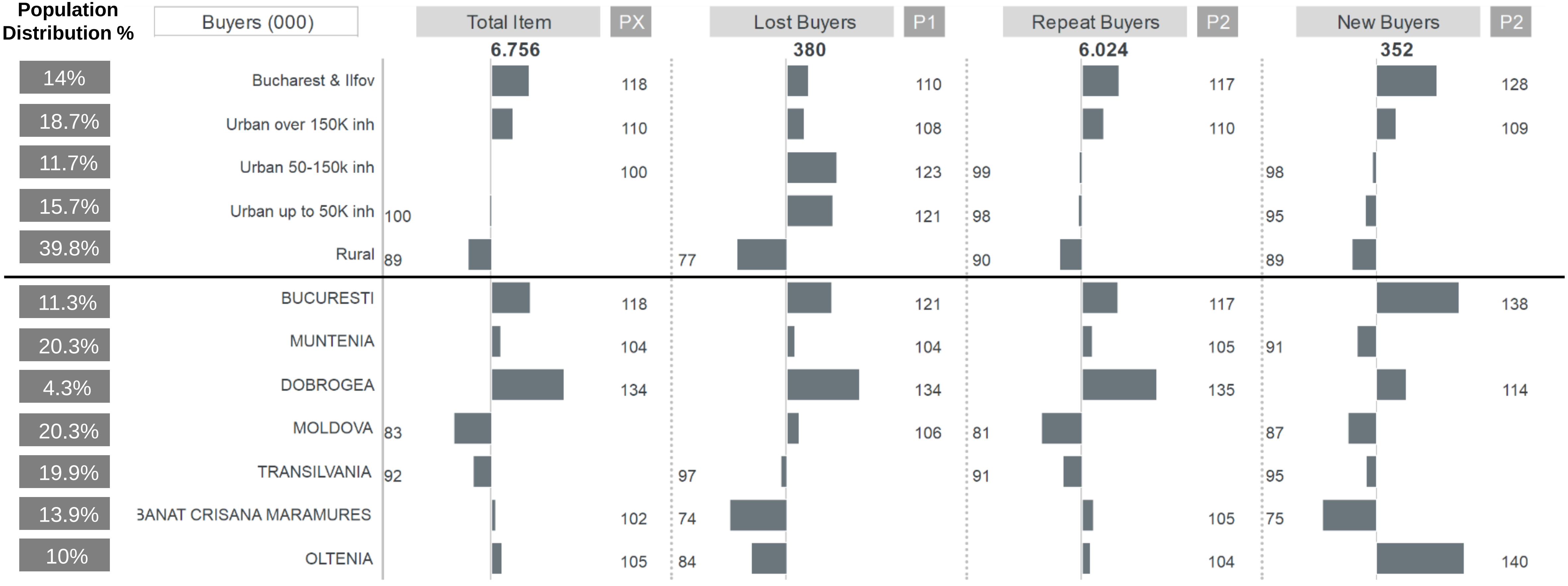
RO FMCG HH Scan 6000 — New - Lost - Retained (RP PA)

Consumer Panel Romania GfK

Lost buyers are more from urban [especially medium and small], Dobrogea and Bucharest, while new ones are over indexed most in Oltenia and Bucharest. Repeaters are overrepresented in Bucharest, big urban and Dobrogea

Sparkling Soft Drinks

Dec 22 - May 23 | Dec 23 - May 24



Beverages

RO FMCG HH Scan 6000

New - Lost - Retained (RP PA)

Income/ family wise, lost are most from low to medium [2001-4000 RON], seniors and retired w/o children. New buyers are over index in up to 1400 RON and 6001-7000 RON, retired, seniors but also, families with bigger children [6-18 yrs]. Repeaters are more at the upper end of income and families with children [6-18 yrs]

Sparkling Soft Drinks

Dec 22 - May 23 | Dec 23 - May 24

Population Distribution %	Buyers (000)	Total Item (PX) 6.756	Lost Buyers (P1) 380	Repeat Buyers (P2) 6.024	New Buyers (P2) 352
8.9%	Up to 1400 RON	82	77	79	147
6.4%	1401-2000 RON	65	77	63	91
12.6%	2001-3000 RON	78	133	73	103
12.4%	3001-4000 RON	93	114	93	78
12.1%	4001-5000 RON	106	88	107	98
10.7%	5001-6000 RON	114	98	117	76
8.6%	6001-7000 RON	111	92	110	151
7.9%	7001-8000 RON	113	108	114	110
20.4%	Over 8000 RON	116	98	119	82
8.1%	Young without children	59	74	57	63
11.4%	Mature without children	104	81	107	72
10.9%	Families with children <6 yrs	93	69	96	68
20.1%	Families with children 6-18 yrs	115	69	118	111
25.4%	Senior without children	109	115	108	113
24.1%	Retired	94	142	90	117

Beverages

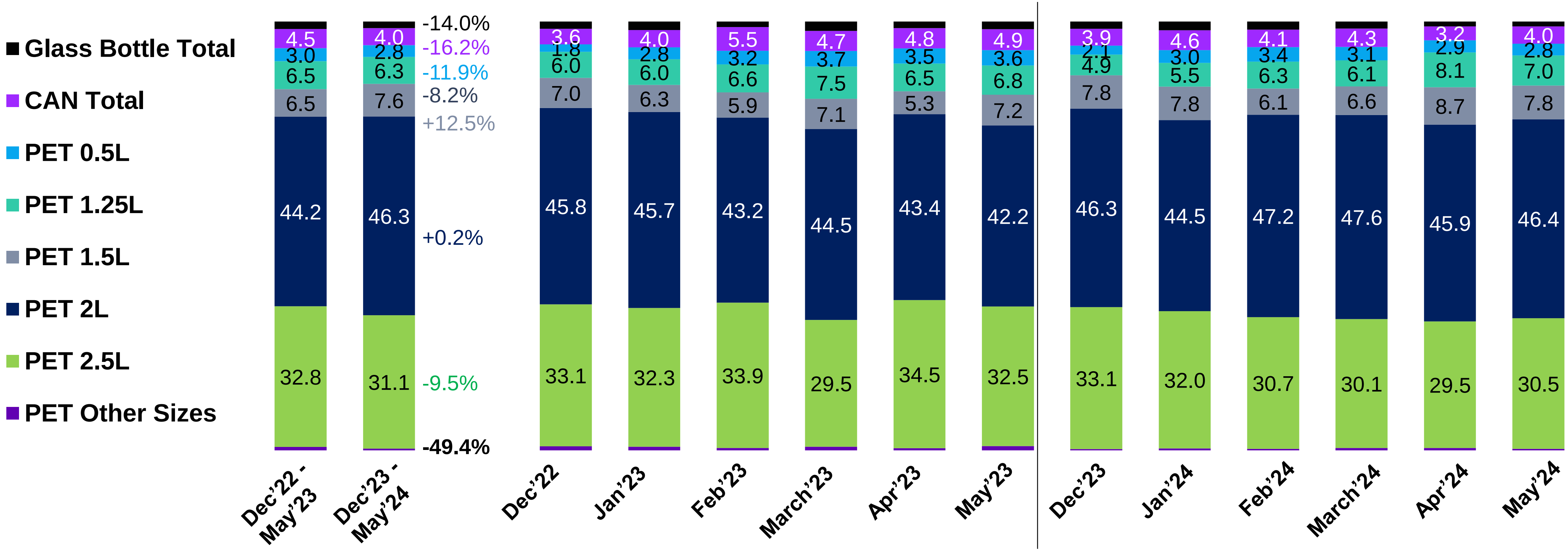
RO FMCG HH Scan 6000

New - Lost - Retained (RP PA)

Pack types wise, only PET 1.5L and PET 2L, managed to improve share [+1.1pp vs. PY and +2.2pp vs. PY] and grow abs. volumes. At the other end, 2.5L lost most in importance [-1.7pp vs. PY] and abs. volumes

Sparkling Soft Drinks

Main pack types shares development for at home consumption



Pack type	Dec'22 - May'23	Dec'23 - May'24	Dec'22	Jan'23	Feb'23	March'23	Apr'23	May'23	Dec'23	Jan'24	Feb'24	March'24	Apr'24	May'24
CAN Total	4.5	4.0	3.6	4.0	5.5	4.7	4.8	4.9	3.9	4.6	4.1	4.3	3.2	4.0
PET 0.5L	3.0	2.8	1.8	2.8	3.2	3.7	3.5	3.6	2.1	3.0	3.4	3.1	2.9	2.8
PET 1.25L	6.5	6.3	6.0	6.0	6.6	7.5	6.5	6.8	4.9	5.5	6.3	6.1	8.1	7.0
PET 1.5L	6.5	7.6	7.0	6.3	5.9	7.1	5.3	7.2	7.8	7.8	6.1	6.6	8.7	7.8
PET 2L	44.2	46.3	45.8	45.7	43.2	44.5	43.4	42.2	46.3	44.5	47.2	47.6	45.9	46.4
PET 2.5L	32.8	31.1	33.1	32.3	33.9	29.5	34.5	32.5	33.1	32.0	30.7	30.1	29.5	30.5

Consumer Panel Romania GfK | PET Other Sizes incl. 0.75L, 1L, 2.25L, 3L

When it comes to at home, highest penetration and consumption are for big PETs [2L and 2.5L]. Smaller pack sizes/ types that build penetration in recent year, now on a reversing trend. Most shoppers lost on CAN, most recruited by PET 1.5L. None improved frequency

Sparkling Soft Drinks

	Absolute volume change vs. PY	Penetration	Change rate	Frequency	Change rate	Volume per Trip (L)	Change rate	Volume per Trip (Pieces)	Change rate	Average Price (RON/L)	Change rate
Total Category	-4.5%	85,7 / 85,4	-0,5	13,2 / 12,2	-7,1	3,390 / 3,501	3,3	2,4 / 2,4	0,5	3,62 / 4,42	22,1
Glass Bottle Total	-14.0%	14,0 / 13,1	-6,4	3,2 / 3,0	-6,5	1,461 / 1,434	-1,8	5,2 / 5,1	-1,3	10,54 / 12,93	22,7
CAN Total	-16.2%	31,3 / 28,9	-7,5	3,7 / 3,7	-1,2	1,491 / 1,368	-8,3	4,5 / 4,2	-8,7	7,88 / 9,36	18,8
PET 0.5L	-11.9%	34,5 / 32,9	-4,5	3,9 / 3,6	-8,3	0,860 / 0,866	0,7	1,7 / 1,7	0,7	8,12 / 9,89	21,8
PET 1.25L	-8.2%	29,0 / 28,2	-2,9	4,2 / 4,0	-5,8	2,027 / 2,034	0,4	1,6 / 1,6	0,4	4,36 / 5,41	24,1
PET 1.5L	+12.5%	28,2 / 31,7	12,6	3,5 / 3,2	-8,7	2,496 / 2,731	9,4	1,7 / 1,8	9,4	4,27 / 4,88	14,2
PET 2L	+0.2%	59,2 / 59,9	1,3	6,7 / 6,3	-5,4	4,286 / 4,481	4,6	2,1 / 2,2	4,6	2,90 / 3,55	22,6
PET 2.5L	-9.5%	50,0 / 49,8	-0,4	6,0 / 5,3	-12,0	4,166 / 4,304	3,3	1,7 / 1,7	3,3	2,98 / 3,85	29,4

Dec 22 - May 23 / Dec 23 - May 24

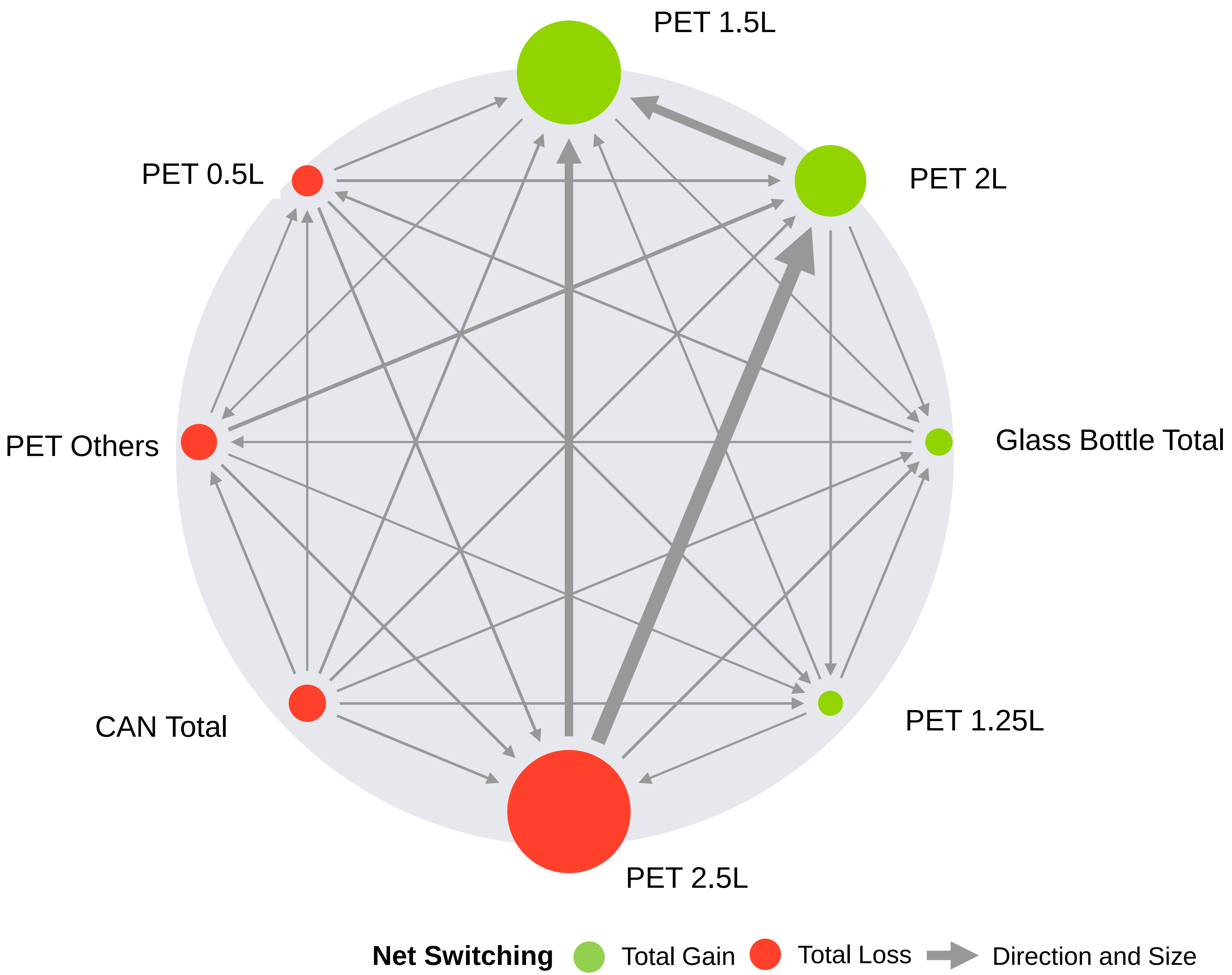
CSD

RO FMCG HH Scan 6000

Consumer Panel Romania GfK | PET Other Sizes incl. 0.75L, 1L, 2.25L, 3L

Looking at the volume movement between packs sizes/ types, PET 1.5L won the most and from almost all others [highest from PET 2.5L], followed by PET 2L [attracting from all except GB Total and PET 1.25L]. Other with a positive balance: GB Total and PET 1.25L, but in a smaller degree

At the other end, PET 2.5L “leaked” most to smaller sizes/ formats

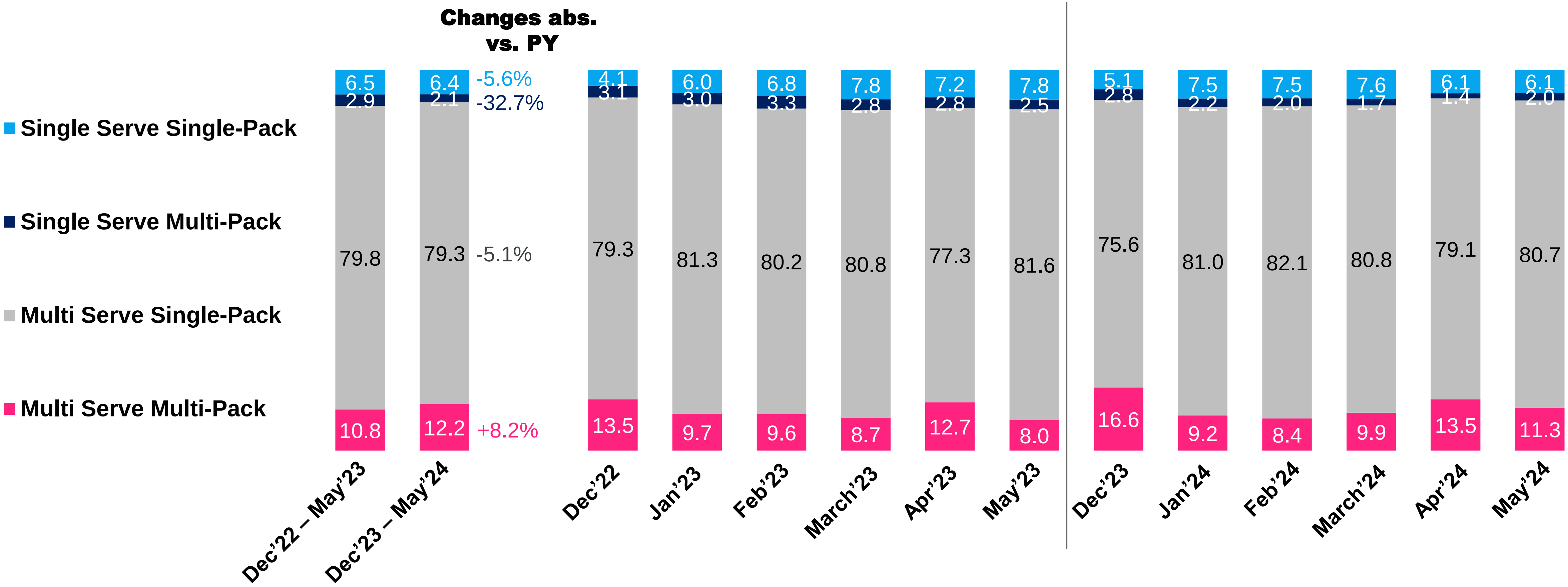


Consumer Panel Romania GfK | Analysis done on volume | PET Other Sizes incl. 0.75L, 1L, 2.25L, 3L

