



# Passport

## Home Improvement in Romania

Euromonitor International

June 2022

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Some content and data have been  
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# LIST OF CONTENTS AND TABLES

Home Improvement in Romania - Category Analysis.....	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
Lockdown accelerates evolution of consumer demand and interest.....	1
Online offer grows at speed in Romania.....	1
Key movements on the competitive landscape.....	1
PROSPECTS AND OPPORTUNITIES.....	2
Sophistication, environmental awareness on the rise.....	2
Operational expansion in power tools.....	2
Rising prices may limit growth although demand remains in place	<b>Error! Bookmark not defined.</b>
CATEGORY DATA.....	2
Table 1    Sales of Home Improvement by Category: Value 2016-2021 .....	2
Table 2    Sales of Home Improvement by Category: % Value Growth 2016-2021 .....	3
Table 3    NBO Company Shares of Home Improvement: % Value 2017-2021 .....	3
Table 4    LBN Brand Shares of Home Improvement: % Value 2018-2021.....	4
Table 5    Distribution of Home Improvement by Format: % Value 2016-2021 .....	5
Table 6    Forecast Sales of Home Improvement by Category: Value 2021-2026.....	6
Table 7    Forecast Sales of Home Improvement by Category: % Value Growth 2021-2026.....	6
Home and Garden in Romania - Industry Overview .....	8
EXECUTIVE SUMMARY .....	8
Home and garden in 2021: The big picture.....	8
2021 key trends .....	8
Competitive landscape .....	8
Retailing developments .....	8
What next for home and garden? .....	9
MARKET DATA.....	9
Table 8    Sales of Home and Garden by Category: Value 2016-2021 .....	9
Table 9    Sales of Home and Garden by Category: % Value Growth 2016-2021.....	9
Table 10   NBO Company Shares of Home and Garden: % Value 2017-2021 .....	10
Table 11   LBN Brand Shares of Home and Garden: % Value 2018-2021.....	10
Table 12   Penetration of Private Label in Home and Garden by Category: % Value 2016-2021 .....	11
Table 13   Distribution of Home and Garden by Format: % Value 2016-2021 .....	12
Table 14   Distribution of Home and Garden by Format and Category: % Value 2021 .....	12
Table 15   Forecast Sales of Home and Garden by Category: Value 2021-2026.....	13
Table 16   Forecast Sales of Home and Garden by Category: % Value Growth 2021-2026.....	13
DISCLAIMER .....	14
SOURCES.....	14
Summary 1    Research Sources.....	14

# HOME IMPROVEMENT IN ROMANIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2021 DEVELOPMENTS

Lockdown accelerates evolution of consumer demand and interest

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Online offer grows at speed in Romania

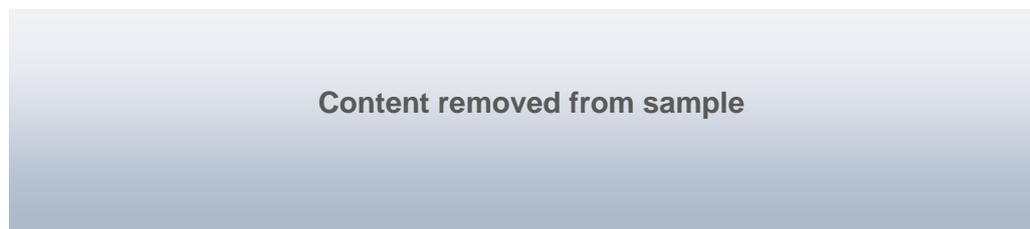
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Key movements on the competitive landscape

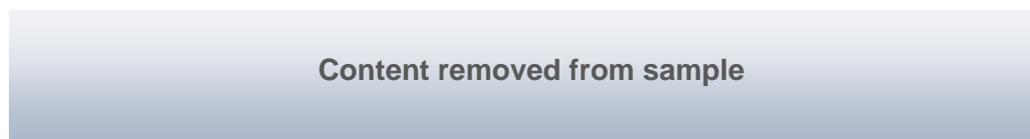
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## PROSPECTS AND OPPORTUNITIES

