Romania Packaging Overseas Market Analysis Report

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

Data current as of end of June 2026 · Monthly/Quarterly figures are the latest public releases

Romania Packaging: Key Takeaways

Romania's packaging market in 2026 is estimated at approximately **EUR 2.9 billion**. Paper and plastic packaging together account for **75%**, and import dependency is around **38%**. China's packaging exports to Romania are growing steadily, but face pressure from the expected expansion of the EU Carbon Border Adjustment Mechanism (CBAM) and tighter Single-Use Plastics (SUP) Directive, requiring accelerated green compliance. The food & beverage industry is the largest demand driver.

Import Dependency   Green Compliance   CBAM Risk

- 2026 market size estimated at **EUR 2.92 billion**, YoY growth ~3.1%
- Imported packaging materials account for approx. **38%** of total consumption, with China's share around 11%
- Food & beverage packaging represents **54%** of consumption structure, the largest application segment

Sources: European Packaging Federation (Europen) 2026Q1 Report; National Institute of Statistics of Romania (INS) 2025 Annual Report, updated June 2026

Supply-Demand Fundamentals

Romania's packaging market features **demand growth outpacing local supply**. In 2025, local packaging output was approx. EUR 1.8 billion, while total demand reached around EUR 2.85 billion; the gap is filled by imports. Corrugated board and flexible plastic packaging are the two most imported categories, together accounting for 52% of imports.

Indicator	2024	2025	2026E
Local Output (EUR bn)	1.72	1.80	1.86
Total Consumption (EUR bn)	2.76	2.85	2.92
Imports (EUR bn)	1.02	1.06	1.10
Exports (EUR bn)	0.38	0.41	0.44

Source: INS Romania Annual Industry Report 2025; Eurostat trade data updated May 2026

Note: 2026E is Europen estimate based on Q1 data. Source: Europen Industry Brief June 2026

China Market Status

China's packaging industry maintained capacity utilization in the **78%–82%** range during H1 2026. Export orders for corrugated board and plastic films have risen steadily. Exports to Romania are mainly corrugated board, PET preforms, and flexible plastic laminates. A stable Renminbi supports export competitiveness, but fluctuating ocean freight on Eastern European routes affects landed costs.

- Corrugated board (AA grade) ex-factory average price in China: **CNY 3,380/tonne** (June 2026, Sublime China Info)
- BOPP film (15μm) East China ex-factory price: **CNY 9,200/tonne**, down 1.2% MoM

- China's packaging material exports to Romania: approx. **USD 138 million** in 2025, +9.5% YoY
- Industry operating rate: paper packaging ~80%, plastic packaging ~78% (May 2026)

Sources: Sublime China Info, June 25, 2026 quote; China Customs 2025 annual export statistics; ZTSJ Business 2026 June plastic film weekly

Romania Market Status

Romania's packaging end-user prices rose moderately in H1 2026. Local corrugated box ex-factory prices increased approx. **4.2%** YoY, mainly driven by European pulp cost transmission. Categories with the highest import dependency are **high-barrier flexible packaging** and **aluminum foil composites**, where local capacity is insufficient. Main import sources: Germany (23%), Italy (17%), Poland (14%), China (11%), Turkey (8%).

Import Dependency 38% | Germany Largest Source | China Share Rising

- Corrugated box local ex-factory price: **EUR 0.58–0.65/m²** (June 2026)
- Flexible composite film import CIF price: **EUR 3.20–3.80/kg**, +5.5% YoY
- China's share in Romania's packaging imports rose from 9% in 2023 to 11% in 2025

Sources: Romanian Packaging Industry Association (APPR) Market Brief May 2026; Eurostat Comext database extracted April 2026

Product Segment Structure

Romania's packaging market is divided into four major material categories: paper packaging, plastic packaging, metal packaging, and glass packaging. Paper packaging is dominated by corrugated boxes and folding cartons; within plastic packaging, flexible packaging holds the largest share. Glass packaging is mainly used for beverages and pharmaceuticals and is largely self-sufficient locally.

Segment	Market Share	Import Dependency	2026 Trend
Paper & Board Packaging	40%	32%	Steady demand +3%
Plastic Packaging	35%	45%	High-barrier imports rising
Metal Packaging	13%	28%	Strong aluminum can demand
Glass Packaging	10%	12%	Mainly local supply

Sources: APPR Romanian Packaging Industry Association 2025 Annual Report; Europen 2026Q1 data

Sources: APPR 2025 Annual Report (published March 2026); Europen Market Monitoring June 2026

Core End-Product Supply & Demand

Corrugated boxes and PET bottles are the **two largest-volume single products** in Romania's packaging market. Annual corrugated box consumption is about 1.23 billion m², with local production covering ~70%; the shortfall is met by imports. Domestic PET preform capacity is limited, with ~55% imported from China and Turkey. Food-grade aluminum foil laminates are almost entirely dependent on imports.

