

ROMANIA

RETAIL

SNAPSHOT

2 0 2 6

ROMANIA RETAIL PERFORMANCE

Retail sales remained on a growth trajectory despite a challenging inflationary environment, with the 125 analyzed retailers generating **€42.2 billion** in turnover in 2025, up 5.6% y-o-y and 77% above the 2019 levels. The operators in question recorded a **10.0% revenue CAGR** between 2019-2025, outperforming cumulative inflation trends and reflecting a strong consumer demand resilience.

KEY TURNOVER HIGHLIGHTS

Food Stores remain the largest retail segment, reaching **€25.7 billion turnover** in 2025 (+6.9% y-o-y), accounting for over 60% of analysed revenues.

DIY continued its strong expansion, generating **€4.2 billion** (+4.8% y-o-y), while **Electro-IT** was the second-largest discretionary category at **€3.6 billion**, broadly stable versus 2024.

Fashion sales increased to **€2.7 billion** (+3.3% y-o-y), reflecting moderate but sustained growth from a broad retailer base.

Growth leaders were **Cosmetics (+12.8%)** and **Food & Beverage (+11.2%)**, highlighting the consumers' continued focus on personal care and experience related spending.

TAKEAWAYS

Romania's retail market continues to expand on broad-based consumer demand, with food-led growth complemented by strong momentum in cosmetics, and lifestyle categories, supporting continued retailer expansion and need for prime retail spaces.

Despite inflationary pressures, retail turnover growth continues to outpace long-term inflation trends in many segments, reinforcing retailer confidence and supporting further investment in physical store networks.

Growth is becoming increasingly diversified, with 11 of 13 categories posting positive turnover evolution in 2025, indicating healthy consumer spending across both necessity-driven and discretionary segments.

