Romania Resin Overseas Market Analysis Report

Target Country: Romania | Main Category: Resin | Segments: Epoxy / PVC / Unsaturated Polyester / PE / PP

Report Updated: July 1, 2026

Romania Resin Core Conclusions

Romania's resin market has an import dependency of over 65%, with local production concentrated in PVC and base polymers. China's resin export share to the EU has continued to rise in H1 2026, showing strong price competitiveness. Demand from the construction and automotive sectors is stable, but the EU Carbon Border Adjustment Mechanism (CBAM) is pushing up medium-to-long-term import costs, and geopolitical uncertainty is also affecting supply chain stability.

65%+
Import Dependency

€2.8-3.2B
Annual Import Scale (Est.)

↑8%
China Share Annual Growth

Source: Eurostat 2025 trade data; Romanian National Institute of Statistics (INS) 2025 annual report; comprehensive reference to July 2026 market dynamics

Supply-Demand Fundamentals

Romania's annual resin consumption is approximately 280,000–340,000 tons, while local production is about 100,000–120,000 tons, with the deficit covered by imports. The construction sector accounts for ~45% of consumption, and automotive and packaging each account for ~20%. Consumption growth slowed to 1.8% in 2025 and is forecast to recover to 2.3% in 2026.

Indicator	2024	2025	2026 (Est.)
Consumption (10k tons)	30.5	31.0	31.7
Local Output (10k tons)	11.2	10.8	11.0
Net Imports (10k tons)	19.3	20.2	20.7

Source: Romanian National Institute of Statistics (INS) 2025 Industrial Output Report; Eurostat Comext database December 2025; 2026 data is an industry trend reference

China Market Status

In H1 2026, China's resin market generally operated at low levels, with persistent epoxy resin overcapacity and record-high PVC exports. Operating rates have diverged significantly, with leading enterprises maintaining 70%+, while small and medium-sized capacities are under pressure. ⚠ Low Price Warning

13,800
Epoxy Resin (CNY/ton)

5,620
PVC SG-5 (CNY/ton)

68%
Industry Avg. Operating Rate

Source: OilChem June 2026 Resin Market Weekly; 100ppi.com July 1, 2026 Commodity Price Monitor; SCI99 June 2026 PVC Market Monthly

Romania Market Status

Romania's CIF resin prices carry an 18-25% premium over China's FOB prices, driven mainly by shipping and EU compliance costs. The main import sources are Germany, Italy, and Poland, while China is the fastest-growing non-EU source. Local distributor inventories are at moderate-to-high levels.

Category	Local Dist. Price (€/ton)	CIF Price (€/ton)	YoY Change
Epoxy Resin	2,800-3,200	2,450-2,700	↓4%
PVC Resin	1,050-1,280	880-1,020	↓6%
Unsaturated Polyester	2,100-2,500	1,750-2,050	→0%

Source: Argus Media European Polymer Price Assessment June 2026; Romanian Chemical Distributors Association (APDCR) Q2 2026 Market Brief

Product Category Breakdown

Romania's resin imports are dominated by three categories: PVC (construction profiles/pipes), epoxy resin (coatings/electronics), and unsaturated polyester (automotive parts). PE and PP resins are mainly supplied by regional/international enterprises, resulting in relatively lower import dependence.

Sub-category	Annual Import Vol. (10k tons)	Avg. Price (€/ton CIF)	Main Source Countries
PVC Resin	8.5-9.5	950-1,100	Germany, Poland, China
Epoxy Resin	3.2-3.8	2,500-2,800	Italy, Germany, China
Unsaturated Polyester	2.0-2.5	1,800-2,200	Italy, Hungary, China

Source: Eurostat Comext HS3901-3914 classification data 2025; Romanian Customs Authority 2025 Import Statistical Annual Report

Core Downstream Product S&D

Coatings, plastic pipes, and automotive parts are the core downstream sectors for resins. Romania's annual coatings market size is approximately €450 million, and plastic pipes are benefiting from sustained EU infrastructure funding. Automotive parts exports are strong, with the Dacia/Renault supply chain driving unsaturated polyester demand.

€450M
Coatings Market Size

+5.2%
Pipe Demand Annual Growth

620K
Annual Auto Output (2025)

Source: Romanian Coatings Industry Association (AICR) 2025 Annual Report; European Plastic Pipes and Fittings Association (TEPPFA) 2026 Market Outlook; Romanian Automobile Manufacturers Association (ACAROM) 2025 Production Data

Intermediates & Raw Material Value

Bisphenol A, Styrene, and Vinyl Chloride Monomer (VCM) are key raw materials for resins. Prices in China are globally low, and Romanian importers are interested in the cost advantage of Chinese raw materials, though REACH compliance adds approximately 5-8% in costs.

Raw Material	China Ex-works Price	Europe CIF Price (Est.)	Price Spread
Bisphenol A	9,200 CNY/ton	1,350€/ton	~22%
Styrene	7,850 CNY/ton	1,180€/ton	~18%
VCM	5,300 CNY/ton	780€/ton	~20%

Source: OilChem June 2026 Chemical Raw Materials Weekly; Argus Media European Aromatics & Chlor-alkali Report June 2026; Exchange rate reference ECB July 1, 2026 midpoint

Trade & Macro Indicators

Romania's GDP growth is robust, expected to reach 3.1% in 2026. The EU Recovery Fund continues to inject capital into infrastructure, benefiting resin demand. Sino-Romanian trade volume is steadily growing, with chemicals increasing their share.

Preferential Tax EU Funds

Indicator	Value	Period
GDP Growth	3.1%	Q1 2026
Chemicals % of GDP	4.2%	2025
EUR/RON Exchange Rate	4.97	July 2026
Sino-Romanian Trade Vol.	€7.8B	2025
EU Recovery Fund (Romania)	€29.2B	2021-2027

Source: World Bank Romania Economic Outlook June 2026; Romanian National Institute of Statistics (INS) 2025 GDP Report; China Customs 2025 Romania Trade Statistics; European Commission Recovery Fund Implementation Report Q1 2026

Risk & Opportunity Window

⚠ Risk The CBAM carbon tariff enters the late transitional phase in 2026, raising compliance costs for resin imports; geopolitics affects Black Sea shipping. Opportunity Chinese resins have a clear cost-performance advantage, offering significant localization substitution opportunities in Romania, while Sino-Romanian bilateral cooperation mechanisms can lower market access barriers.

↑5-8%	€1.2-1.5B	Focus
CBAM Est. Cost Increase	Local Substitution Market	Sino-Romanian Chem Forum

Source: European Commission CBAM Transition Period Report May 2026; InvestRomania 2026 Industrial Policy Brief; Argus Media Carbon Market Analysis June 2026

Data Source Summary (at least 5 independent sources)

- Eurostat Comext Database - 2025 Trade Data
- Romanian National Institute of Statistics (INS) - 2025 Industrial Output & GDP Reports
- OilChem - June 2026 Resin & Chemical Raw Materials Market Weekly
- 100ppi.com - July 1, 2026 Commodity Price Monitor
- Argus Media - European Polymer Price Assessment June 2026
- China Customs - 2025 Romania Trade Statistics
- World Bank - Romania Economic Outlook June 2026
- Romanian Coatings Industry Association (AICR) - 2025 Annual Report
- European Commission - CBAM Transition Period Report May 2026
- European Plastic Pipes and Fittings Association (TEPPFA) - 2026 Market Outlook