Romania Agricultural Film Overseas Market Analysis Report

Target Country: Romania

Main Category: Agricultural Film

Report Type: Overseas Market Analysis

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Romania Agricultural Film Core Conclusions

Romania's agricultural film market has an annual consumption of approximately 25,000–30,000 tons, with import dependency exceeding 70%, dominated by intra-EU supply. Chinese agricultural film, leveraging cost-performance advantages, shows growing exports to Romania, though total volume remains modest. In 2026, rising LLDPE raw material cost centers, combined with tightening EU plastics regulations, create dual pressures of cost and compliance. Demand for functional agricultural film is growing at approximately 8–12% annually, making it the most attractive niche segment.

- Romania agricultural film **import dependency ~72%**, annual imports ~18,000–22,000 tons
- Chinese agricultural film accounts for **less than 5%** of Romania's imports, significant growth potential
- LLDPE raw material prices fluctuate between **CNY 7,800–9,200/ton**, up ~6% YoY ▲
- Functional agricultural film demand growth **~10%**, premium space 1.5–2× that of standard film

Source: Longzhong Information 2025 Q4 Agricultural Film Industry Report; Eurostat 2025 Trade Data; Zocun Information June 2026 PE Market Weekly

Supply & Demand Fundamentals

Romania's agricultural film market has a structural supply-demand gap; limited domestic production (approx. 7,000 tons/year) cannot meet modern agricultural demand. Consumption mainly consists of greenhouse film and mulch film, together accounting for ~75%. China, the world's largest agricultural film producer with annual output exceeding 2.6 million tons, has ample export capacity.

Indicator	Romania	China (Reference)
Annual Consumption	25,000–30,000 tons	2.4–2.6 million tons
Domestic Production	6,000–8,000 tons	2.6–2.8 million tons
Import Volume	18,000–22,000 tons	Small amount of high-end film
Export Volume	~1,000 tons	150,000–200,000 tons

Source: Eurostat 2025 Trade Statistics; Romania National Institute of Statistics (INS) 2025 Annual Report; Longzhong Information June 2026

China Market Status

In the first half of 2026, China's agricultural film industry operating rate remained in the 65–75% range with clear seasonal fluctuations. LLDPE raw material prices were at medium-to-high levels supported by international crude oil, with agricultural film ex-factory prices up ~5–8% year-on-year. Export markets are concentrated in Southeast Asia and Central Asia, while growth in exports to Europe is constrained by compliance costs.

- Industry **operating rate ~68%** (before June peak season), up 2 percentage points vs. the same period in 2025
- Standard mulch film ex-factory: **CNY 9,600–10,800/ton**, functional greenhouse film: **CNY 13,200–15,800/ton**
- China's total agricultural film exports: **~168,000 tons** (full-year 2025), EU share ~8%
- Shandong and Hebei production capacity accounts for **~55%** of the national total, with strong industrial cluster effects

Source: Zocun Information June 2026 Agricultural Film Market Monitor; China General Administration of Customs 2025 Export Statistics; Longzhong Information PE Weekly June 2026

Romania Market Status

Romania's agricultural film market is import-driven, with Germany, Italy, and Poland as the top three suppliers, together accounting for ~60% of import volume. End-user prices are notably affected by EUR exchange rates and logistics costs. Local distribution channel concentration is relatively high, with large agricultural cooperatives being the main purchasers.

Supply Source	Share	CIF Reference (€/ton)
Germany	~25%	1,850–2,400
Italy	~20%	1,700–2,250
Poland	~15%	1,550–2,000
China	~4%	1,350–1,750

Source: Eurostat 2025 Detailed Trade Data; Romanian Ministry of Agriculture 2025 Industry Brief (previous data cited, no updated public data as of July 2026)

Product Segment Structure

Romania's agricultural film consumption is mainly greenhouse film and mulch film, with silage film growing rapidly along with livestock sector development. Functional agricultural film (anti-drip, photo-selective, biodegradable film) has a low share but leads in growth rate, representing the key direction for value enhancement.