AGENDA

01

MACROECONOMICS

02

CEE RETAIL MARKET

03

ROMANIA RETAIL MARKET

04

ROMANIA RETAIL MARKET PERFORMANCE

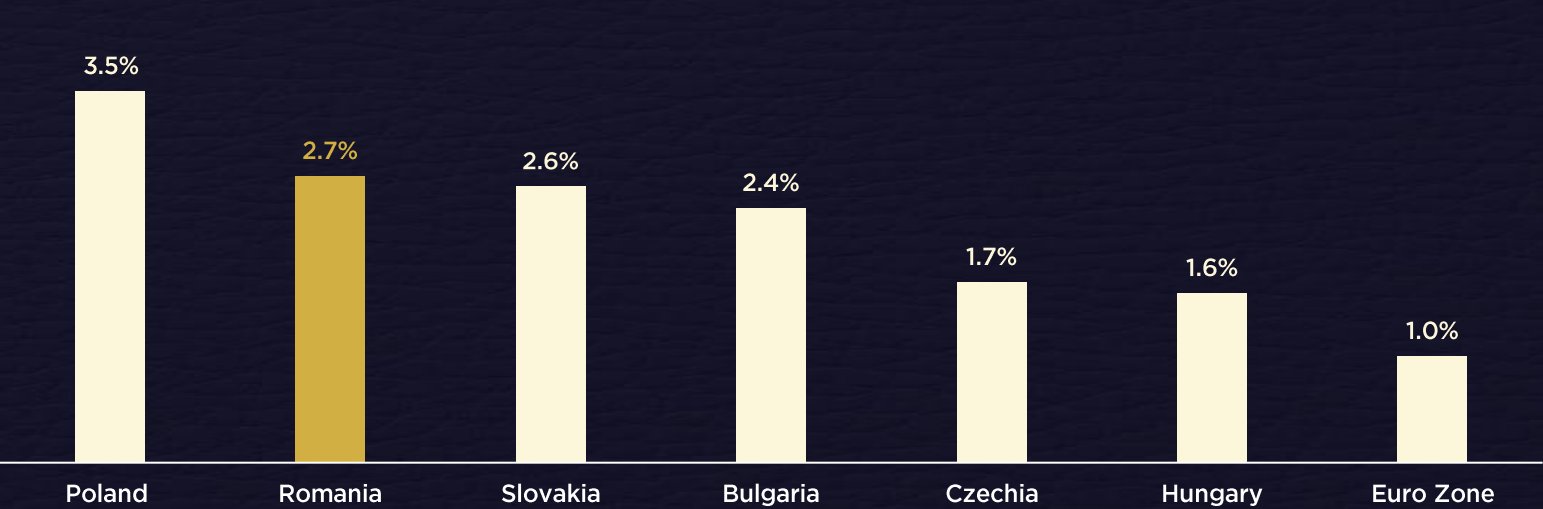


MACRO ECONOMICS

POPULATION	19.0 (2026)
GDP	€380.1 billion (2025)
GDP growth	0.7% (2025)
Monetary Policy Rate (RON /EUR)	6.5% / 2.25% (August 2026)
Inflation rate	10.4% (June 2026)
Average net salary (€/ month) Romania	1,087*
Average net salary (€/ month) Bucharest	1,397*
Unemployment rate Romania	3.2%*
Unemployment rate Bucharest	0.4%*

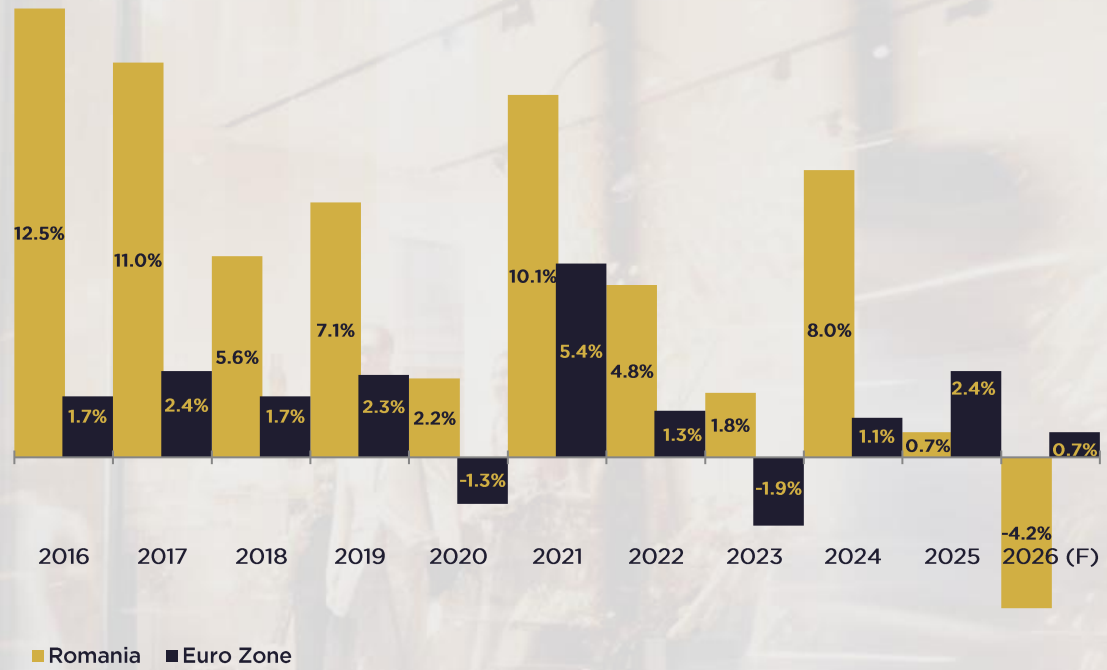
Source: National Institute of Statistics, National Commission for Prognosis
*May 2026

