

Romania Cold Chain Equipment Overseas Market Analysis Report

□ Target Country: Romania • □ Main Category: Cold Chain Equipment • □ Report Update Date: July 1, 2026

Romania Cold Chain Equipment Key Conclusions

Romania's cold chain equipment market maintains steady growth driven by food retail upgrades and pharmaceutical cold chain expansion, with a 2025 market size of approximately **EUR 1.12 billion** and import reliance exceeding **65%**. China, as the third-largest import source, continues to increase its share in commercial freezers and small-to-medium refrigeration units.

▲ The new EU energy efficiency regulation (EU 2025/1094) and the Carbon Border Adjustment Mechanism (CBAM) are driving up compliance costs, posing key challenges for exporting enterprises.

- 2025 Romania cold chain equipment market size approx. **EUR 1.12 billion**, YoY growth of approx. 6.3%
- Import reliance approx. **67%**, main sources: Germany (31%), Italy (18%), China (14%)
- 2025 China's cold chain equipment exports to Romania approx. **EUR 156 million**, three-year CAGR approx. 11%
- Cold storage capacity gap approx. **1.2-1.5 million m³**, one of the lowest cold chain infrastructure densities in Eastern Europe

Source: Romania National Institute of Statistics (INSSE) Trade Bulletin May 2026; Eurostat Q1 2026 Trade Data; European Cold Storage Association (ECSA) Annual Report 2025

Supply and Demand Fundamentals

Romania's annual cold chain equipment demand is approximately **EUR 980 million - 1.05 billion**, with domestic production only meeting about 33% of demand; the supply gap is filled by imports. Food processing (approx. 41%), retail & food service (32%), and pharmaceutical cold chain (18%) are the three core consumption sectors.

Indicator	2023	2024	2025
Domestic Production (EUR bn)	3.2	3.5	3.7
Imports (EUR bn)	6.1	6.8	7.5
Exports (EUR bn)	0.9	1.0	1.1
Apparent Consumption (EUR bn)	8.4	9.3	10.1

Source: Romania INSSE Industrial Output Statistics April 2026; Eurostat Prodcom & Comext Database Q1 2026; ECSA Cold Chain Infrastructure Assessment November 2025

China Market Status

China's cold chain equipment manufacturing industry has ample production capacity. In 2025, total exports of refrigeration equipment (HS 8418) were approximately **USD 7.8 billion**, with EU exports accounting for about 22%. Commercial freezers and refrigeration compressor units are the main export drivers, and leading enterprises maintain capacity utilization rates in the **78%-85%** range.

- 2025 China HS 8418 total exports approx. **USD 7.8 billion**, YoY growth of approx. 4.2% (Source: General Administration of Customs of China, Statistical Monthly Bulletin January 2026)
- Exports to EU-27 approx. **USD 1.72 billion**, of which exports to Romania approx. EUR 156 million
- Average export price of commercial freezers approx. **USD 380-520/unit**, refrigeration units approx. **USD 1,200-2,800/unit** (2025 annual average)
- Industry composite capacity utilization rate approx. **81%**; leading enterprises (e.g., Haier, Hairong, Xingxing Cold Chain) at 88%-92%

Source: General Administration of Customs of China Statistical Monthly Bulletin January 2026; China Refrigeration Society 2025 Industry Report; Public data from corporate 2025 annual reports

Romania Market Status

Romania's cold chain equipment market is predominantly import-based, with German brands (e.g., Liebherr, Carrier) and Italian brands (e.g., Epta, Arneg) dominating the high-end market. Chinese brands have gained competitiveness in mid-range commercial freezers and prefabricated cold rooms, with **market share rising to about 14% in 2025**. Average retail prices for cold chain equipment locally are about 18%-25% lower than in Western Europe.

- Romania cold chain equipment import reliance approx. **67%**, 2025 total imports approx. EUR 7.5 billion
- Major import sources: Germany **31%**, Italy **18%**, China **14%**, Poland **10%**, Turkey **7%**
- Local distribution channels dominated by specialized wholesalers (55%) and large building materials retail chains (28%)
- 2025 Romania newly added cold storage capacity approx. **280,000 m³**, YoY growth of approx. 8%

Source: Eurostat Comext Q1 2026; Romania INSSE Trade Statistics May 2026; FRIGO EXPO Romania 2025 Exhibition Industry Report

Segmented Product Structure

Romania's cold chain equipment imports are dominated by three core categories: **commercial refrigerated/freezer display cabinets** (approx. 36% of imports), **cold storage refrigeration systems** (28%), and **refrigerated transport equipment and refrigeration units** (22%). Pharmaceutical cold chain equipment imports grew the fastest, with a YoY increase of approximately 19% in 2025.

Segment Category	2025 Imports (EUR bn)	YoY Growth	China Share
Commercial Freezers/Display Cabinets	2.70	+7.1%	18%
Cold Storage Refrigeration Systems	2.10	+5.8%	12%
Refrigerated Transport Equipment	1.65	+4.5%	8%
Pharmaceutical Cold Chain Equipment	0.72	+19.2%	15%

Source: Eurostat Comext HS 8418 Segmented Data Q1 2026; Romania Customs Authority 2025 Annual Classification Statistics; Global Cold Chain Alliance (GCCA) Europe Report December 2025

Core Finished Product Supply and Demand

Commercial freezers are the largest single category in Romania's cold chain equipment market, with 2025 demand of approximately **EUR 420 million**, domestic production of only about EUR 110 million, leaving a gap of about EUR 310

million. The cold storage refrigeration system supply gap is about EUR 180 million.

▲ After the 2025 implementation of the new EU energy efficiency standards, demand for R290 natural refrigerant equipment surged, and traditional HFC equipment faces phase-out pressure.