Product Segment	Consumption Share	Price Range (€/ton)	Annual Demand Trend
Greenhouse Film	~40%	1,600–2,500	▲ Steady Growth
Mulch Film	~35%	1,200–1,800	Stable
Silage Film	~15%	1,400–2,000	▲ Fast Growth
Functional/Specialty Film	~10%	2,200–3,500	▲▲ High-speed Growth

Source: Romanian Agricultural Inputs Association 2025 Report; Eurostat Product-Level Trade Data (previous data cited, no updated public data as of July 2026)

Core Finished Product Supply & Demand

Greenhouse film is the core finished product in Romania's agricultural film market, with annual consumption of ~10,000–12,000 tons and domestic production below 3,000 tons, creating a supply-demand gap exceeding 7,000 tons. In 2026, driven by the EU CAP subsidy policy, greenhouse expansion projects are increasing, with greenhouse film demand expected to grow ~8%.

- Greenhouse film **supply-demand gap ~7,000–9,000 tons/year**, entirely filled by imports
- Romania greenhouse area: **~3,500 hectares**, annual growth 4–6%
- Greenhouse film import CIF price: **€1,850–2,400/ton**, with significant quality premium
- Local greenhouse film capacity utilization: **~55%**, constrained by aging equipment and raw material costs

Source: Romania National Institute of Statistics (INS) 2025 Agricultural Structure Survey; Eurostat 2025 Trade Data

Intermediate Goods & Raw Material Value

Core raw materials LLDPE and LDPE account for 60–70% of production costs. In the first half of 2026, international crude oil prices remained at medium-to-high levels, with PE raw material costs transmitting to agricultural film ex-factory prices. Raw material prices in China's production regions are competitive, but logistics costs to Romania partly erode the price advantage.

Raw Material / Intermediate	China Producer Price (CNY/ton)	Romania CIF Reference (€/ton)
LLDPE	7,800–9,200	1,050–1,250
LDPE	9,200–10,800	1,200–1,400
EVA (for functional film)	13,500–16,500	1,750–2,100

Source: Longzhong Information June 2026 PE Raw Material Market Report; Argus Media June 2026 European Polymer Price Assessment

Trade & Macroeconomic Indicators

As an EU member state, Romania applies the EU Common Tariff (~6.5%) on agricultural film imports. GDP growth was ~2.8% in 2025, with agriculture accounting for 4.2% of GDP. Bilateral trade between China and Romania is growing steadily, with chemicals as a key category. EU CAP subsidies continue to support agricultural inputs.

Indicator	Value	Trend
Romania GDP Growth Rate	2.8% (2025)	Stable
Agriculture GDP Share	4.2%	Slightly Declining
EUR/RON Exchange Rate	~5.0	Stable
EU Agricultural Film Import Tariff	~6.5%	Unchanged

Source: World Bank 2025 Romania Economic Brief; EU TARIC Tariff Database 2026; National Bank of Romania (BNR) Exchange Rate Data

Risks & Opportunity Windows

⚠ The proposed revision of EU plastics regulations (expected to take effect in Q3 2026) may raise environmental standards for agricultural film, increasing the required recycled content ratio to 30%. Non-compliant products face market access restrictions.

Key risks include tightening EU environmental regulations, exchange rate fluctuations (RON against USD), and intensifying localized competition. Opportunities lie in the high premium space for functional agricultural film, growing investment in Romania's agricultural modernization, and trade facilitation arising from improved China-Romania bilateral relations.

- Risk EU REACH regulation update, expanded restrictions on plasticizers
- Risk Ocean freight cost volatility, China to Constanța port freight rates up ~12% YoY
- Opportunity Biodegradable agricultural film benefits from EU green subsidies, 30–50% premium
- Opportunity China-Romania agricultural cooperation MOU signed, trade barriers expected to decrease

Source: European Commission 2026 Plastics Regulation Proposal; Argus Media Logistics Cost Report June 2026; Romanian Ministry of Foreign Affairs 2026 Bilateral Cooperation Bulletin

Main Data Sources

- ▸ Longzhong Information — 2025 Q4 Agricultural Film Industry Report / June 2026 PE Raw Material Market Report
- ▸ Zocun Information — June 2026 Agricultural Film Market Monitor Weekly
- ▸ China General Administration of Customs — 2025 Agricultural Film Export Statistics Annual Report
- ▸ Eurostat — 2025 Romania Agricultural Film Import Detailed Trade Data
- ▸ Romania National Institute of Statistics (INS) — 2025 Agricultural Structure Survey Annual Report
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