



Passport

Convenience Stores in Romania

Euromonitor International

February 2022

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purposes only.
Some content and data have been changed.

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CONVENIENCE STORES IN ROMANIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Convenience stores booms, boosted by rising demand for proximity retailing

Convenience stores registered strong sales growth in 2021 as the channel benefited from the

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Numerous new convenience stores open as players look to cash in on high demand

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Local convenience stores chains tend to have only regional reach

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PROSPECTS AND OPPORTUNITIES

Changing demand patterns, emerging trends to support growth in convenience stores

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Growth in convenience stores to come at the expense of independent small grocers

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The offer of high-quality local fresh produce likely to prove instrumental

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CHANNEL DATA

Table 1 Convenience Stores: Value Sales, Outlets and Selling Space

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

Table 2 Convenience Stores: Value Sales, Outlets and Selling Space: % Growth

DATA REMOVED FROM SAMPLE

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

Table 3 Convenience Stores GBO Company Shares: % Value

DATA REMOVED FROM SAMPLE

Table 4 Convenience Stores GBN Brand Shares: % Value

% retail value rsp excl sales tax
 Brand Company (GBO)

DATA REMOVED FROM SAMPLE

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

Table 5 Convenience Stores LBN Brand Shares: Outlets

sites/outlets
 Brand (GBO) Company (NBO)

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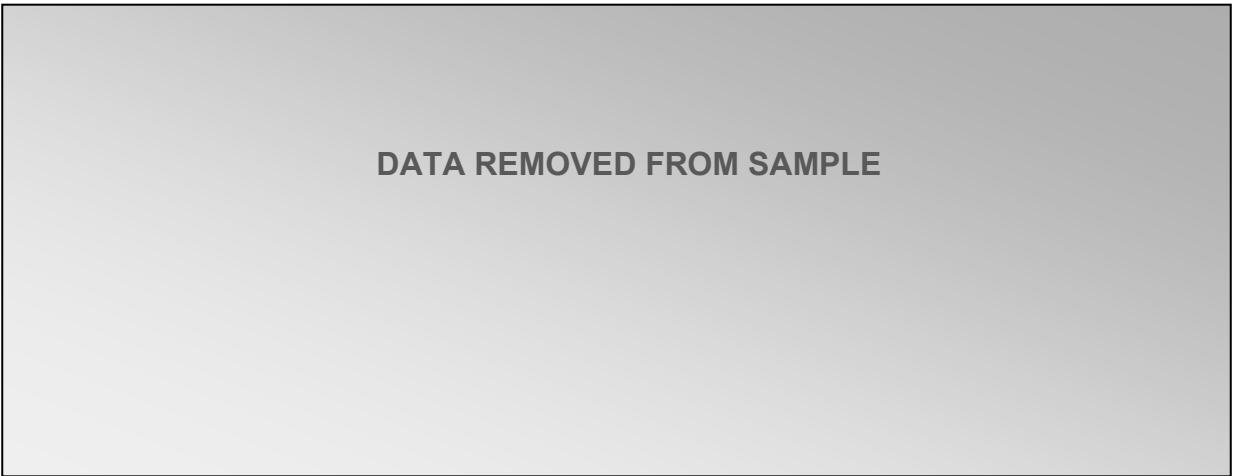
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Convenience Stores LBN Brand Shares: Selling Space

selling space '000 sq m
 Brand (GBO) Company (NBO)

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Table 7 Convenience Stores Forecasts: Value Sales, Outlets and Selling Space

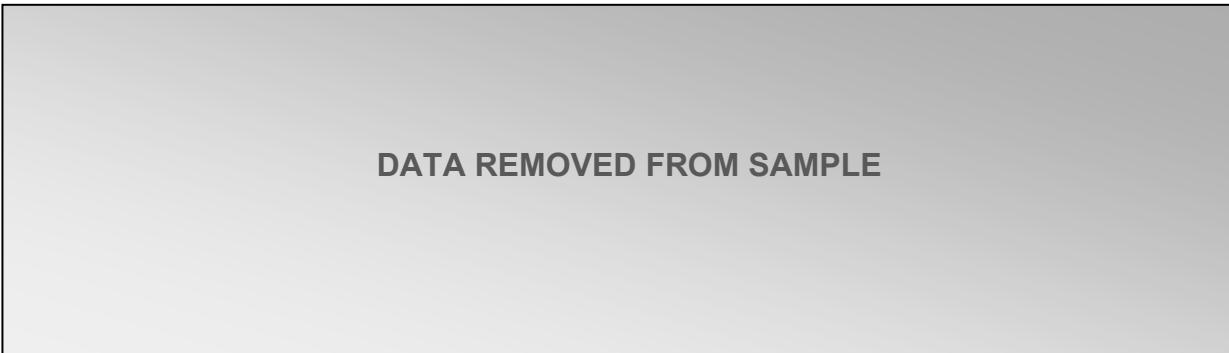


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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 8 Convenience Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth



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Note: Forecast value data in constant terms.

RETAILING IN ROMANIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Retailing in 2021: The big picture

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Shift towards e-commerce continues at rapid pace as consumers demand convenience

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The reopening of Romanian society benefits retailing, despite low vaccination rates

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What next for retailing?

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OPERATING ENVIRONMENT

Informal retailing

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Opening hours

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Summary 1 Standard Opening Hours by Channel Type 2021

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Source: Euromonitor International

Note: These reflect typical opening hours outside of lockdown

Physical retail landscape

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Cash and carry

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Table 9 Cash and Carry Sales: Value

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Seasonality

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Shopping Season Name

Valentine's Day

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Mother's Day

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Easter

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Summer sales

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Back to School

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Black Friday

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Winter sales

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Christmas

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Payments

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Delivery and collection

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Emerging business models

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MARKET DATA

Table 10 Sales in Retailing by Store-based vs Non-Store: Value

RON million

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Table 11 Sales in Retailing by Store-based vs Non-Store: % Value Growth

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Table 12 Sales in Store-based Retailing by Channel: Value

RON million

DATA REMOVED FROM SAMPLE

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 13 Sales in Store-based Retailing by Channel: % Value Growth

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Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 14 Store-based Retailing Outlets by Channel: Units

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Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 15 Store-based Retailing Outlets by Channel: % Unit Growth