Overall, shoppers went more for the value per money option: Multi Serve Multi-Pack [only one with a positive volume development and adding market share], while DRS detracted Single Serve Multi-Pack most. Still, by far most volume purchased were Multi Serve Single-Pack

Sparkling Soft Drinks

Sigle Serve vs. Multi Serve and Single-pack vs. Multi-pack
Share development for at home consumption



Consumer Panel Romania GfK | Single Serve <1L, Multi Serve >= 1L

Multi Serve Single-Pack had the highest penetration and consumption, but it contributed most to category losses in abs. volume terms [due to a frequency drop]

Sparkling Soft Drinks

	Absolute volume change vs. PY	Penetration	Change rate	Frequency	Change rate	Volume per Trip (L)	Change rate	Volume per Trip (Pieces)	Change rate	Average Price (RON/L)	Change rate
Total category	-4.5%	85,7 / 85,4	-0,5	13,2 / 12,2	-7,1	3,390 / 3,501	3,3	2,4 / 2,4	0,5	3,62 / 4,42	22,1
Single Serve Single-Pack	-5.6%	49,8 / 48,3	-3,2	5,2 / 4,9	-5,5	0,954 / 0,984	3,1	2,5 / 2,5	3,2	8,90 / 10,35	16,4
Single Serve Multi-Pack	-32.7%	12,1 / 11,1	-8,1	3,1 / 2,5	-19,2	3,053 / 2,768	-9,3	9,8 / 9,2	-6,4	7,31 / 9,56	30,9
Multi Serve Single-Pack	-5.1%	78,1 / 77,8	-0,3	10,3 / 9,6	-7,3	3,788 / 3,892	2,7	1,9 / 1,9	3,7	3,16 / 3,95	25,0
Multi Serve Multi-Pack	+8.2%	21,5 / 23,7	10,4	3,3 / 3,2	-4,7	5,788 / 5,950	2,8	2,9 / 3,0	2,9	2,93 / 3,56	21,5

Dec 22 - May 23 Dec 23 - May 24

CSD

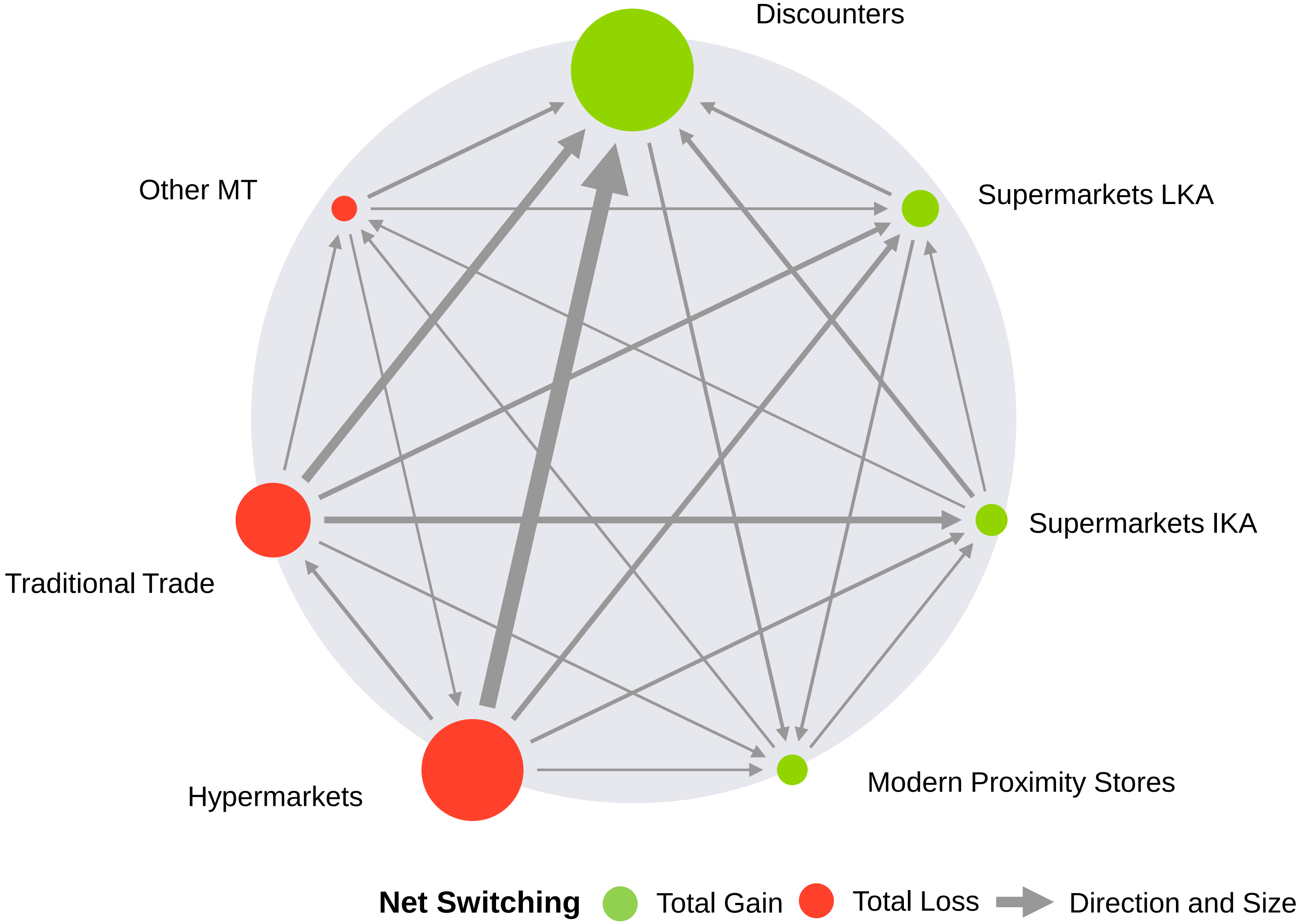
RO FMCG HH Scan 6000
Consumer Panel Romania GfK

Discounters now most important channel for sparkling soft drinks acquisition, surpassing hypermarkets which are contracting most

Volume Share% & chg. pp vs. PY

Consumer Panel Romania GfK | Other MT incl. Online, Cash & Carry, Other e.g. DYI, Toys & Home, Sports etc

Discounters attracting from all other channels, except Modern Proximity



GfK CPS | YouGov

Discounters had the biggest buyer base [51.2%, recruited most from other channels, not incremental for the category] and consumption. On the other hand, Modern Proximity was the only channel gaining through all sources [consumption contributed most]. Hypers eroded, especially due to frequency, while TT as it lost shoppers

Sparkling Soft Drinks

	Absolute volume change vs. PY	Penetration Dec 22 - May 23	Penetration Dec 23 - May 24	Penetration Change rate	Frequency Dec 22 - May 23	Frequency Dec 23 - May 24	Frequency Change rate	Volume per Trip (L) Dec 22 - May 23	Volume per Trip (L) Dec 23 - May 24	Volume per Trip (L) Change rate	Volume per Trip (Pieces) Dec 22 - May 23	Volume per Trip (Pieces) Dec 23 - May 24	Volume per Trip (Pieces) Change rate	Average Price (RON/L) Dec 22 - May 23	Average Price (RON/L) Dec 23 - May 24	Average Price (RON/L) Change rate
Total Market	-4.5%	85,7	85,4	-0,5	13,2	12,2	-7,1	3,390	3,501	3,3	2,4	2,4	0,5	3,62	4,42	22,1
Hypermarkets	-16.7%	44,5	43,5	-2,2	5,9	5,0	-14,9	3,732	3,738	0,2	2,8	2,7	-4,8	3,74	4,50	20,3
Supermarkets IKA	-3.6%	30,5	31,2	2,4	6,6	5,6	-15,0	2,404	2,662	10,7	1,8	1,8	1,7	4,02	4,80	19,5
Supermarkets LKA	+10.9%	11,0	11,0	-0,3	4,3	4,5	4,8	3,433	3,645	6,2	2,4	2,6	11,6	3,61	4,60	27,2
Discounters	+6.0%	47,3	51,2	8,1	5,3	5,1	-2,9	3,657	3,690	0,9	2,8	2,7	-2,5	3,32	3,97	19,5
Modern Proximity Stores	+13.3%	21,5	21,9	1,6	4,8	5,0	4,9	3,033	3,226	6,4	1,9	2,0	6,6	3,62	4,36	20,2
Traditional Trade	-11.6%	35,5	31,7	-10,9	7,0	6,7	-3,4	3,553	3,647	2,7	2,2	2,2	3,2	3,57	4,62	29,4

Dec 22 - May 23 | Dec 23 - May 24

Beverages

RO FMCG HH Scan 6000

Consumer Panel Romania GfK

Take-aways

Beer Lager Alco

Dec’23 – May’24

Category status at **total market level**

- 83.6% of beer lager alco packages purchased by May 2024 were registered in DRS (PET and CAN being over-indexed)
- Category in-home volumes registered a slight decrease of 1.2% driven by reduced frequency, but recruited new shoppers, reaching at least once 68.7% of the households. Volumes were lost due to decrease in consumption intensity, while at the same time category kept being added to repertoire and won from other beverages [mainly SSD and still drinks].
- Repeaters are 82.7% from all shoppers, generating 98.5% of category volume. Their loyalty is also slightly higher vs previous year. Category won more shoppers than it lost [9.8% vs 7.5%]. Lost buyers increase consumption most for water, spirits and smaller beverage segments, while new ones decreased for water, still drinks, wine and other beverages.
- **Pack types:** CANs – the biggest pack for in home, with the most shoppers – recruited buyers, but had a small decrease of frequency. Large glass bottle had the biggest improvement and added share, due to higher frequency. At the same time, small glass bottle lowered the volumes and decreased share, effect of frequency reduction, but a small recruitment. PET kept contracting, especially on big sizes [most 3L and 2L], due to less shoppers mainly. Looking at the volume movement between packs types, CANs won the most and from almost all others [except Large GB, most from Small GB]. Large GB also a winner, gaining from all except Large PET. Small PET slightly positive, winning only from Large PET.
At the other end, Small Glass Bottle “leaked” the most [highest to CAN]

Take-aways

Beer Lager Alco

Dec’23 – May’24

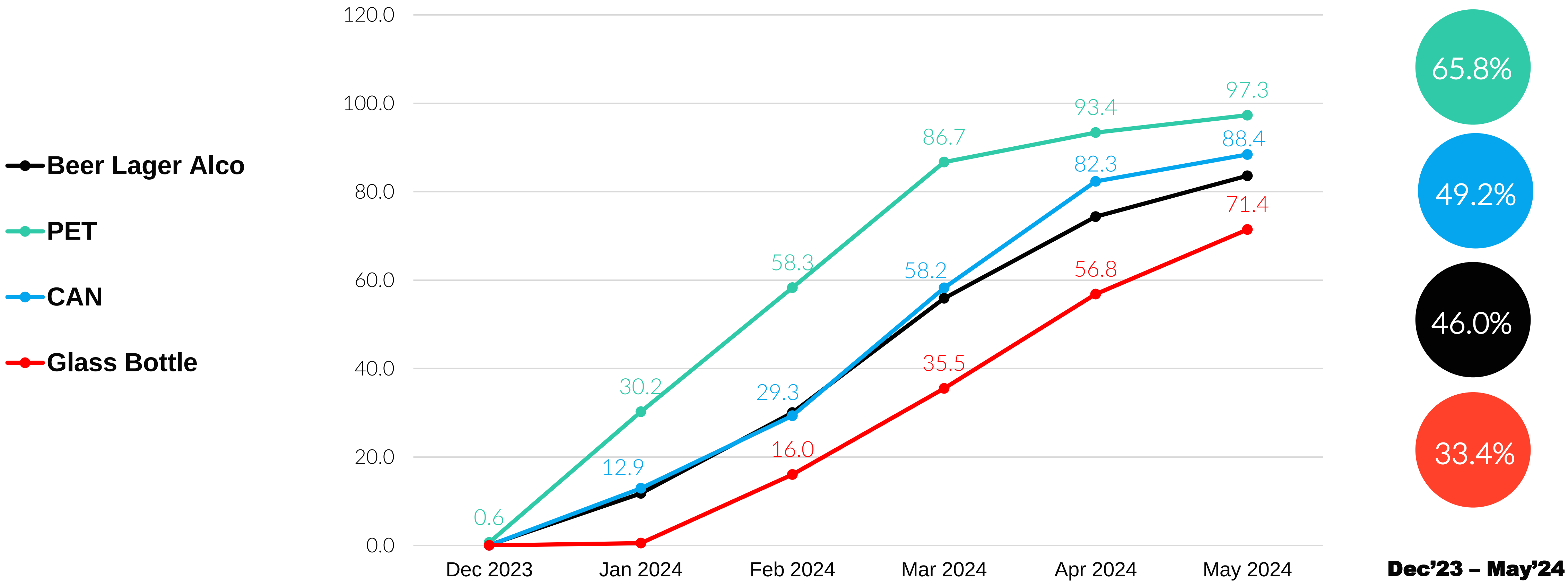
Category status at **retail channels level**

- Discounters consolidated leader position [at almost 30%], gaining the most from Supermarkets IKA and Hypermarkets. More shoppers purchased from Discounters, but the gap to Hypers has decreased [as second recruited the more & most]. Frequency decrease was a negative factor for this channel.
- Hypermarkets improved their market share the most in beer lager alco, attracting volumes from all other channels except Discounters. Recruitment in this channel was the highest, but frequency decreased.
- Supermarkets IKA lost the most, losing share and leaking especially towards Discounters. All measures – penetration, frequency, volume per trip – registered negative developments in this channels.
- At the same time, Supermarkets LKA were flat: frequency increased a lot, but with some shoppers lost.
- Modern Proximity contracted as a consequence of frequency and volume per trip decrease.
- Traditional Trade slightly lost share. Their decline is primary attributed to penetration decrease, but frequency improved. Consumption remains highest in Traditional Trade.

By May'24, 83.6% of beer lager alco packages purchased for in-home consumption were registered in DRS, with both PET and CAN over indexed

Beer Lager Alco

DRS Development for at home purchases [Volume % Pieces]



In first six months since DRS implementation, the category lost 1.2% in volume for at home, coming from lower consumption [particularly lower frequency]. Penetration kept a positive trend, with recruitment at 2.5% [126k new shoppers], up to 68.7%

Beer Lager Alco

Dec 22 - May 23 | Dec 23 - May 24

Period 1	Period 2
Value abs.	Value abs.
Change abs.	Change %

Value (000 RON)	
1.763.445,8	1.933.523,8
170.078,0	9,6%

Average Price (RON/L)	
6,08	6,74
0,67	10,9%

Volume (000 L)	
290.146,2	286.741,7
-3.404,4	-1,2%

Buyers (000)	
5.009	5.134
126	2,5%

Volume per Buyer (L)	
57,930	55,848
-2,082	-3,6%

Population (000 HH/Ind)	
7.470	7.470
-0	-0,0%

Penetration	
67,0	68,7
1,7	2,5%

Volume per Trip (L)	
3,791	3,782
-0,009	-0,2%

Frequency	
15,3	14,8
-0,5	-3,4%

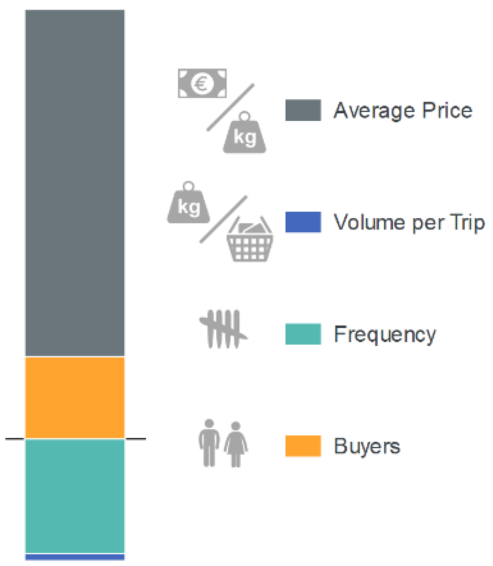
Volume per Trip (Pieces)	
6,4	6,5
0,1	1,6%

Repeat Rate	
80,7	82,0
1,3	1,6%

Spend per Buyer (RON)	
352,08	376,59
24,50	7,0%

Volume per Buyer (Pieces)	
98,3	96,6
-1,8	-1,8%

Key Driver Contribution to Value Change in %



Beer

RO FMCG HH Scan 6000

GfK YouGov

Zooming on monthly level, penetration was challenged particularly in Jan-Feb’24 & Apr’24, while frequency most in the month where recruitment was positive [trialists]. Shoppers rather went for downsizing. Av. prices not even close the spikes of SSD [except Jan’24]

Beer Lager Alco

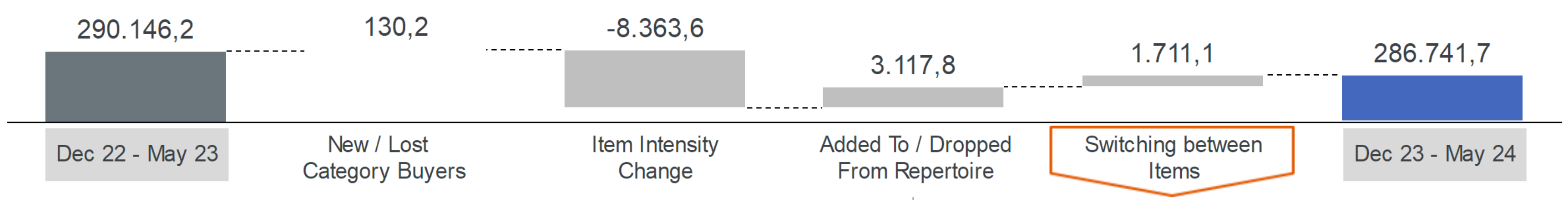
Monthly shopper behavior development starting DRS implementation

