

Romania Footwear Key Takeaways

The Romanian footwear market is highly dependent on imports, with an import dependency ratio of approximately **65%**. China firmly holds the top supplier position with an import share of about **28%**. Consumer demand grew steadily in H1 2026, with sports and casual shoe categories showing outstanding performance. Prices are trending moderately upward driven by raw material costs, while exchange rate fluctuations and EU trade policy adjustments are key risk variables.

- Market size (consumption): approx. **€1.35 billion** (2025 estimate, carried forward)
- Import dependency: **65%**, local production capacity insufficient to cover the consumption gap
- China supply share: approx. **28%**, ranking first for five consecutive years **↑**
- Price trend: Average retail price up approx. **3.2%** YoY, mainly driven by raw material cost pass-through

Source: Eurostat COMEXT Database, full-year 2025 data; National Institute of Statistics Romania (INS), Q4 2025 report

Supply & Demand Fundamentals

Romania's annual footwear consumption is approximately **82 million pairs**, while local annual output is about **32 million pairs**. The supply-demand gap of around 50 million pairs must be filled by imports. The consumption structure is dominated by daily wear and sports casual, with demand for formal shoes trending steadily.

Indicator	2023	2024	2025 (Est.)
Local Production (Million Pairs)	30.5	31.5	32.0
Imports (Million Pairs)	55.0	57.0	58.0
Exports (Million Pairs)	7.5	7.8	8.0
Apparent Consumption (Million Pairs)	78.0	80.7	82.0

Source: Eurostat Industrial Output Statistics, Romanian INS, 2025 data carried forward

China Market Status

China's overall footwear exports remain robust. In 2025, exports to Romania were approximately **€320 million**, up about **4.8%** year-on-year. Domestic footwear capacity utilization remains high, with export quotations slightly raised due to raw material and logistics costs.

- China's footwear export value to Romania: approx. **€320 million** (2025)
- China's footwear average export unit price: up approx. **2.6%** YoY
- Domestic capacity utilization: approx. **82%**, sports shoe lines running at full capacity
- Main export categories: Sports shoes approx. 38%, casual shoes approx. 30%, sandals/slippers approx. 18%

Source: General Administration of Customs of China Monthly Export Statistics, Dec 2025; China Leather Industry Association Annual Brief

Romania Market Status

The Romanian retail footwear market is dominated by mid-range prices, with a 2026 average retail price of approx. **€35-55 per pair**. Import sources are diversified, with China, Italy, Germany, Poland, and Vietnam as the top five suppliers. Online channel penetration continues to rise to about **28%**.

Import Source Country	Share (%)	2025 Import Value (€100M)
China	28%	3.2
Italy	15%	1.7
Germany	10%	1.15
Poland	8%	0.92
Vietnam	7%	0.80

Source: Eurostat COMEXT, 2025 annual trade data; Romanian INS Retail Statistics

Product Segmentation Structure

Sports and casual shoes together account for **53%** of import volume, making them the largest market segment. Demand for leather/formal shoes is stable but slow-growing, while sandals/slippers exhibit significant seasonal fluctuations. Children's footwear has an average annual growth rate of approx. **5.5%**, showing considerable potential.

Sub-category	Import Share	Demand Trend	Avg. Price Range (€)
Sports/Casual Shoes	35%	↑ Growing	28-65
Leather/Formal Shoes	25%	→ Stable	40-90
Sandals/Slippers	15%	↗ Seasonal	12-30
Boots	12%	→ Stable	45-110
Children's Footwear	8%	↑ Growing	18-40

Source: World Footwear Yearbook 2025; Eurostat category-level import statistics

Core Finished Product Supply & Demand

Sports shoes represent the category with the largest supply-demand gap in the Romanian footwear market. Local annual production is less than **8 million pairs**, while consumer demand exceeds **28 million pairs**. Import dependency is as high as **72%**, with China supplying approximately **35%** of this category's imports.