% unit growth

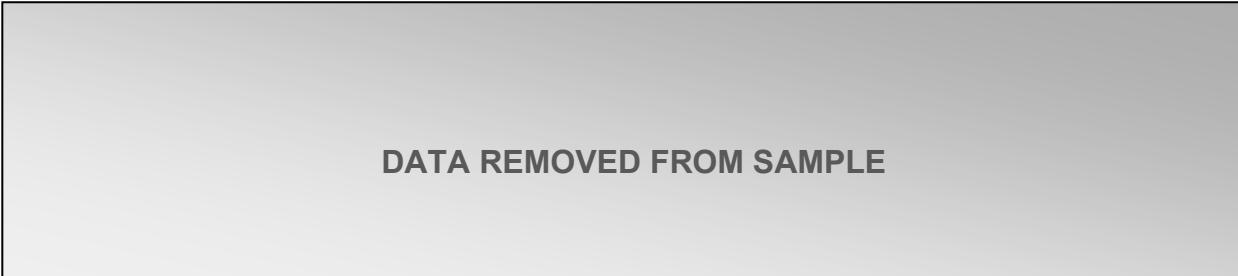
2020/21 2016-21 CAGR 2016/21 Total

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Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 16 Sales in Non-Store Retailing by Channel: Value

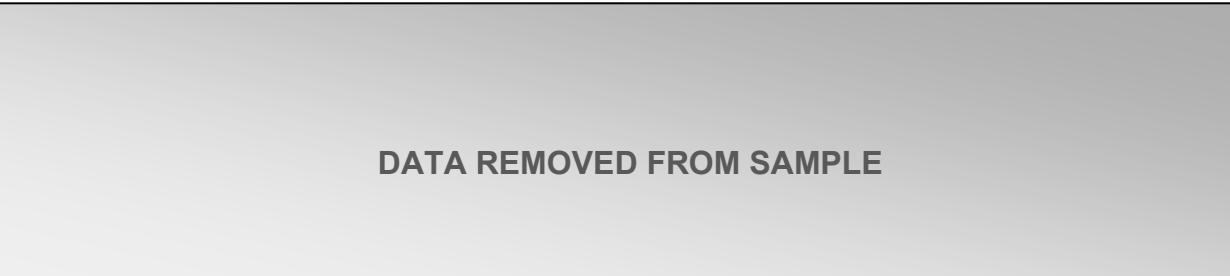


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Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 17 Sales in Non-Store Retailing by Channel: % Value Growth

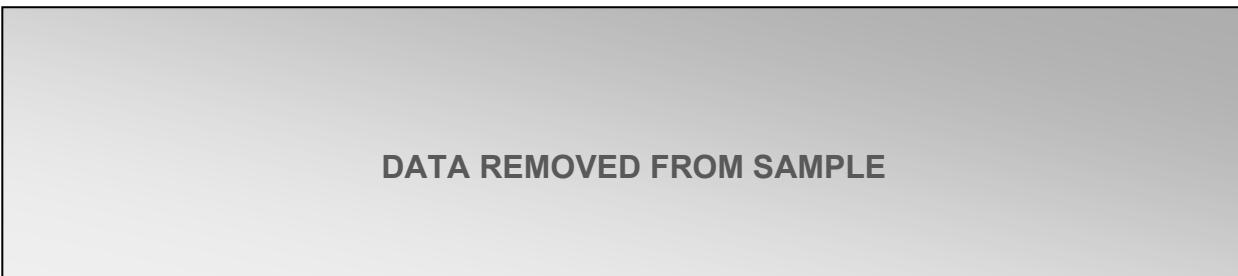


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Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

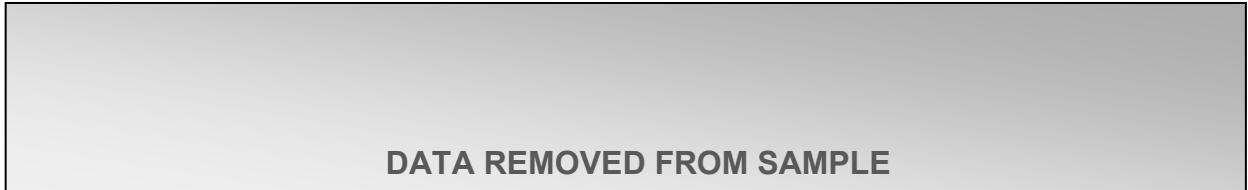
Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 18 Grocery Retailers: Value Sales, Outlets and Selling Space



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Table 19 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth



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Table 20 Sales in Grocery Retailers by Channel: Value

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Table 21 Sales in Grocery Retailers by Channel: % Value Growth

Table 22 Grocery Retailers Outlets by Channel: Units

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Table 23 Grocery Retailers Outlets by Channel: % Unit Growth

DATA REMOVED FROM SAMPLE

Table 24 Non-Grocery Specialists: Value Sales, Outlets and Selling Space

DATA REMOVED FROM SAMPLE

Table 25 Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth

DATA REMOVED FROM SAMPLE

Table 26 Sales in Non-Grocery Specialists by Channel: Value

RON million

DATA REMOVED FROM SAMPLE

Table 27 Sales in Non-Grocery Specialists by Channel: % Value Growth

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Table 28 Non-Grocery Specialists Outlets by Channel: Units

DATA REMOVED FROM SAMPLE

Table 29 Non-Grocery Specialists Outlets by Channel: % Unit Growth

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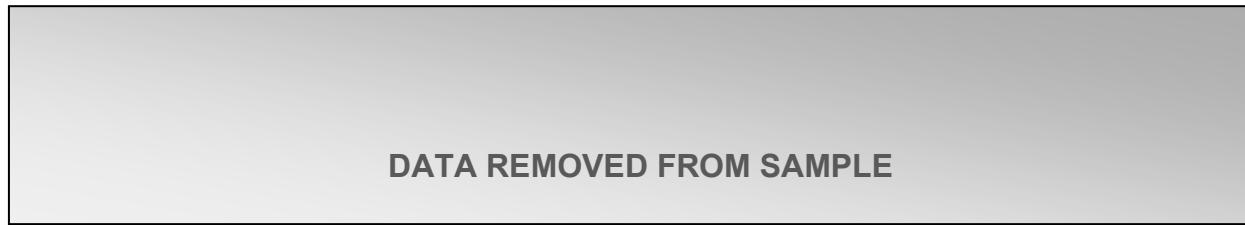
Table 30 Mixed Retailers: Value Sales, Outlets and Selling Space

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Table 31 Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth

