Euromonitor International

Retail in Romania

June 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail

INDUSTRY PERFORMANCE

Robust Growth Despite Economic Headwinds

A Phase of Hyper-Concentration

Temu and Shein Intensify Competition as Trendyol Empowers Romanian Smes with Fast Fulfilment

Chart 2 - Trendyol Aims to Expand the Reach of Local Merchants

Chart 3 - Value Sales 2020-2030

Chart 4 - Value Sales by Category 2025

WHAT'S NEXT?

Discounters Accelerates Value-Driven Growth as Price Caution Persists

Chart 5 - Analyst Insight for Retail

Retailers Adopt Artificial Intelligence and Automation to Cut Costs

Chart 6 - Forecast Value Sales 2020-2030

Chart 7 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Lidl and Kaufland Expand Networks and Drive Concentration through Pricing and Digitalisation

Mergers and New Digital Launches Reshape Competition and Opportunity

Chart 8 - Merchantpro and Emag Implement Ai Solutions for Optimisation of Operations

Chart 9 - Company Shares 2025

Chart 10 - Brand Shares 2025

OPERATING ENVIRONMENT

Informal Retail

Opening Hours for Physical Retail

Chart 11 - Standard Opening Hours by Channel Type 2025

Seasonality

Valentine’s Day

Mother’s Day

Easter

Summer sales

Back to School

Black Friday

Winter sales

Christmas

ECONOMIC CONTEXT

Chart 12 - Economic Context for Retail

Chart 13 - Real Gdp Growth 2020-2030

Chart 14 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 15 - Consumer Context for Retail

Chart 16 - Population 2020-2030

Chart 17 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Convenience Retailers in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Convenience Retailers Summary

KEY INDUSTRY TRENDS

Chart 18 - Key Industry Trends for Convenience Retailers

INDUSTRY PERFORMANCE

Ahold Delhaize Expands Reach through Major Acquisition
Profi and Mega Image Join Forces to Dominate Proximity Shopping
Metro'S La Doi Pasi Extra Leverages Technology to Elevate Urban Shopping
Chart 19 - La Doi Pasi Extra - an Urban Proximity Retail Concept
Chart 20 - Value Sales 2020-2030
Chart 21 - Value Sales by Category 2025

WHAT'S NEXT?

Metro'S Franchise Model Drives Small Grocers to Embrace Proximity
Chart 22 - Analyst Insight for Convenience Retailers
Petrom and Auchan Partnership Fuels Forecourt Retailer Expansion
Chart 23 - Forecast Value Sales 2020-2030
Chart 24 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Ahold Delhaize Accelerates Consolidation with Profi Acquisition, Boosting National Coverage
Chart 25 - Profi Generates Synergies with Ahold Delhaize'S Existing Brands
Chart 26 - Company Shares 2025
Chart 27 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 28 - Economic Context for Convenience Retailers
Chart 29 - Real Gdp Growth 2020-2030
Chart 30 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 31 - Consumer Context for Convenience Retailers
Chart 32 - Population 2020-2030
Chart 33 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Supermarkets in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Supermarkets Summary

KEY INDUSTRY TRENDS

Chart 34 - Key Industry Trends for Supermarkets

INDUSTRY PERFORMANCE

Profi and Mega Image Adapt Store Formats to Drive Growth Amid Inflation
Ahold Delhaize Leverages Dual-Brand Strategy for Broader Reach and Innovation
Mega Image Expands Private Label Portfolio to Meet Demand for Affordable Quality
Chart 35 - Mega Image Develops Broad Private Label Offer
Chart 36 - Value Sales 2020-2030

WHAT'S NEXT?

Ahold Delhaize Acquires Profi to Expand Reach and Drive Consolidation
Profi'S New Format and Digitalisation Set Pace for Growth and Innovation
Independent Supermarkets Maintain Presence but Face Rising Pressure From Chains
Chart 37 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Chart 38 - Analyst Insight for Supermarkets
Ahold Delhaize Unites Profi and Mega Image to Secure Stable Leadership
Chart 39 - Profi Evolves in Synergy with Mega Image
Chart 40 - Company Shares 2025
Chart 41 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 42 - Economic Context for Supermarkets
Chart 43 - Real Gdp Growth 2020-2030
Chart 44 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 45 - Consumer Context for Supermarkets
Chart 46 - Population 2020-2030
Chart 47 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Hypermarkets in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Hypermarkets Summary

KEY INDUSTRY TRENDS

Chart 48 - Key Industry Trends for Hypermarkets

INDUSTRY PERFORMANCE

Carrefour Extends E-Commerce Reach through Delivery Partnerships
Chart 49 - Carrefour Has the Most Extensive Partnerships Network for E-Commerce
Chart 50 - Value Sales 2020-2030

WHAT'S NEXT?