Sophistication, environmental awareness on the rise



Operational expansion in power tools



## CATEGORY DATA

Table 1 Sales of Home Improvement by Category: Value 2016-2021

RON million	2016	2017	2018	2019	2020	2021
- Bathroom and Sanitaryware	Data removed from sample					
- Floor Covering						
-- Carpets						
-- Floor Tiles						
-- Wooden Flooring						
-- Other Floor Covering						
- Hand Tools						
- Hardware						
- Home Paint						
-- Lacquer and Varnish						
-- Decorative Paint						
- Kitchen Sinks						
- Power Tools						
-- Drills						
--- Corded Drills						
--- Cordless Drills						
-- Other Power Tools						
--- Other Corded Power Tools						
--- Other Cordless Power Tools						
- Wall Covering						
-- Wall Tiles						
-- Wallpaper						
- Other Home Improvement						
Home Improvement						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Home Improvement by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Bathroom and Sanitaryware			
- Floor Covering			
-- Carpets			
-- Floor Tiles			
-- Wooden Flooring			
-- Other Floor Covering			
- Hand Tools			
- Hardware			
- Home Paint			
-- Lacquer and Varnish			
-- Decorative Paint			
- Kitchen Sinks			
- Power Tools			
-- Drills			
--- Corded Drills			
--- Cordless Drills			
-- Other Power Tools			
--- Other Corded Power Tools			
--- Other Cordless Power Tools			
- Wall Covering			
-- Wall Tiles			
-- Wallpaper			
- Other Home Improvement			
Home Improvement			

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 NBO Company Shares of Home Improvement: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
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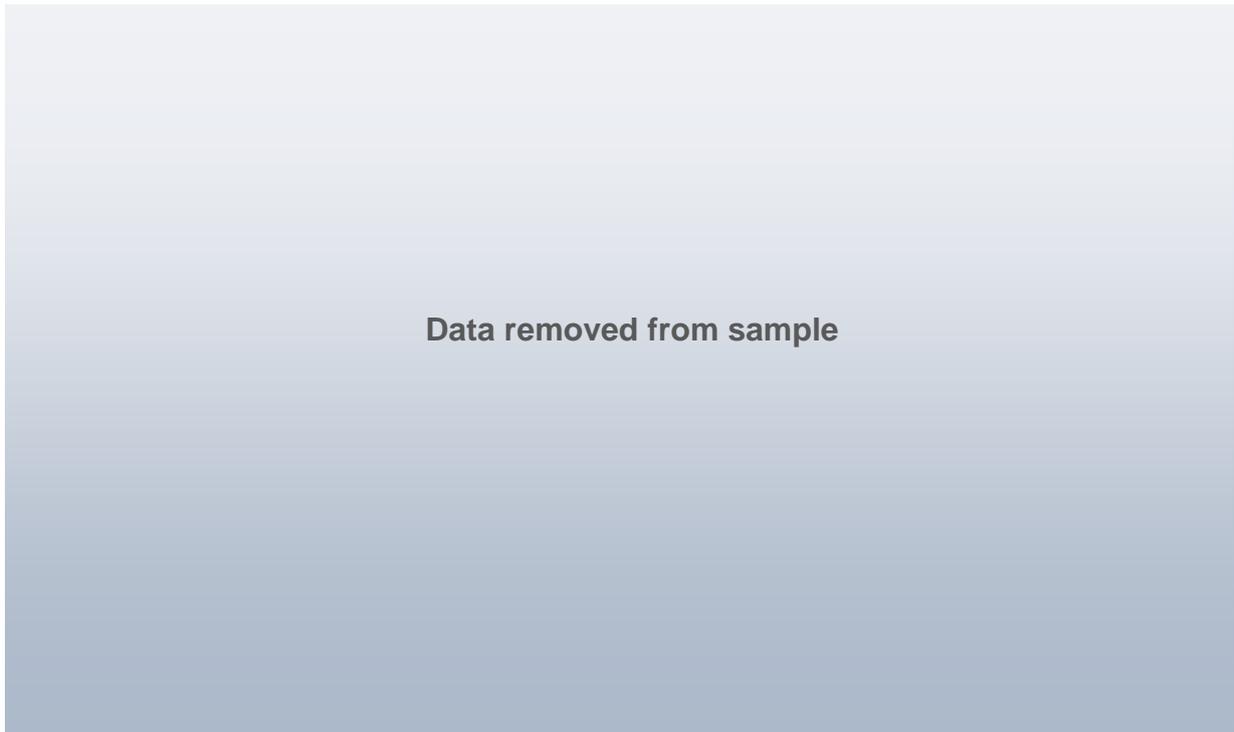
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Home Improvement: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5** Distribution of Home Improvement by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Homeshopping						

- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 Forecast Sales of Home Improvement by Category: Value 2021-2026**

RON million

	2021	2022	2023	2024	2025	2026
- Bathroom and Sanitaryware	<b>Data removed from sample</b>					
- Floor Covering						
-- Carpets						
-- Floor Tiles						
-- Wooden Flooring						
-- Other Floor Covering						
- Hand Tools						
- Hardware						
- Home Paint						
-- Lacquer and Varnish						
-- Decorative Paint						
- Kitchen Sinks						
- Power Tools						
-- Drills						
--- Corded Drills						
--- Cordless Drills						
-- Other Power Tools						
--- Other Corded Power Tools						
--- Other Cordless Power Tools						
- Wall Covering						
-- Wall Tiles						
-- Wallpaper						
- Other Home Improvement						
Home Improvement						