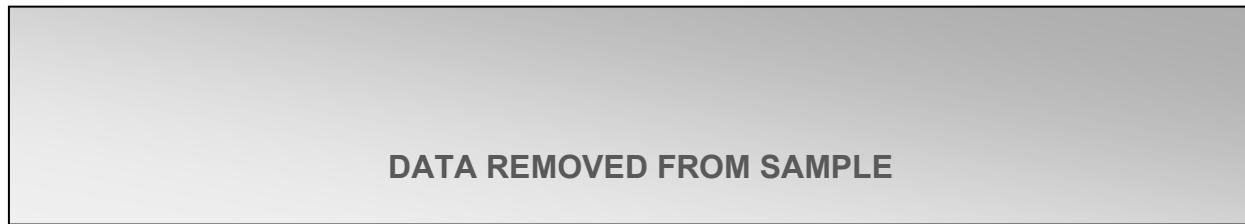
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Table 32 Sales in Mixed Retailers by Channel: Value



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Table 33 Sales in Mixed Retailers by Channel: % Value Growth



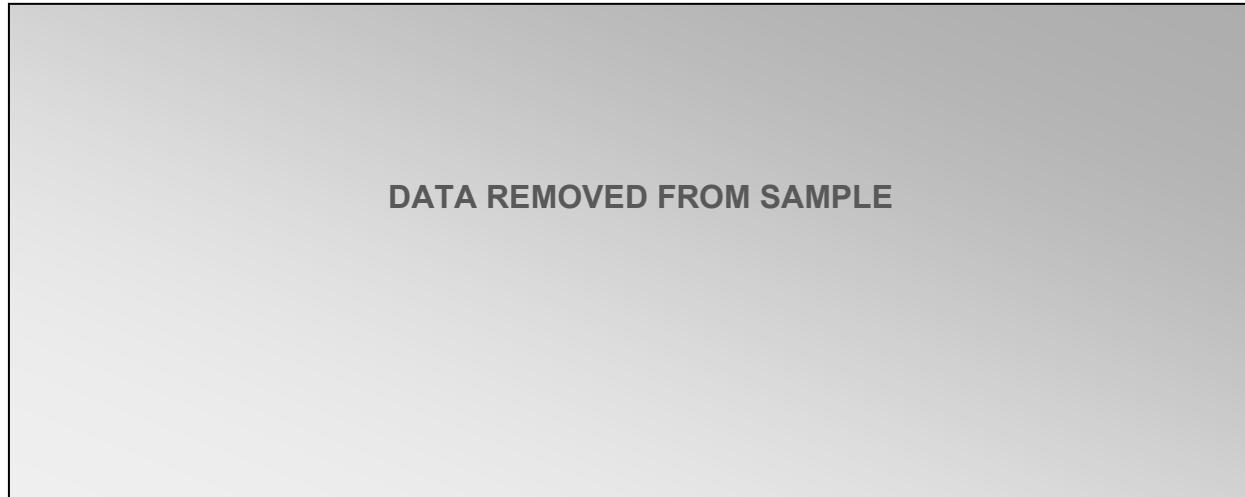
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Table 34 Mixed Retailers Outlets by Channel: Units



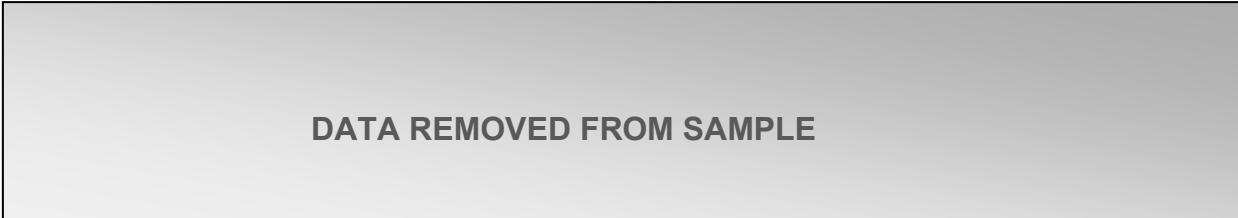
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Table 35 Mixed Retailers Outlets by Channel: % Unit Growth



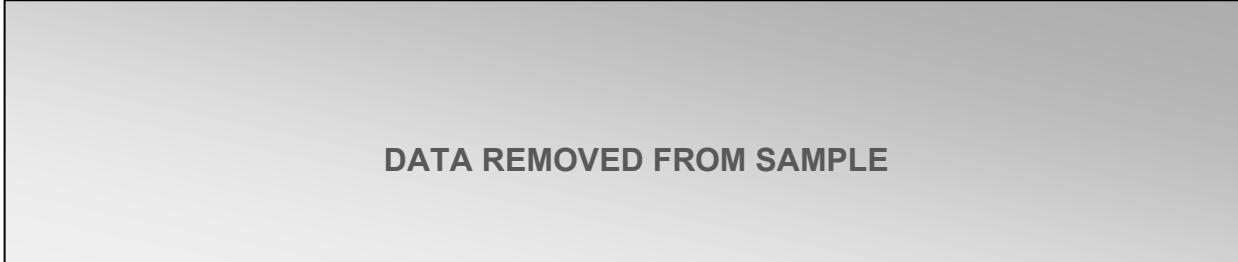
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Table 36 Retailing GBO Company Shares: % Value



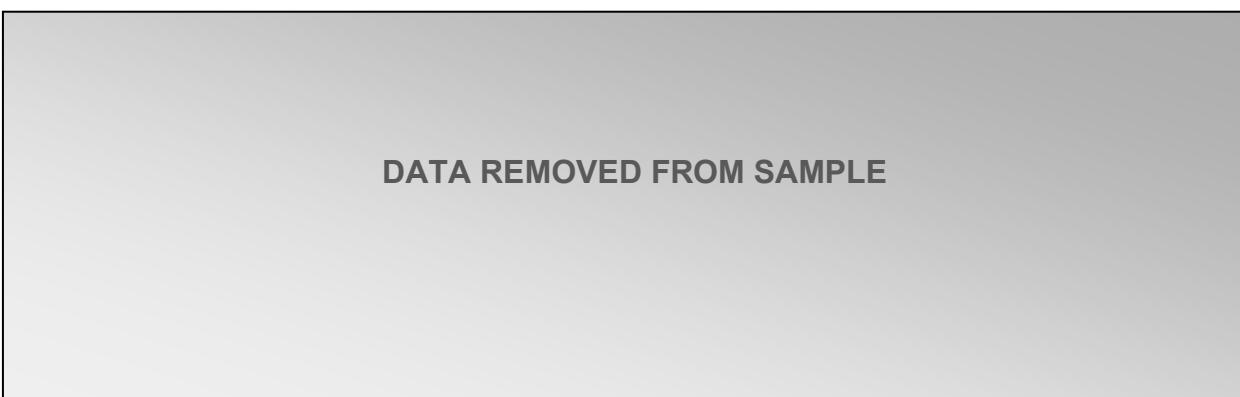
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Table 37 Retailing GBN Brand Shares: % Value



