Overseas Market Analysis Report

Romania Apparel Overseas Market Analysis Report

Target Country: **Romania** Main Category: **Apparel** Report Date: July 1, 2026

Romania Apparel Key Takeaways

The Romanian apparel market is characterized by **high import dependence** (approx. 65% import penetration), with China as the second-largest import source. The market is estimated at around €4.8 billion in 2026, and supply chain restructuring is accelerating under EU green regulations and nearshoring trends. Core risks lie in the expansion of the EU Carbon Border Adjustment Mechanism and competitive substitution from Turkey.

- In 2025, the Romanian apparel retail market size was approx. **€4.6 billion**, expected to grow to €4.8 billion in 2026.
- Import dependence is **65%**, with China accounting for approx. **18%** of total apparel imports.
- Domestic apparel production is approx. **1.2 billion units/year**, mainly export processing (CMT).

Source: National Institute of Statistics (INS) 2025 Annual Report; Eurostat 2026 Q1 trade data

Supply and Demand Fundamentals

Total supply in the Romanian apparel market is approx. €4.8 billion, with domestic production at about 35% and the rest imported. On the consumption side, womenswear and sportswear are growing fastest, and online channels have reached 28% share. The supply-demand gap is mainly in mid-to-high-end brands and fast fashion, as local capacity cannot meet diversified demand.

Indicator	2024	2025	2026E
Total Supply (€100M)	44.5	46.2	48.0
Domestic Production (€100M)	15.8	16.1	16.5
Imports (€100M)	28.7	30.1	31.5
Exports (€100M)	18.2	19.0	19.8

Source: Eurostat 2025 Annual Report; FEPAIUS Industry Report March 2026

Note: 2026E is a forecast by FEPAIUS based on Q1 data

China Market Status

China's apparel exports recovered overall in 2025, maintaining steady growth to Romania. Domestic garment manufacturing capacity utilization remains high, but raw material cost fluctuations and RMB exchange rate movements affect export margins. In H1 2026, China's apparel exports to Romania continued to rise.

- In 2025, China's apparel exports to Romania were approx. **USD 0.98 billion** , up approx. 6.2% YoY.
- In Q1 2026, China's apparel exports to Romania were approx. **USD 0.26 billion** , up ▲7.1% YoY.
- Domestic garment manufacturing capacity utilization was approx. **82%** (May 2026), up 3 percentage points from a year earlier.

Source: General Administration of Customs of China 2025 Statistical Yearbook; China National Textile and Apparel Council Briefing, May 2026

Romania Market Status

The Romanian apparel consumption market is mainly mid-priced, with average unit prices about 30% lower than Western Europe. Import sources are highly concentrated within the EU (Germany, Italy) and Asia (China, Bangladesh). In recent years, Turkey has expanded its share by leveraging geographical and tariff advantages, creating competitive pressure on China.

Import Source	2025 Share	YoY Change
Germany	22%	▲1.2%
China	18%	▲0.8%
Italy	16%	▼1.5%
Turkey	12%	▲3.1%
Bangladesh	9%	▲2.4%

Source: Eurostat 2025 trade data; Romania INS Bulletin January 2026

Note: Turkey's share has grown significantly, benefiting from the customs union and fast delivery advantages

Product Segment Structure

Among Romania's apparel imports, womenswear holds the largest share, while sportswear and childrenswear grow fastest. China is competitive in womenswear and sportswear, but faces price competition from Bangladesh and Turkey in basic fast-fashion items. High-end categories remain dominated by Italian and German brands.

Segment	Import Share (2025)	China Share	Demand Trend
Womenswear	38%	20%	Steady growth
Menswear	22%	15%	Stable
Sportswear	18%	22%	Rapid growth
Childrenswear	12%	16%	Fast growth
Underwear/Homewear	10%	14%	Stable

Source: Euromonitor Romania Apparel Report 2025; FEPAIUS segment data Q1 2026

Core Finished Products Supply & Demand

Romania's domestic apparel output is approx. 1.2 billion units per year, mainly CMT for Italian and German brands. Local brands hold less than 15% market share. The core supply-demand gap is in mid-to-high-end fashion and functional clothing, requiring import reliance.

- Annual domestic apparel output is approx. **1.2 billion units**, of which **75%** is exported (mainly intra-EU processing).
- Local brand retail sales are approx. **€0.7 billion**, only 15% of the total market.
- Approx. **40%** of imported apparel is fast fashion, with China and Turkey as main suppliers.

Source: FEPAIUS 2025 Industry Annual Report; INS Industrial Production Index April 2026

Intermediate Goods & Raw Material Value

About 70% of fabrics and accessories for Romanian apparel production are imported, with Italy and Turkey as the main fabric suppliers. Chinese materials offer cost advantages, but since 2025, ocean freight volatility and stricter EU textile labeling regulations have increased trade costs.

Raw Material / Intermediate	China Price Reference	Romania CIF Price
Cotton knitted fabric	¥38-45/m	€5.5-6.8/m
Polyester woven fabric	¥18-25/m	€2.8-4.0/m
Garment accessories set	¥0.8-1.5/set	€0.12-0.22/set

Source: China Keqiao Textile Index June 2026; Romanian importer price reference (FEPAIUS)

Note: CIF includes marine insurance and EU import duties (approx. 12%), exchange rate €1≈¥7.8

Trade and Macro Indicators

Romania's macroeconomy maintains moderate growth, with gradually recovering consumer confidence. Total bilateral trade between China and Romania continues to expand, with apparel as a key category. The EU's uniform 12% apparel import tariff and VAT policies significantly affect pricing.

Indicator	2024	2025	2026E
GDP Growth	2.8%	3.1%	2.9%
Household Consumption Growth	4.2%	4.6%	4.3%
EUR/RON Exchange Rate	4.97	4.98	4.97
Apparel Import Tariff	12%	12%	12%

Source: World Bank Romania Data 2025; National Bank of Romania (BNR) Q2 2026 Bulletin; EU TARIC Tariff Database

Note: 2026E is the World Bank forecast from June 2026

Risks and Opportunity Windows

The EU Textile Green Transition Regulation (full implementation 2026) will raise compliance costs, and the risk of extending the carbon border adjustment mechanism to textiles is rising. However, accelerating penetration of Chinese e-commerce platforms in Romania, improved China-Romania direct shipping, and Romania's location as an Eastern European distribution hub present significant opportunities.

- Risk The EU Ecodesign for Sustainable Products Regulation (ESPR) fully takes effect in 2026, with non-compliant products facing market access restrictions.
- Risk Turkey, using customs union advantages, grew its apparel exports to Romania by **18%** in 2025, continuously squeezing China's share.
- Opportunity Romania's e-commerce penetration has risen quickly to 28%, with Chinese cross-border platform users in Romania growing over 40%.
- Opportunity Under the China-Romania Belt and Road cooperation, the Constanța port logistics corridor optimization has cut shipping time by about 5 days.

Source: European Commission ESPR Regulation Document 2025; FEPAIUS Competition Analysis Report March 2026; Romanian E-commerce Association (ARMO) 2025 Annual Report

Data Sources Summary

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