

ROMANIAN RETAIL SNAPSHOT

JUNE 2025

Better never settles





AGENDA

01

MACROECONOMICS

02

CEE REAL ESTATE MARKET

03

ROMANIA REAL ESTATE
MARKET

04

ROMANIA RETAIL MARKET
PERFORMANCE

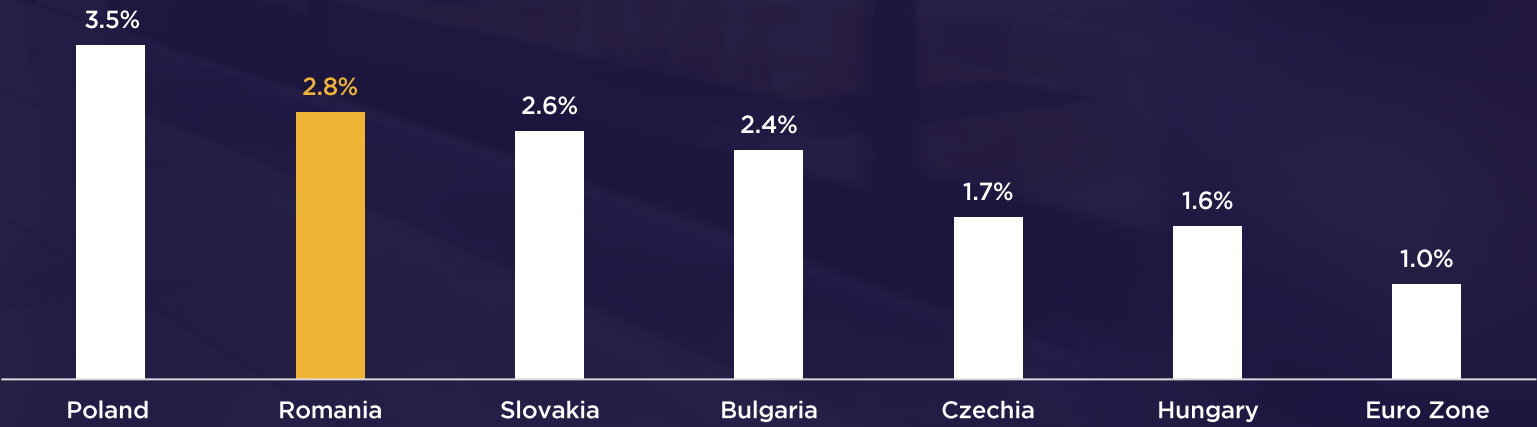
MACROECONOMICS

Single-digit inflation, but a slower economic growth in 2024; Second highest GDP growth in the CEE & SEE regions in the 2007 - 2024 period

Population	19.1 (2024)
GDP	€ 353.8 billion (2024)
GDP growth	0.8% (2024)
Monetary Policy Rate	6.5% (June 2025)
Inflation rate	5.5% (May 2025)
Average net salary (€/ month) Romania	1,144*
Average net salary (€/ month) Bucharest	1,527*
Unemployment rate Romania	3.3%*
Unemployment rate Bucharest	0.6%*

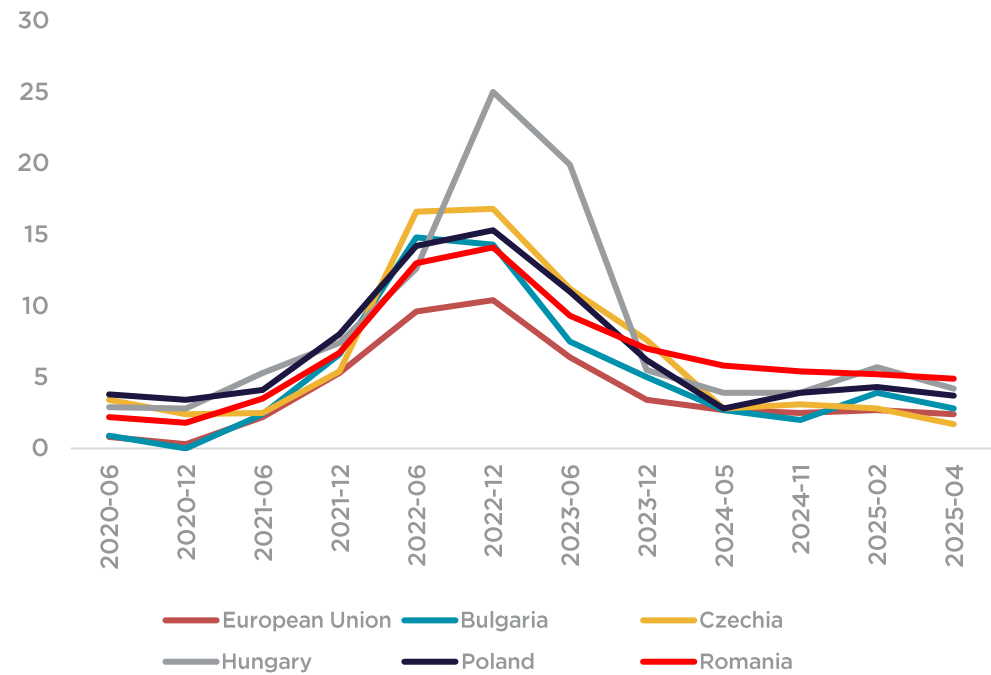
Source: National Institute of Statistics, National Commission for Prognosis
*March 2025