	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024
Changes vs. PY ->>>												
Penetration	44,2	34,0	36,3	35,2	45,9	43,9	46,4	32,5	35,2	40,6	44,9	49,0
Penetration – change vs. PY							+4.9%	-4.5%	-2.9%	+15.5%	-2.3%	+11.7%
Frequency	4,2	4,0	4,0	4,5	4,3	4,7	3,9	3,8	4,0	4,1	4,5	4,1
Frequency – change vs. PY							-7.7%	-3.6%	+1.5%	-8.8%	+4.6%	-12.0%
Vol/ trip [L]	4,069	3,618	3,505	3,561	4,067	3,769	3,921	3,622	3,501	3,617	3,791	4,083
Vol/ trip [L] – change vs. PY							-3.6%	+0.1%	-0.1%	+1.6%	-6.8%	+8.3%
Vol/ trip [Pieces]	7,0	6,1	5,8	5,9	7,0	6,4	7,3	6,1	5,9	6,2	6,5	6,9
Vol/ trip [Pieces] – change vs. PY							+4.3%	-0.1%	+0.8%	+5.1%	-6.6%	+6.7%
Av. price [RON/ L]	5,84	5,93	5,94	6,07	6,23	6,34	6,86	6,51	6,47	6,64	6,82	6,94
Av. price [RON/ L] – change vs. PY							+17.4	+9.8%	+9.0%	+9.4%	+9.4%	+9.5%
Volume [000 L]	56.126,9	36.524,1	37.854,7	41.787,3	59.920,5	57.932,7	52.335,5	33.674,2	37.248,3	44.755,6	57.060,1	61.668,0
Volume [000 L] – change vs. PY							-6.8%	-7.8%	-1.6%	+7.1%	-4.8%	+6.4%

Consumer Panel Romania GfK

All the volume lost in Dec'23 – May'24 was a due to a decrease in consumption intensity, but beer lager alco kept being added to repertoire and won in the battle with other beverages [gains came from SSD - 36%, followed by still drinks - 26.6% and other beverages - 17.3%]

Beer Lager Alco



Volume (000 L/tonnes)

Change:
-3.404,4
-1,2%

Losses to: 136.258 / Gains from: 137.969

Total switching: 1.711

	Losses to	Gains from	Aff.	Net switching	Aff.
CSD	-31.525	33.046	85	1.522	85
Still Drinks	-5.594	6.718	78	1.124	78
Other Beverages	-2.577	3.305	80	729	80
Water	-69.966	70.500	116	534	116
Ready to Drink Tea	-1.543	1.632	74	89	74
Beer Other	-6.301	4.538	104	-1.763	104
Wine	-9.175	8.673	100	-502	100
Spirits	-3.163	3.018	97	-145	97
Sports Drinks	-244	144	73	-100	73
Coffee wo. RTD Coffee	-2.360	2.385	79	25	79

Beverages
RO FMCG HH Scan 6000

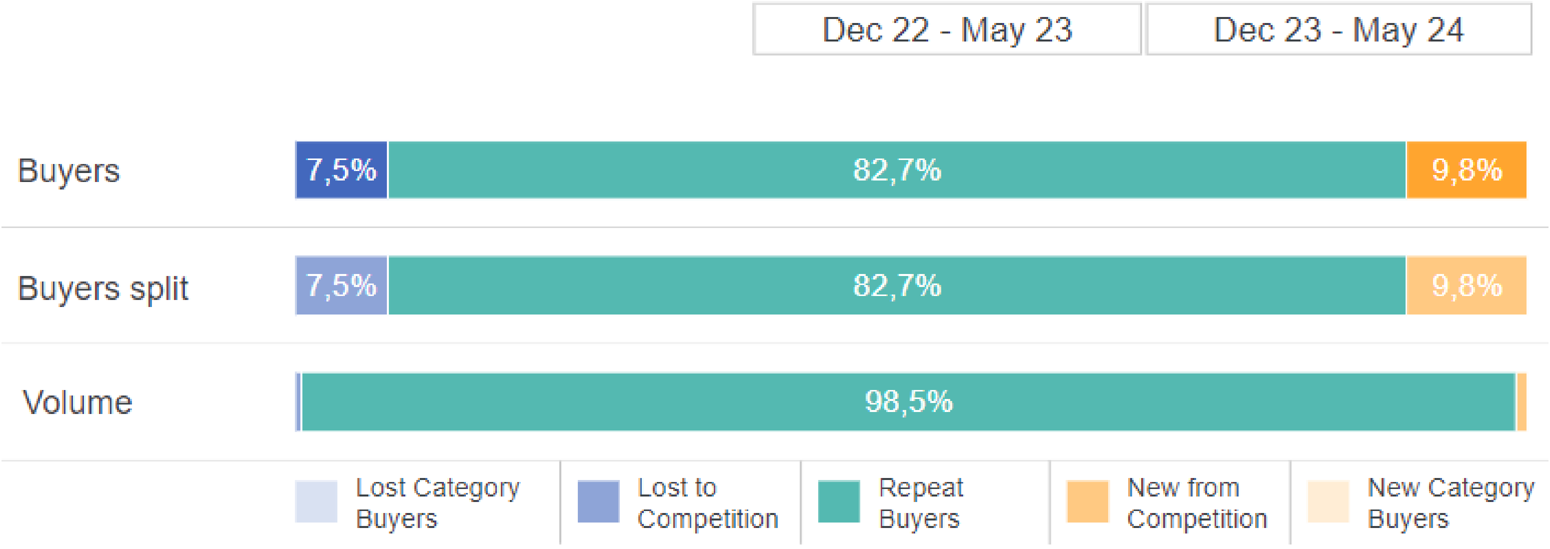
Volume (000 L/tonnes)
Gain & Loss (RP PA)

Consumer Panel Romania GfK | Affinity Index measure for exchange relationships between two items, if above 100 is higher than expected

GfK | YouGov

Beer Lager Alco won more shoppers than it lost [9.8% vs. 7.5%]. New ones are also more loyal [6.6% vs. 4.0%], consuming more [with frequency as driver]

Repeaters are 82.7% from all shoppers, generating 98.5% of category volume. Their loyalty is also slightly up



	Volume per trip		Frequency		Volume per buyer		Loyalty Volume	
	P1	P2	P1	P2	P1	P2	P1	P2
Total	3,79	3,78	15,3	14,8	57,89	55,81	20,1	20,6
New Buyers		2,93		3,4		10,10		6,6
Repeat Buyers	3,79	3,80	16,5	16,1	62,48	61,21	21,0	21,5
Lost buyers	3,63		2,0		7,35		4,0	

Lost buyers increase consumption most for water, spirits and smaller beverage segments, while new ones decreased for water, still drinks, wine and other beverages

Dec 22 - May 23 | Dec 23 - May 24

Beer Lager Alco

	Lost Buyers %		Repeat Buyers %		New Buyers %	
Buyers %	**7,5**		**82,7**		**9,8**	
Loyalty Rate (Measure)	**4,0**		**21,0**	**21,5**		**6,6**
others = 100%, measure %	P1	P2	P1	P2	P1	P2
Total Beverages	100,0	100,0	100,0	100,0	100,0	100,0
CSD	18,4	18,5	20,0	19,8	16,5	18,8
Water	61,0	63,3	60,4	60,4	66,1	65,3
Beer Other	2,0	1,5	1,7	2,2	1,5	1,4
Ready to Drink Tea	1,6	1,1	1,4	1,2	1,1	0,8
Nectars and Juices	1,7	1,3	1,7	1,8	1,4	1,5
Still Drinks	6,2	4,4	3,9	3,2	2,8	2,1
Energy Drinks	0,5	0,3	0,3	0,3	0,4	0,2
Sports Drinks	0,1	0,2	0,1	0,3	0,2	0,1
RTD Coffee	0,0	0,0	0,1	0,1	0,1	0,1
Coffee wo. RTD Coffee	1,6	1,4	1,5	1,5	1,6	1,7
Wine	4,1	4,3	4,9	5,2	5,4	5,1
Spirits	0,8	1,3	1,7	2,1	1,3	1,7
Other Beverages	1,9	2,3	2,3	2,0	1,8	1,3

Beverages | Volume (000 L/tonnes)

RO FMCG HH Scan 6000 | New - Lost - Retained (RP PA)

Consumer Panel Romania GfK

Lost buyers are over indexed in Bucharest incl. Ilfov, small urban and Oltenia. New shoppers are overrepresented in Bucharest incl. Ilfov, Dobrogea and Oltenia

Beer Lager Alco

Dec 22 - May 23 | Dec 23 - May 24

Population Distribution %	Buyers (000)	Total Item (PX) 5.560	Lost Buyers (P1) 417	Repeat Buyers (P2) 4.599	New Buyers (P2) 544
14%	Bucharest & Ilfov	118	127	113	157
18.7%	Urban over 150K inh	119	86	124	97
11.7%	Urban 50-150k inh	102	95	106	75
15.7%	Urban up to 50K inh	97	137	94	91
39.8%	Rural	86	84	85	92
11.3%	BUCURESTI	117	123	111	168
20.3%	MUNTENIA	106	102	109	81
4.3%	DOBROGEA	137	90	141	141
20.3%	MOLDOVA	88	92	90	71
19.9%	TRANSILVANIA	91	74	94	82
13.9%	BANAT CRISANA MARAMURES	94	102	93	105
10%	OLTENIA	102	140	95	132

Beverages

RO FMCG HH Scan 6000

New - Lost - Retained (RP PA)

Lost shoppers are over indexed most in 3001 – 6000 RON range and mature without children. New ones are, income wise, more in 3001 – 4000 RON and 7001 – 8000 RON, while life stage wise also mature without children

Beer Lager Alco

Dec 22 - May 23 | Dec 23 - May 24

Population Distribution %	Buyers (000)	Total Item (PX) 5.560	Lost Buyers (P1) 417	Repeat Buyers (P2) 4.599	New Buyers (P2) 544
8.9%	Up to 1400 RON	78	100	71	118
6.4%	1401-2000 RON	57	88	55	53
12.6%	2001-3000 RON	79	86	75	110
12.4%	3001-4000 RON	93	116	87	124
12.1%	4001-5000 RON	104	143	106	58
10.7%	5001-6000 RON	111	122	111	104
8.6%	6001-7000 RON	120	81	131	62
7.9%	7001-8000 RON	113	111	112	126
20.4%	Over 8000 RON	118	70	123	115
8.1%	Young without children	45	55	36	111
11.4%	Mature without children	102	119	96	144
10.9%	Families with children <6 yrs	88	93	88	81
20.1%	Families with children 6-18 yrs	107	105	107	104
25.4%	Senior without children	116	99	122	79
24.1%	Retired	100	107	99	103

Beverages

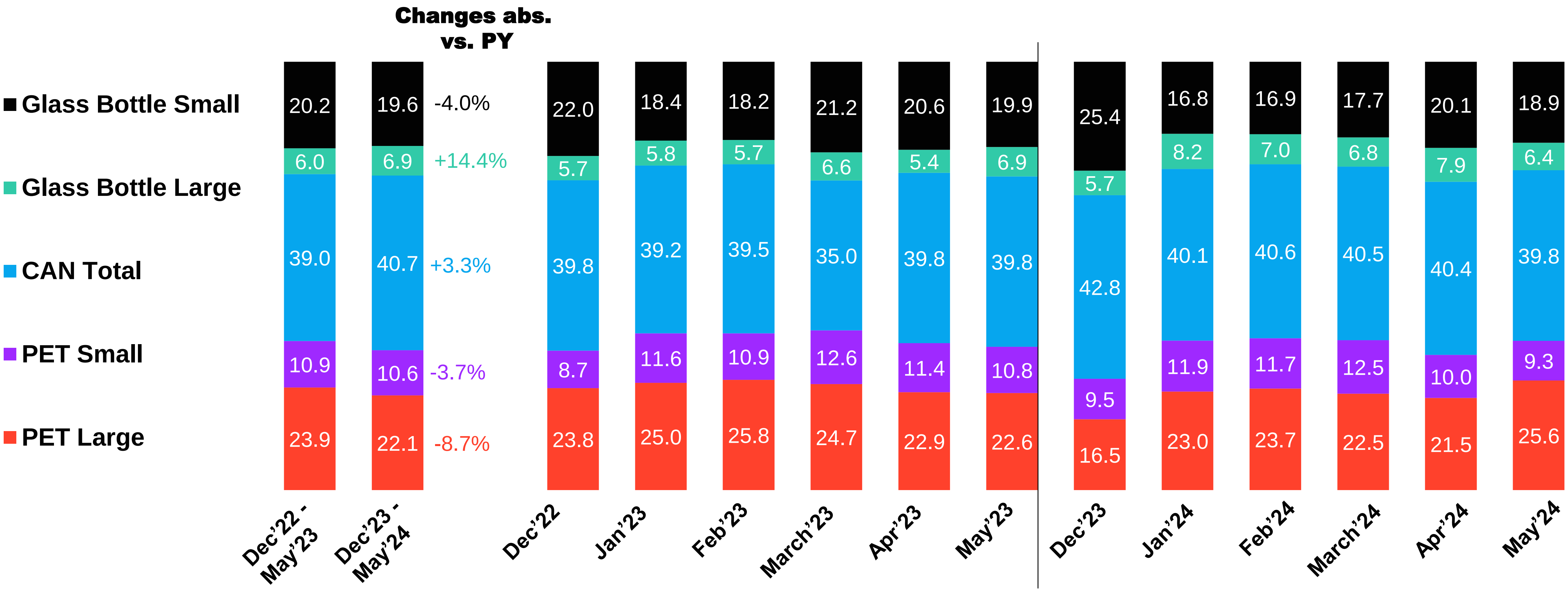
RO FMCG HH Scan 6000

New - Lost - Retained (RP PA)

Zooming on pack types, only large glass bottles and CANs managed to improve share [+0.9pp and +1.7pp vs. PY] and grow in abs. volumes. PET kept contracting, especially on big sizes [most 3L and 2L]

Beer Lager Alco

Main pack types shares development for at home consumption



Consumer Panel Romania GfK | GB Small Small <= 500ml, GB Large Large >500ml | PET Small <= 1000ml, PET Large > 1000ml

GfK YouGov

CANs and Small GB are the two formats with highest penetration and only ones recruiting for at home, but even so second had a negative development due to frequency. Large GB overperformed due to consumption, while PET lost due to less shoppers mainly

Beer Lager Alco

Absolute volume change vs. PY		Penetration Dec 22 - May 23	Penetration Dec 23 - May 24	Penetration Change rate	Frequency Dec 22 - May 23	Frequency Dec 23 - May 24	Frequency Change rate	Volume per Trip (L) Dec 22 - May 23	Volume per Trip (L) Dec 23 - May 24	Volume per Trip (L) Change rate	Volume per Trip (Pieces) Dec 22 - May 23	Volume per Trip (Pieces) Dec 23 - May 24	Volume per Trip (Pieces) Change rate	Average Price (RON/L) Dec 22 - May 23	Average Price (RON/L) Dec 23 - May 24	Average Price (RON/L) Change rate
Beer Lager Alco	-1.2%	67,0	68,7	2,5	15,3	14,8	-3,4	3,791	3,782	-0,2	6,4	6,5	1,6	6,08	6,74	10,9
Glass Bottle Small	-4.0%	39,2	40,5	3,5	5,8	5,2	-10,5	3,459	3,585	3,6	9,5	9,8	3,4	9,24	10,29	11,4
Glass Bottle Large	+14.4%	17,0	16,3	-4,0	5,6	6,1	9,7	2,459	2,671	8,6	3,5	3,8	9,0	7,85	8,20	4,4
CAN Total	+3.3%	45,7	49,0	7,1	9,7	9,4	-3,1	3,405	3,386	-0,5	6,8	6,8	-0,6	5,99	6,67	11,4
PET Small	-3.7%	17,2	16,6	-3,4	8,9	8,7	-1,6	2,771	2,806	1,3	4,4	4,8	7,9	5,24	5,68	8,5
PET Large	-8.7%	14,3	13,3	-6,5	10,7	10,4	-2,7	6,076	6,098	0,4	2,6	2,6	0,8	3,48	3,77	8,2

Dec 22 - May 23 | Dec 23 - May 24

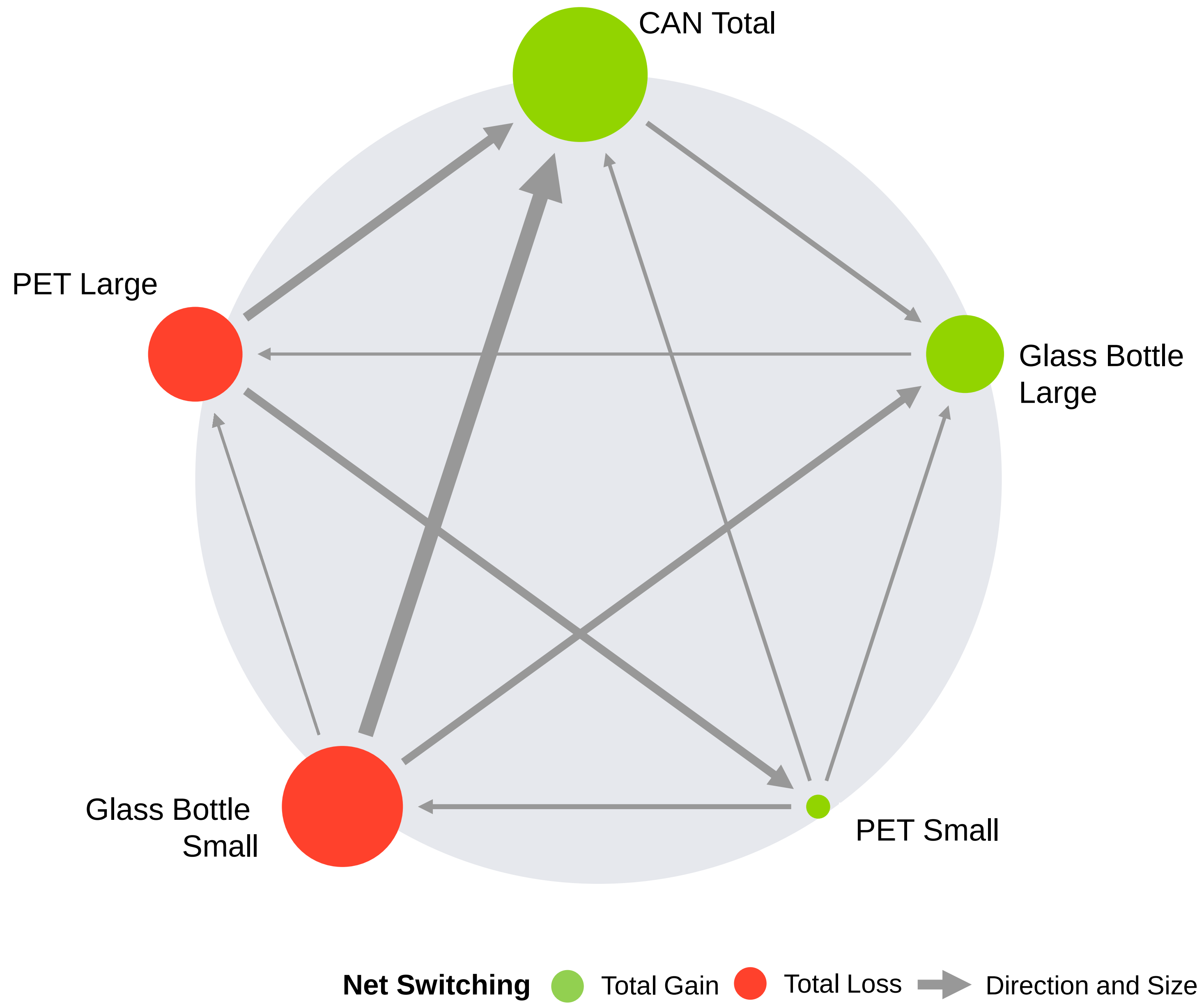
Beer

RO FMCG HH Scan 6000

Consumer Panel Romania GfK | GB Small Small <= 500ml, GB Large Large >500ml | PET Small <= 1000ml, PET Large > 1000ml

Looking at the volume movement between packs sizes/ types, CANs won most and from almost all others [except Large GB, most from Small GB]. Large GB also a winner, gaining from all except Large PET. Small PET slightly positive, winning only from Large PET.