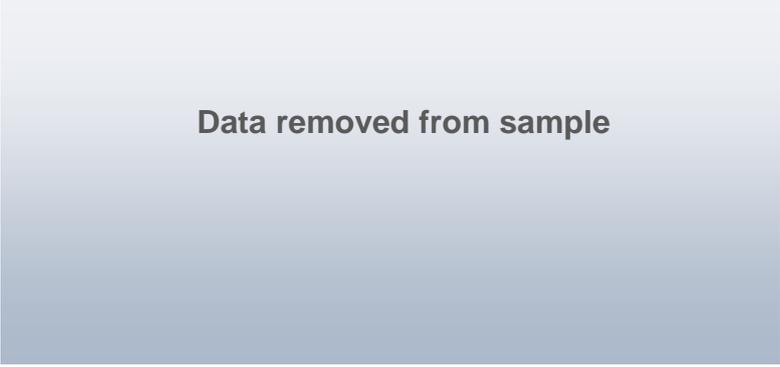
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 7 Forecast Sales of Home Improvement by Category: % Value Growth 2021-2026**

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Bathroom and Sanitaryware	<b>Data removed from sample</b>		
- Floor Covering			
-- Carpets			
-- Floor Tiles			
-- Wooden Flooring			
-- Other Floor Covering			
- Hand Tools			
- Hardware			
- Home Paint			
-- Lacquer and Varnish			
-- Decorative Paint			

- Kitchen Sinks
  - Power Tools
    - Drills
      - Corded Drills
      - Cordless Drills
      - Other Corded Power Tools
      - Other Cordless Power Tools
    - Other Power Tools
  - Wall Covering
    - Wall Tiles
    - Wallpaper
  - Other Home Improvement
- Home Improvement



**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# HOME AND GARDEN IN ROMANIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Home and garden in 2021: The big picture

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### 2021 key trends

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### Competitive landscape

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### Retailing developments

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**What next for home and garden?**

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**MARKET DATA**

**Table 8 Sales of Home and Garden by Category: Value 2016-2021**

RON million	2016	2017	2018	2019	2020	2021
Home Improvement and Gardening	<b>Data removed from sample</b>					
Home Improvement						
Gardening						
Homewares and Home Furnishings						
Homewares						
Home Furnishings						
Home and Garden						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9 Sales of Home and Garden by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Home Improvement and Gardening	<b>Data removed from sample</b>		
Home Improvement			
Gardening			
Homewares and Home Furnishings			
Homewares			
Home Furnishings			
Home and Garden			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Home and Garden: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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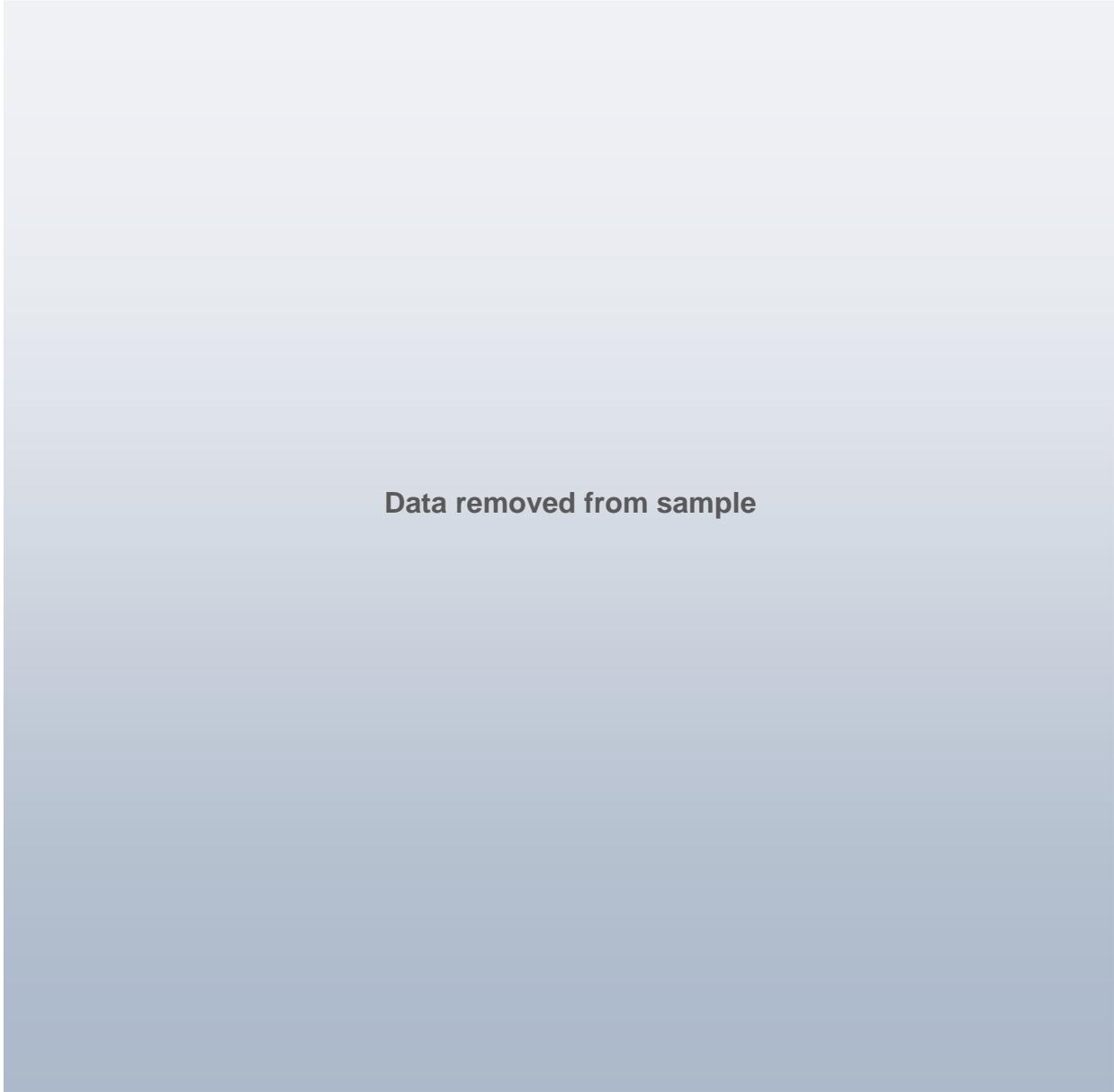
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 LBN Brand Shares of Home and Garden: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 12** Penetration of Private Label in Home and Garden by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Gardening	<b>Data removed from sample</b>					
Home and Garden						
Home Improvement						
Home Improvement and Gardening						
Homewares						