GDP CAGR 2007 – 2024

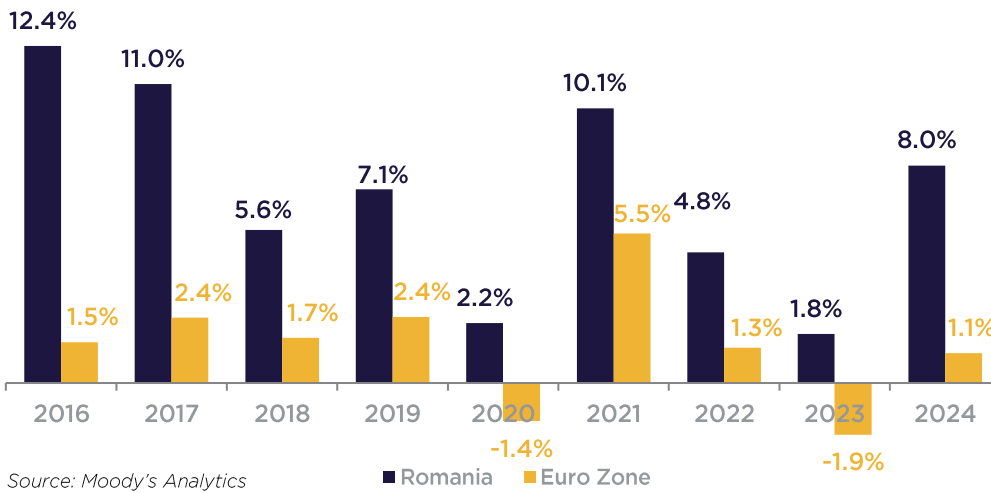


Source: Eurostat, Cushman & Wakefield Echinox Research

THE IMPACT OF INFLATION BY MARKET



ROMANIA VS. EURO ZONE RETAIL SALES VOLUME Y/Y GROWTH



Source: Moody's Analytics

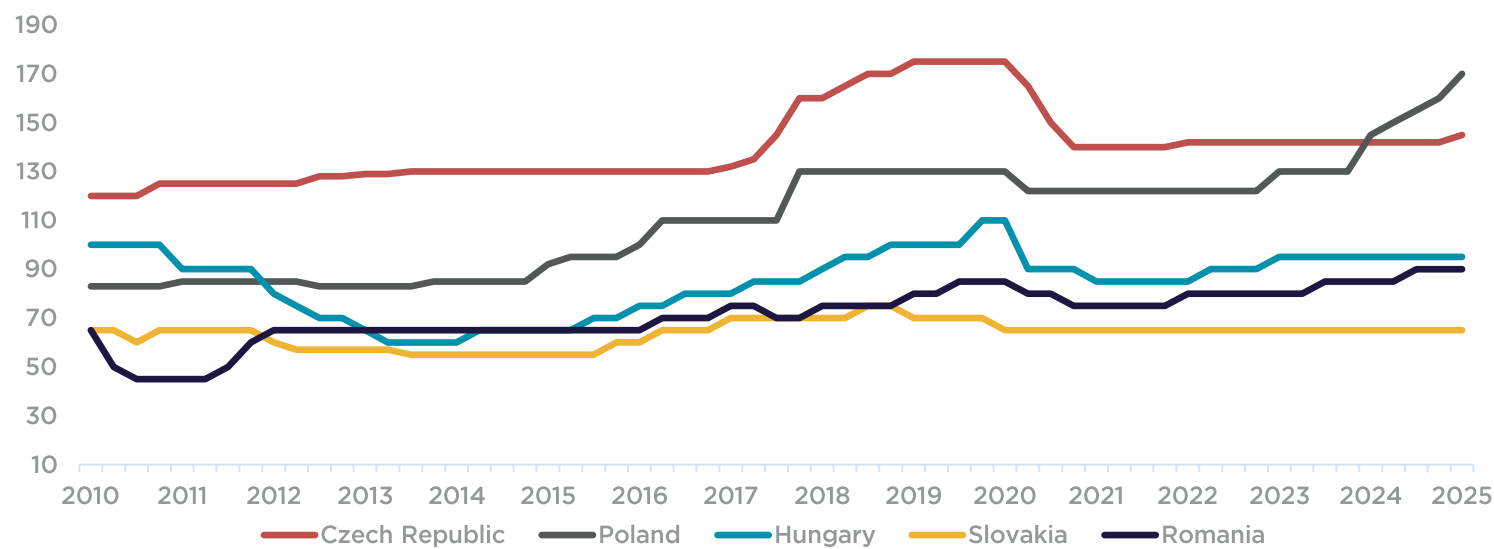
CEE RETAIL MARKET

KEY INDICATORS

Country	Stock (sq. m)	Prime rent (€/ sq. m/ month)	Density (sq. m / 1,000 inhabitants)
Poland	13,687,600	170	356
Romania	4,728,400	90	248
Czechia	3,920,300	145	357
Hungary	3,112,700	95	325
Slovakia	2,328,100	65	431

Source: Cushman & Wakefield Echinox Research

PRIME SHOPPING CENTRE RENTS (€/ SQ. M/ MONTH)