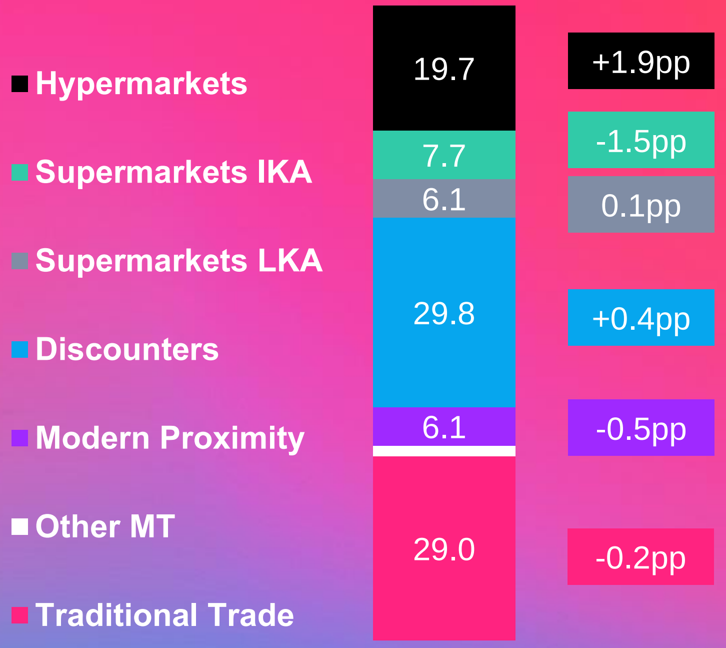
At the other end, Small Glass Bottle "leaked" most [highest to CAN]



Consumer Panel Romania GfK | GB Small Small <= 500ml, GB Large Large >500ml | PET Small <= 1000ml, PET Large > 1000ml

Discounters consolidated leader position [at almost 30%], but Hypers improved most [+1.9pp vs. PY]

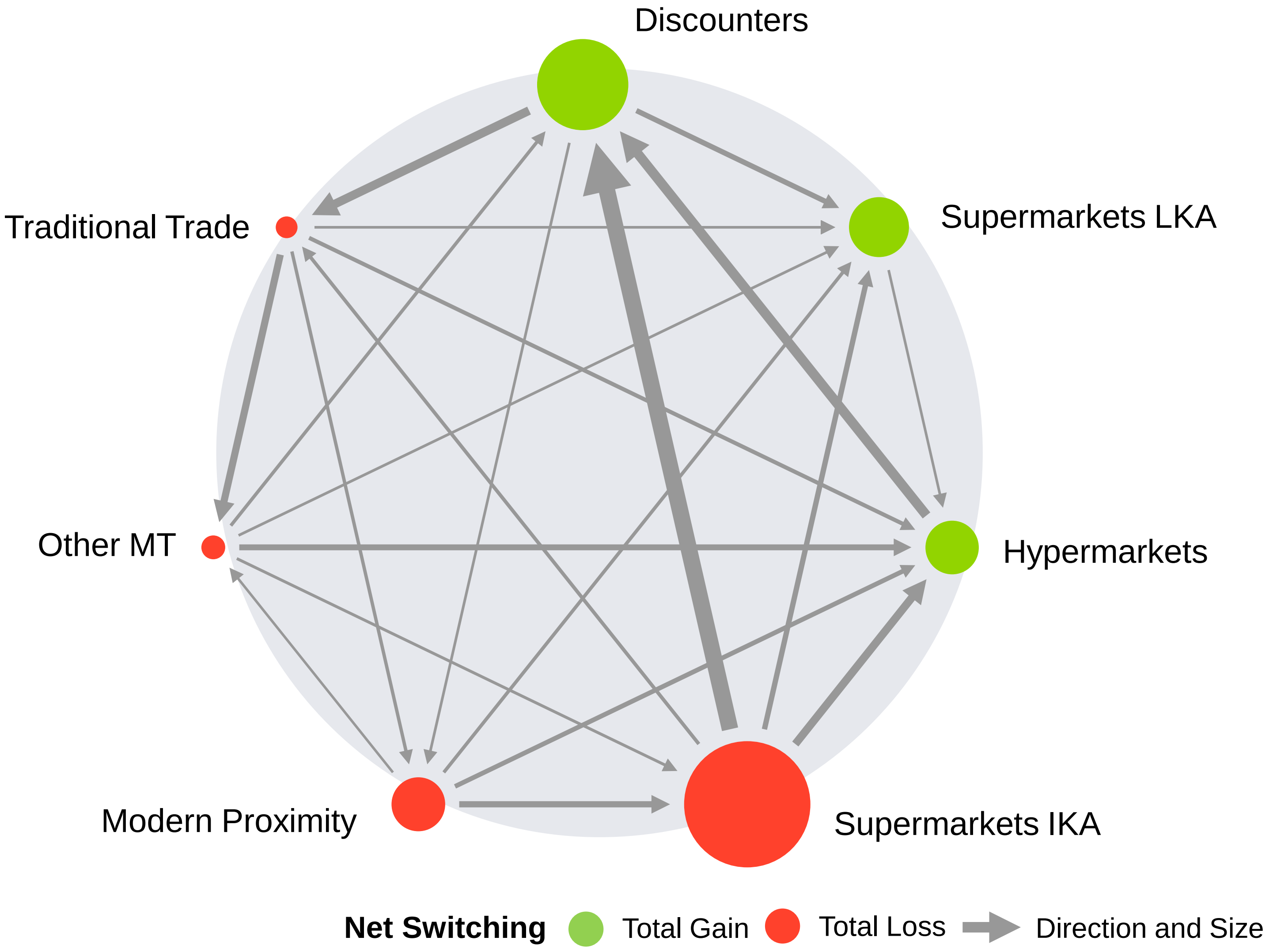
Volume Share% & chg. pp vs. PY



Dec'23 – May'24

Consumer Panel Romania GfK | Other MT incl. Online, Cash & Carry, Other e.g. DYI, Toys & Home, Sports etc

Hypers attracting now from all others, except Discounters



GfK CPS | YouGov

Discounters keep to upper hand when it comes to penetration, but gap on Hypers has decreased [as second recruited the more & most]. Consumption remains highest in TT [46L]. At the other end, Supers IKA lost most, through all drivers

Beer Lager Alco

	Absolute volume change vs. PY	Penetration: Dec 22 - May 23	Penetration: Dec 23 - May 24	Penetration: Change rate	Frequency: Dec 22 - May 23	Frequency: Dec 23 - May 24	Frequency: Change rate	Volume per Trip (L): Dec 22 - May 23	Volume per Trip (L): Dec 23 - May 24	Volume per Trip (L): Change rate	Volume per Trip (Pieces): Dec 22 - May 23	Volume per Trip (Pieces): Dec 23 - May 24	Volume per Trip (Pieces): Change rate	Average Price (RON/L): Dec 22 - May 23	Average Price (RON/L): Dec 23 - May 24	Average Price (RON/L): Change rate
Total Market	-1.2%	67,0	68,7	2,5	15,3	14,8	-3,4	3,791	3,782	-0,2	6,4	6,5	1,6	6,08	6,74	10,9
Hypermarkets	+9.2%	29,5	33,4	13,3	6,1	5,5	-9,8	3,860	4,126	6,9	7,6	8,1	6,8	6,81	7,31	7,3
Supermarkets IKA	-17.4%	19,7	18,8	-4,7	6,3	6,0	-5,3	2,861	2,618	-8,5	5,5	4,9	-11,3	7,02	7,74	10,4
Supermarkets LKA	+0.1%	10,1	9,4	-6,5	7,1	8,2	14,5	3,227	3,018	-6,5	5,9	5,5	-6,0	6,72	7,26	8,1
Discounters	+0.3%	35,4	36,4	2,7	7,6	7,3	-4,0	4,211	4,284	1,7	7,2	7,6	4,8	5,32	5,99	12,7
Modern Proximity Stores	-8.2%	14,3	14,4	0,5	5,8	5,6	-3,8	3,082	2,929	-5,0	5,3	5,0	-5,2	6,54	7,27	11,1
Traditional Trade	-1.7%	26,1	24,3	-7,0	10,8	11,8	8,6	4,011	3,905	-2,6	5,6	5,7	1,1	5,81	6,47	11,4

Dec 22 - May 23 | Dec 23 - May 24

Beverages

RO FMCG HH Scan 6000
Consumer Panel Romania GfK

Take-aways

Water

Dec’23 – May’24

Category status at **total market level**

- 80.6% of water packages purchased by May 2024 were registered in DRS (with PET just slightly over-indexed)
- Water in-home volumes evolution were negatively influenced by smaller volumes purchased per trip. Category still recruited for in-home, reaching around 9 in 10 families. Consumption decrease was behind category volume loss, while the positive switching from other beverages slightly balanced the effect. Gains came mostly from SSD.
- Almost 89% of category shoppers were repeaters, accounting for 99% of the volumes. More than half of their beverage consumption is for water [increasing vs PY]. Water gained more shoppers than it lost, but new ones are significantly less loyal than those lost. They also purchase more often, but in lower quantities.
- **Pack types:** PET 2.5L and PET 10L were the packs that grew the most, due to more shoppers and more frequent purchases. Still, in terms of share, highest improvement was registered by PET 5L, which also recruited shoppers. Highest contraction happened for the most important size, PET 2L, which is now covering less than half of the category. It continued to add more shoppers, but overall the frequency and number of packs per trip decreased. PET 1L had the strongest recruitment rate. Glass Bottle suffered a contraction, impacted by less frequency purchases. Looking at the volume movement between packs types/sizes, PET 5L attracted most, especially from PET 2L. On the winning end we have PET 2.5L [most from PET 5L], PET 0.5L and PET 10L [gaining from almost all others in smaller quantities]. At the other end, PET 2L lost most [due to upsizing to PET 5L]

Take-aways

Water

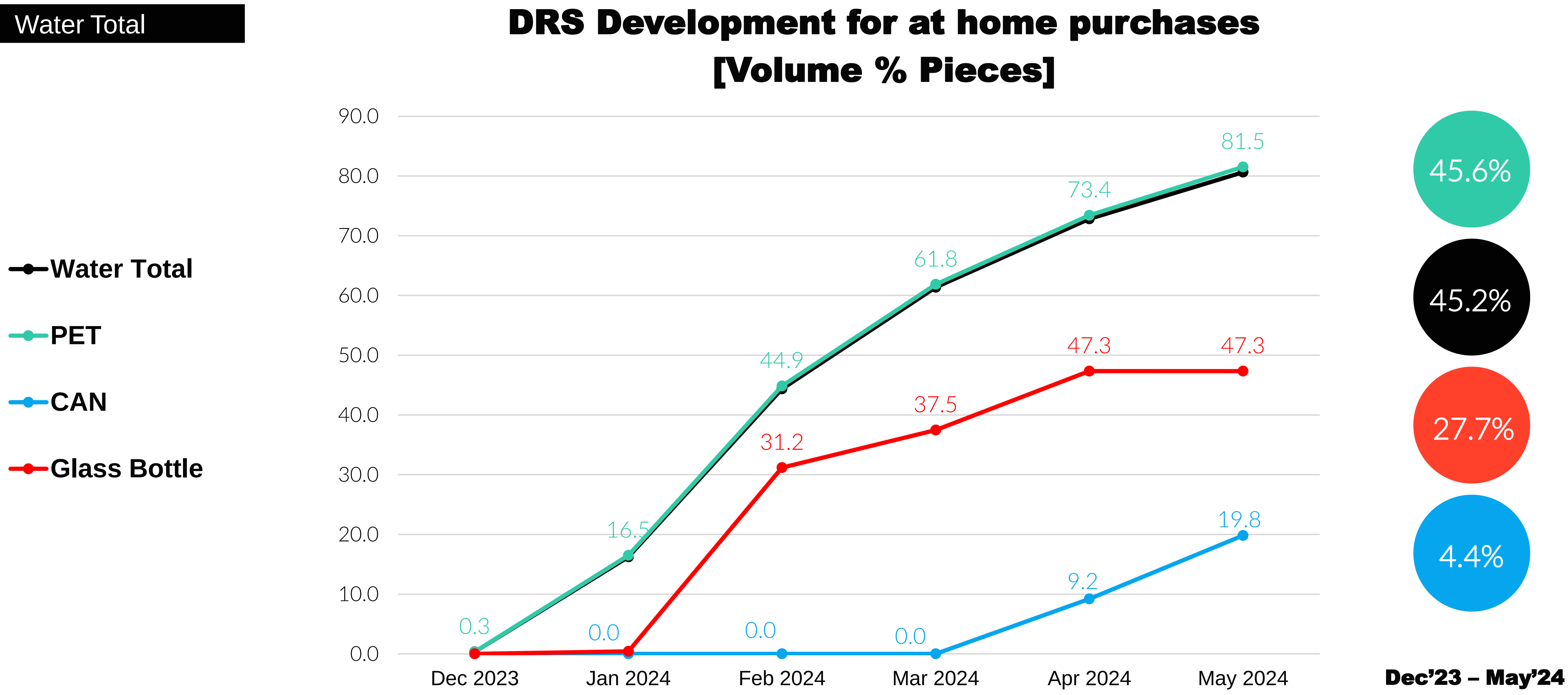
Dec’23 – May’24

Category status at **retail channels level**

- Discounters took the leadership position in this category, with 1.1pp gained vs PY, gaining the most volumes from Hypermarkets. They detached from Hypers also from the penetration perspective, but being still behind in terms of frequency & volume per trip.
- Hypermarkets contracted 2.6pp, losing volume towards all channels excepting Supermarkets IKA. Frequency reduction affected the performance of this channel, while volume per trip contributed also on top of this.
- Supermarkets IKA lost share, volumes being lost towards Discounters, Supermarkets LKA and Hypermarkets. More shoppers purchased category here, but lower volumes were bought per trip.
- Supermarkets LKA are improving their position in water, gaining the most volumes from Hypermarkets. Number of shoppers remained constant, while there was the biggest frequency improvement.
- Modern Proximity was almost constant. There was a big recruitment, but lower baskets purchased from this channel.
- No major development for Traditional Trade. Most of their gained volumes came from Hypermarkets, but volumes were lost on the other hand towards Modern Proximity and IKA Supermarkets.