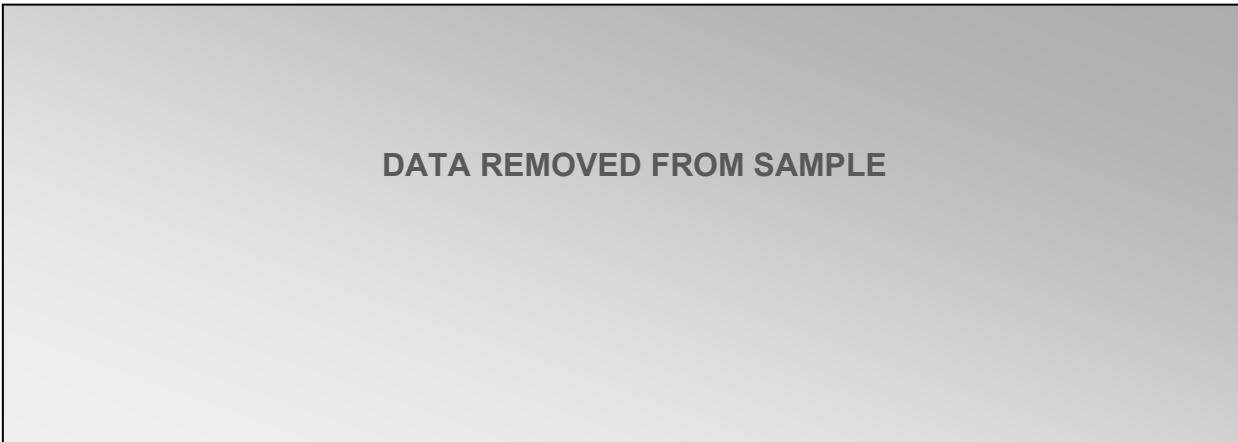
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Table 38 Store-based Retailing GBO Company Shares: % Value



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Table 39 Store-based Retailing GBN Brand Shares: % Value



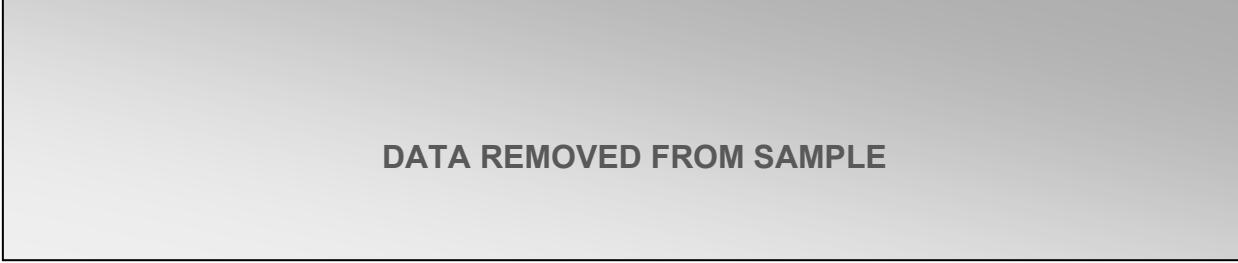
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Table 40 Store-based Retailing LBN Brand Shares: Outlets



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Table 41 Non-Store Retailing GBO Company Shares: % Value



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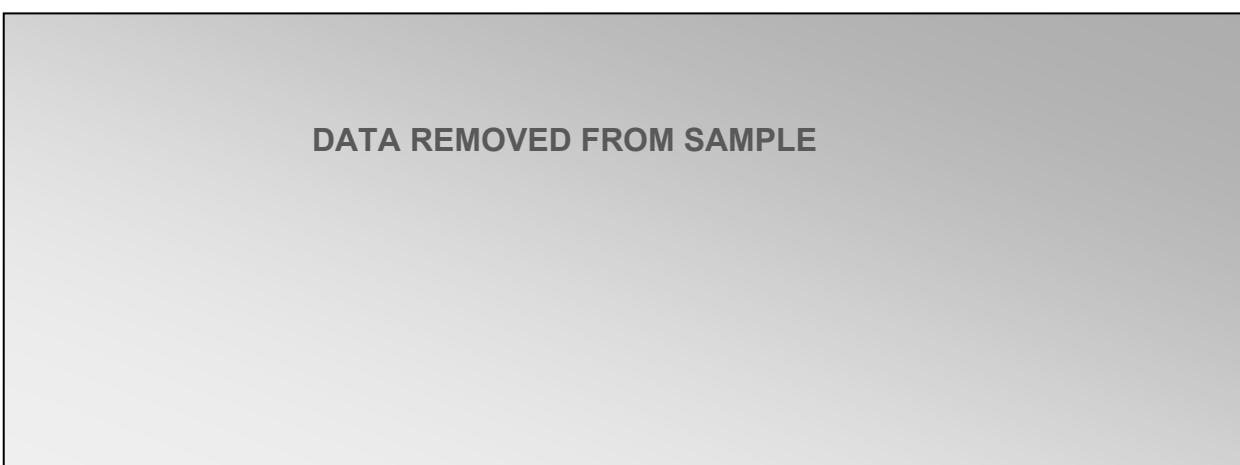
Table 42 Non-Store Retailing GBN Brand Shares: % Value



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Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 43 Grocery Retailers GBO Company Shares: % Value



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Table 44 Grocery Retailers GBN Brand Shares: % Value



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Table 45 Grocery Retailers LBN Brand Shares: Outlets