Kaufland and Carrefour Adapt Formats to Meet Evolving Shopper Habits
Chart 51 - Analyst Insight for Hypermarkets
Auchan and Kaufland Invest in Local Sourcing to Retain Loyalty
Consolidation and Smaller Footprints Reshape Future Store Formats
Chart 52 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Kaufland Expands Footprint as Carrefour Pivots to Small Formats

Schwarz Group Acquisition of La Cocos Signals Further Shake-Up

Chart 53 - La Cocos Focuses on Low Operational Costs and an Efficient Shopping Experience

Chart 54 - Company Shares 2025

Chart 55 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 56 - Economic Context for Hypermarkets

Chart 57 - Real Gdp Growth 2020-2030

Chart 58 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 59 - Consumer Context for Hypermarkets

Chart 60 - Population 2020-2030

Chart 61 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Discounters in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Discounters Summary

KEY INDUSTRY TRENDS

Chart 62 - Key Industry Trends for Discounters

INDUSTRY PERFORMANCE

Auchan Repositions Hypermarkets as Atac to Capture Value-Focused Shoppers

Chart 63 - Transformation of Auchan Hypermarkets into Atac Hiper Discount Discounters

Penny'S Hanul Boieresc Builds Loyalty with Romanian-Sourced Private Label

Chart 64 - Penny's Hanul Boieresc "Megabrand" Offers Products Made in Romania

International Chains Expand Store Networks to Meet Rising Demand

Chart 65 - Value Sales 2020-2030

WHAT'S NEXT?

Penny and Auchan Drive Automation to Boost Convenience and Loyalty

Chart 66 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Chart 67 - Analyst Insight for Discounters

Lidl Accelerates Store Openings While Penny Targets Network Expansion

Chart 68 - Company Shares 2025

Chart 69 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 70 - Economic Context for Discounters

Chart 71 - Real Gdp Growth 2020-2030

Chart 72 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 73 - Consumer Context for Discounters

Chart 74 - Population 2020-2030

Chart 75 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Small Local Grocers in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Small Local Grocers Summary

INDUSTRY PERFORMANCE

Convenience Store Players Expands= Presence and Reduce Consumer Reliance on Traditional Shops
Chart 76 - Value Sales 2020-2030

WHAT'S NEXT?

Convenience Chains Drive Independent Stores to Franchise Adoption
Speciality Food Stores Shift Focus to Local Chain Development
Chart 77 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Chart 78 - Analyst Insight for Small Local Grocers
A Highly Fragmented Channel
Chart 79 - Company Shares 2025
Chart 80 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 81 - Economic Context for Small Local Grocers
Chart 82 - Real Gdp Growth 2020-2030
Chart 83 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 84 - Consumer Context for Small Local Grocers
Chart 85 - Population 2020-2030
Chart 86 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

General Merchandise Stores in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

General Merchandise Stores Summary

KEY INDUSTRY TRENDS

Chart 87 - Key Industry Trends for General Merchandise Stores

INDUSTRY PERFORMANCE

Action Accelerates Expansion and Reshapes Value Proposition
Chart 88 - Romania Becomes the 14Th Country in Which the Action Store Chain Operates.
Action Works to Appeal to Local Consumers
International Entrants Reshape Competitive Landscape and Consumer Expectations
Chart 89 - Value Sales 2020-2030
Chart 90 - Value Sales by Category 2025

WHAT'S NEXT?

Chart 91 - Analyst Insight for General Merchandise Stores

Action Sustains Growth as Variety Stores Capture Value-Driven Demand

Shopping Malls Expand While Department Stores Remains Absent

High Inflation and Action'S Pricing Strategy Drive Future Expansion

Chart 92 - Forecast Value Sales 2020-2030

Chart 93 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Miniso Extends Dominance as Action Drives New Growth

Chart 94 - Miniso Dominates Variety Stores in Romania

Chart 95 - Company Shares 2025

Chart 96 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 97 - Economic Context for General Merchandise Stores

Chart 98 - Real Gdp Growth 2020-2030

Chart 99 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 100 - Consumer Context for General Merchandise Stores

Chart 101 - Population 2020-2030

Chart 102 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Apparel and Footwear Specialists in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Apparel and Footwear Specialists Summary

KEY INDUSTRY TRENDS

Chart 103 - Key Industry Trends for Apparel and Footwear Specialists

INDUSTRY PERFORMANCE

Primark Drives Affordable Fashion Amid Inflation and Changing Consumer Priorities

Chart 104 - Primark Offers Variety, Low Prices and a Focus on Sustainability

International Brands Accelerate Expansion as Local Players Face Mounting Pressure

Fashion Days Leverages Omnichannel Integration to Lead Digital Transformation

Chart 105 - Fashion Days Focuses on Omnichannel Integration and Launch of Own Marketplace

Chart 106 - Value Sales 2020-2030

WHAT'S NEXT?