After 6 months, 80.6% of water packages purchased for in-home consumption were registered in DRS, with PET just slightly over-indexed

Water Total



Around 9 out 10 families purchase bottled water at home and category is still recruiting [+140k vs. PY]. Consumption was slightly negative [due to smaller baskets], influencing also the overall volume development. Behind, only still segment underperformed [60.6% from total category volume, -8.9% vs. PY]

Water Total

Dec 22 - May 23 | Dec 23 - May 24

Period 1	Period 2
Value abs.	Value abs.
Change abs.	Change %

Value (000 RON)	
1.058.226,9	1.131.758,4
73.531,5	6,9%

Average Price (RON/L)	
1,32	1,43
0,11	8,5%

Volume (000 L)	
802.062,0	790.260,1
-11.801,9	-1,5%

Buyers (000)	
6.470	6.610
140	2,2%

Volume per Buyer (L)	
123,964	119,553
-4,411	-3,6%

Population (000 HH/Ind)	
7.470	7.470
-0	-0,0%

Penetration	
86,6	88,5
1,9	2,2%

Volume per Trip (L)	
8,873	8,458
-0,415	-4,7%

Frequency	
14,0	14,1
0,2	1,2%

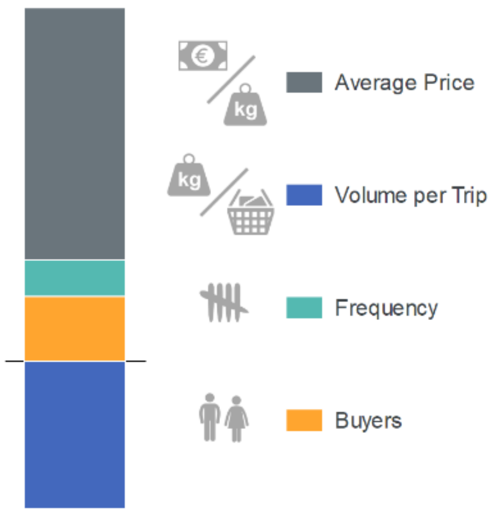
Volume per Trip (Pieces)	
4,3	4,1
-0,2	-4,2%

Repeat Rate	
88,8	89,6
0,8	0,9%

Spend per Buyer (RON)	
163,56	171,22
7,66	4,7%

Volume per Buyer (Pieces)	
59,9	58,0
-1,9	-3,1%

Key Driver Contribution to Value Change in %



Water
RO FMCG HH Scan 6000

Consumer Panel Romania GfK

Zooming on monthly level, penetration improved month on month, with higher values in Dec’23, Feb’24 and Apr’24. Volume per trip was challenged more in Feb-Apr’24, while frequency started also to contract from Mar’24 onwards

Water Total

Monthly shopper behavior development starting DRS implementation

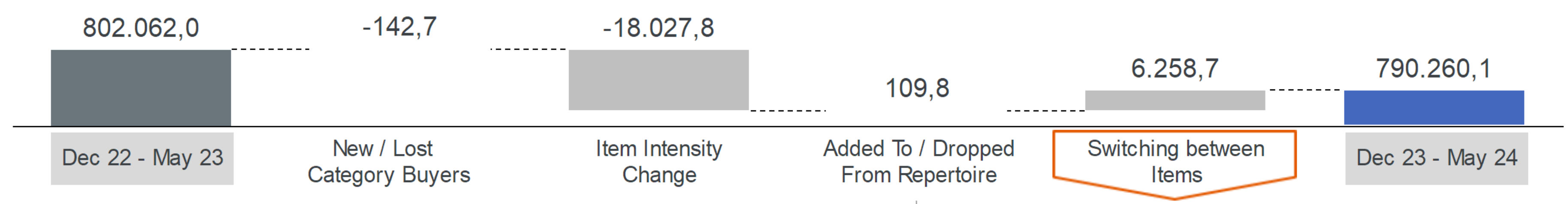
	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024
Changes vs. PY ->>>							+4.5%	+2.4%	+5.4%	+2.1%	+4.4%	+1.5%
Penetration	60,0	61,5	59,7	60,6	62,3	62,1	62,7	62,9	63,0	61,9	65,0	63,0
Changes vs. PY							-0.1%	+2.9%	+1.7%	-0.4%	-1.1%	-2,7%
Frequency	3,3	3,3	3,2	3,4	3,3	3,4	3,3	3,4	3,3	3,4	3,3	3,3
Changes vs. PY							+1.7%	-4.5%	-8.2%	-5.9%	-6.6%	-4.9%
Vol/ trip [L]	9,227	8,824	8,893	8,821	8,938	8,553	9,382	8,427	8,163	8,298	8,347	8,138
Changes vs. PY							+2.7%	-4.7%	-6.6%	-6.7%	-7.7%	-2.4%
Vol/ trip [Pieces]	4,4	4,2	4,2	4,2	4,4	4,2	4,6	4,0	4,0	3,9	4,1	4,1
Changes vs. PY							+4.8	+8.2%	+9.2%	+8.9%	+10.4%	+10.5%
Av. price [RON/ L]	1,31	1,29	1,30	1,32	1,34	1,36	1,37	1,40	1,42	1,44	1,48	1,50
Changes vs. PY							+6.1%	+0.6%	-1.6%	-4.3%	-3.6%	-6.1%
Volume [000 L]	135.771,9	131.962,6	126.940,8	137.499,0	136.738,0	133.149,7	144.087,0	132.732,7	124.886,5	131.632,0	131.840,1	125.081,7

Consumer Panel Romania GfK

GfK | YouGov

Almost all the volume lost by water in Dec’23 – Mar’24 was due to a decrease in consumption intensity. These losses were partially balanced by the positive switching from other beverages. Here, most notable was the SSD interaction [37.4% of all net switching gains, 120 affinity index, hence more than expected]

Water Total



Volume (000 L/tonnes)

Change:
-11.801,9
-1,5%

Losses to: 216.445 / Gains from: 222.703

Total switching: 6.259

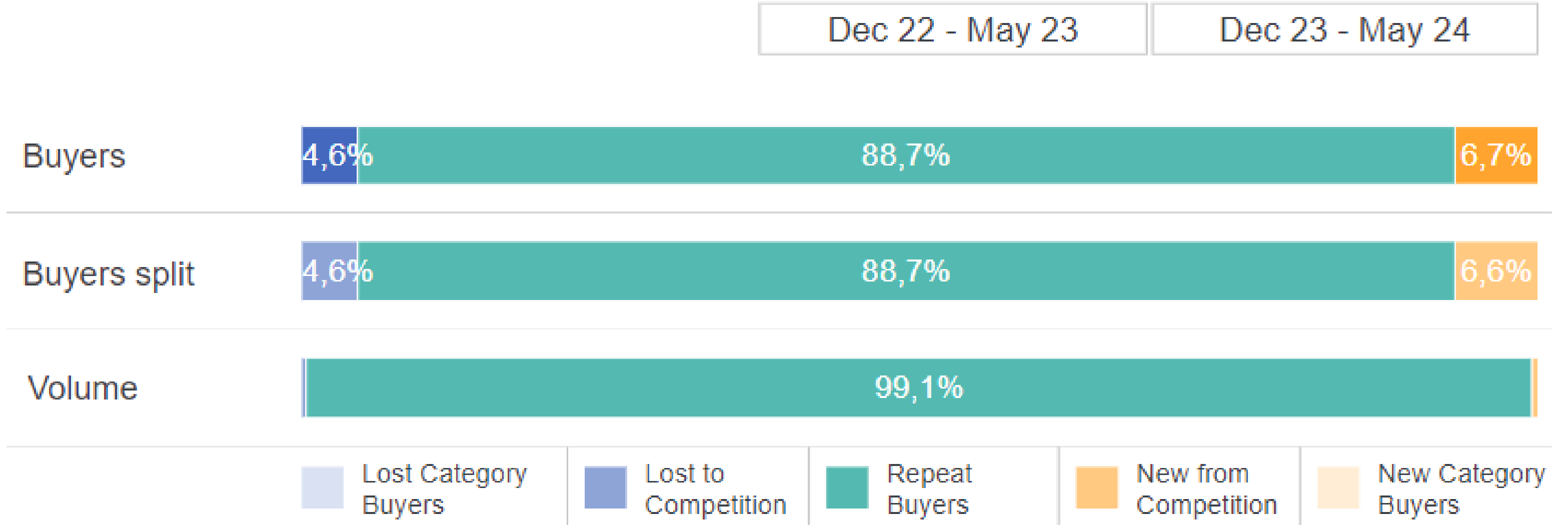
	Losses to	Gains from	Aff.	Net switching	Aff.
CSD	-77.615	80.427	120	2.812	120
Still Drinks	-12.807	13.781	96	975	96
Nectars and Juices	-9.399	10.194	111	795	111
Ready to Drink Tea	-3.422	4.143	100	721	100
Other Beverages	-6.021	6.678	98	657	98
Spirits	-5.209	4.672	88	-537	88
Beer Regular	-70.500	69.966	116	-534	116
Sports Drinks	-573	451	109	-122	109
RTD Coffee	-220	162	106	-58	106
Coffee wo. RTD Coffee	-5.379	5.379	102	-1	102

Beverages — Volume (000 L/tonnes)
RO FMCG HH Scan 6000 — Gain & Loss (RP PA)

Consumer Panel Romania GfK | Affinity Index measure for exchange relationships between two items, if above 100 is higher than expected

Water gained more shoppers than it lost [6.7% vs. 4.6%], but new ones are significantly less loyal than those lost [16.3% vs. 23.1%]. They also purchase more often, but in lower quantities

Almost 89% of shoppers are repeaters and they account for 99% of the category volume. More than half of their beverage consumption is for water [and this loyalty is also increasing]



	Volume per trip		Frequency		Volume per buyer		Loyalty Volume	
	P1	P2	P1	P2	P1	P2	P1	P2
Total	8,87	8,46	14,0	14,1	123,96	119,55	50,3	50,5
New Buyers		5,03		3,1		15,73		16,3
Repeat Buyers	8,88	8,51	14,6	15,0	129,41	127,34	50,8	51,5
Lost buyers	7,70		2,6		19,69		23,1	

Lost buyers increased consumption most SSD, then Wine, while new ones decreased more notable for SSD

Water Total

Dec 22 - May 23 | Dec 23 - May 24

	Lost Buyers %		Repeat Buyers %		New Buyers %	
Buyers %	4,6		88,7		6,7	
Loyalty Rate (Measure)	23,1		50,8	51,5		16,3
others = 100%, measure %	P1	P2	P1	P2	P1	P2
Total Beverages	100,0	100,0	100,0	100,0	100,0	100,0
CSD	27,7	31,3	35,0	34,9	36,6	34,3
Beer Regular	24,1	23,2	33,1	33,6	35,0	36,6
Beer Other	2,8	3,4	2,8	3,4	1,1	1,9
Ready to Drink Tea	2,0	0,8	2,4	2,0	0,6	0,6
Nectars and Juices	2,1	3,0	2,9	3,0	2,5	2,2
Still Drinks	7,0	4,6	7,0	5,8	5,9	5,5
Energy Drinks	0,3	0,2	0,7	0,5	0,8	0,4
Sports Drinks	0,1	0,2	0,3	0,4	0,1	0,2
RTD Coffee	0,0	0,1	0,1	0,1	0,1	0,1
Coffee wo. RTD Coffee	3,4	3,1	2,5	2,6	2,7	3,2
Wine	14,0	17,3	7,4	7,7	9,2	9,2
Spirits	5,2	4,2	2,4	3,0	2,3	2,4
Other Beverages	11,3	8,6	3,3	3,0	3,1	3,3

Beverages
RO FMCG HH Scan 6000
Consumer Panel Romania GfK

Volume (000 L/tonnes)
New - Lost - Retained (RP PA)

GfK YouGov

Lost buyers are overrepresented in rural, Dobrogea and Oltenia. On the other hand, new shoppers are over indexed in Rural and medium urban, Banat-Crisana-Maramures and Oltenia

Water Total

Dec 22 - May 23 | Dec 23 - May 24

Population Distribution %	Buyers (000)	Total Item PX (6.931)	Lost Buyers P1 (321)	Repeat Buyers P2 (6.149)	New Buyers P2 (461)
14%	Bucharest & Ilfov	114	82	118	81
18.7%	Urban over 150K inh	110	88	113	83
11.7%	Urban 50-150k inh	101	66	102	116
15.7%	Urban up to 50K inh	100	98	102	72
39.8%	Rural	90	123	86	121
11.3%	BUCURESTI	115	82	118	88
20.3%	MUNTENIA	106	96	106	104
4.3%	DOBROGEA	127	177	131	35
20.3%	MOLDOVA	86	101	86	80
19.9%	TRANSILVANIA	91	86	90	107
13.9%	BANAT CRISANA MARAMURES	100	84	99	120
10%	OLTENIA	107	143	103	133

Beverages

RO FMCG HH Scan 6000

New - Lost - Retained (RP PA)

GfK CPS | YouGov

Lost buyers are most skewed among lower to mid clusters [1401-4000 RON] and 7001-8000 RON, while life stage wise among young w/o children. New ones are by far most over indexed in 3001-4000 RON, mature w/o children and retired

Water Total

Dec 22 - May 23 | Dec 23 - May 24

Population Distribution %	Buyers (000)	Total Item (PX) 6.931	Lost Buyers (P1) 321	Repeat Buyers (P2) 6.149	New Buyers (P2) 461
8.9%	Up to 1400 RON	80	110	80	68
6.4%	1401-2000 RON	64	146	57	103
12.6%	2001-3000 RON	83	117	79	118
12.4%	3001-4000 RON	98	122	92	167
12.1%	4001-5000 RON	103	79	104	106
10.7%	5001-6000 RON	114	75	118	84
8.6%	6001-7000 RON	114	106	118	68
7.9%	7001-8000 RON	114	130	115	92
20.4%	Over 8000 RON	111	69	115	83
8.1%	Young without children	56	136	54	31
11.4%	Mature without children	105	92	102	151
10.9%	Families with children <6 yrs	90	70	91	89
20.1%	Families with children 6-18 yrs	111	118	114	62
25.4%	Senior without children	111	98	111	109
24.1%	Retired	97	93	95	127

Beverages

RO FMCG HH Scan 6000

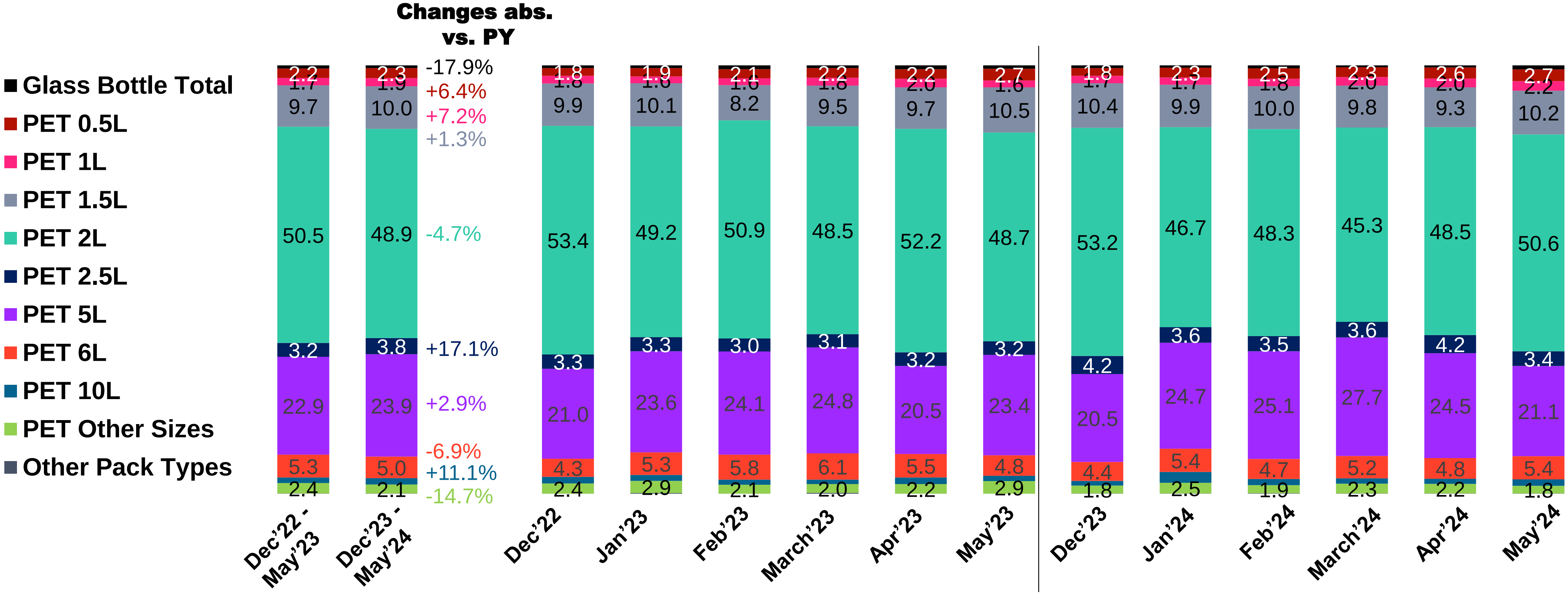
New - Lost - Retained (RP PA)

GfK CPS | YouGov

Zooming on pack types and sizes, highest improvement in market share were registered by PET 5L [+1pp vs. PY] and PET 2.5L [+0.6pp vs. PY], but in abs. terms only PET 2.5L and PET 10L improved by double digit. Highest drop [both in share and in abs. volumes] was for PET 2L, which is now covering less than half of the category

Water Total

Main pack types shares development for at home consumption



Consumer Panel Romania GfK | PET Other incl. sizes from 50ml to 19L | Other incl. Carton Box, CAN, Metallic Bottle etc

PET 2L remains the format with highest penetration [65.2%, but also consumption – 79.2L], followed by PET 1.5L and PET 0.5L, but recruitment rate was highest for PET 1L. Behind top performers – PET 2.5L and PET 10L – frequency was main driver

Water Total

	Absolute volume change vs. PY	Penetration Dec 22 - May 23	Penetration Dec 23 - May 24	Penetration Change rate	Frequency Dec 22 - May 23	Frequency Dec 23 - May 24	Frequency Change rate	Volume per Trip (L) Dec 22 - May 23	Volume per Trip (L) Dec 23 - May 24	Volume per Trip (L) Change rate	Volume per Trip (Pieces) Dec 22 - May 23	Volume per Trip (Pieces) Dec 23 - May 24	Volume per Trip (Pieces) Change rate	Average Price (RON/L) Dec 22 - May 23	Average Price (RON/L) Dec 23 - May 24	Average Price (RON/L) Change rate
Total Category	-1.5%	86,6	88,5	2,2	14,0	14,1	1,2	8,873	8,458	-4,7	4,3	4,1	-4,2	1,32	1,43	8,5
Glass Bottle	-17.9%	4,7	5,0	7,6	3,2	2,8	-10,7	5,340	4,560	-14,6	6,2	5,5	-11,2	3,24	3,76	16,1
PET 0.5L	+6.4%	35,9	39,1	9,0	3,5	3,3	-4,8	1,863	1,912	2,6	3,7	3,8	2,6	3,54	3,84	8,6
PET 1L	+7.2%	20,7	24,5	18,3	2,8	2,8	-1,8	3,206	2,958	-7,8	3,2	3,0	-7,8	2,48	2,85	15,0
PET 1.5L	+1.3%	36,6	39,4	7,5	4,7	4,6	-1,4	6,036	5,764	-4,5	4,0	3,8	-4,5	1,95	2,07	6,1
PET 2L	-4.7%	63,6	65,2	2,6	8,6	8,4	-2,2	9,913	9,418	-5,0	5,0	4,7	-5,0	1,18	1,31	10,4
PET 2.5L	+17.1%	11,6	12,4	6,4	4,3	4,8	10,8	6,790	6,746	-0,6	2,7	2,7	-0,6	1,20	1,27	5,8
PET 5L	+2.9%	31,7	33,6	6,1	6,9	6,9	0,1	11,223	10,870	-3,1	2,2	2,2	-3,1	1,01	1,02	1,5
PET 6L	-6.9%	6,3	6,1	-2,9	6,6	5,7	-13,3	13,617	15,059	10,6	2,3	2,5	10,6	0,63	0,65	3,2
PET 10L	+11.1%	3,2	3,3	4,4	2,8	3,0	6,5	16,041	16,037	-0,0	1,6	1,6	-0,0	0,92	0,92	0,6