GDP CAGR 2007 – 2025

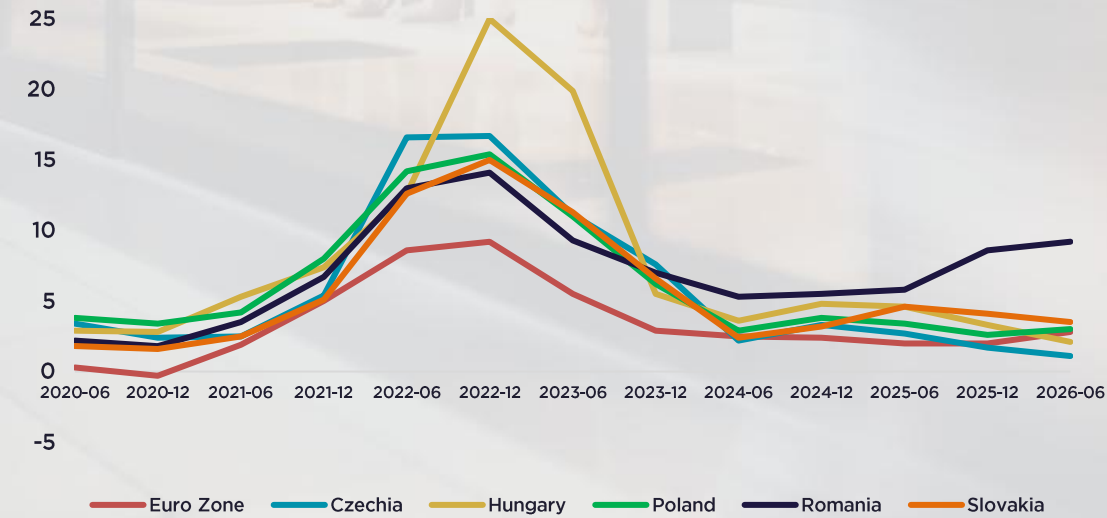


Source: Eurostat, Cushman & Wakefield Echinox Research

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



THE IMPACT OF INFLATION BY MARKET



Source: Moody's Analytics

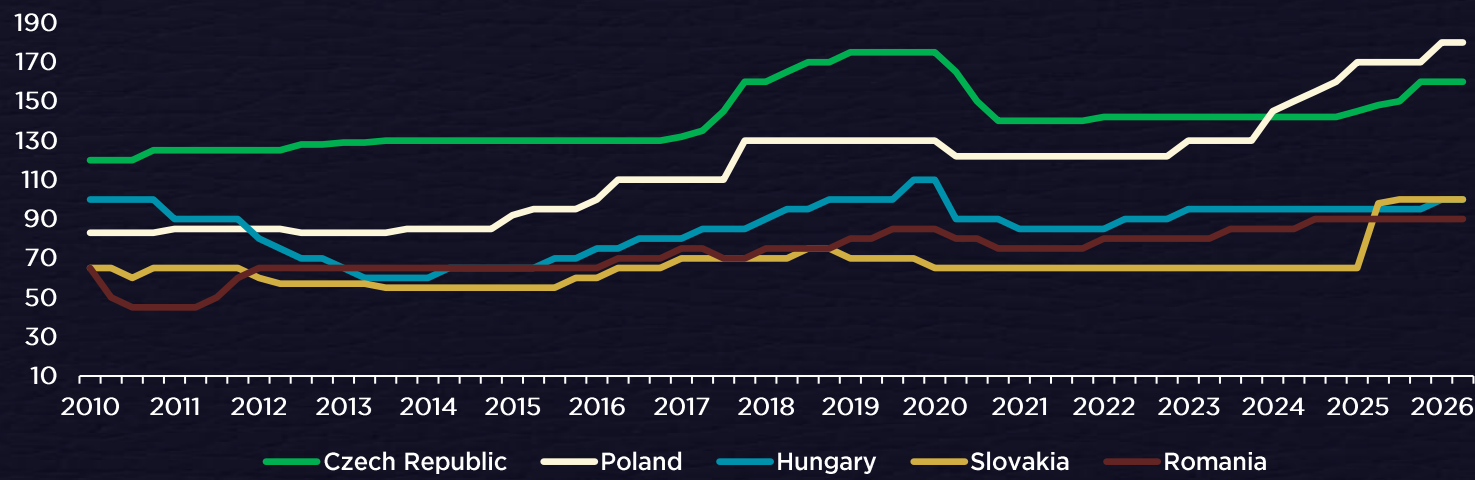
C E E RETAIL MARKET

KEY INDICATORS

COUNTRY	STOCK (SQ. M)	PRIME SHOPPING CENTER RENT (€/ SQ. M/ MONTH)	DENSITY (SQ. M / 1,000 INHABITANTS)
Romania	4,916,300	90	258
Hungary	3,172,200	100	330
Czechia	3,986,100	160	365
Poland	14,037,900	180	366
Slovakia	2,431,500	100	450