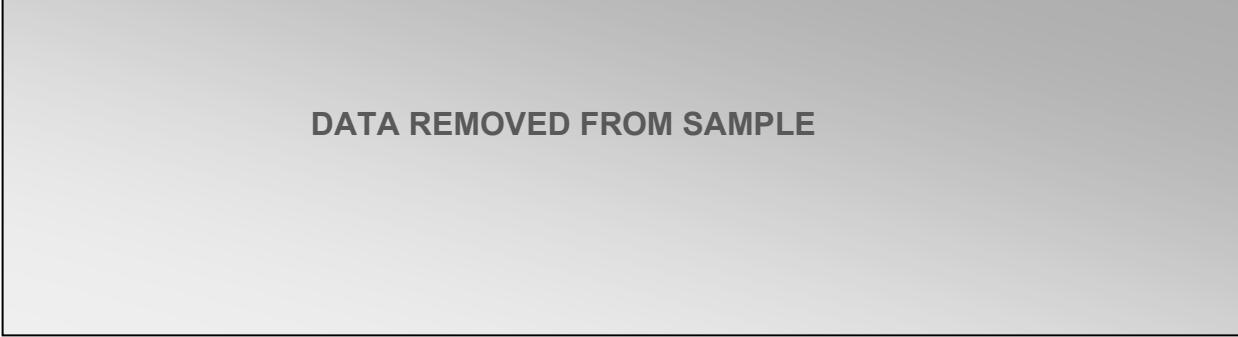
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Table 46 Grocery Retailers LBN Brand Shares: Selling Space 2018-2021



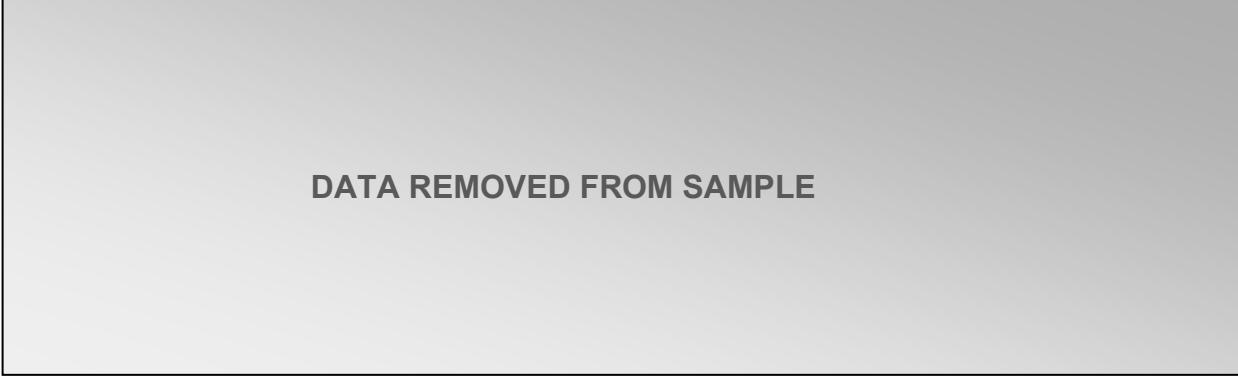
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Table 47 Non-Grocery Specialists GBO Company Shares: % Value

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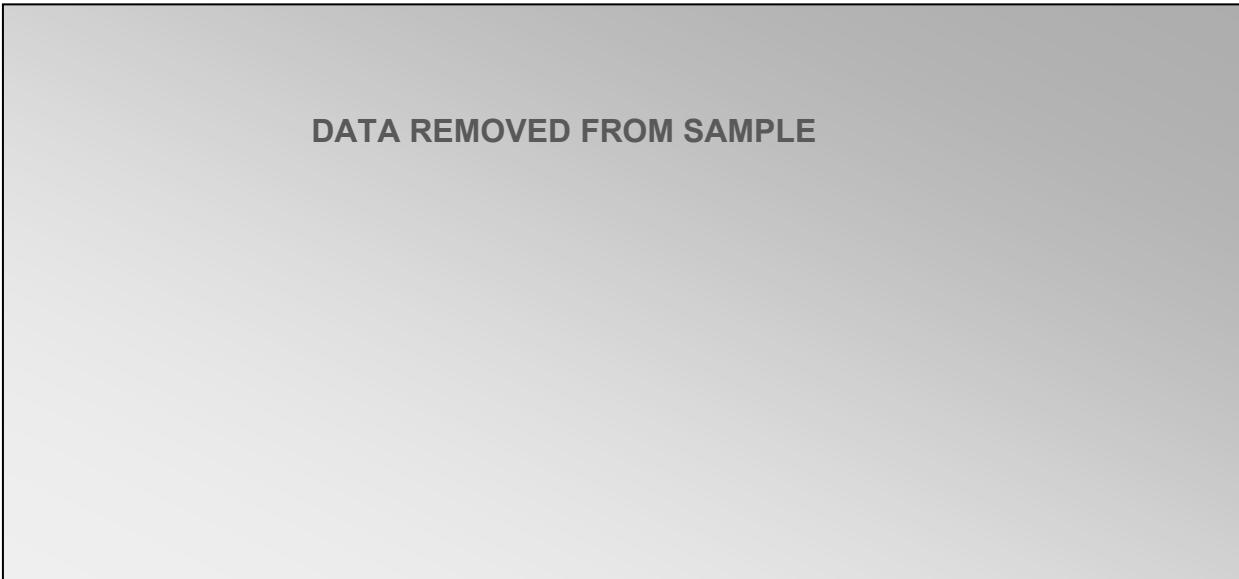
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Table 48 Non-Grocery Specialists GBN Brand Shares: % Value

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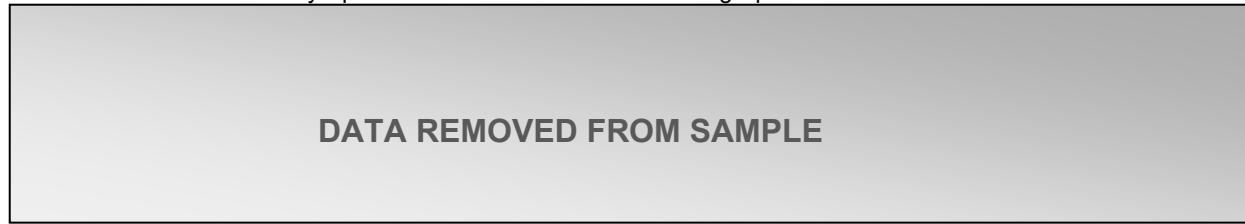
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Table 49 Non-Grocery Specialists LBN Brand Shares: Outlets