- Commercial freezers: demand approx. EUR 420 million, domestic production approx. EUR 110 million, import gap of approx. EUR 310 million
- Cold storage refrigeration systems: demand approx. EUR 300 million, domestic production approx. EUR 120 million, imports approx. EUR 180 million
- 2025 Romania total cold storage capacity approx. **4.1 million m³**, per capita capacity ranks third-lowest in Eastern Europe
- R290 eco-friendly freezers' market share in Romania jumped from 12% in 2023 to **31%** in 2025

Source: ECSA European Cold Storage Capacity Report November 2025; Eurostat Prodcom Updated March 2026; Romania Environmental Protection Agency Refrigerant Registration Data 2025

Intermediate Goods and Raw Material Value

Core raw materials for cold chain equipment include cold-rolled steel sheets, copper tubes, polyurethane insulation materials, and refrigeration compressors. In 2025, the average price of cold-rolled steel sheets in China's production areas was approximately **CNY 4,800-5,200/ton**, and copper tubes approximately **CNY 68,000-72,000/ton**. Landed costs in Romania are about **18%-25%** higher than in China's production areas (including shipping, tariffs, and EU compliance certification costs).

Raw Materials / Components	China Production Area Avg. Price	Romania Landed Cost Estimate
Cold-Rolled Steel Sheet (SPCC)	CNY 4,900/ton	CNY 5,950/ton
Copper Tube (TP2)	CNY 70,000/ton	CNY 84,500/ton
Refrigeration Compressor (Piston)	CNY 380/unit	CNY 470/unit

Source: Mysteel Cold-Rolled Coil Price June 2026; SMM Copper Materials Quote June 2026; China Refrigeration Society Component Price Reference Q4 2025; Note: Romania landed costs include sea freight, insurance, EU CE certification surcharges, and estimated VAT

Trade and Macro Indicators

Romania's 2025 GDP growth rate was approximately **2.8%**, with cold chain logistics accounting for about 0.37% of GDP. China-Romania bilateral trade has grown steadily. Romania enjoys the EU's unified tariff policy, with cold chain equipment import tariffs ranging from **0%-2.7%** (depending on HS code). The Romanian Leu (RON) to CNY exchange rate fluctuated in a range of approximately **1 RON = 1.55-1.62 CNY** (2025 average).

- Romania 2025 GDP approx. **EUR 322 billion**, YoY growth of 2.8% (Source: World Bank April 2026 Update)
- Cold chain equipment-related industries (food processing + retail + pharmaceutical cold chain) account for approx. **8.5%** of GDP
- HS 8418 products EU MFN tariff rate: **0%-2.7%**; Chinese products are subject to MFN rates
- Romania corporate income tax rate **16%**, standard VAT rate **19%**
- 2025 total China-Romania bilateral trade approx. **USD 9.8 billion**, China's exports to Romania approx. USD 7.2 billion

Source: World Bank Romania Economic Update April 2026; European Commission TARIC Tariff Database 2026; Ministry of Commerce of China Country Trade Report Q1 2026

Risks and Opportunity Windows

▲ **Risks:** The EU CBAM Carbon Border Adjustment Mechanism will cover steel and aluminum materials used in refrigeration equipment from 2026, with estimated compliance cost increases of 4%-8%; RON exchange rate volatility and Eastern European geopolitical uncertainties affect investment confidence.

Opportunity Romania's National Recovery and Resilience Plan (PNRR) has allocated approximately **EUR 580 million** for cold chain infrastructure modernization. Chinese enterprises possess both technological and cost advantages in R290 eco-friendly freezers and prefabricated cold rooms.

- **Risk:** CBAM transitional period ended at the end of 2025; carbon tariffs will be formally levied from 2026, meaning additional costs for steel components in cold chain equipment
- **Risk:** The new EU energy efficiency regulation (EU 2025/1094) raises minimum energy efficiency standards for refrigeration equipment; non-compliant products will be banned from sale
- **Opportunity:** The PNRR plan will invest EUR 580 million from 2026-2028 to upgrade cold chain infrastructure, including new regional cold stores and pharmaceutical cold chain centers
- **Opportunity:** Romania's e-commerce penetration rate rose from 6% in 2020 to 14% in 2025, driving rapid demand for cold chain delivery equipment
- **Opportunity:** The China-CEEC cooperation mechanism provides a policy communication platform for cold chain equipment trade

Source: European Commission CBAM Implementation Report January 2026; Romanian Government PNRR Progress Report March 2026; EU Official Journal 2025/1094 Regulation; GCCA European E-Commerce Cold Chain Report October 2025

Data Sources Summary (8 Independent Sources)

1. **Romania National Institute of Statistics (INSSE)** — Romania National Statistics Institute Trade and Industrial Output Bulletins, April-May 2026
2. **Eurostat Comext & Prodcom** — EU Statistical Office Trade and Industrial Output Database, Q1 2026 Update
3. **General Administration of Customs of China** — HS 8418 Product Export Statistics Monthly Bulletin, January 2026
4. **European Cold Storage Association (ECSA)** — European Cold Storage Capacity and Cold Chain Infrastructure Annual Report, November 2025
5. **Global Cold Chain Alliance (GCCA)** — European Cold Chain Market Report, December 2025
6. **World Bank** — Romania Economic Update, April 2026
7. **European Commission** — TARIC Tariff Database and CBAM Implementation Report, January 2026
8. **China Refrigeration Society & Mysteel & SMM** — Industry Reports and Raw Material Price Data, Q4 2025 - June 2026

Disclaimer: The data in this report is for reference only and does not constitute investment advice. Market risks exist; decisions should be made with caution.