Source: Cushman & Wakefield Echinox Research

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

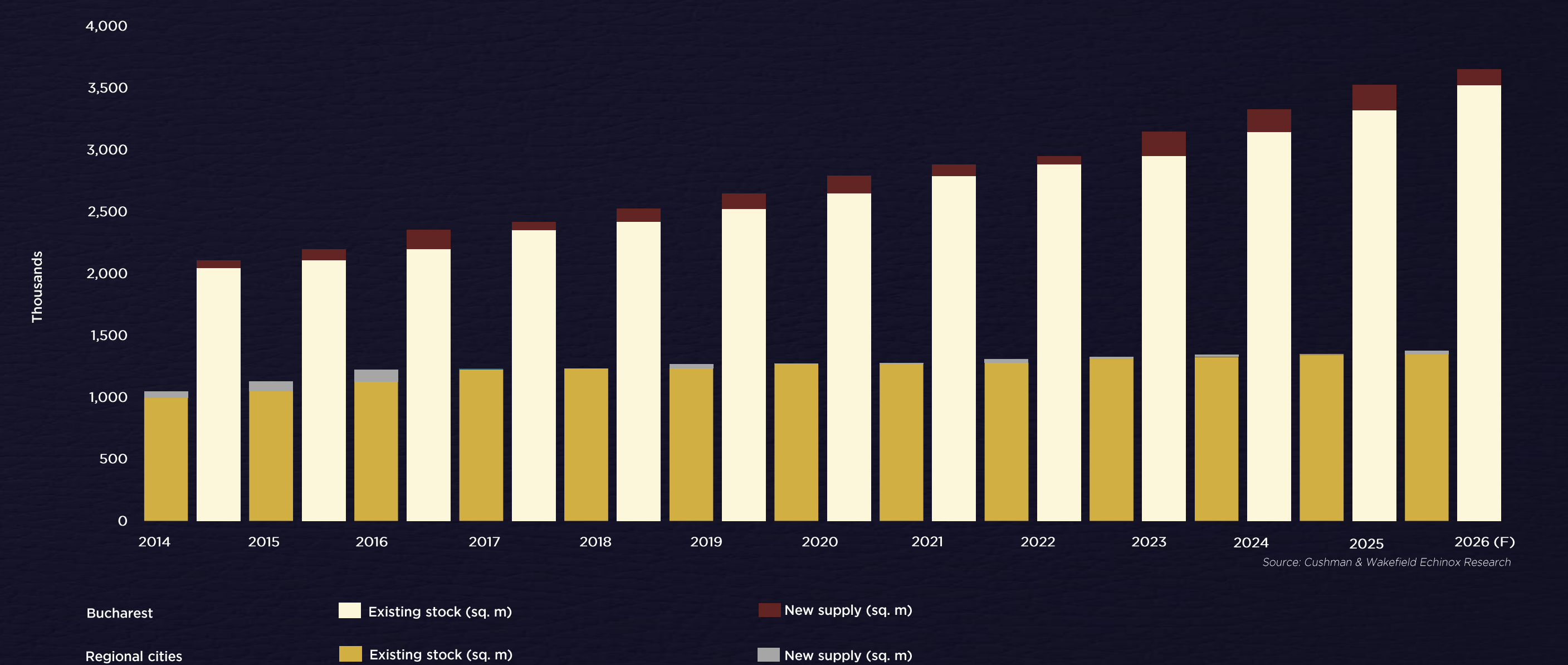


Source: Cushman & Wakefield Echinox Research



ROMANIA RETAIL MARKET

KEY FIGURES 2026



ROMANIA RETAIL MARKET



*For a space of 100 - 200 sq. m at the ground floor of a dominant shopping center
Source: Cushman & Wakefield Echinox Research

ROMANIA RETAIL MARKET PERFORMANCE



13 SEGMENTS

125

Analyzed operators

42,212

Total revenue 2025 (mil. €)