Dec 22 - May 23 | Dec 23 - May 24

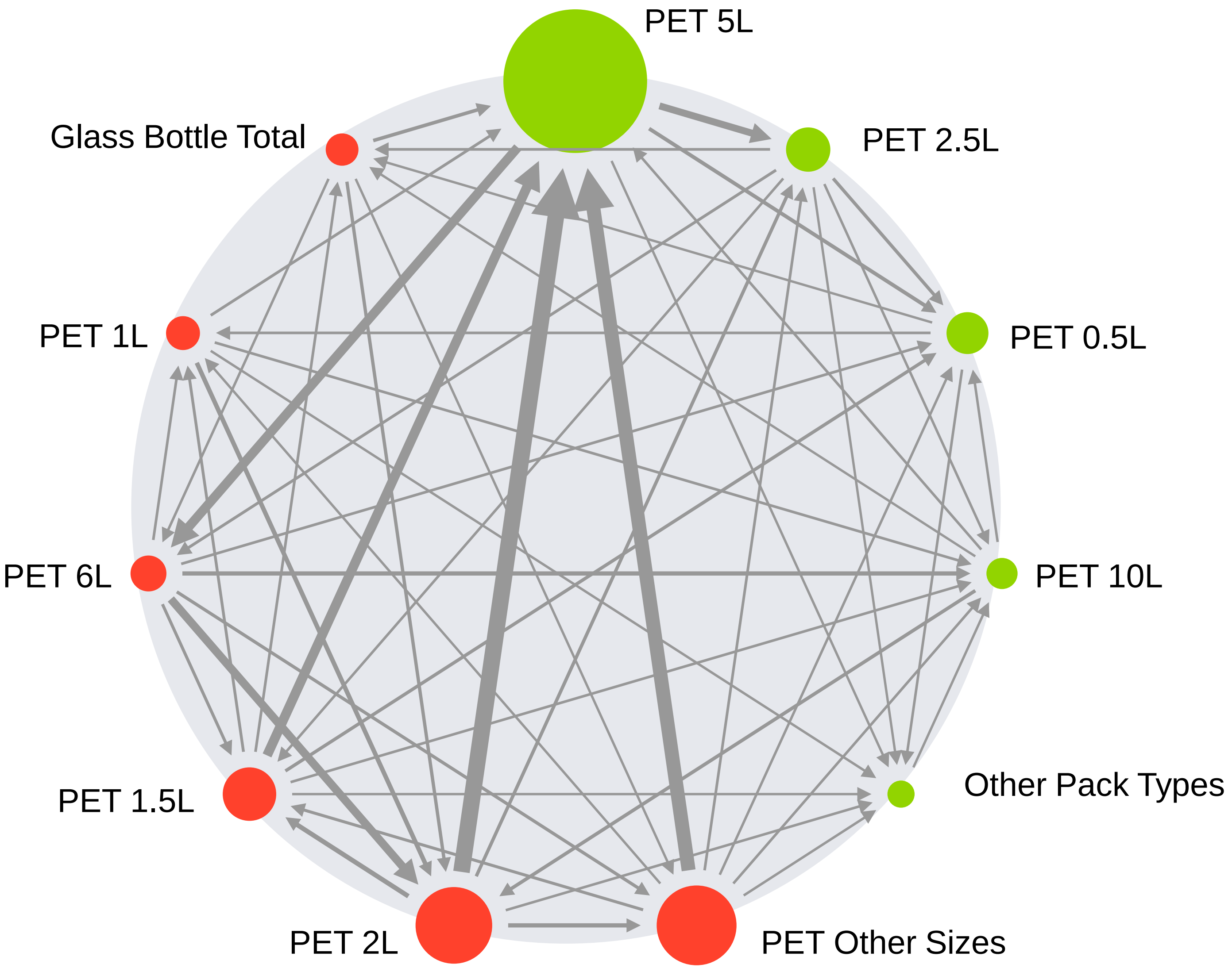
Water

RO FMCG HH Scan 6000

Consumer Panel Romania GfK | PET Other incl. sizes from 50ml to 19L | Other incl. Carton Box, CAN, Metallic Bottle etc

Looking at the volume movement between packs types/ sizes, PET 5L attracted most, especially from PET 2L. On the winning end we have PET 2.5L [most from PET 5L], PET 0.5L and PET 10L [gaining from almost all others in smaller quantities]

At the other end, PET 2L lost most [due to upsizing to PET 5L]



Net Switching Total Gain Total Loss Direction and Size

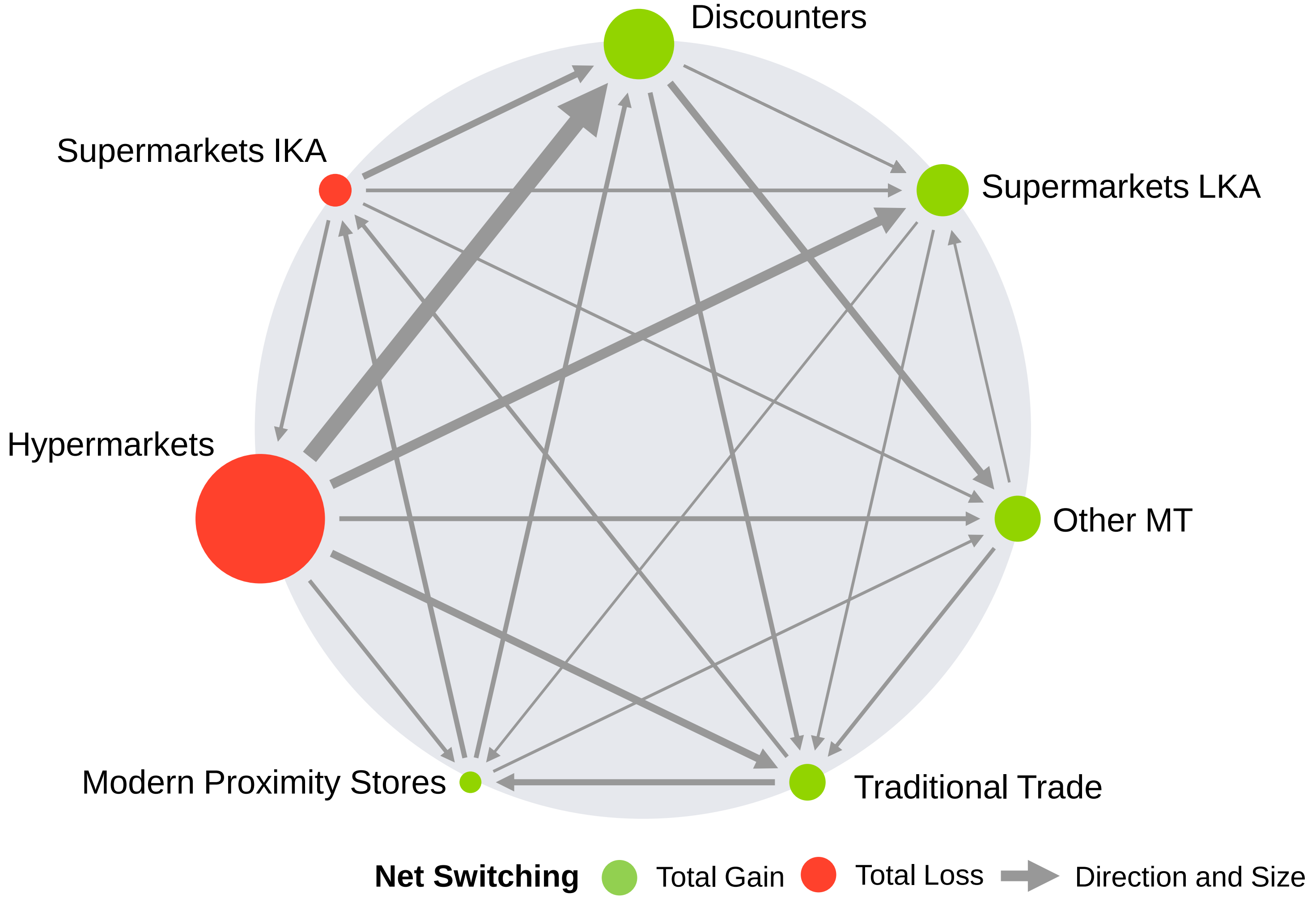
Consumer Panel Romania GfK | PET Other incl. sizes from 50ml to 19L | Other incl. Carton Box, CAN, Metallic Bottle etc

Hypermarkets contracted 2.6pp vs. PY leaving room for Discounters to take the leader position [+1.1pp vs. PY]

Volume Share% & chg. pp vs. PY

Consumer Panel Romania GfK | Other MT incl. Online, Cash & Carry, Other e.g. DYI, Toys & Home, Sports etc

Except Supers IKA, Hypermarkets “alimented” with volumes all other formats [Discounters most]



GfK YouGov

Discounters detached from Hypers also from the penetration pov [51.1% vs. 46.1%], but consumption remains highest in first [frequency main reason behind contraction]. In abs. terms, Supers LKA most dynamic [driven by more purchase occasions]

Water Total

	Absolute volume change vs. PY	Penetration		Change rate	Frequency		Change rate	Volume per Trip (L)		Change rate	Volume per Trip (Pieces)		Change rate	Average Price (RON/L)		Change rate
		Dec 22 - May 23	Dec 23 - May 24		Dec 22 - May 23	Dec 23 - May 24		Dec 22 - May 23	Dec 23 - May 24		Dec 22 - May 23	Dec 23 - May 24		Dec 22 - May 23	Dec 23 - May 24	
Total Market	-1.5%	86,6	88,5	2,2	14,0	14,1	1,2	8,873	8,458	-4,7	4,3	4,1	-4,2	1,32	1,43	8,5
Hypermarkets	-10.0%	46,3	46,1	-0,4	6,9	6,4	-6,6	10,187	9,859	-3,2	5,2	4,9	-5,4	1,43	1,58	10,7
Supermarkets IKA	-4.5%	29,6	31,1	5,3	6,3	6,4	0,9	5,581	5,012	-10,2	2,6	2,4	-7,1	1,44	1,57	8,9
Supermarkets LKA	+14.0%	12,2	12,1	-0,5	4,5	5,0	11,9	8,807	9,013	2,3	4,2	4,3	1,4	1,44	1,48	3,2
Discounters	+2.3%	47,6	51,1	7,3	6,1	6,3	3,1	10,516	9,729	-7,5	5,1	4,8	-5,4	1,06	1,15	8,8
Modern Proximity Stores	+0.4%	17,7	20,0	13,0	5,0	5,0	-0,2	6,781	6,040	-10,9	3,0	2,7	-7,9	1,32	1,45	9,4
Traditional Trade	-0.7%	33,7	33,9	0,6	7,4	7,3	-1,0	7,695	7,672	-0,3	3,5	3,4	-1,9	1,41	1,50	6,2

Dec 22 - May 23 · Dec 23 - May 24

Beverages

RO FMCG HH Scan 6000

Consumer Panel Romania GfK

Module 3

Understanding DRS: Shoppers' Attitudes and Habits

Methodology

Quantitative Study

Target

Households from Romania, national representative based on socio-demographic characteristics such as geography (region; community size), household purchase power and structure (number of member, presence of children, age of members).

Data collection method

100% online

Sample

N = 1057 households from CPS-GfK Household Panel, out of which:
- 360 households beer shoppers
- 349 households carbonated soft drinks (SSD) buyers
- 348 households water buyers

Questionnaire

Max 10 min length; developed by CPS-GfK Romania in close cooperation with partners

Data collection period

August 12 – September 2, 2024

Understanding DRS

DRS awareness

99%

of households in Romania are aware about DRS

Awareness of types of packs included in DRS

96% Aluminium cans

92% Plastic bottles (PET) of maximum 3 liters

94% Glass bottles

13% Plastic bottles (PET) larger than 3 liters

15% Plastic or cardboard beverage cans

Aspects of DRS familiar with – x% know that ....

99% Buyers pay a deposit of 0.5 RON (50 bani) for each can, plastic bottle or beverage bottle they buy

99% Buyers receive the deposit back when they bring the empty packaging to a return point

99% Packaging must be returned intact, with legible labels and emptied of contents

97% Packaging must not be damaged or pressed in any way

97% It applies to beverages such as beer, soft drinks, sodas, juices, water, wine and spirits, etc.

95% The deposit is added to the product price and is displayed separately on the shelf price label and on the receipt

94% Applies only to packaging bearing the DRS symbol on the label

92% The deposit applies to packaging with a volume between 0.1L and 3L

91% Returns do not have to be made to the same place from where the drinks were purchased

91% If the packaging is not brought to one of these return points, the deposit is lost

89% The return points are organized in every medium-large store or small neighborhood store that sells products in non-returnable packaging (with return guarantee)

88% Does NOT apply to dairy packaging, jars, cans, cosmetics, cleaning products

63% Not compulsory for all shops to have a return point

Base: 1057 households (total sample)
Q1. Have you heard about DRS, the scheme introduced by the Romanian Government to improve recycling rates and reduce waste from beverage packaging?
Q2. Which packaging do you think are included in DRS?
Q3. What aspects of DRS are you familiar with?
Consumer Panel Romania GfK

Opinion about DRS

84% Positive or rather positive opinion

9% Neutral opinion

7% Negative or rather negative opinion

Dealing with DRS

95% Have returned the DRS packaging to the dedicated return points

3% Have discarded the packaging as before without recovering the deposit

1% Have intentionally bought non-DRS packaging

2% Have no opinion, need more information

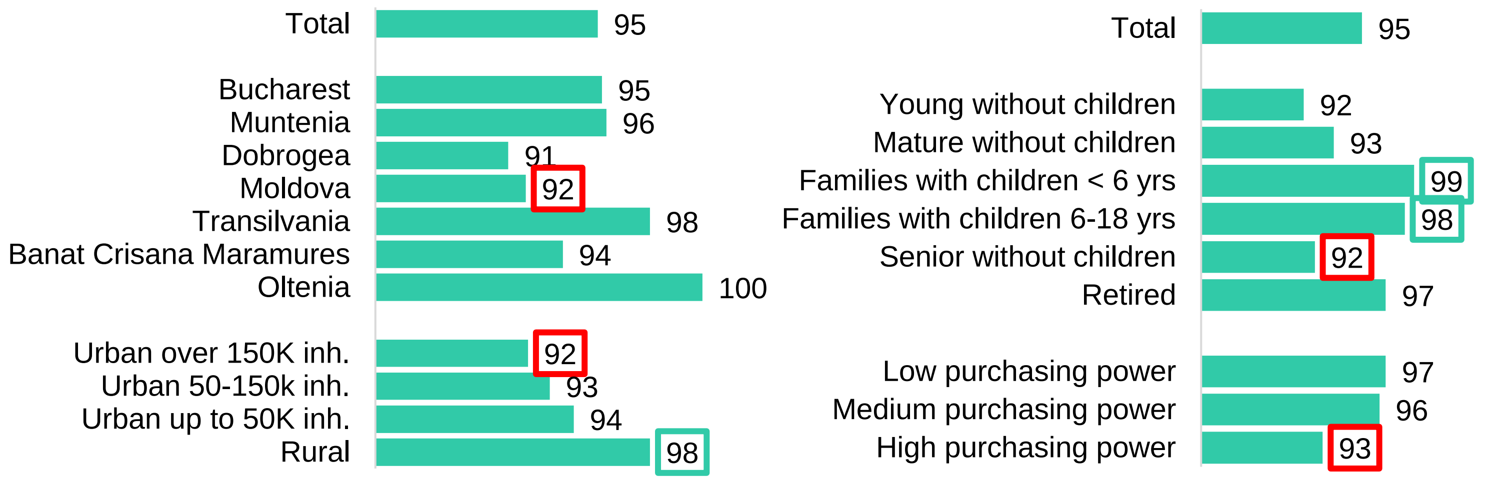
DRS evaluation

53% Simple of very simple

29% Neither complicated, nor simple

18% Complicated of very complicated

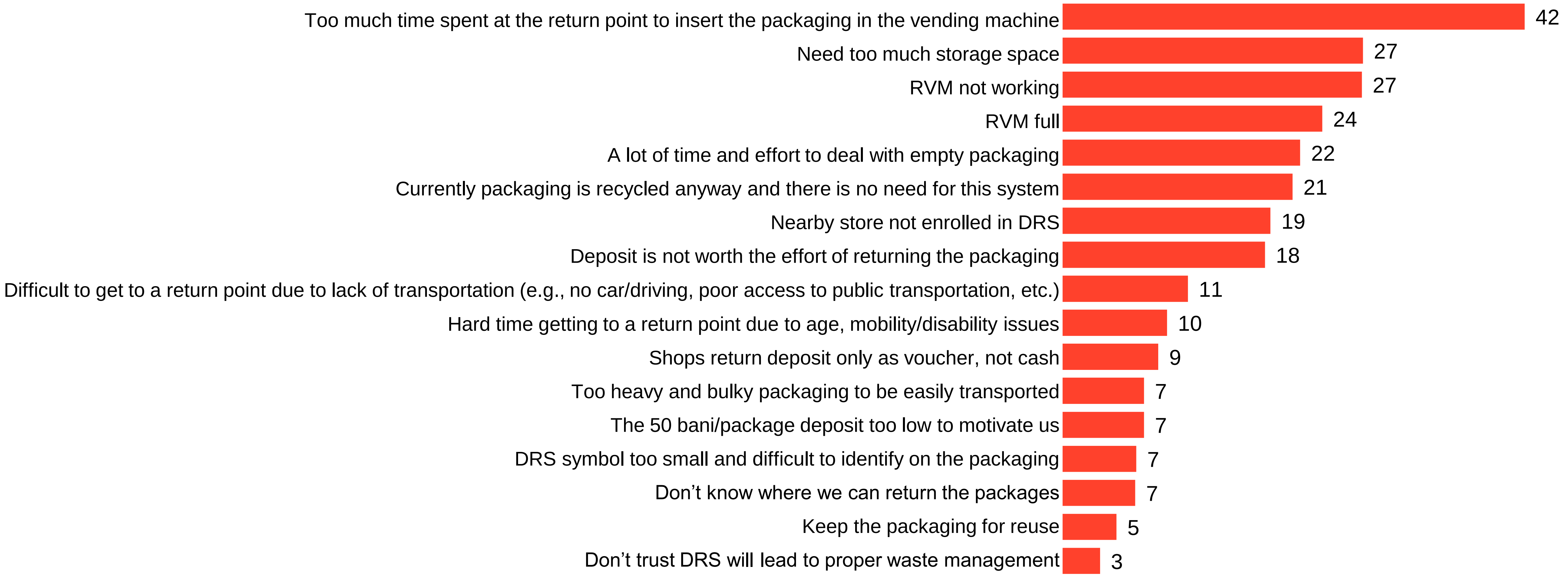
Who is most/least compliant with DRS?