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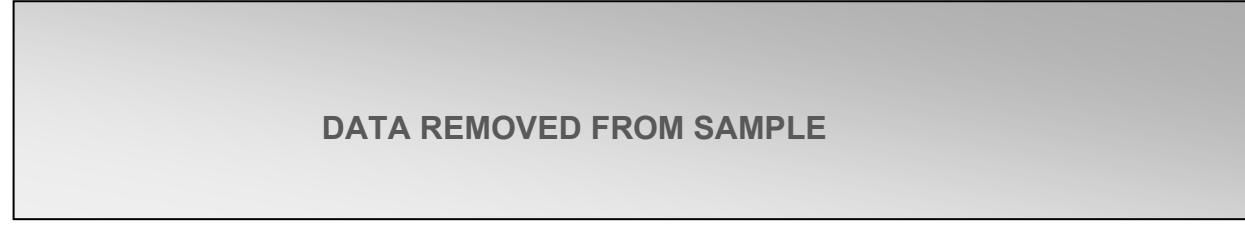
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Table 50 Non-Grocery Specialists LBN Brand Shares: Selling Space



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Table 51 Mixed Retailers GBO Company Shares: % Value



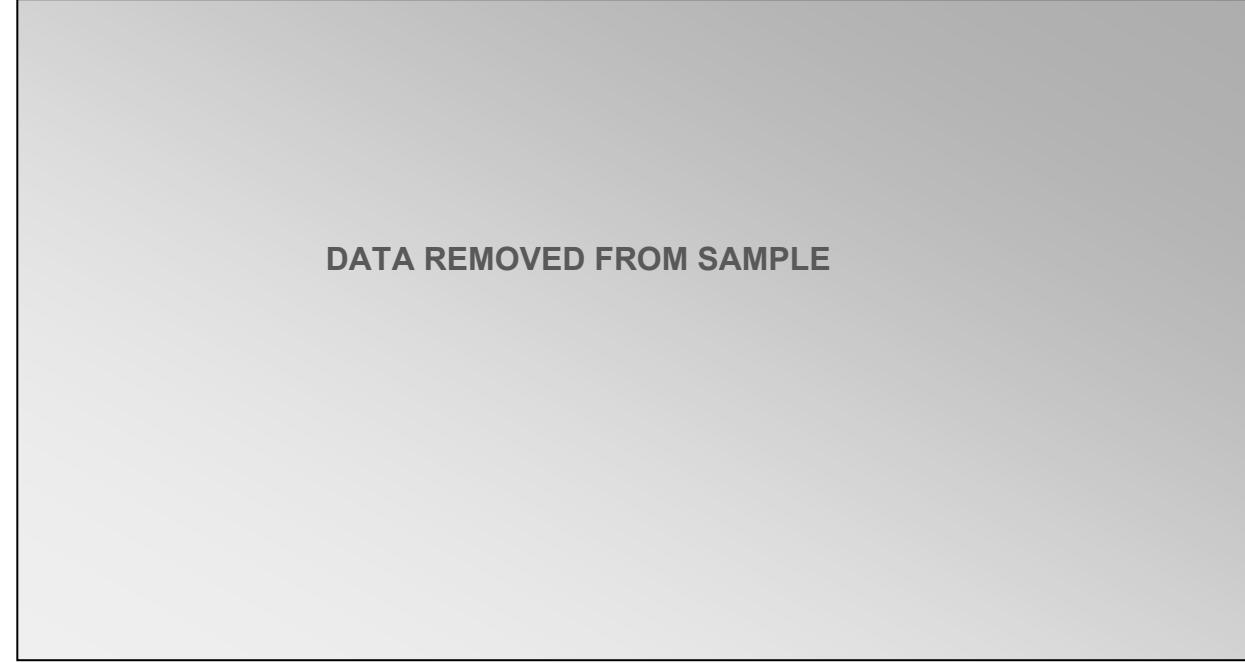
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Table 52 Mixed Retailers GBN Brand Shares: % Value



DATA REMOVED FROM SAMPLE

Table 53 Mixed Retailers LBN Brand Shares: Outlets



DATA REMOVED FROM SAMPLE

Table 54 Mixed Retailers LBN Brand Shares: Selling Space

DATA REMOVED FROM SAMPLE

Table 55 Forecast Sales in Retailing by Store-based vs Non-Store: Value

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Note: Forecast value data in constant terms.

Table 56 Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth

DATA REMOVED FROM SAMPLE

Table 57 Forecast Sales in Store-based Retailing by Channel: Value

DATA REMOVED FROM SAMPLE

Note 1: Forecast value data in constant terms.

Note 2: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 3: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 4: No forecast data available for luxury and off-price retailing.

Table 58 Forecast Sales in Store-based Retailing by Channel: % Value Growth

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Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 3: No forecast data available for luxury and off-price retailing.

Table 59 Forecast Store-based Retailing Outlets by Channel: Units

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Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 3: No forecast data available for luxury and off-price retailing.

Table 60 Forecast Store-Based Retailing Outlets by Channel: % Unit Growth

DATA REMOVED FROM SAMPLE

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 3: No forecast data available for luxury and off-price retailing.

Table 61 Forecast Sales in Non-Store Retailing by Channel: Value

DATA REMOVED FROM SAMPLE

Note 1: Forecast value data in constant terms.

Note 2: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 3: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 62 Forecast Sales in Non-Store Retailing by Channel: % Value Growth

DATA REMOVED FROM SAMPLE

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 63 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space

DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms.

Table 64 **Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth****DATA REMOVED FROM SAMPLE**

Note: Forecast value data in constant terms.

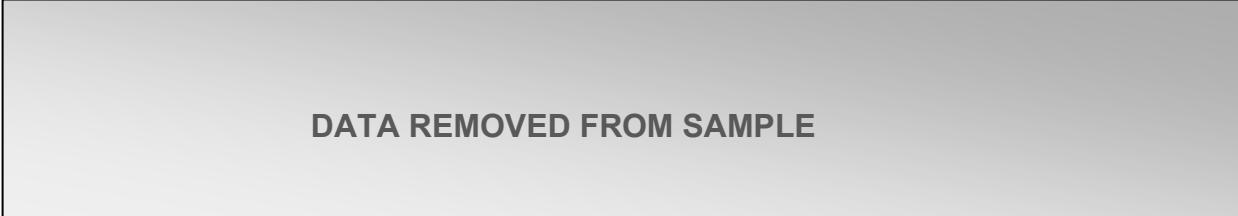
Table 65 **Forecast Sales in Grocery Retailers by Channel: Value****DATA REMOVED FROM SAMPLE**

Note: Forecast value data in constant terms.