5.6%

Growth 2025 vs 2024

7.3%

Annual inflation rate 2025

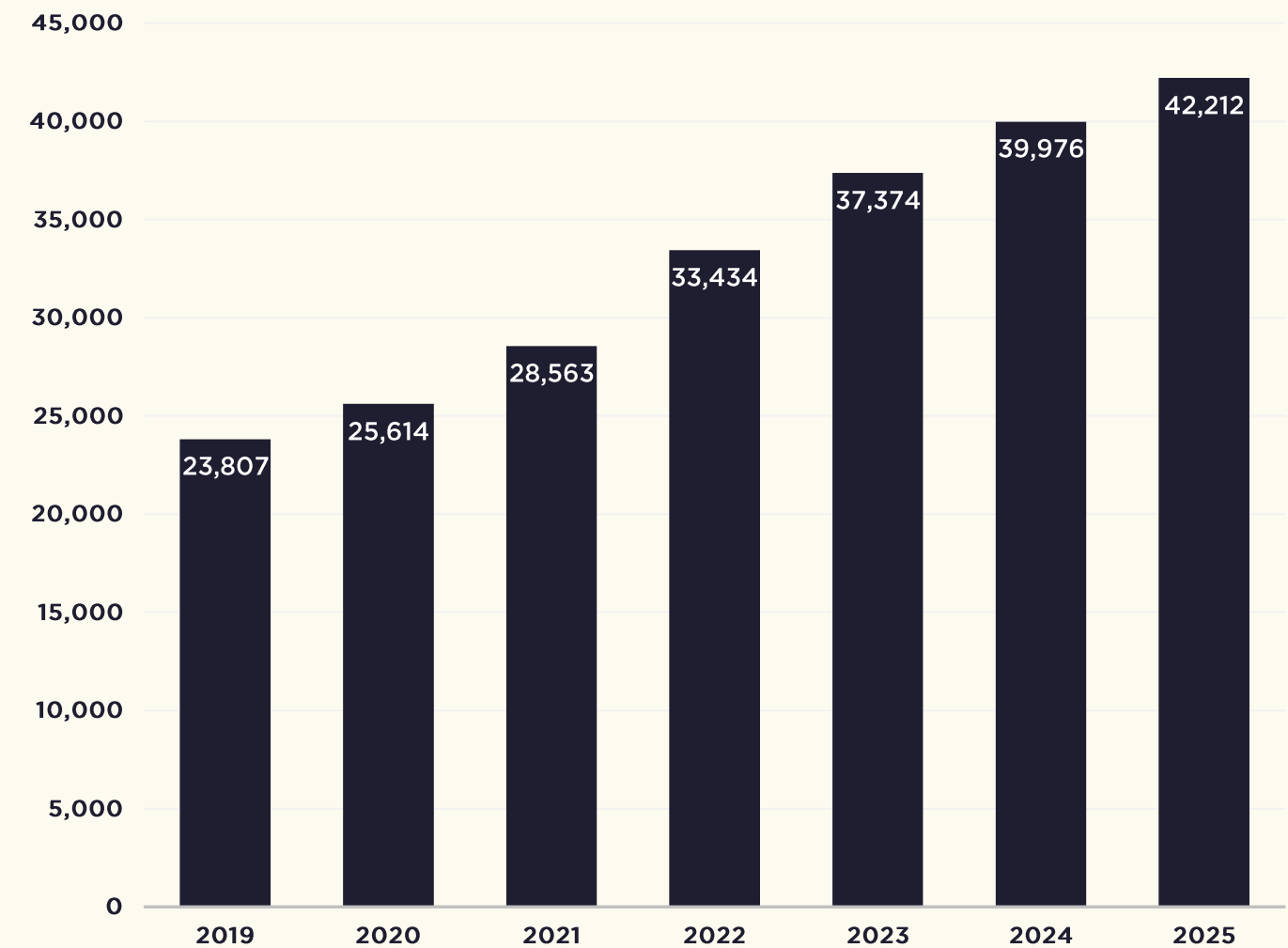
10.0%

CAGR revenue 2019 - 2025

7.4%

CAGR inflation 2019 - 2025

OVERALL TURNOVER EVOLUTION (MIL €)