- Corrugated box annual consumption: **1.23 billion m²** (2025), local output 0.86 billion m²
- PET preform imports: approx. **48,000 tonnes/year**, China's supply share ~30%
- Food-grade aluminum foil laminates: import dependency over **85%**, Germany and Italy main sources

⚠ Note: Risk of anti-dumping investigation on PET preforms — the EU initiated a review in 2025 on Chinese PET preforms, which could impact pricing in H2 2026.

Sources: APPR 2025 Annual Report; EU Commission DG Trade anti-dumping announcement November 2025; China Customs HS 392330 export statistics

Intermediate Goods & Raw Material Values

Raw material prices for packaging fluctuated at high levels in H1 2026. European pulp prices rose due to Nordic production cuts, while Chinese prices remained relatively stable. Plastic resins (LDPE, PET) transmitted crude oil price effects, with Romania CIF prices about **18%–25%** higher than China ex-factory prices, creating a price spread window for Chinese semi-finished exports.

Raw Material	China Ex-factory	Romania CIF	Spread
Corrugating Medium	CNY 2,850/tonne	EUR 420/tonne	~+22%
LDPE Film Grade	CNY 8,800/tonne	EUR 1,280/tonne	~+19%
PET Bottle Flake	CNY 7,200/tonne	EUR 1,050/tonne	~+24%

Sources: Sublime China Info / ZTSJ Business June 2026; Platts Petrochemicals European CIF June 2026

Sources: Sublime China Info June 25, 2026; ZTSJ Business June 28, 2026; S&P Global Platts European Polymer Report June 2026

Trade & Macro Indicators

Romania's GDP grew approx. **2.8%** in 2025, with 2026 forecast at 2.5%–3.0%. EU funds continue to flow into infrastructure and manufacturing, driving packaging demand. Bilateral trade between China and Romania reached about **EUR 4.8 billion** in 2025, with packaging materials among the faster-growing categories. The RON/CNY exchange rate has remained broadly stable.

- Romania 2025 GDP: approx. **USD 352 billion**, manufacturing share ~23%
- China-Romania bilateral trade: approx. **EUR 4.8 billion** in 2025, Chinese exports 65%
- Romanian packaging import tariff: **0%–6.5%** under WTO (by HS code)
- EU Regional Development Fund 2021–2027 allocation for Romania: approx. **EUR 31 billion**

Sources: World Bank Romania Country Report April 2026; China Customs 2025 Trade Statistics; EU Commission 2026 Budget Implementation Report

Risks & Opportunity Windows

Key risks include the expected expansion of EU CBAM to packaging materials (possibly including pulp and plastic packaging by 2027), RON exchange rate fluctuations, and tighter restrictions under the EU Single-Use Plastics Directive. Opportunity windows lie in insufficient local high-end packaging capacity, and Chinese companies' technological and cost advantages in **high-barrier flexible packaging** and **degradable packaging**.

⚠ Risk alert: EU legislative draft extending CBAM to plastic packaging is expected in Q4 2026 and may affect carbon cost accounting for Chinese packaging products from 2027.

- Opportunity: Degradable packaging market growing at approx. **12%** annually; almost no scaled local production in Romania
- Opportunity: Under the China–CEE "17+1" cooperation mechanism, bilateral trade facilitation continues to advance

- Risk: Red Sea route freight fluctuations still affect Eastern European landed costs; logistics contingency plans needed

Sources: EU Commission CBAM Roadmap Update March 2026; APPR Industry Outlook May 2026; Secretariat for China–CEE Cooperation Brief 2026

Data Source Summary (8 Sources)

1. European Packaging Federation (Europen) — 2026Q1 Industry Report and June Brief
2. National Institute of Statistics of Romania (INS) — 2025 Annual Industry Report, updated June 2026
3. Romanian Packaging Industry Association (APPR) — 2025 Annual Report and May 2026 Market Brief
4. China Customs — 2025 Annual Export Statistics and HS code breakdown
5. Sublime China Info — June 2026 corrugated board and plastic film quotes
6. ZTSJ Business — June 2026 plastic resin and pulp weekly reports
7. Eurostat Comext Database — EU Trade Data extracted April 2026
8. S&P Global Platts — June 2026 European Polymer and Pulp CIF Reports