Table 66 **Forecast Sales in Grocery Retailers by Channel: % Value Growth****DATA REMOVED FROM SAMPLE**

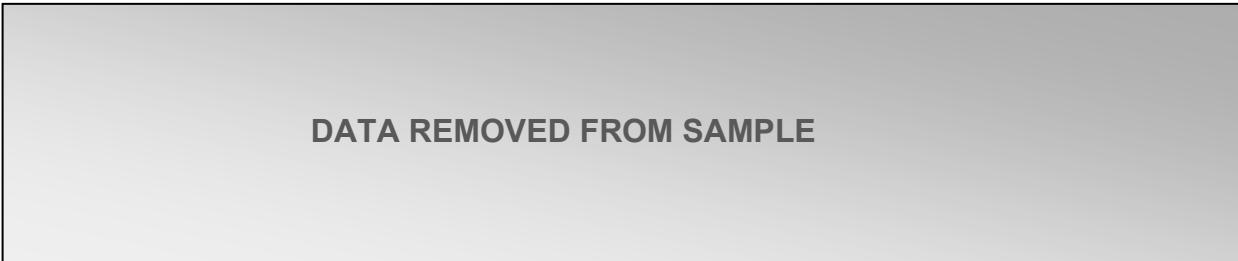
Note: Forecast value data in constant terms.

Table 67 Forecast Grocery Retailers Outlets by Channel: Units



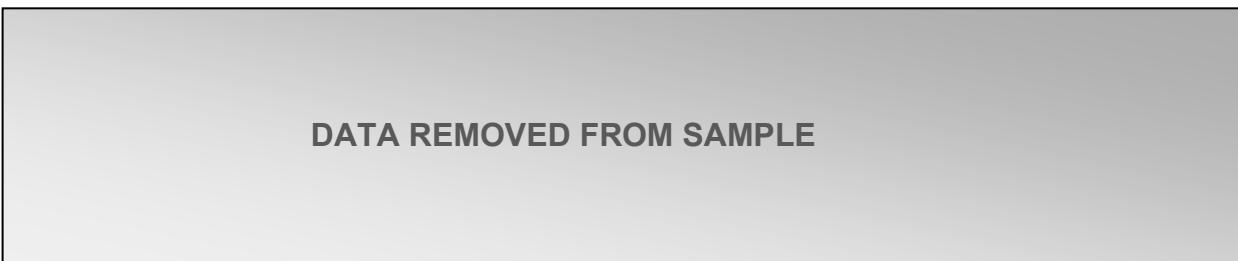
DATA REMOVED FROM SAMPLE

Table 68 Forecast Grocery Retailers Outlets by Channel: % Unit Growth



DATA REMOVED FROM SAMPLE

Table 69 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space



DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms.

Table 70 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth



DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms.

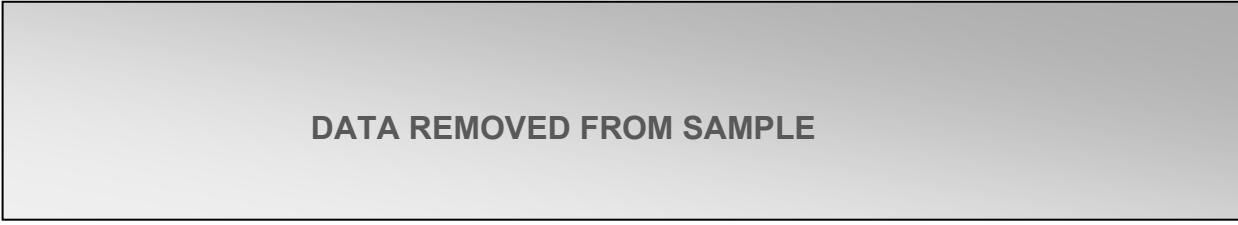
Table 71 Forecast Sales in Non-Grocery Specialists by Channel: Value

A large rectangular box with a light gray background, representing the redacted content of Table 71.

DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms.

Table 72 Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth

A large rectangular box with a light gray background, representing the redacted content of Table 72.

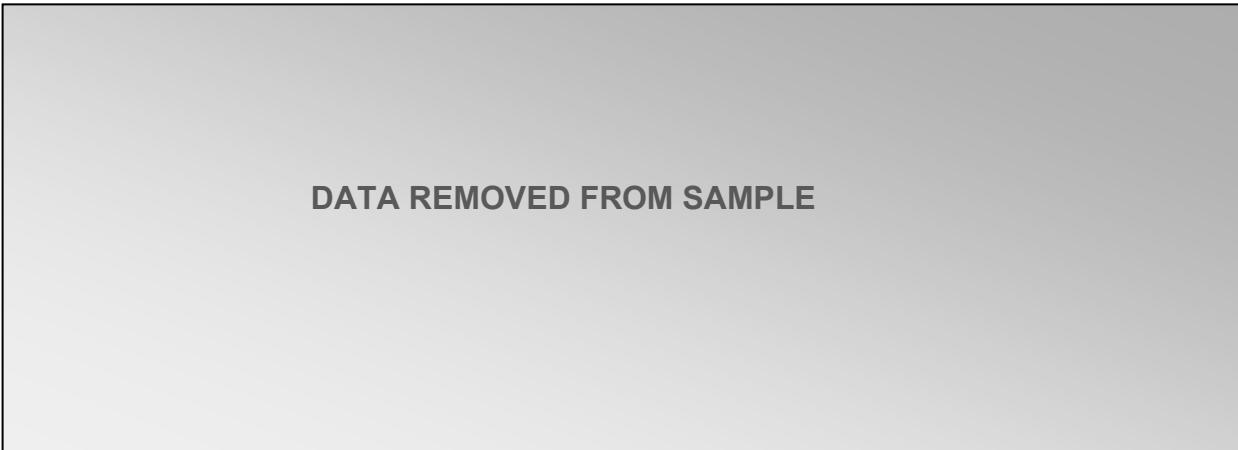
DATA REMOVED FROM SAMPLE

Table 73 Forecast Non-Grocery Specialists Outlets by Channel: Units

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DATA REMOVED FROM SAMPLE

Table 74 Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth

A large rectangular box with a light gray background, representing the redacted content of Table 74.