Source: Cushman & Wakefield Echinox Research

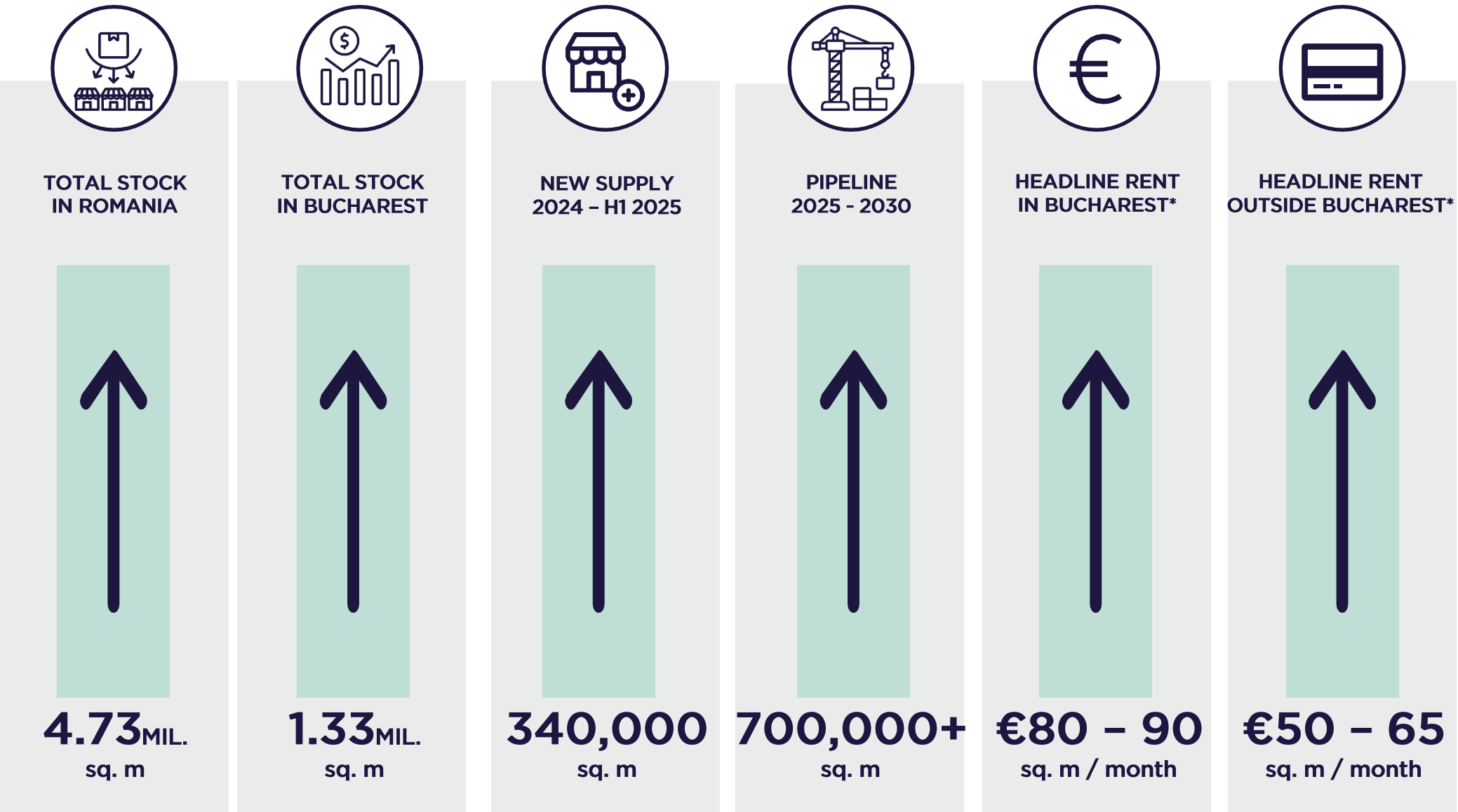


ROMANIA RETAIL MARKET

KEY FIGURES 2025



ROMANIA RETAIL MARKET



*For a space of 100 - 150 sq. m at the ground floor of a dominant shopping center



ROMANIA RETAIL MARKET PERFORMANCE



13 SEGMENTS

123

Analyzed operators

39,734

Total revenue 2024 (mil. €)

7.1%

Growth 2024 vs 2023

5.6%

Annual inflation rate 2024

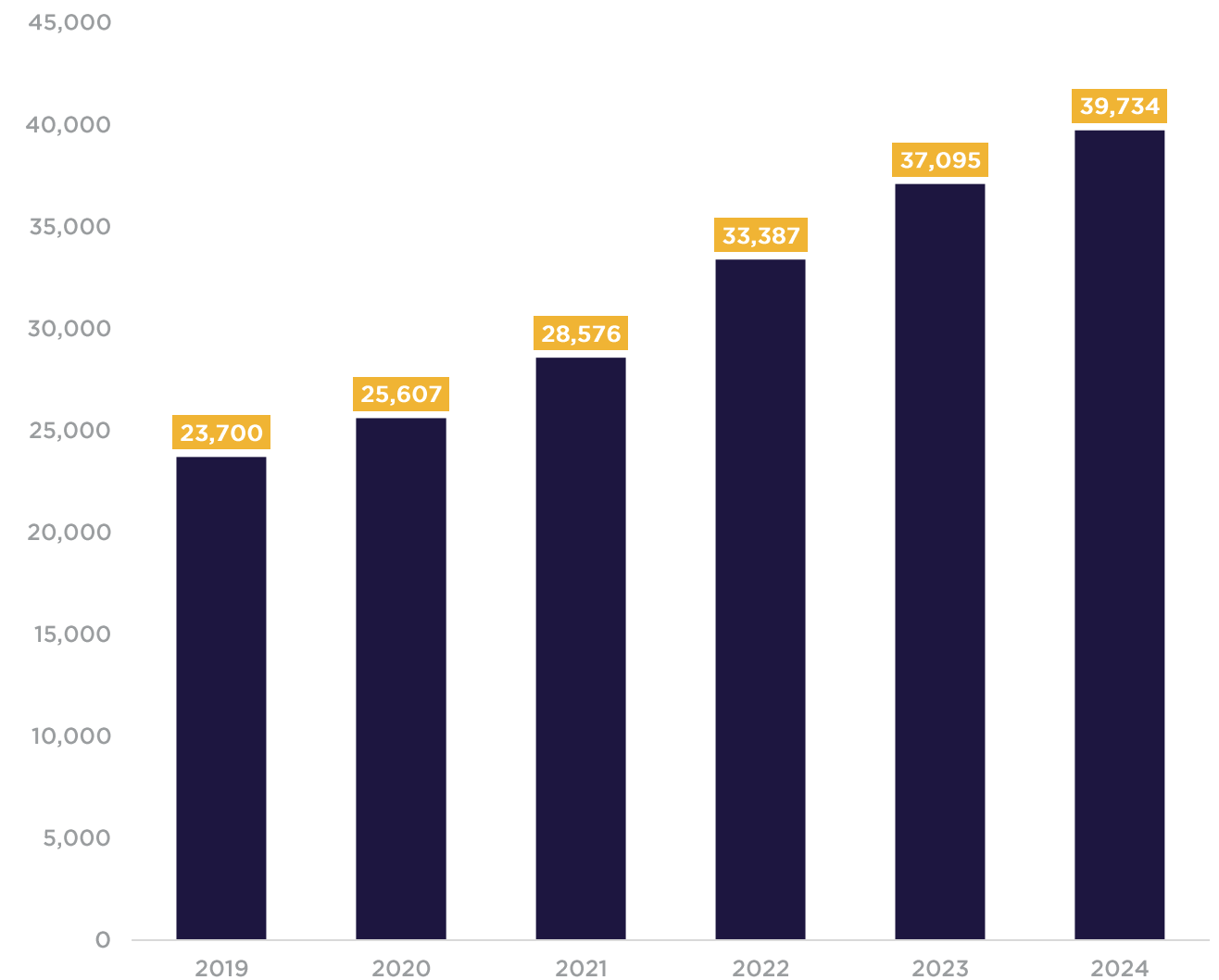
10.9%

CAGR revenue 2019 - 2024

7.4%

CAGR inflation 2019 - 2024

OVERALL TURNOVER EVOLUTION (MIL €)



