



Apparel and Footwear in Romania

November 2023

Table of Contents

Apparel and Footwear in Romania

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023

Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023

Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023

Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023

Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023

Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023

Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028

Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028

Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Parents are willing to spend more for good quality products

Licensing – a key trend for the category

Pepco retains lead in childrenswear

PROSPECTS AND OPPORTUNITIES

Growth dampened by population ageing but boosted by premiumisation

Demand for childrenswear to follow a seasonal pattern

Room for growth for private labels

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023

Table 14 - Sales of Childrenswear by Category: Value 2018-2023

Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023

Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023

Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023

Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028

Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028

Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028

Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Apparel accessories regarded as an affordable way to improve one's image

Low quality products still have a significant presence

Ties category leads growth in 2023

PROSPECTS AND OPPORTUNITIES

Less expensive brands preferred in the short term

Expected success for small companies

More apparel accessories in grocery stores

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023

Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation remains a major factor in 2023

Formal apparel continues to grow

Higher adoption of e-commerce

PROSPECTS AND OPPORTUNITIES

Focusing on comfortable clothes

Increasing product variety expected

Retailers to become even more active

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023

Table 34 - Sales of Menswear by Category: Value 2018-2023

Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023

Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Menswear: % Value 2019-2023

Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023

Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023
Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028
Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028
Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028
Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

Womenswear in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for womenswear remains high
Rising interest in second-hand products
E-commerce on the rise

PROSPECTS AND OPPORTUNITIES

Sustainability in the limelight
A market for womenswear from all price ranges
Retail landscape to become even more dynamic

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2018-2023
Table 52 - Sales of Womenswear by Category: Value 2018-2023
Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023
Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023
Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023
Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023
Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023
Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023
Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023
Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023
Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023
Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023
Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023
Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023
Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028
Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028
Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028
Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

Jeans in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Working from home trend slows down growth
Between big brands and private labels
Online sales are occupying a central place

PROSPECTS AND OPPORTUNITIES

Expected competition from sportswear
High product diversity and further online expansion
Romanians to embrace eco-friendly jeans

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023
Table 70 - Sales of Jeans by Category: Value 2018-2023
Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023
Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023
Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023
Table 74 - Sales of Men's Jeans by Category: Value 2018-2023
Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023
Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023
Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023
Table 78 - Sales of Women's Jeans by Category: Value 2018-2023
Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023
Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023
Table 81 - NBO Company Shares of Jeans: % Value 2019-2023
Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023
Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028
Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028
Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028
Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028
Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028
Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028
Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028
Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028
Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028
Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028
Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028
Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

Hosiery in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Adoption of more active lifestyles has positive impact on hosiery sales
Good context for non-sheer hosiery
Private labels become more relevant

PROSPECTS AND OPPORTUNITIES

Sustained growth in the future
Premiumisation and innovation expected
Pepco to lead sales

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023
Table 96 - Sales of Hosiery by Category: Value 2018-2023
Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023
Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023
Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023
Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023
Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028
Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028
Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028
Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

2023 brings growth for footwear

Winners and losers amongst the local manufacturers

Footwear retailers rely heavily on innovation

PROSPECTS AND OPPORTUNITIES

Consistent growth in the forecast period

Intensifying competition over the forecast period

Online retail to keep on growing

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023

Table 106 - Sales of Footwear by Category: Value 2018-2023

Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023

Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Footwear: % Value 2019-2023

Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023

Table 111 - Distribution of Footwear by Format: % Value 2018-2023

Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028

Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028

Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028

Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sportswear grows amid a favourable context

Chained retailers are dominating sales

Decathlon remains in front, while the voice of Romanian sportswear players is increasingly heard

PROSPECTS AND OPPORTUNITIES

Soaring performance forecast for sportswear

Expected premiumisation

Rising importance of e-commerce

CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023

Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023

Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023

Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023

Table 120 - Distribution of Sportswear by Format: % Value 2018-2023

Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028

Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

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/apparel-and-footwear-in-romania/report.