Source: Cushman & Wakefield Echinox Research

FOOD STORES



16

Operators analyzed

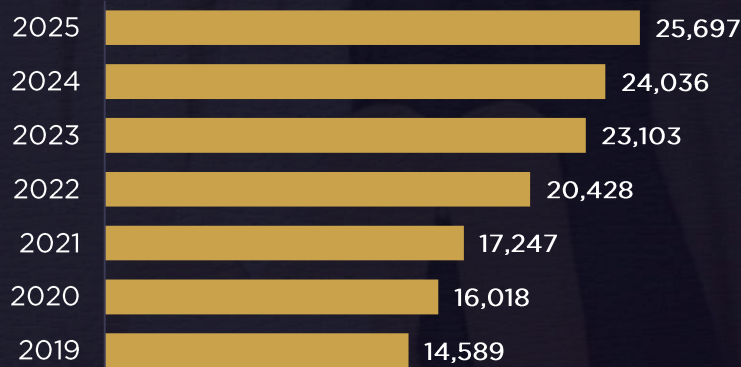
6.9%

Growth '25 vs '24

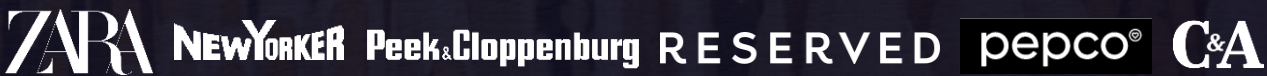
9.9%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