Shopping Mall Expansion Fuels Outlet Growth Despite Persistent Inflation

Omnichannel Brands Transform Stores into Digital Showrooms for E-Commerce

Social Commerce and Payment Innovation Reshape Competitive Dynamics

Chart 107 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Chart 108 - Analyst Insight for Apparel and Footwear Specialists

Pepco and Inditex Expand Share as Kik Surges with Value-Driven Growth

Chart 109 - Company Shares 2025

Chart 110 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 111 - Economic Context for Apparel and Footwear Specialists
Chart 112 - Real Gdp Growth 2020-2030
Chart 113 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 114 - Consumer Context for Apparel and Footwear Specialists
Chart 115 - Population 2020-2030
Chart 116 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Appliances and Electronics Specialists in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Appliances and Electronics Specialists Summary

KEY INDUSTRY TRENDS

Chart 117 - Key Industry Trends for Appliances and Electronics Specialists

INDUSTRY PERFORMANCE

Altex Expands through Acquisition as Premium Focus Reshapes Demand
Flanco Repositions as Smart Discounter to Capture Price-Savvy Shoppers
Chart 118 - Flanco Becomes Flanco Smart Discounter
Chart 119 - Value Sales 2020-2030

WHAT'S NEXT?

Altex and Flanco Leverage E-Commerce to Drive Replacement Demand
Smart Appliances and Digital Engagement Sustain Premium Sales Growth
Chart 120 - Analyst Insight for Appliances and Electronics Specialists
Chart 121 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Altex Expands Omnichannel Network to Reinforce Sales Lead
Chart 122 - Altex Romania Enters Home Products Specialists
Media Galaxy Expands with Discounts as Istyle Focuses on Stability
Chart 123 - Company Shares 2025
Chart 124 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 125 - Economic Context for Appliances and Electronics Specialists
Chart 126 - Real Gdp Growth 2020-2030
Chart 127 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 128 - Consumer Context for Appliances and Electronics Specialists
Chart 129 - Population 2020-2030
Chart 130 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Home Products Specialists in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Home Products Specialists Summary

KEY INDUSTRY TRENDS

Chart 131 - Key Industry Trends for Home Products Specialists

INDUSTRY PERFORMANCE

Major Players' Expansion and Acquisition Strategies Reshape Retail Landscape
Dedeman Leverages Scale to Dominate Sales of Home Improvement and Gardening Stores
Digital Transformation with Ai Raises Standards for Personalised Retail Experiences
Chart 132 - The Ikea Home Smart App
Chart 133 - Value Sales 2020-2030
Chart 134 - Value Sales by Category 2025

WHAT'S NEXT?

Chart 135 - Analyst Insight for Home Products Specialists
Pet Shops and Superstores Expands as Pet Ownership Rises
E-Commerce and Omnichannel Drive Convenience and Resilience
Chart 136 - Forecast Value Sales 2020-2030
Chart 137 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Dedeman Expands Digital Reach as Jysk Accelerates Growth
Chart 138 - Dedemand Combines Physical Expansion with Digital Investment
Chart 139 - Company Shares 2025
Chart 140 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 141 - Economic Context for Home Products Specialists
Chart 142 - Real Gdp Growth 2020-2030
Chart 143 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 144 - Consumer Context for Home Products Specialists
Chart 145 - Population 2020-2030
Chart 146 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Health and Beauty Specialists in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Health and Beauty Specialists Summary

KEY INDUSTRY TRENDS

Chart 147 - Key Industry Trends for Health and Beauty Specialists

INDUSTRY PERFORMANCE

Dr Max Drives Discount Pharmacy Expansion to Outpace Rivals

Dr Max Overtakes Catena as Low-Cost Leader in Terms of Store Numbers
Chart 148 - Dr Max Consolidating Its Discount Area under the "Dr Max Prices Are Low" Slogan
Catena and Dm Expand Store Networks to Capture Wellness Demand
Chart 149 - Catena Sustains the Consolidation Trend
Chart 150 - Value Sales 2020-2030
Chart 151 - Value Sales by Category 2025

WHAT'S NEXT?