Significantly higher/ lower than total sample

Base: 1057 households (total sample)
Q4.What is your opinion about the introduction of DRS in Romania?
Q5.How do you evaluate DRS?
Q6.Since the introduction of DRS, how has your household managed the packaging (glass, cans and PET) of drinks that carry a deposit?
Consumer Panel Romania GfK

Barriers for compliance



Base: 40 households (those who are not compliant)
Q9. Below you will see a list of reasons given by other people for NOT returning the packaging to the return locations to get the deposit back. Please select a maximum of 3 of these reasons why you have NOT returned the packaging to the return points and discarded them as before.
Consumer Panel Romania GfK

Frequency of packaging return

9% A few times a week, in daily shopping

31% Once/ week, in larger/ top-up shopping, and return all packs collected during the week

30% 2-3 times a month, in large shopping

29% Once a month when we collect a large volume of packaging

1% Several times a year

Preferred method for reimbursement

55% Voucher to be spent in **the shop** where the return was made

17% Voucher to be spent in **the chain store** where the return was made

5% Electronic voucher in the store's app

22% Cash

0.4% Bank transfer

Base: 1000 households (those who declared that are compliant)
Q15. How often do you return beverage packaging (glass bottles, cans or PETs) for which you have paid a deposit?
Q16. What is your preferred reimbursement method?
Consumer Panel Romania GfK

Easiness to get the money back

66% Easy and very easy

22% Neither easy, nor difficult

12% Difficult and very difficult

Reimbursement usage

66%	Pay with the vouchers in the shopping trip we returned packaging
17%	Collect enough vouchers and use them in one shopping session
16%	Cash the money and use it as needed
1%	Donate vouchers to those in need
1%	Other

Perception about deposit included in the price

77% The deposit is clearly and separately marked from the product price on the receipt

15% I have observed both situations

9% The deposit is included in the price of the product on the receipt

Amount reimbursed

20	Up to 10 RON
25	11-20 RON
30	21-40 RON
26	More than 40 RON

34 RON Average for one reimbursement session

Base: 1000 households (those who declared that are compliant)
Q17. How do you mostly use the value of the reimbursed deposit?
Q18. How easy do you find it to be reimbursed?
Q19. On average, how much do you get reimbursed in a return session?
Q20. Now think about the price of the DRS products. Would you say ...
Consumer Panel Romania GfK

To wrap up …

Understanding DRS

In 8 months since the introduction on the Romanian market, **DRS manages to be heard of by everyone**, with an 99% awareness level among household in Romania. Households make the **correct distinction between packages that are included in this system and those that do not** – more than 90% referred to all three of them (aluminium cans, plastic bottles (PET), of maximum 3 liters, glass bottles) and less than 15% referred to both plastic bottles (PET) larger than 3 liters or plastic or cardboard beverage cans.

Moreover, households in Romania are **very familiar with DRS' details**, unanimously about deposit value, how they get it back, the condition of the packs upon the return and so on. **One of the least known aspect about DRS** is that it is compulsory for all shops to have a return point – 6 out of 10 households said that it is NOT compulsory for all shops to have a return point.

DRS is not only very popular, but it is also very well received by the population – 8 out of 10 households have a positive or very positive opinion about it, 5 out of 10 find it simple or very simple, and almost 10 out of 10 have adopted it, thus making them compliant with the system. Most compliant with DRS are households from rural areas, as well as families with children of any age, while the least compliant are those from Moldova region, those households from large urban areas, households with high purchasing power, as well as those who are seniors without children. Among the very few who declared that are not compliant to DRS **the main reason invoked was that they would spend too much time at the return point to insert the packaging in the vending machine** (42%).

Compliance with DRS brings to light some more details – **households rather prefer to return a larger number of packs instead of a few once they do it, and prefer to do it rather rarely instead of daily**, thus 3 out of 10 mentioned they return the packs once/ week, in larger/ top-up shopping, and return all packs collected during the week, 3 out of 10 mentioned 2-3 times a month, also in large shopping, while 3 out of 10 mentioned once a month when they collect a large volume of packaging.

When it comes to reimbursement**, the preferred method is the voucher of any form** (7 out of 10 households), that they are **using in the same shopping trip** (almost 7 out of 10 households). The average amount reimbursed in one trip is of **34 RON**. **The reimbursement process is an easy or very easy one** (almost 7 out 10 households), and **the deposit is clearly and separately marked from the product price on the receipt** (almost 8 out of 10 households perceive this).

About stores

Return point usage		Return point preference
38%	RVM at Hypermarket	35%
34%	RVM at Discounter	30%
12%	RVM at Supermarket	8%
5%	RVM at Modern proximity	3%
5%	RVM at a Mini-market or a neighborhood shop	3%
5%	Handover at counter / checkout in a mini-market / convenience store	3%
n/a	Any of these	19%

Base: 1000 households (those who declared that are compliant)
Q13.Thinking about all the packaging returned so far, please estimate in percentages how much you have returned in each of the return point types below.
Q14.Which of these types of return points do you prefer and why?
Consumer Panel Romania GfK

Return point preference reasons

RVM at Hypermarket 35%

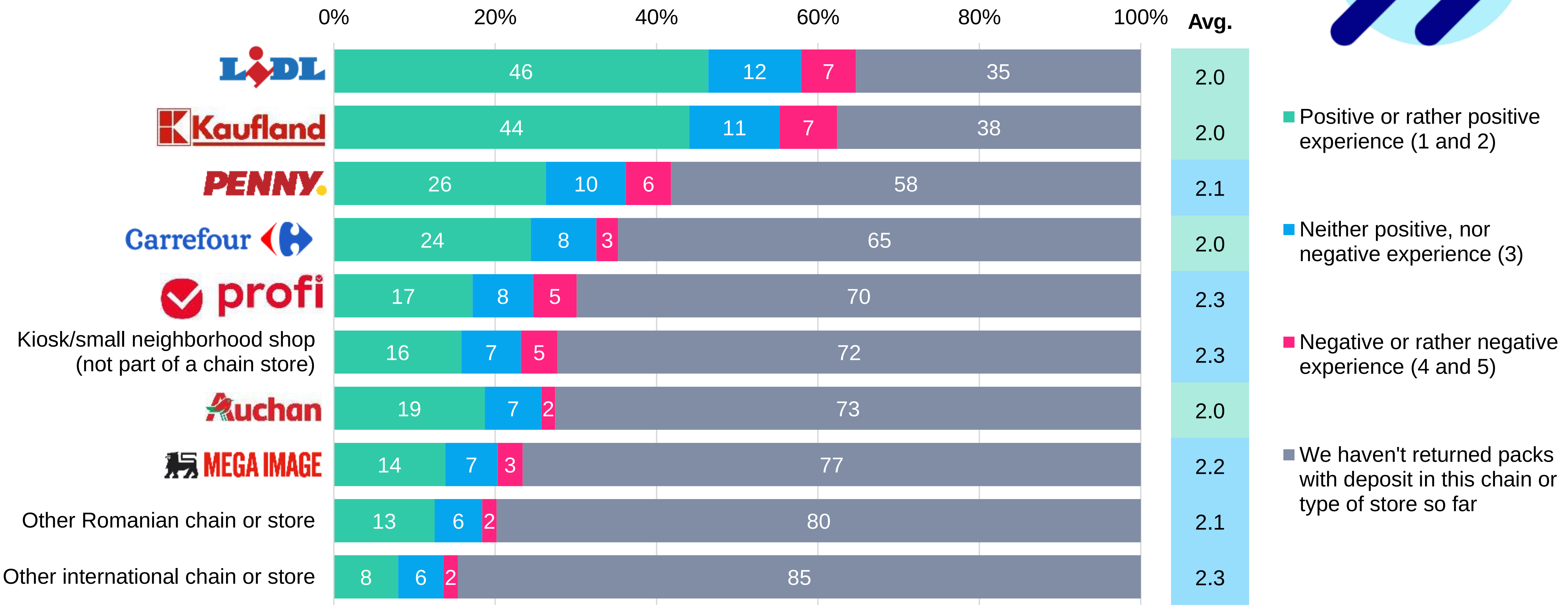
Reason	%
Proximity / It is located nearby / It`s in my way	19
It`s faster / reduced waiting time	17
There are several machines	13
I shop there often	12
It`s easier / practical / comfortable	12

RVM at Discounter 30%

Reason	%
Proximity / It is located nearby / It`s in my way	48
I shop there often	14
It`s not too crowded	10

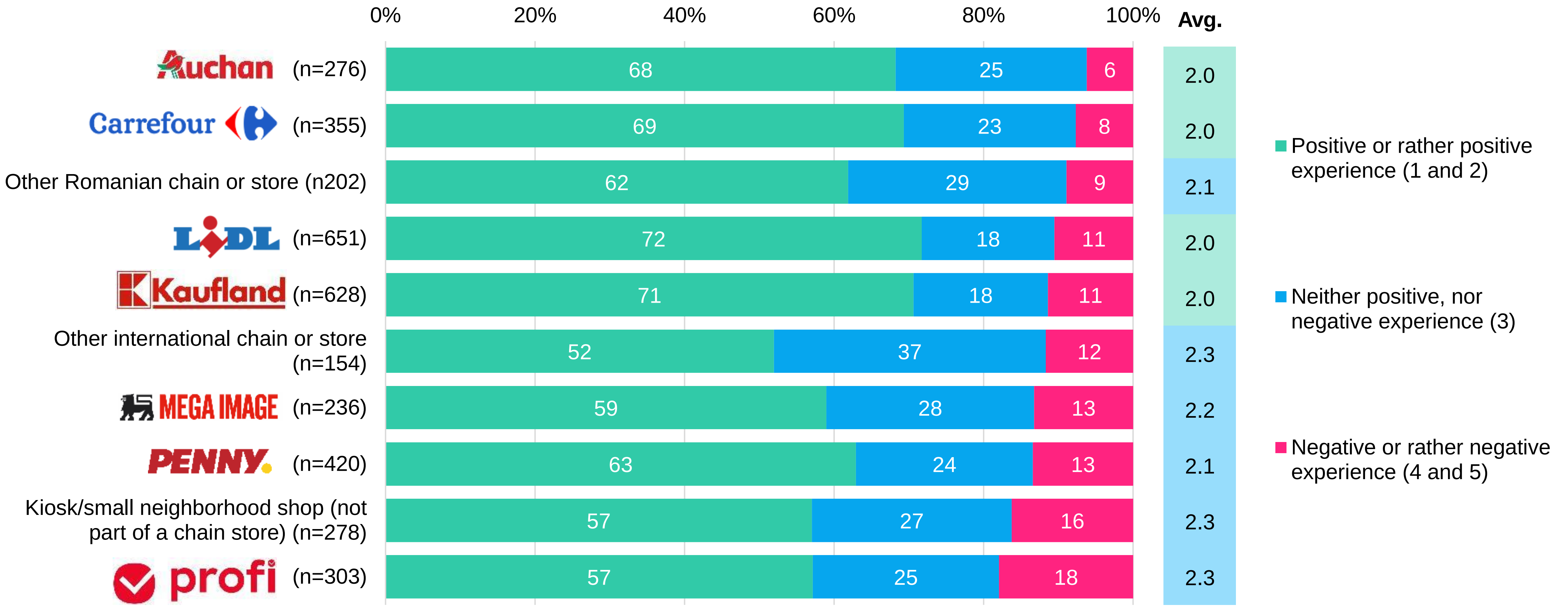
Base: 1000 households (those who declared that are compliant)
Q14.Which of these types of return points do you prefer and why?
Consumer Panel Romania GfK

Evaluation of the overall experience of returning to different type of stores



Base: 1000 households (those who declared that are compliant)
Q21. Below you will see a list of the main stores in Romania. Please rate your experience of returning DRS packaging in each of these stores.
Consumer Panel Romania GfK

Evaluation of the overall experience of returning to different type of stores



Base: 1000 households (those who declared that are compliant) **and have returned packs with deposit in the respective chain or type of store so far**
Q21. Below you will see a list of the main stores in Romania. Please rate your experience of returning DRS packaging in each of these stores.
Consumer Panel Romania GfK

20%

of households in Romania are not aware of any of the following campaigns

Retailers' campaigns awareness

Carrefour

11%	7%	9%
for slogan	for 1st mechanism	for 2nd mechanism

„Bravo ție. Reciclezi și binele se ține lanț"

→ *Scanând voucherul eliberat de sistemul de colectare cu funcția Self Scan din aplicația magazinului, recuperați garanția direct în contul dumneavoastră și deblocați extra beneficii. Puteți vedea oricând în cont câte ambalaje ați reciclat de-a lungul timpului, și câți bani ați recuperat.*

→ *Primele 15 ambalaje scanate săptămânal îți aduc extra un voucher de 7.5 lei*

Auchan

38%	13%	9%
for slogan	for 1st mechanism	for 2nd mechanism

„Intră cu noi în hora reciclării"

→ *0.1 lei în plus față de garanția de 0.5 lei, ca și voucher pe cardul de fidelitate pentru fiecare ambalaj cu sigla „Ambalaj cu garanție"*

→ *Pentru fiecare 5 ambalaje reciclate ai câte 1 voucher de reducere prin cardul de fidelitate pentru anumite mărci de produse. Voucherul de reducere se acordă în limita a maxim 100 de ambalaje/card client/campanie*

Kaufland

38%	12%
for slogan	for mechanism

„Reciclezi și salvezi"

La 5 recipiente primiți un voucher cu 10% Extra Reducere la articolele semnalizate cu bănuțul „Reciclezi și salvezi". Se eliberează maxim 3 vouchere de acest gen în cazul sesiunilor de peste 15 ambalaje.

profi

12%	13%
for 1st slogan	for 2nd slogan

„Poți recicla cat vrei, când vrei… pe vouchere sau lei"
„Punem suflet în mediu"

LIDL

31%
for slogan

„Pentru un viitor mai bun"

Base:1057 households (total sample)
Q22. Below you will see a list of the main stores in Romania. Please rate your experience of returning DRS packaging in each of these stores.
Consumer Panel Romania GfK

Reward likeably

Carrefour

72% like | 26% neutral | 2% dislike

Primele 15 ambalaje scanate săptămânal îți aduc extra un voucher de 7.5 lei

Kaufland

64% like | 32% neutral | 4% dislike

La 5 recipiente primiți un voucher cu 10% Extra Reducere la articolele semnalizate cu bănuțul „Reciclezi și salvezi”. Se eliberează maxim 3 vouchere de acest gen în cazul sesiunilor de peste 15 ambalaje.

Auchan

62% like | 33% neutral | 5% dislike

Pentru fiecare 5 ambalaje reciclate ai câte 1 voucher de reducere prin cardul de fidelitate pentru anumite mărci de produse. Voucherul de reducere se acordă în limita a maxim 100 de ambalaje/card client/campanie

Carrefour

62% like | 32% neutral | 6% dislike

Scanând voucherul eliberat de sistemul de colectare cu funcția Self Scan din aplicația magazinului, recuperați garanția direct în contul dumneavoastră și deblocați extra beneficii. Puteți vedea oricând în cont câte ambalaje ați reciclat de-a lungul timpului, și câți bani ați recuperat.

Auchan

61% like | 34% neutral | 5% dislike

0.1 lei în plus față de garanția de 0.5 lei, ca și voucher pe cardul de fidelitate pentru fiecare ambalaj cu sigla „Ambalaj cu garanție”

Base: 1057 households (total sample)
Q23. Some retail chains have devised different mechanisms to encourage the return of DRS packaging, below you will see a selection of such mechanisms that are currently on the market. Please let us know how you like each of these incentive mechanisms.
Consumer Panel Romania GfK

To wrap up …

About stores

In line with how households prefer to return the deposit packs in terms of frequency and type of shopping trip, the return points most used and preferred are **RVMs at Hypermarkets and Discounters,** and the main reason for these is proximity/ being on their way**.** The retail chains most returned to are **Lidl** and **Kaufland** (65%, respectively 62%), and households**' returning experience at them was mostly positive** (slightly more than 7 out of 10 households in both cases). Interesting enough, **larger store formats offer a more positive experience than small store formats**, considering the average scores on experience for each store.

Some of the retail chains created different messages to inform the population about DRS – either through slogans or even mechanisms to encourage the return of packaging. 20% of households mentioned they **haven't heard of any** of the main retailers' actions in these regards.

The **most known slogans are Auchan's** (4 out of 10 households heard of *„Intră cu noi în hora reciclării"),* **Kaulfand's** (4 out of 10 households heard of *„Reciclezi și salvezi")*, and **Lidl's** (3 out of 10 households heard of *„Pentru un viitor mai bun"),* while **the most known mechanisms are one of Auchan's** (0.1 lei extra for 0.5 lei deposit – 13% awareness), and **Kaulfand's** (any 5 returned packs = 10% discount on specific items – 12% awareness).

When asked about how they like the mechanisms to encourage the return of packaging proposed by retailers, households **seemed to be rather pleased with all of them** (all mechanism were liked by at least 6 out of 10 households). **The most liked one was Carrefour's** ("*Primele 15 ambalaje scanate săptămânal îți aduc extra un voucher de 7.5 lei"* – 72% like), while **the least liked one was Auchan's ("***0.1 lei în plus față de garanția de 0.5 lei, ca și voucher pe cardul de fidelitate"* – 61% like).

SSD category

Consumer Panel Romania GfK

Photo source: https://depositphotos.com/editorial/bottles-and-cans-of-assorted-global-soft-drinks-164076104.html

MaxDiff preference – The Probability score represents the relative preference for an item within the evaluated set. The scores add up to 100% to represent the preference shares. Scores are based on how often an item is chosen as worst and best and are calculated using a hierarchical Bayes estimation procedure.