FASHION



34

Operators analyzed

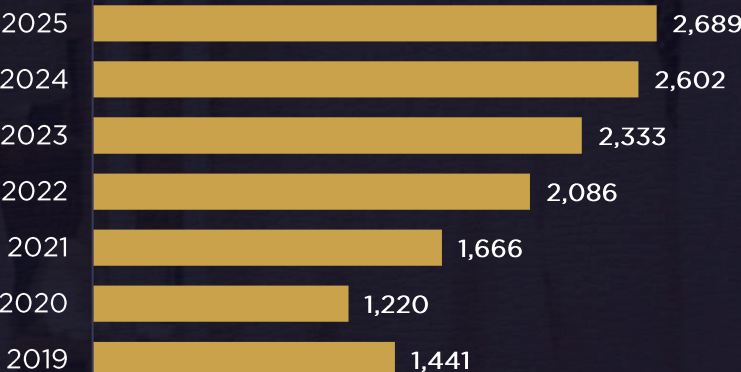
3.3%

Growth '25 vs '24

11.0%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



DIY

HORNBACH



ARABESQUE
CÂND CONSTRUIEȘC



4

Operators analyzed

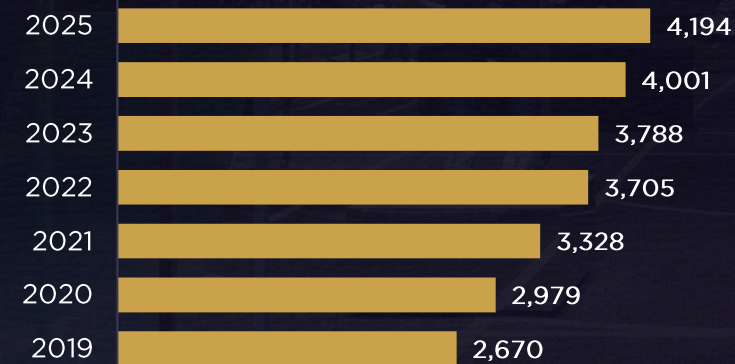
4.8%

Growth '25 vs '24

7.8%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



SPORTS

INTERSPORT

DECATHLON



6

Operators analyzed

1.6%

Growth '25 vs '24

8.8%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



KIDS & TOYS



6

Operators analyzed

6.7%

Growth '25 vs '24

12.0%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



FOOTWEAR



9

Operators analyzed

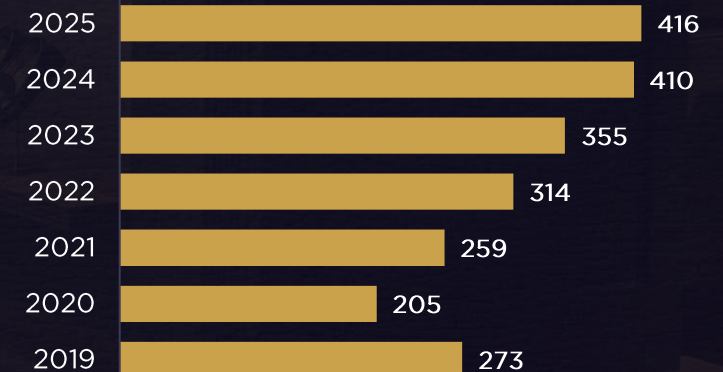
1.5%

Growth '25 vs '24

7.3%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



JEWELRY

TEILOR
FINE JEWELLERY

B&B
collection

PANDORA

5

Operators analyzed

3.4%

Growth '25 vs '24

7.9%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



HOME & DECO

IKEA

JYSK

MOBEXPERT

ROVERE

7

Operators analyzed

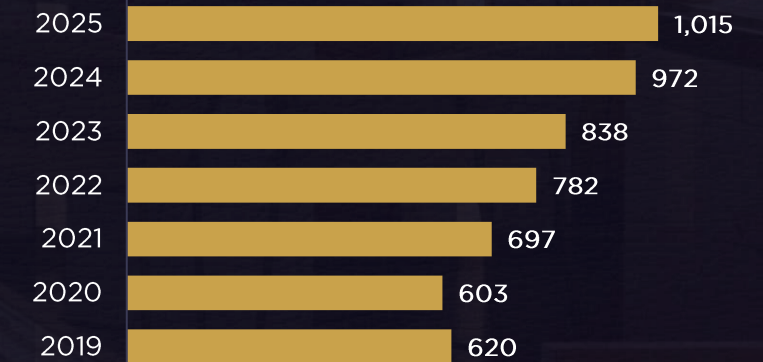
4.4%

Growth '25 vs '24

8.6%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



FOOD & BEVERAGE



KFC



FRY.

14

Operators analyzed

11.2%

Growth '25 vs '24

15.5%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



COSMETICS

SEPHORA



DOUGLAS

6

Operators analyzed

12.8%

Growth '25 vs '24

18.2%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



ELECTRO — IT

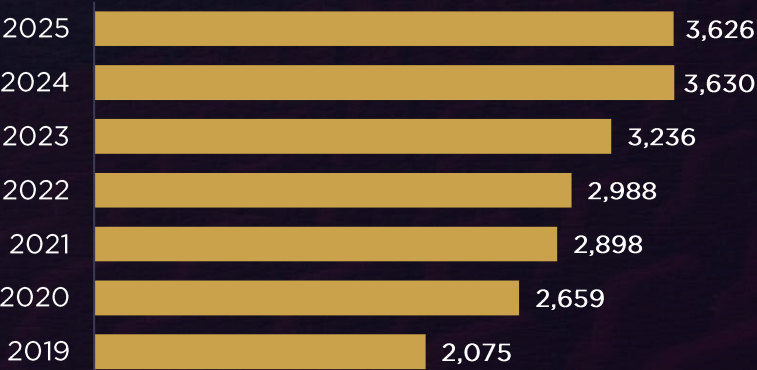


3
Operators analyzed

-0.1%
Growth '25 vs '24

9.8%
CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



ENTERTAINMENT



5
Operators analyzed

6.5%
Growth '25 vs '24

9.4%
CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



SPECIALIZED STORES

inmedio

animax

cărturești
carte, ceai, muzică, dichis

FINE STORE®

10

Operators analyzed

-0.8%

Growth '25 vs '24

15.5%

CAGR '19-'25

TURNOVER EVOLUTION (MIL €)



CONTACT

VLAD SAFTOIU

Head of Research

vlad.saftoiu@cwechinox.com

DANA RADOVENEANU

Head of Retail Agency

dana.radoveneanu@cwechinox.com



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

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

Cushman & Wakefield Echinox is a leading real estate company on the local market and the exclusive affiliate of Cushman & Wakefield in Romania, owned and operated independently, with a team of over 80 professionals and collaborators offering a full range of services to investors, developers, owners and tenants.

Copyright ©2026 Cushman & Wakefield Echinox. All rights reserved

RETAIL

SNAPSHOT