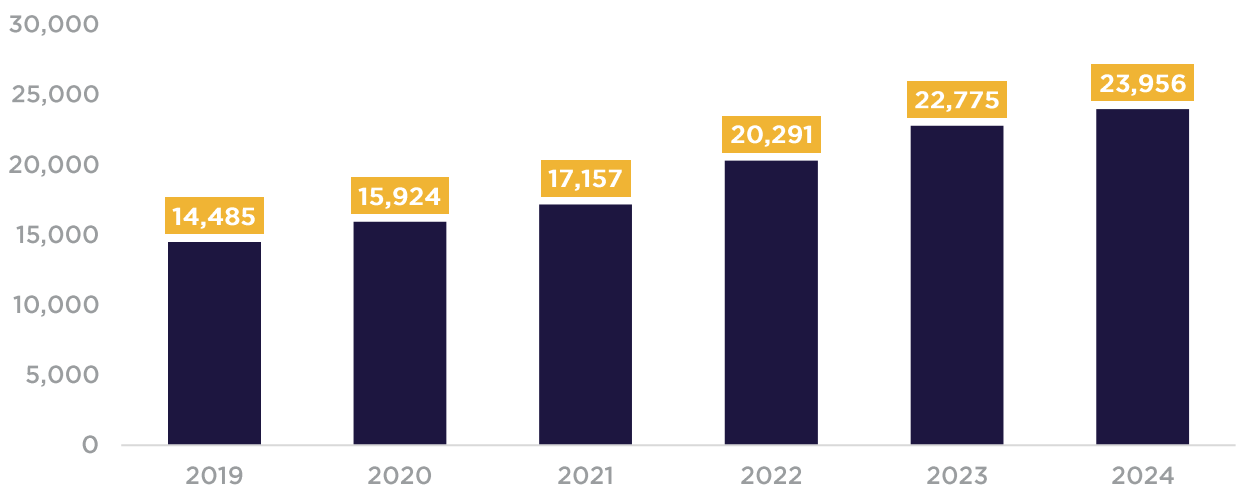
SEGMENT

FOOD STORES

Analyzed operators: 11
Growth 2024 vs 2023: 5.2%
CAGR 2019 – 2024: 10.6%



TURNOVER EVOLUTION (MIL €)

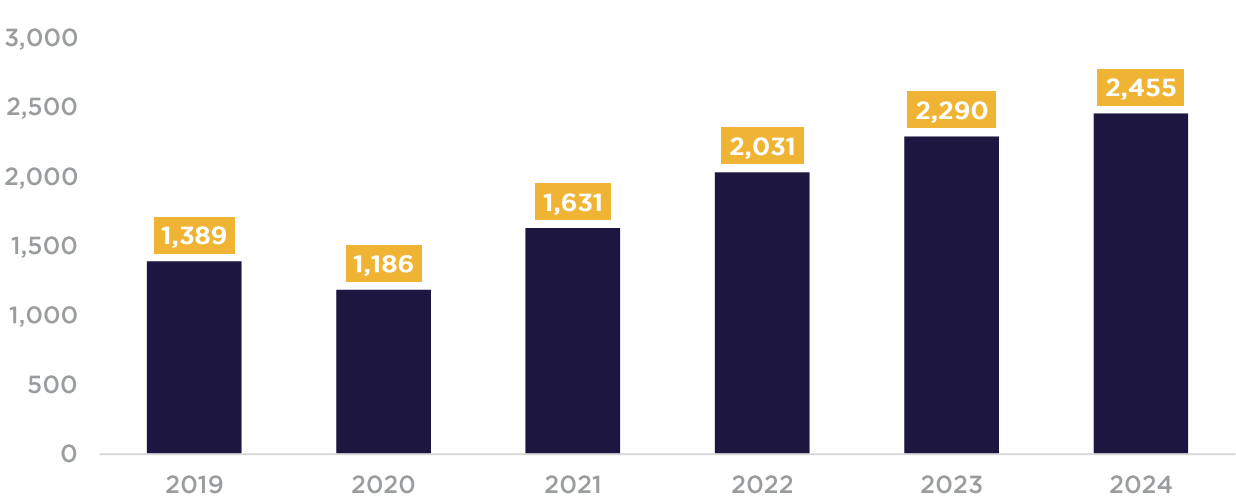


FASHION

Analyzed operators: 35
Growth 2024 vs 2023: 7.2%
CAGR 2019 – 2024: 12.1%



TURNOVER EVOLUTION (MIL €)



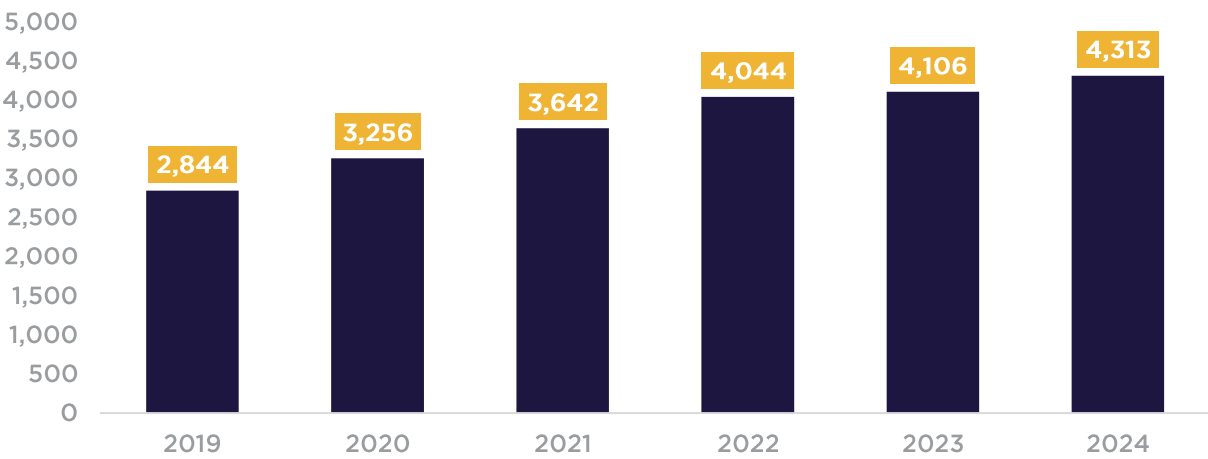
SEGMENT

DIY

Analyzed operators: 5
Growth 2024 vs 2023: 5.0%
CAGR 2019 – 2024: 8.7%



TURNOVER EVOLUTION (MIL €)