Purchase criteria in SSD category

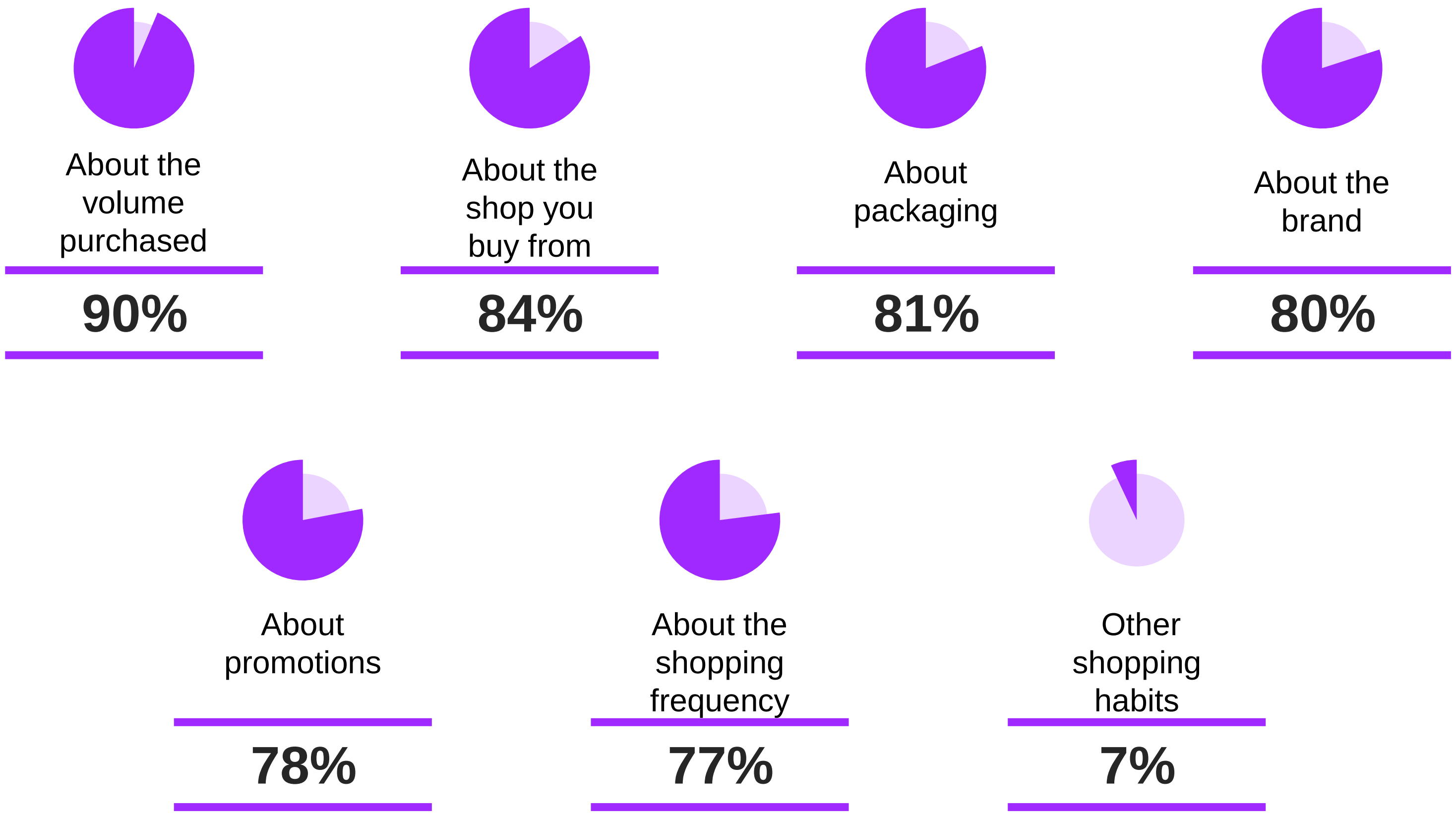
	SSD buyers (n=375)	Heavy SSD buyers (n=125)	Medium SSD buyers (n=125)	Light SSD buyers (n=125)
Sugar content	13	11	15	13
Artificial sweetener content	11	9	13	11
Current promotions	10	12	10	9
Price per piece	10	12	9	10
Brand	10	9	10	11
Drink flavor (cola, fruit, etc.)	8	8	9	8
Price per liter	8	10	6	8
Spend per trip for the category	6	8	5	6
Carbonation level	5	4	7	5
Type of packaging (glass bottle, PET bottle, can)	5	4	5	6
Volume of packaging (0.33l,0.5l,0.66/0.75l,1/1.25l,2/2.25l, etc)	5	5	4	5
Recommendation from family or friends	4	4	4	5
Total deposit paid for the shopping trip	3	3	2	3
Ads / recommendations from people we follow online	1	1	1	1

Base: 349 households (SSD buyers); weighted sample=375 households
Q10. Next please think about how you usually buy SSD for in-home consumption. You will see some criteria that may play a role when deciding which product in this category to buy. Please indicate which criterion is most and least important to you in each of the following combinations.
Consumer Panel Romania GfK

Significantly higher/ lower than total sample

58%
Kept their SSD shopping habits

Changed behaviors in SSD category among those who changed their behaviour



Base: 159 households (those who changed their behaviour)
Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop SSD, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop SSD, select the answer "We have kept our shopping habits.".
Consumer Panel Romania GfK

Most important strategies revealed are waiting for promo combined with downtrading (cheaper brands), lower volumes and higher frequency.

Changed behaviors in SSD category among those who changed their behavior

	All mentions	Ranked 1st
About the volume purchased	**90**	**20**
In a typical month, we buy less than before	53	10
Don`t buy at all	8	7
Buy less per shopping trip	38	1
Buy more per shopping trip	8	1
Substitute with other types of drinks	13	1
About the shop you buy from	**84**	**10**
Shop more often from big stores (hyper/super/discounters)	42	7
Shop less often from big stores (hyper/super/discounters)	6	
Shop more often in small neighborhood shops	9	1
Shop less often in small neighborhood shops	17	1
Shop mostly in stores with a return point	26	2

	All mentions	Ranked 1st
About packaging	**81**	**22**
Buy a different type of packaging (glass bottle, PET, can)	15	6
Buy less in multi-packs	18	3
Buy more in multi-packs	25	5
Buy in the same type of packaging, but bigger	20	4
Buy in the same type of packaging, but smaller	8	3
About the brand	**80**	**18**
Buy cheaper brand	50	14
Buy more expensive brand	30	4
About promotions	**78**	**19**
Mainly shop on promo	78	19
About the shopping frequency	**77**	**7**
Buy less often than before	35	7
Buy more often than before	43	0
Other shopping habits	**7**	**4**

Base: 159 households (those who changed their behaviour)
Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop SSD, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop SSD, select the answer "We have kept our shopping habits.".
Consumer Panel Romania GfK

Beer lager alco category

MaxDiff preference – The Probability score represents the relative preference for an item within the evaluated set. The scores add up to 100% to represent the preference shares. Scores are based on how often an item is chosen as worst and best and are calculated using a hierarchical Bayes estimation procedure.

Purchase criteria in beer lager alco category

	Beer buyers (n=337)	Heavy beer buyers (n=112)	Medium beer buyers (n=113)	Light beer buyers (n=112)
Taste (more bitter, sweeter)	14	13	14	14
Brand	12	13	12	13
Current promotions	11	13	10	10
Type of beer (lager, dark, craft, etc.)	10	10	10	11
Price per piece	10	12	10	10
Origin (Romanian, German, Czech, etc.)	7	6	8	6
Type of packaging (glass bottle, PET bottle, can)	6	5	6	8
Spend per trip for the category	6	6	6	6
Price per liter	6	6	6	6
Volume of packaging (0.33l,0.5l,0.66/0.75l,1/1.25l,2/2.25l, etc)	5	5	5	5
Alcohol level	4	5	4	4
Recommendation from family or friends	4	3	5	4
Total deposit paid for the shopping trip	2	2	2	2
Ads / recommendations from people we follow online	1	1	2	2

Base: 360 households (beer buyers); weighted sample=337 households
Q10. Next please think about how you usually buy beer for in-home consumption. You will see some criteria that may play a role when deciding which product in this category to buy. Please indicate which criterion is most and least important to you in each of the following combinations.
Consumer Panel Romania GfK

Significantly higher/ lower than total sample

58%

Kept their beer shopping habits

Changed behaviors in beer lager alco category among those who changed their behaviour

About the shop they buy from	94%
About packaging	89%
About the shopping frequency	86%
About the volume purchased	84%
About the brand	82%
About promotion	75%
Other shopping habits	5%

Base: 141 households (those who changed their behaviour)
Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop beer, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop beer, select the answer "We have kept our shopping habits.".
Consumer Panel Romania GfK

Most important strategies revealed are reducing purchase frequency combined with downtrading (cheaper brands), waiting for promo or shifting more purchases to big formats.

Changed behaviors in beer lager alco category among those who changed their behavior

	All mentions	Ranked 1st
About the shop you buy from	**94**	**20**
Shop more often from big stores (hyper/super/discounters)	59	13
Shop less from big stores (hyper/super/discounters)	9	2
Shop more often in small neighborhood shops	9	1
Shop less from small neighborhood shops	8	
Shop mostly in stores with a return point	19	3
About packaging	**89**	**22**
Buy a different type of packaging (glass bottle, PET, can)	21	3
Buy less in multi-packs	18	1
Buy more in multi-packs	17	5
Still buy in PET, but bigger	5	1
Still buy in PET, but smaller	6	1
Still buy in glass bottles, but bigger	8	3
Still buy in glass bottles, but smaller	18	6
Buy RGBs from small shops	10	1

	All mentions	Ranked 1st
About the shopping frequency	**86**	**15**
Buy less often than before	70	14
Buy more often than before	16	1
About the volume purchased	**84**	**9**
In a typical month, buy less than before	46	6
Don`t buy at all	1	2
Buy less per shopping trip	28	
Buy more per shopping trip	11	
Substitute with other types of drinks	13	2
About the brand	**82**	**20**
Buy cheaper brand	48	13
Buy more expensive brand	35	7
About promotions	**75**	**14**
Mainly shop on promo	75	14
Other shopping habits	**5**	**2**

Base: 141 households (those who changed their behaviour)
Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop beer, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop beer, select the answer "We have kept our shopping habits.".
Consumer Panel Romania GfK

Water category

Consumer Panel Romania GfK

MaxDiff preference – The Probability score represents the relative preference for an item within the evaluated set. The scores add up to 100% to represent the preference shares. Scores are based on how often an item is chosen as worst and best and are calculated using a hierarchical Bayes estimation procedure.

Purchase criteria in water category

	Water buyers (n=345)	Heavy water buyers (n=115)	Medium water buyers (n=115)	Light water buyers (n=115)
Type of water (still, carbonated)	13	13	14	13
Origin (spring, purified, etc.)	13	12	14	13
Brand	12	13	11	10
Mineral content	10	9	11	9
Price per liter	8	8	8	9
Price per piece	8	8	7	9
Current promotions	8	7	8	8
pH level	7	8	7	7
Spend per trip for the category	6	6	6	7
Volume of packaging (0.33l,0.5l,0.66/0.75l,1/1.25l,2/2.25l, etc)	4	5	5	4
Type of packaging (glass bottle, PET bottle, can)	4	4	4	5
Recommendation from family or friends	2	3	2	2
Total deposit paid for the shopping trip	2	2	2	2
Ads / recommendations from people we follow online	1	1	1	2

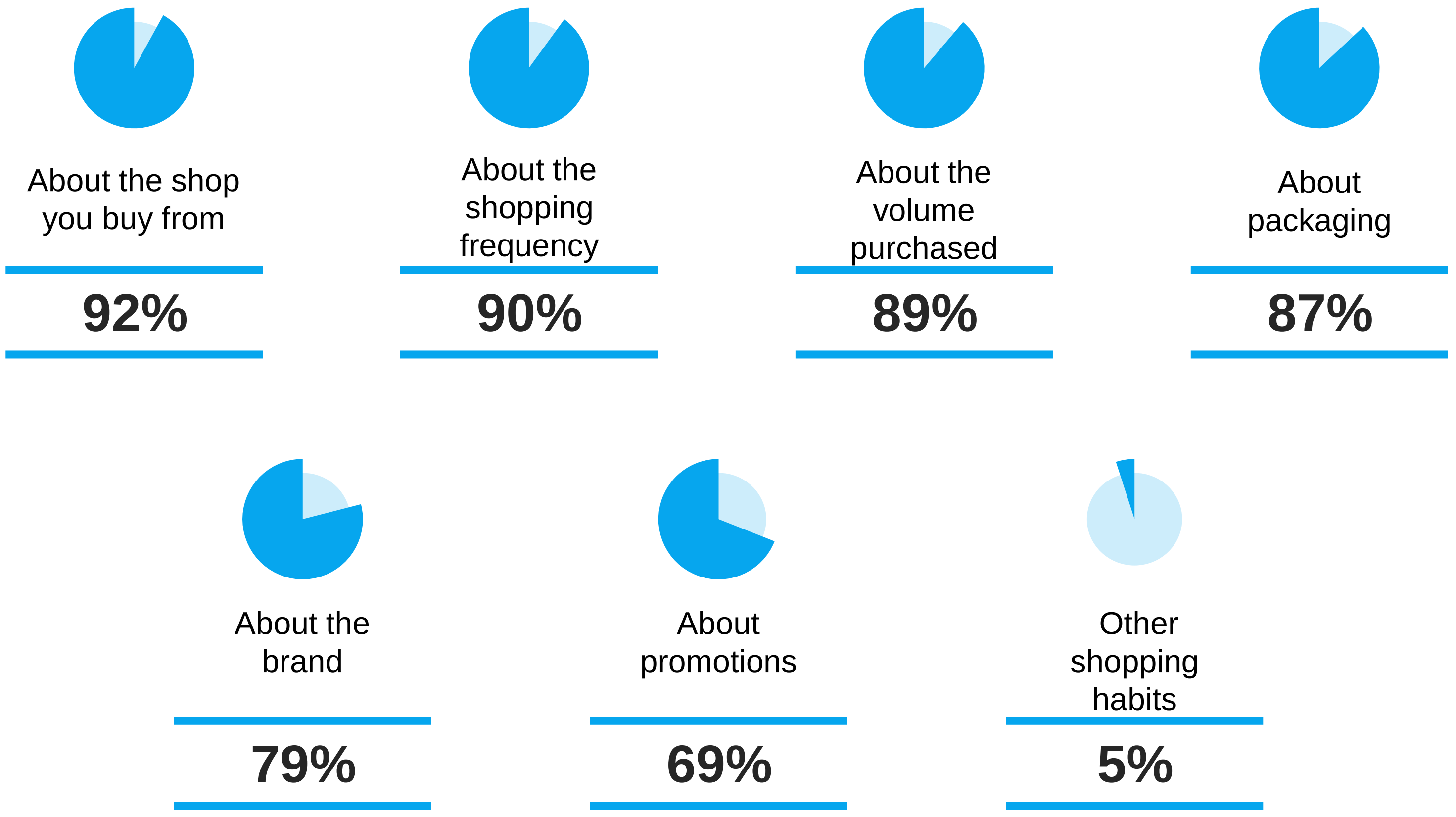
Base: 348 households (water buyers); weighted sample=345 households
Q10. Next please think about how you usually buy water for in-home consumption. You will see some criteria that may play a role when deciding which product in this category to buy. Please indicate which criterion is most and least important to you in each of the following combinations.
Consumer Panel Romania GfK

Significantly higher/ lower than total sample

61%

Kept their water shopping habits

Changed behaviors in water category among those who changed their behaviour



Base: 134 households (those who changed their behaviour)

Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop water, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop water, select the answer "We have kept our shopping habits.".

Consumer Panel Romania GfK

Most important strategies revealed are mainly shop on promo combined with downtrading (cheaper brands), shifting more purchases to big formats and shopping less frequent.

Changed behaviors in water category among those who changed their behavior

	All mentions	Ranked 1st
About the shop you buy from	**92**	**15**
Shop more often from big stores (hyper/super/discounters)	53	9
Shop less from big stores (hyper/super/discounters)	5	0
Shop more often in small neighborhood shops	16	4
Shop less often in small neighborhood shops	7	0
Shop mostly in stores with a return point	18	1
About the shopping frequency	**90**	**16**
Buy less often than before	52	13
Buy more often than before	38	3
About the volume purchased	**89**	**16**
In a typical month, we buy less than before	38	5
Don`t buy at all	2	2
Buy less per shopping trip	23	1
Buy more per shopping trip	19	1
Switched to tap/filtered water	24	7

	All mentions	Ranked 1st
About packaging	**87**	**22**
Buy a different type of packaging (glass bottle, PET, can)	6	1
Buy less in multi-packs	15	2
Buy more in multi-packs	18	7
Buy in same type of packaging, but bigger	22	4
Buy in same type of packaging, but smaller	9	2
Search for water in non-DRS packaging (>3L)	25	7
About the brand	**79**	**23**
Buy cheaper brand	54	19
Buy more expensive brand	25	4
About promotions	**69**	**7**
Mainly shop on promo	69	7
Other shopping habits	**5**	**2**
I have a water filter	2	0

Base: 134 households (those who changed their behaviour)
Q11. As a result of the introduction of DRS, some shoppers have changed the way they shop water, while others have made no change at all. Below, you'll see the different actions shoppers have taken to manage guarantee and return packaging. Which of these are you or members of your household doing? If you have not made any changes in the way you shop water, select the answer "We have kept our shopping habits.".
Consumer Panel Romania GfK

To wrap up …

About categories

Total deposit paid for the shopping trip is **one of the least important criterion when purchasing any category** impacted by the introduction of DRS (beer, SSDs, water).

Most important purchase criteria		
Beer category	**SSD category**	**Water category**
Taste	Sugar content (- - heavy buyers; ++ medium buyers)	Type of water
Brand	Artificial sweetener content (- - heavy buyers; ++ medium buyers)	Origin
Current promo (++heavy buyers)	Current promo (++ heavy buyers; - - light buyers)	Brand (++ heavy buyers; - - light buyers)

When asked about if they changed their shopping habits regarding the categories, **6 out of 10 households** said that **they kept their shopping behavior.**

Most popular coping strategies to DRS		
Beer category	**SSD category**	**Water category**
Reducing purchase frequency combined with downtrading (cheaper brands), waiting for promo or shifting more purchases to big formats.	Waiting for promo combined with downtrading (cheaper brands), lower volumes and higher frequency.	Shop on promo combined with downtrading (cheaper brands), shifting more purchases to big formats and shopping less frequent.

For more in-depth insights, don’t hesitate to get in touch!

Romina Ardelean – Business Growth Lead, CP Romania GfK
romina.ardelean@gfk-cps.com

Aura Matei – Senior Research Consultant, CP Romania GfK
aura.matei@gfk-cps.com

Adela Sevastre – Senior Research Consultant, CP Romania GfK
adela.sevastre@gfk-cps.com