

Romania Rubber & Plastics Overseas Market Analysis Report

Target Country: Romania

Primary Category: Rubber & Plastics

Report Date: July 1, 2026

Romania Rubber & Plastics Key Takeaways

Supply-demand gap of ~580k tons, annual imports exceed €4.5 billion. China is the 3rd largest supplier. Packaging & automotive industries drive PP, PET demand growth, but EU carbon tariffs and logistics costs pose major risks.		
Total Annual Imports	€4.52 billion	
Supply-Demand Gap	580k tons	
China's Share	12.8%	
PP European Avg Price	€1,280/t	▲

Source: National Institute of Statistics (INS) Romania June 2026 Trade Flash; Argus Media July 2026 Polymer Weekly

Supply & Demand Fundamentals

Romania's annual consumption is ~1.62m tons, domestic output only 1.04m tons. Gap relies on imports. Packaging consumes 42% of plastic raw materials, auto manufacturing 18%.

Indicator	2025	2026 H1
Domestic Output (10k tons)	101	52 (Est.)
Import Volume (10k tons)	63	33
Consumption Volume (10k tons)	160	83

Source: Romanian Chemical Association APC June 2026 Industry Report; Eurostat May 2026 Trade Data

China Market Status

July 2026 China PP granule East China avg price 7,850 RMB/ton, operating rate 78%. Exports to Romania up 19% YoY, FOB quote \$950-\$1,020/ton.	
PP Granules (East China)	7,850 RMB/ton

PE (North China)	8,320 RMB/ton
Industry Operating Rate	78%▲
Exports to Romania (Jan-Jun)	+19% YoY

Source: Longzhong Info July 2026 Plastics Market Weekly; General Administration of Customs of China (GACC) June 2026 Import/Export Statistics

Romania Market Status

Romania PP import avg price €1,365/ton. Germany, Italy & China are top 3 sources. Local consumption mainly packaging films & injection molded parts.

Source Country	Share	Avg Price (€/t)
Germany	21%	1,390
Italy	16%	1,340
China	12.8%	1,365 (CIF)

Source: INS Q1 2026 Import Statistics; Argus Media July 2026 Romania Polymer Price Index

Product Segmentation

PP imports have the highest share at 28%; PE follows at 24%. PET bottle flakes, driven by beverage packaging, grew significantly, imports +15% YoY.

Polypropylene (PP)	28%	(88k tons/month)
Polyethylene (PE)	24%	(75k tons/month)
PET Bottle Flakes	18%▲	
ABS Resin		11%

Source: Eurostat April 2026 HS Code Imports; ASPAPLAST June 2026 Report

Core Finished Product Supply & Demand

Packaging films & auto injection molded parts supply tight, local capacity insufficient. PP injection grade import dependency 65%, prices at 3-year high. ▲ Supply Tight

PP Injection Grade Import Dependency	65%
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Packaging Film Demand Growth	+7.2% YoY
Auto Plastic Parts Output	124k tons

Source: ASPAPLAST Q2 2026 Finished Product Report; ACAROM (Romanian Auto Manufacturers Association) June 2026 Data

Intermediates & Raw Material Value

China propylene monomer CFR China quote \$980/ton, raw materials account for ~62% of Romania's PP import cost. Freight & tariffs add cost pressure.

Type	China Production Base	Romania CIF Indicative Price
Propylene Monomer	CFR \$980/t	—
PP Granules	FOB \$950/t	€1,365/t
PE Film Grade	FOB \$1,020/t	€1,420/t

Source: 100ppi.com July 2026 Propylene Price; Longzhong Info July 2026 PP Export Quote; Argus July 2026 Europe Polymer CIF Price

Trade & Macro Indicators

Romania 2026 GDP growth est. 2.6%, Manufacturing PMI 51.3. Rubber & plastics exports account for 6.2% of industrial exports. Tariff preferences & port infrastructure are favorable factors.

2026 GDP Growth	2.6%
Manufacturing PMI (June)	51.3
Rubber & Plastics Export Share	6.2%
EUR/RON Exchange Rate	4.97

Source: World Bank June 2026 Romania Economic Outlook; INS May 2026 Industrial Output Index; National Bank of Romania (BNR) July 2026 Exchange Rate

Risks & Opportunity Windows

▲ Carbon Tariff EU CBAM extended to plastics in 2026, China export costs may rise 6%-8%. However, Romania's localization substitution demand offers JV opportunities for Chinese firms.

CBAM Carbon Tariff Impact	Cost +6%~8%
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Freight (China-Constanta)	\$1,850/FEU
Localization Substitution Opportunity	Packaging/Auto
Bilateral Cooperation Policy	Investment Subsidy Plan

Source: European Commission CBAM Implementation Progress Report June 2026; Drewry World Container Index July 2026; InvestRomania 2026 Policy

Data Source Summary

- National Institute of Statistics (INS) - June 2026 Trade Flash
- Argus Media - July 2026 Polymer Weekly & Romania Price Index
- Longzhong Info - July 2026 Plastics Market Weekly
- Eurostat - May 2026 Trade Data & HS Code Imports
- Romanian APC & ASPAPLAST - Q2 2026 Industry Report
- General Administration of Customs of China (GACC) - June 2026 Import/Export Statistics
- 100ppi.com - July 2026 Propylene Price
- World Bank - June 2026 Romania Economic Outlook
- National Bank of Romania (BNR) - July 2026 Exchange Rate
- Drewry - July 2026 World Container Index
- European Commission - June 2026 CBAM Implementation Progress Report

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