Homewares and Home Furnishings

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Home and Garden by Format: % Value 2016-2021

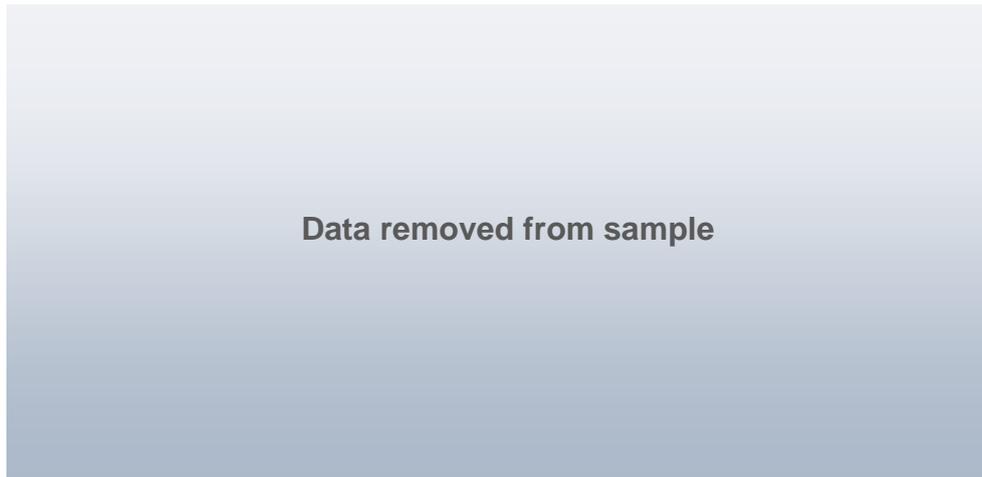
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Home and Garden by Format and Category: % Value 2021

% retail value rsp	Home Improvement and Gardening	Home Improvement	Gardening	Homewares and Home Furnishings	Homewares	Home Furnishings
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						

- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Home and Garden Specialist Retailers
- Home Improvement and Gardening Stores
- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: HIG = home improvement and gardening; HI = home improvement; GD = gardening; HHF = homewares and home furnishings; HW = homewares; HF = home furnishings

**Table 15 Forecast Sales of Home and Garden by Category: Value 2021-2026**

RON million	2021	2022	2023	2024	2025	2026
Home Improvement and Gardening	<b>Data removed from sample</b>					
Home Improvement						
Gardening						
Homewares and Home Furnishings						
Homewares						
Home Furnishings						
Home and Garden						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 16 Forecast Sales of Home and Garden by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Home Improvement and Gardening	<b>Data removed from sample</b>		
Home Improvement			
Gardening			
Homewares and Home Furnishings			
Homewares			
Home Furnishings			
Home and Garden			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources

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Source: Euromonitor International