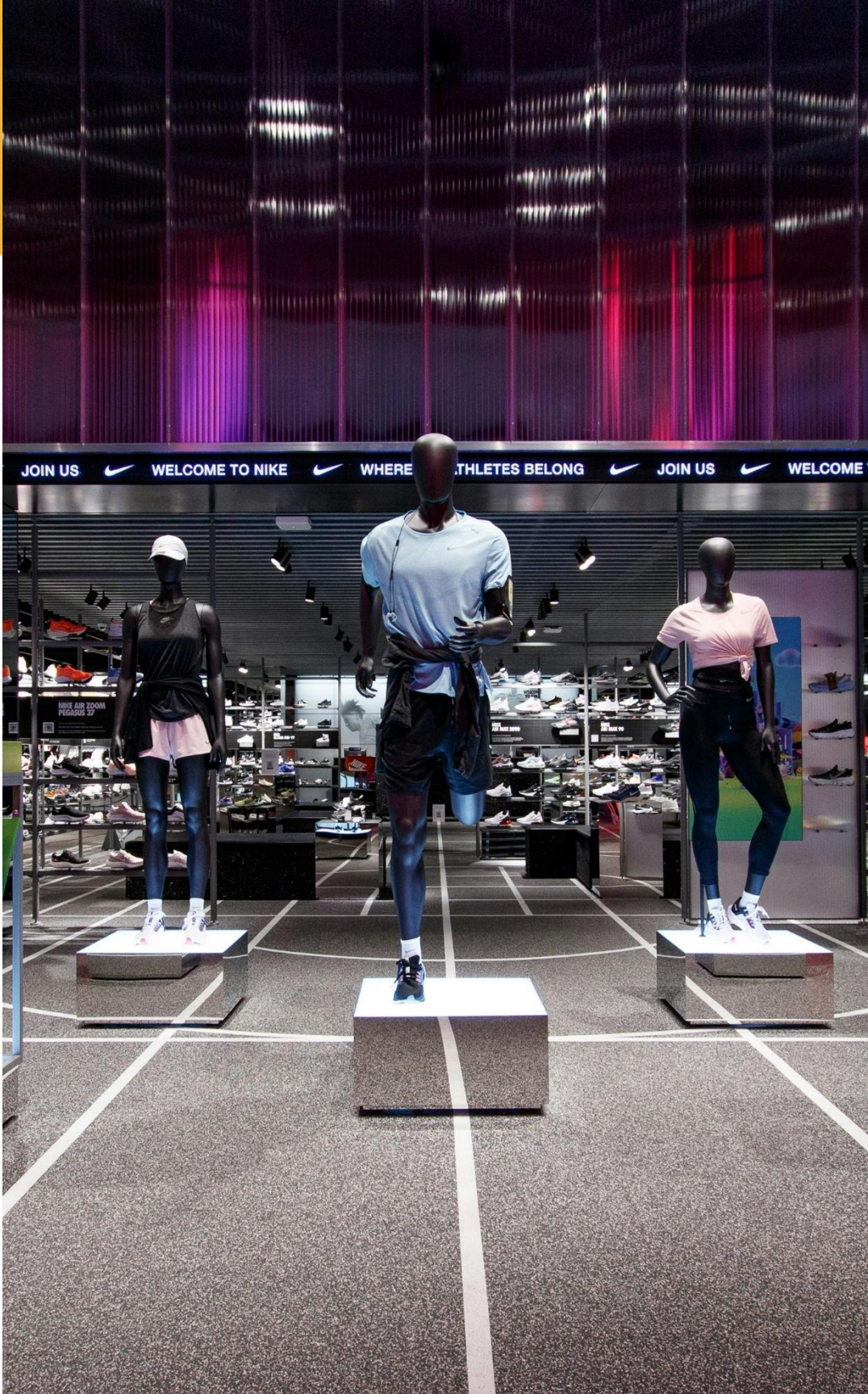
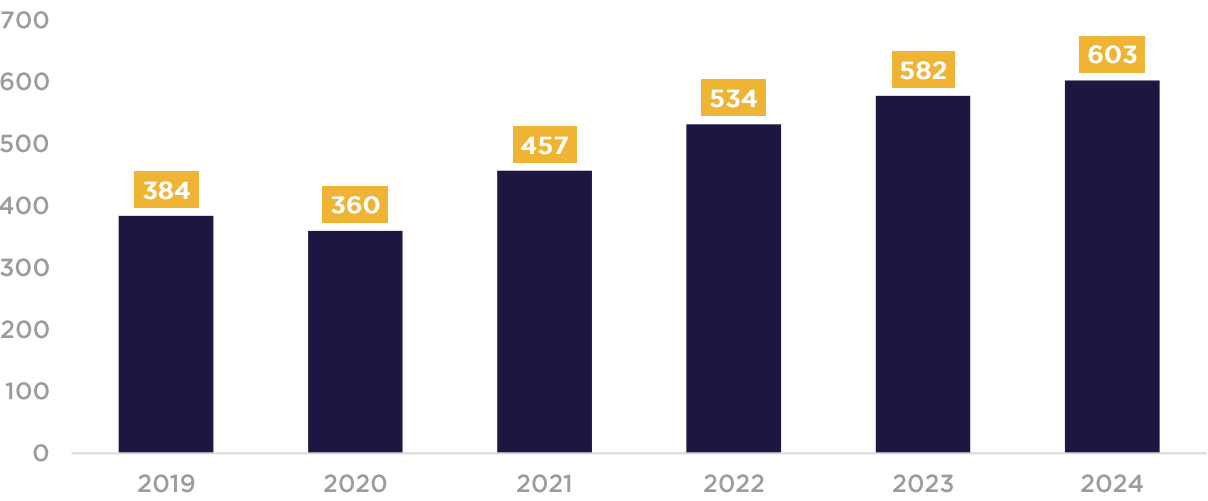


SPORTS

Analyzed operators: 6
Growth 2024 vs 2023: 3.6%
CAGR 2019 – 2024: 9.4%



TURNOVER EVOLUTION (MIL €)



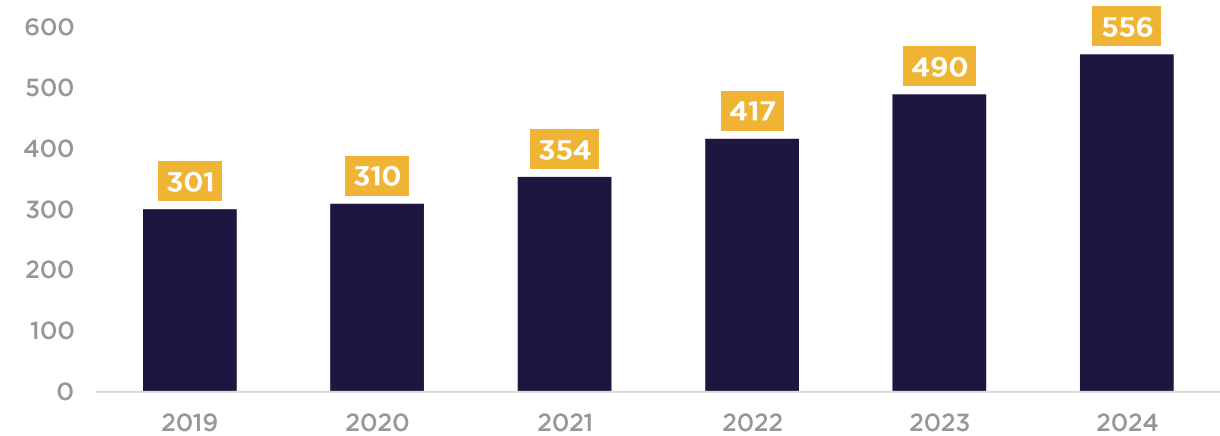
SEGMENT

KIDS & TOYS

Analyzed operators: 6
Growth 2024 vs 2023: 13.5%
CAGR 2019 – 2024: 13.1%



TURNOVER EVOLUTION (MIL €)