DATA REMOVED FROM SAMPLE

Table 75 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space



DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms

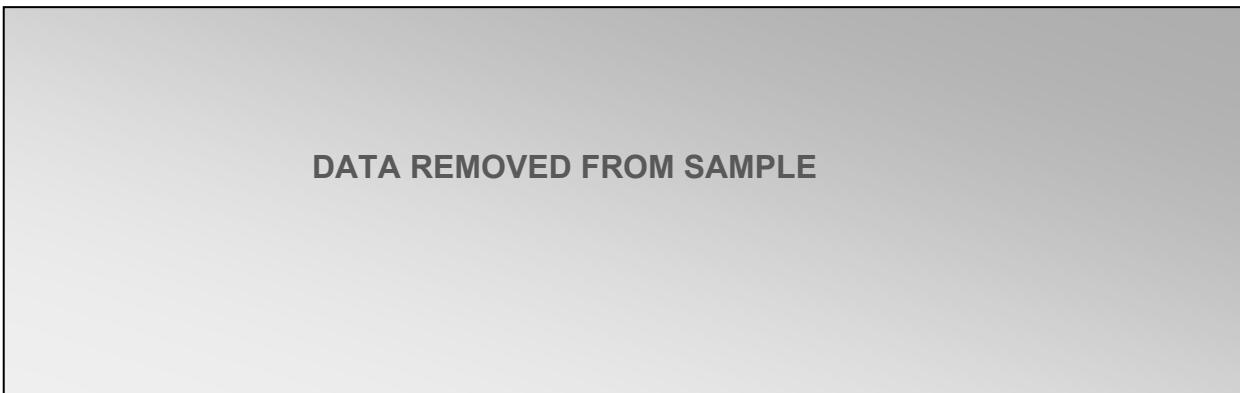
Table 76 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth



DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms

Table 77 Forecast Sales in Mixed Retailers by Channel: Value



DATA REMOVED FROM SAMPLE

Note: Forecast value data in constant terms

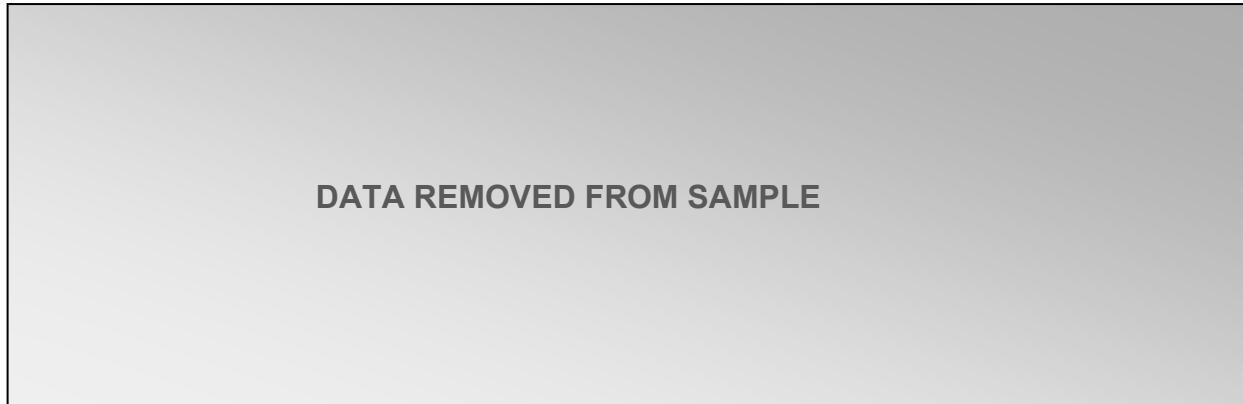
Table 78 Forecast Sales in Mixed Retailers by Channel: % Value Growth



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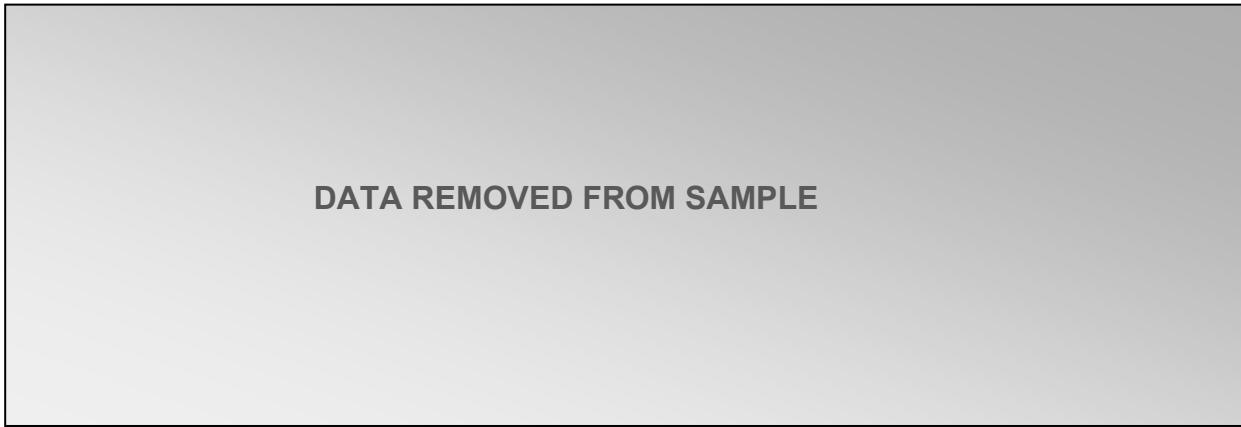
Note: Forecast value data in constant terms.

Table 79 Forecast Mixed Retailers Outlets by Channel: Units



DATA REMOVED FROM SAMPLE

Table 80 Forecast Mixed Retailers Outlets by Channel: % Unit Growth



DATA REMOVED FROM SAMPLE

DISCLAIMER

Euromonitor International's Retailing research took place before the invasion of Ukraine. As such, the impact of the war in Ukraine and sanctions on Russia are not factored into our forecast data and analysis. The repercussions of the crisis and implications at a wider regional/global level will be addressed in the near- to mid-terms by Euromonitor International through commentary and reports which will be published on both Euromonitor.com and our Passport platform.

The data included in this report is accurate according to Euromonitor International's market research database at the time of publication:

Forecast closing date: 17 January 2022

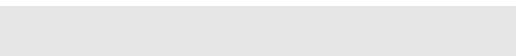
Report closing date: 22 February 2022

SOURCES

Sources used during research include the following:

Summary 2 Research Sources

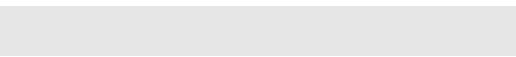
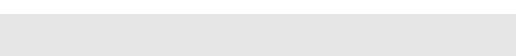
Official Sources



Trade Associations



Trade Press





Source: Euromonitor International