Pharmacy Chains Expand Networks and Strengthen Brand Loyalty through Omnichannel Investment
Dm Leverages Wellness and Digital Integration to Accelerate Health and Personal Care Growth
Chart 152 - Analyst Insight for Health and Beauty Specialists
Brand Advertising and Digital Sales Shape Competition and Consumer Experience
Chart 153 - Forecast Value Sales 2020-2030
Chart 154 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Catena and Dm Strengthen Positions as Digitalisation and Brand Investments Drive Share Shifts
Chart 155 - Company Shares 2025
Chart 156 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 157 - Economic Context for Health and Beauty Specialists
Chart 158 - Real Gdp Growth 2020-2030
Chart 159 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 160 - Consumer Context for Health and Beauty Specialists
Chart 161 - Population 2020-2030
Chart 162 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Vending in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Vending Summary

INDUSTRY PERFORMANCE

Consumers Shift to Coffee Vending as Vat Rise Hits Cafés
Chart 163 - Value Sales 2020-2030
Chart 164 - Value Sales by Category 2025

WHAT'S NEXT?

Coffee Drinkers Embrace Vending for Affordable On-The-Go Refreshment
Operators Invest in Modern Technology as Cash Payments Decline
Chart 165 - Forecast Value Sales 2020-2030
Chart 166 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Major Players Expand in Premium Sites as Independents Lose Ground
Chart 167 - Company Shares 2025
Chart 168 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 169 - Economic Context for Vending
Chart 170 - Real Gdp Growth 2020-2030
Chart 171 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 172 - Consumer Context for Vending
Chart 173 - Population 2020-2030
Chart 174 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Direct Selling in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Direct Selling Summary

KEY INDUSTRY TRENDS

Chart 175 - Key Industry Trends for Direct Selling

INDUSTRY PERFORMANCE

Growing Pressure to Engage in Digital Transformation
Beauty and Personal Care Brands Maintain Value Leadership through Digital Adaptation
Digital-First Sales Models Reshape Beauty Brand-Consumer Relationships
Chart 176 - Avon Has Managed to Move From Direct Sales to E-Commerce
Chart 177 - Value Sales 2020-2030
Chart 178 - Value Sales by Category 2025

WHAT'S NEXT?

Avon, Oriflame and Farmasi Accelerate Digital Investments to Sustain Sales
Health and Beauty Direct Selling Consolidates Lead as Fashion Surges
Mobile-First Shopping Habits Reshape Competition and Digital Strategies
Chart 179 - Forecast Value Sales 2020-2030
Chart 180 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Chart 181 - Analyst Insight for Direct Selling
Avon Leverages Digitalisation to Defend Leadership as Share Narrows
Chart 182 - Company Shares 2025
Chart 183 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 184 - Economic Context for Direct Selling
Chart 185 - Real Gdp Growth 2020-2030
Chart 186 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 187 - Consumer Context for Direct Selling
Chart 188 - Population 2020-2030
Chart 189 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Retail E-Commerce in Romania

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail E-Commerce Summary

KEY INDUSTRY TRENDS

Chart 190 - Key Industry Trends for Retail E-Commerce

INDUSTRY PERFORMANCE

Growth Amid Macroeconomic Challenges
Marketplace E-Commerce Strengthens Platform Dominance and Raises Barriers for Independents
Altex Integrates Physical and Digital Channels to Deliver Seamless Shopping Experiences
Chart 191 - Value Sales 2020-2030
Chart 192 - Value Sales by Category 2025
Chart 193 - Altex Consolidates Its Omnichannel through Digital Integration and Ai Personalisation

WHAT'S NEXT?

Mobile App Innovation Drives New Shopping Habits and Payment Integration
Chart 194 - Analyst Insight for Retail E-Commerce
Marketplace Platforms Expand Access for Start-Ups and Small Retailers
Omnichannel Strategies and Delivery Efficiency Reshape Competition
Chart 195 - Forecast Value Sales 2020-2030
Chart 196 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Emag Accelerates Investment While Trendyol and Temu Disrupt the Competitive Order
Chart 197 - Emag Operates the Largest E-Commerce Marketplace in Romania
Chart 198 - Company Shares 2025
Chart 199 - Brand Shares 2025

ECONOMIC CONTEXT

Chart 200 - Economic Context for Retail E-Commerce
Chart 201 - Real Gdp Growth 2020-2030
Chart 202 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 203 - Consumer Context for Retail E-Commerce
Chart 204 - Population 2020-2030
Chart 205 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.

- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/retail-in-romania/report.