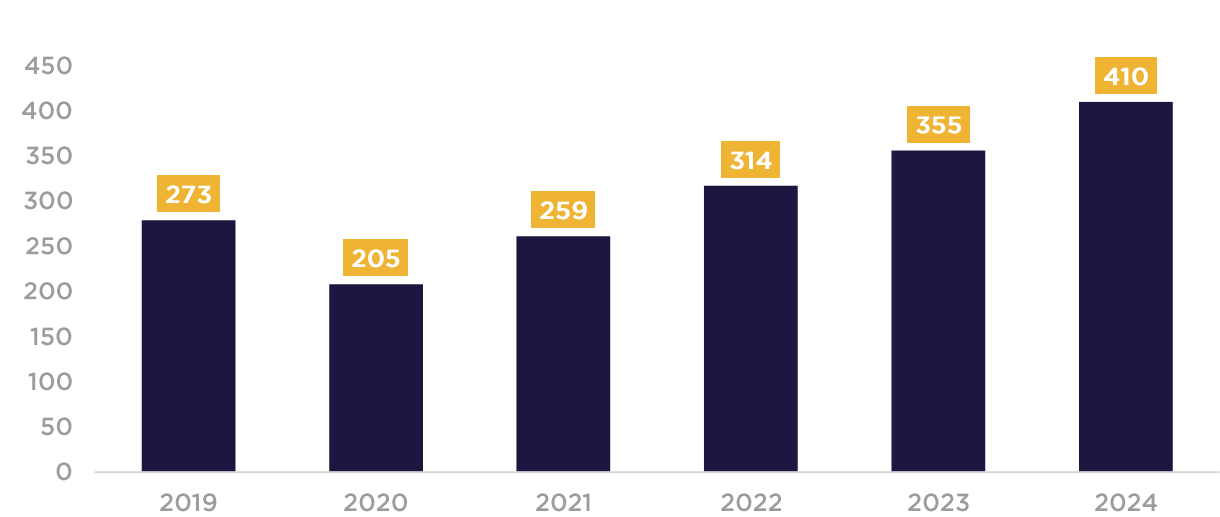


FOOTWEAR

Analyzed operators: 10
Growth 2024 vs 2023: 15.5%
CAGR 2019 – 2024: 8.5%



TURNOVER EVOLUTION (MIL €)



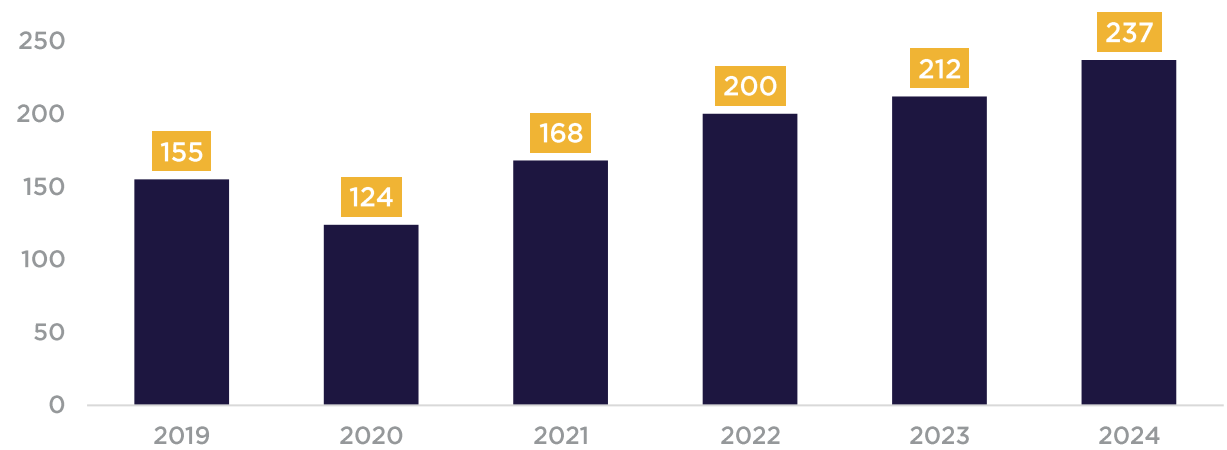
SEGMENT

JEWELRY

Analyzed operators: 5
Growth 2024 vs 2023: 11.8%
CAGR 2019 – 2024: 8.9%



TURNOVER EVOLUTION (MIL €)

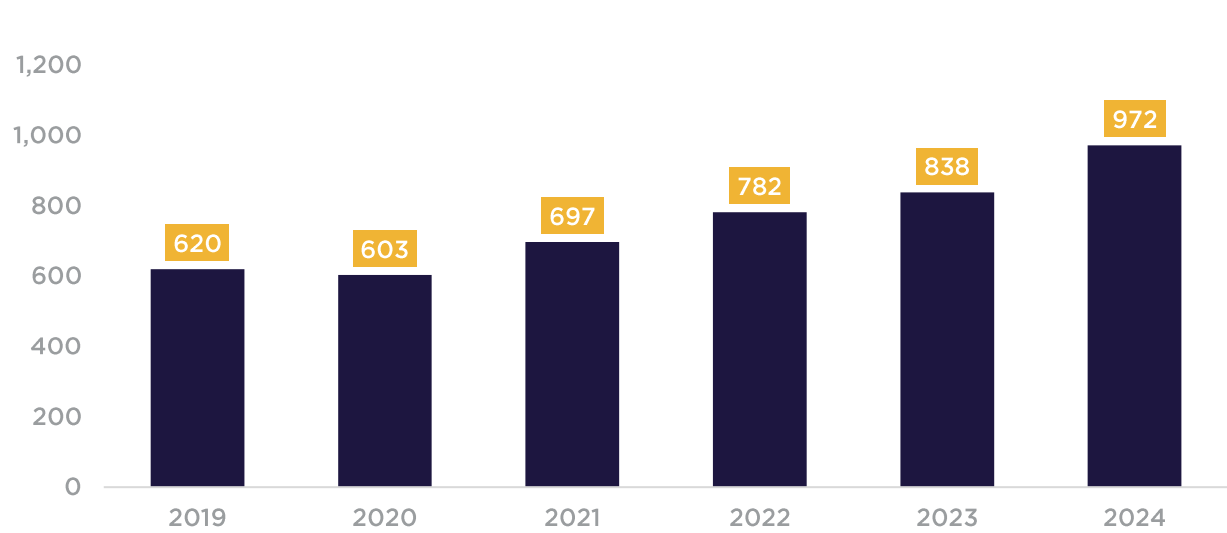


HOME & DECO

Analyzed operators: 7
Growth 2024 vs 2023: 16.0%
CAGR 2019 – 2024: 9.4%



TURNOVER EVOLUTION (MIL €)