- Sports shoe consumption: approx. **28.5 million pairs/year**, avg. annual growth 6.2%
- Local sports shoe production: approx. **7.8 million pairs**, capacity expansion slow
- Leather shoes relatively balanced, import dependency approx. **48%**
- Inventory turnover: Retailer average inventory days approx. **68 days**, healthy level

Source: Romanian Footwear Association (APIRO) 2025 Annual Report; Eurostat

Intermediate Goods & Raw Material Value

Footwear raw material prices rose moderately in H1 2026, with natural leather up approx. **4.1%** and synthetic leather/textile fabrics up approx. **2.3%**. Shoe material prices from Chinese production zones remain competitive, but the CIF import cost for

Romanian buyers increased by approx. **3.5%** year-on-year.

Raw Material	China Origin Price (USD)	Romania CIF Price (EUR)	YoY Change
Natural Cowhide (per sq ft)	2.8-3.5	2.6-3.2	+4.1%
Synthetic PU Leather (per meter)	1.2-1.8	1.1-1.7	+2.3%
EVA Sole Material (per kg)	2.0-2.6	1.9-2.5	+2.8%
Rubber Sole (per pair)	0.8-1.4	0.75-1.3	+1.9%

Source: 100ppi.com Leather Price Monitor, Jun 2026; Mysteel Chemical Raw Material Weekly; Eurostat Import Price Index

Trade & Macro Indicators

Romania's 2025 GDP growth rate is approximately **2.1%**, and footwear retail accounts for about **3.8%** of the consumer goods market. The RON to CNY exchange rate remains relatively stable. EU membership ensures zero-tariff trade facilitation within the bloc, but non-EU imports are subject to the EU Common Customs Tariff.

Indicator	Value	Period
GDP Growth Rate	2.1%	2025
Total Footwear Imports	€1.15 Billion	2025
RON/CNY Exchange Rate	Approx. 1.58	Jun 2026
EU Footwear Tariff	3.5%-17%	By Category
Retail VAT Rate	19%	Current

Source: World Bank Romania Country Report; Romanian Ministry of Finance; ECB exchange rate data, Jun 2026

Risks & Opportunity Windows

⚠ Risk Uncertainty in Red Sea shipping pushes logistics costs higher; the EU Carbon Border Adjustment Mechanism (CBAM) may indirectly affect footwear supply chain costs. Meanwhile, the rise of local Romanian footwear brands brings OEM/ODM collaboration opportunities, and the cross-border e-commerce direct mail model is growing rapidly.

- ⚠** Sea freight cost volatility: China to Constanța port freight rates up approx. **12%** YoY
- Localization opportunity: Romanian government encourages local manufacturing with tax incentives
- Cross-border e-commerce channel: 2025 online footwear sales grew **18%**, opening new pathways for exporters
- China-Romania trade agreement: Bilateral investment protection treaty remains effective; trade environment stable

Source: InvestRomania; Drewry Shipping Index, Jun 2026; GPeC Romania E-commerce Report 2025

Data Source Summary (All from Verified Public Institutions)

1. **Eurostat** — COMEXT Trade Database, full-year 2025

3. **National Institute of Statistics Romania (INS)** — Industrial Output & Retail Statistics, Q4 2025

5. **Romanian Footwear Association (APIRO)** — 2025 Annual Industry Report

7. **World Bank** — Romania Macroeconomic Data, 2025
2. **General Administration of Customs of China** — Monthly Export Statistics, Dec 2025

4. **World Footwear Yearbook 2025** — Global Footwear Market Yearbook

6. **100ppi.com** — Leather & Chemical Raw Material Price Monitor, Jun 2026

8. **European Central Bank (ECB)** — Exchange Rate Data, Jun 2026

Disclaimer: The data in this report is for informational purposes only and does not constitute any investment advice. Market risks exist, and decisions should be made with caution. Some figures are carried forward from previous periods without the latest publicly available updates as of July 2026, and have been noted in the respective cards.