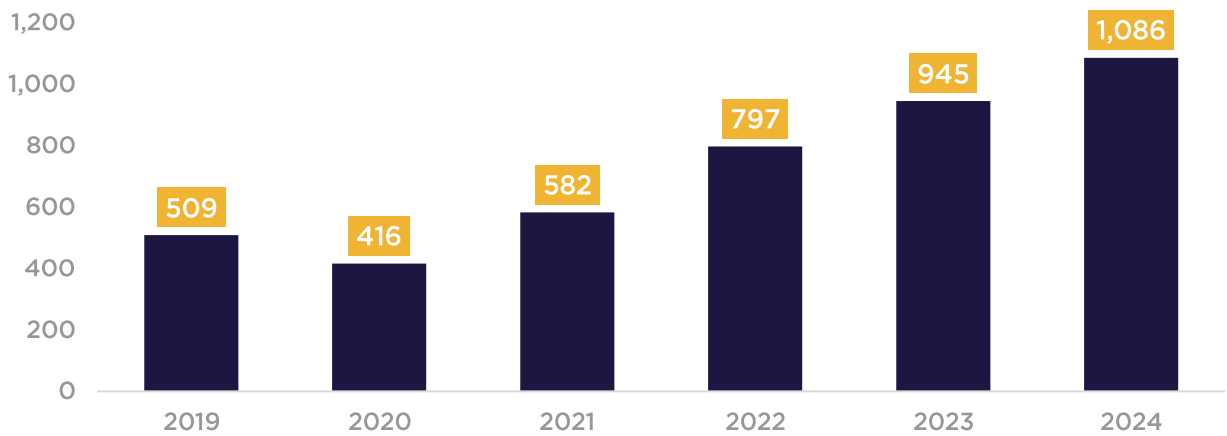
SEGMENT

FOOD & BEVERAGE

Analyzed operators: 14
Growth 2024 vs 2023: 14.9%
CAGR 2019 – 2024: 16.4%



TURNOVER EVOLUTION (MIL €)

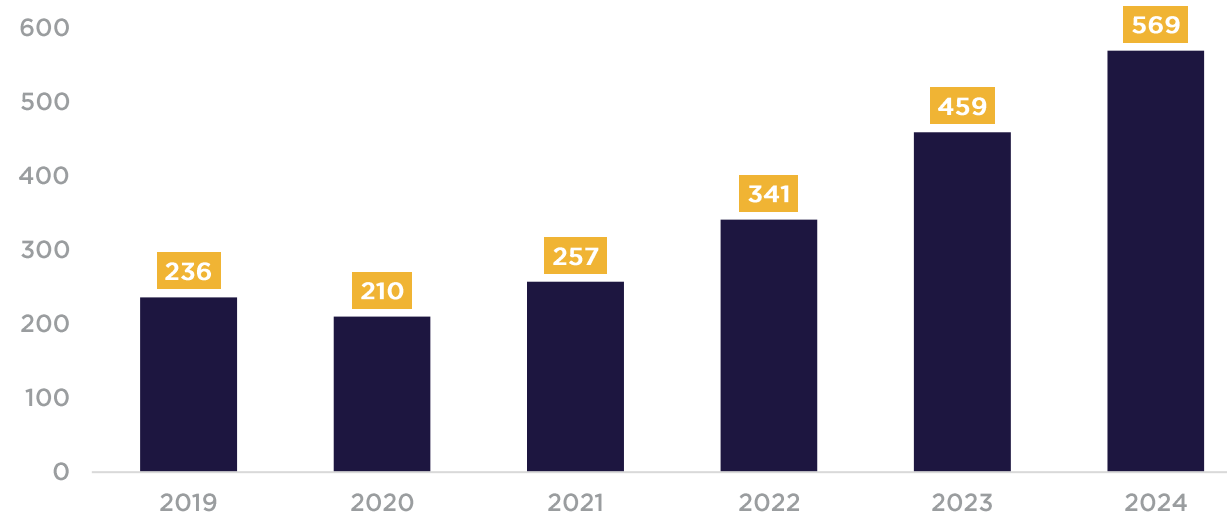


COSMETICS

Analyzed operators: 7
Growth 2024 vs 2023: 24.0%
CAGR 2019 – 2024: 19.2%



TURNOVER EVOLUTION (MIL €)



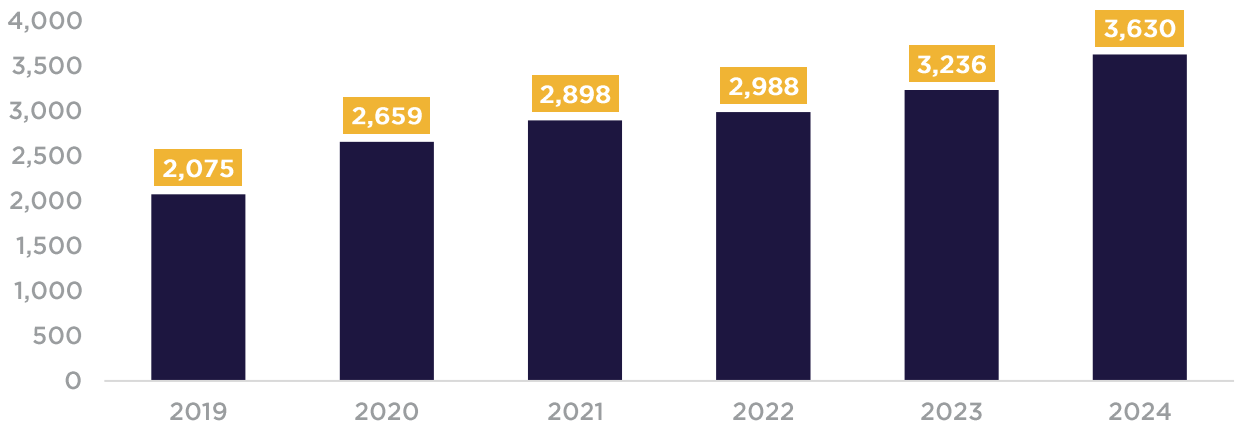
SEGMENT

ELECTRO - IT

Analyzed operators: 3
Growth 2024 vs 2023: 12.2%
CAGR 2019 – 2024: 11.8%



TURNOVER EVOLUTION (MIL €)

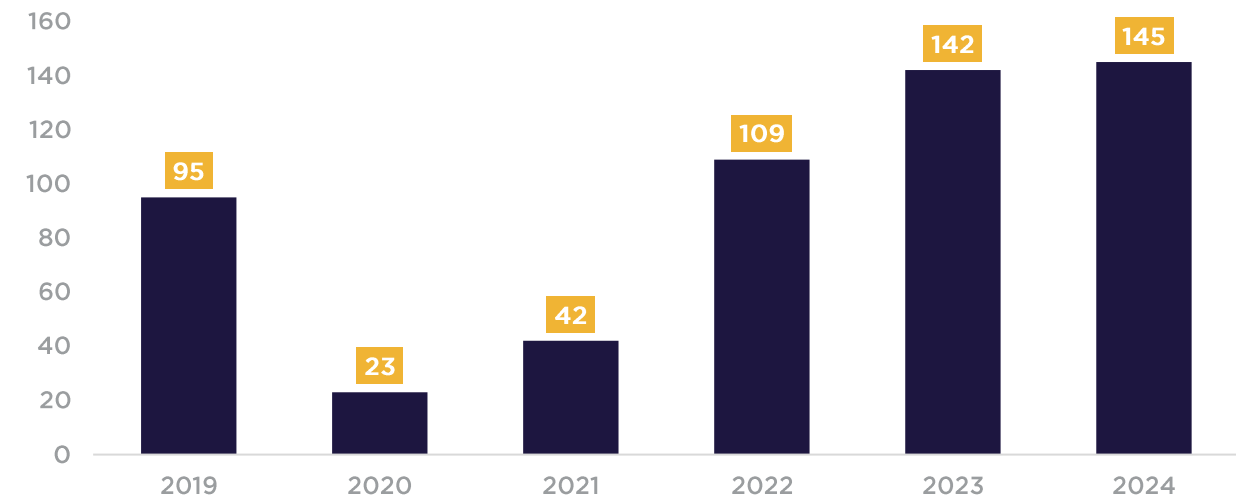


ENTERTAINMENT

Analyzed operators: 5
Growth 2024 vs 2023: 2.1%
CAGR 2019 – 2024: 8.8%



TURNOVER EVOLUTION (MIL €)



SEGMENT

SPECIALIZED STORES

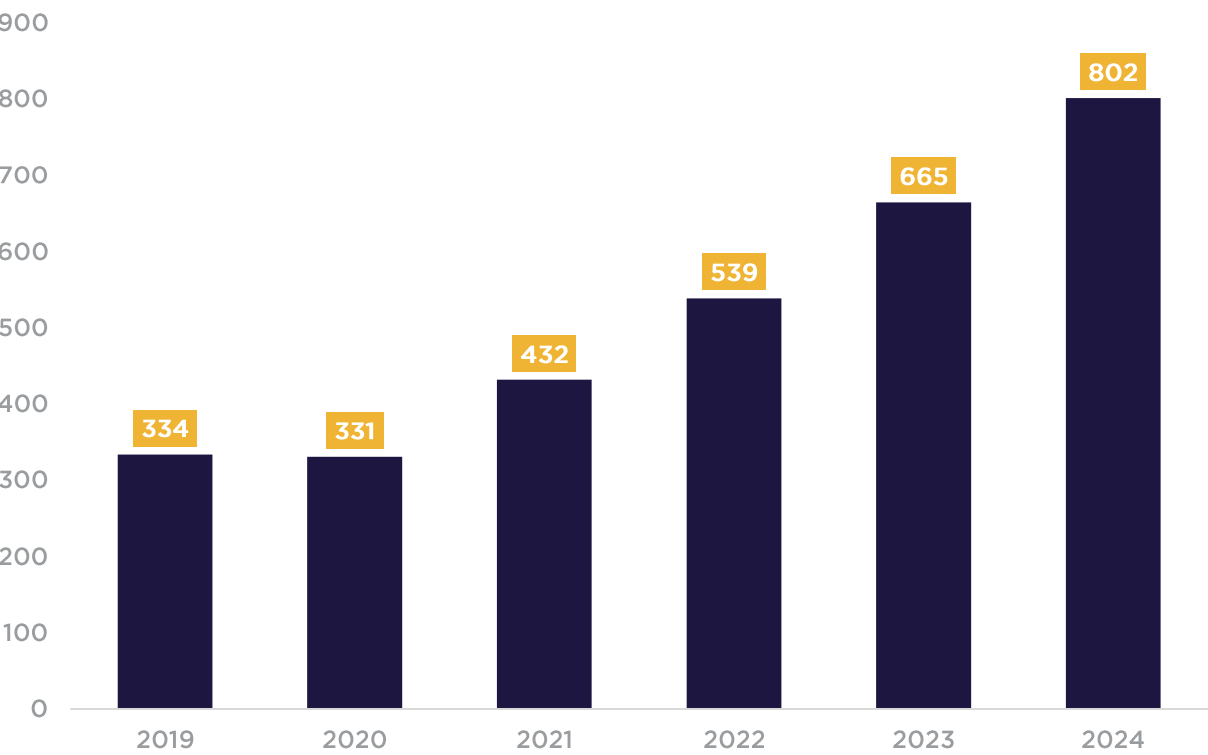
Analyzed operators: 9

Growth 2024 vs 2023: 20.6%

CAGR 2019 – 2024: 19.1%



TURNOVER EVOLUTION (MIL €)



ROMANIAN RETAIL SNAPSHOT

82-94 Buzești St, Tiriac Tower, 6th Floor
011017, District 1, Bucharest, Romania

cwechinox.com | [Linkedin](#) | [Instagram](#) | [Facebook](#)

CONTACT

VLAD SAFTOIU

Head of Research

vlad.saftoiu@cwechinox.com

DANA RADOVENEANU

Head of Retail Agency

dana.radoveneanu@cwechinox.com