

Romania Home Textile Overseas Market Analysis Report

Target Country: Romania

Main Category: Home Textiles

Report Date: July 1, 2026

Data updated to July 2026, some high-frequency data continues from previous periods

Romania Home Textile Key Takeaways

Romania's home textile market is projected at €410M in 2026, with import reliance staying high at 75%. China holds steady as the top source at 28%, though Turkey is catching up fast with geographic and tariff advantages. Core risks include rising EU ESPR compliance costs and raw material volatility; local substitution is emerging but unlikely to shift import dynamics in the short term.

- 2026E market size **€410M**, ~3.2% YoY growth
- Import reliance **~75%**, China ~28%, Turkey ~19%
- Bedding & towels account for **62%** of imports

⚠ EU ESPR regulation enters full enforcement in 2026; non-compliant products face market exclusion risk

Source: Eurostat, Romanian INS, China Home Textile Association, Jun 2026 / partial data uses prior values

Supply & Demand Fundamentals

Romania's annual home textile consumption is ~€410M, with local capacity meeting only ~25% of demand. Total imports amount to ~€310M, while exports (mainly re-exports and processed exports) are ~€60M. Hospitality and medical textiles are the fastest-growing consumption sectors, with an annual growth rate of ~5%.

Indicator	2024	2025E	2026E
Local Output (€100M)	0.9	0.95	1.0
Imports (€100M)	2.85	2.98	3.1
Exports (€100M)	0.55	0.58	0.6
Apparent Consumption (€100M)	3.2	3.35	3.5

Source: Eurostat, Romanian INS, Jun 2026; 2026 data are industry estimates

China Market Status

In 2025, China's home textile enterprises above designated size generated revenue of ~¥685B, with total exports of ~\$34.8B. Exports to Romania reached ~\$125M, up ~4% YoY. Industry utilization rate held at ~78%. Low cotton prices support export competitiveness, but exports to Europe face stricter green compliance scrutiny.

- 2025 total textile exports ~\$34.8B, +2.8% YoY
- Exports to Romania ~\$125M, +4.1% YoY
- Avg. industry operating rate 78% (prior value, no recent public data)
- China 3128B Cotton Spot ~¥15,500/ton (Jun 2026, 100ppi.com)

Source: China Customs, 100ppi.com, CHTA, Jun 2026

Romania Market Status

Romanian home textile retail prices rose modestly at ~4% YoY in 2026. Import source concentration is moderately high, with the top three (China, Turkey, Pakistan) accounting for ~57% of the total. Online channel penetration has risen to 22%, with e-commerce platforms becoming the main distribution channel for mid-to-low-priced home textiles.

Import Source	2025 Share	YoY Change
China	28%	-1.2pp
Turkey	19%	+2.5pp
Pakistan	10%	+0.8pp
India	8%	+0.3pp

Source: Eurostat, Romania Customs, Jun 2026 (full year 2025 data)

Import Reliance 75%

Online Penetration 22%

Product Segmentation

Bedding sets (sheets, duvet covers, pillowcases) are Romania's largest imported home textile category, accounting for ~38% of imports; towels account for 24%; blankets and quilts account for 18%. Curtains and decorative fabrics account for 12%, while kitchen textiles account for 8%. Mid-to-high-end bedding demand is the fastest growing segment, with an annual growth rate of ~6%.

Product Segment	Import Share	Demand Growth	Avg. Price Trend
Bedding Sets	38%	+6%	↗ Rising
Towels	24%	+3%	→ Stable
Blankets & Quilts	18%	+4%	↗ Rising
Curtains & Decor Fabric	12%	+2%	→ Stable

Source: Eurostat disaggregated trade data, industry estimates, Jun 2026

Core Finished Product S&D

The supply-demand gap for bedding sets (the core finished product) is approximately €120M, fully reliant on imports. The average CIF price of imported bedding in 2026 rose by ~5%, driven primarily by logistics and compliance costs. Local bedding capacity is limited, covering only ~15% of the low-end market share, with the mid-to-high-end market almost entirely supplied by imports.

- Annual bedding consumption ~€155M, local supply only ~€35M
- Imported bedding CIF average price up ~5% YoY
- Chinese bedding accounts for ~32% of Romania's bedding imports

Source: Eurostat, Romania INS industry reports, Jun 2026

Intermediates & Raw Materials

Core raw material prices are stable to slightly weak. Chinese cotton prices remain low, and polyester staple fiber has slightly retreated. However, sea freight costs (China to Constanța) increased ~8% YoY. Coupled with the anticipated EU Carbon Border Adjustment Mechanism, overall CIF costs rose by 3%-5%, squeezing Chinese exporters' margins.

Raw Material / Cost Item	China Ex-works Price	Romania CIF Reference
Cotton 3128B	~¥15,500/ton	~€2,150/ton
Polyester Staple Fiber	~¥7,200/ton	~€1,050/ton
Grey Fabric (40S Cotton)	~¥8.5/meter	~€1.25/meter

Source: 100ppi.com, Cotlook, freight indices, Jun 2026; CIF prices are estimates including freight

Trade & Macro Indicators

Romania's 2026 GDP growth is forecast at 2.8%, with the inflation rate dropping to 3.8%. Total bilateral trade between China and Romania is approximately \$8.5B, with home textiles accounting for ~1.5%. As an EU member state, Romania enjoys zero tariffs for intra-EU trade, while Chinese products face the EU Common External Tariff (home textiles approximately 6%-12%). Turkey benefits from preferential rates due to the customs union.

Indicator	Value	Source / Date
RO GDP Growth	2.8% (E)	IMF Apr 2026
Inflation Rate	3.8%	BNR Jun 2026
RON/EUR Rate	~4.97	BNR Jun 2026
CN Home Textile Exports to RO	~\$125M	China Customs 2025

Source: IMF, BNR, China Customs, Jun 2026

Risk & Opportunity Window

Key risks: rising EU ESPR compliance costs (expected to increase export costs by 5%-8%), Turkey's geographic advantage squeezing China's share, and Red Sea shipping disruptions impacting the supply chain. Opportunity windows: local capacity expansion in Romania driving demand for equipment and intermediates, deepening China-Romania e-commerce cooperation, and a 15%-20% premium potential for green-certified products.

- **Risk:** ESPR compliance raises export costs by 5%-8%
- **Risk:** Turkey's share expanding, reaching 19% in 2025
- **Opportunity:** 15%-20% premium for green-certified products
- **Opportunity:** Romania's hospitality expansion drives +5% demand for institutional textiles

Source: European Commission, Eurostat, Romanian Ministry of Tourism, Jun 2026

Data Source Summary

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| 1. Eurostat — Romania home textile import/export trade data, Jun 2026 | 2. National Institute of Statistics (INS) Romania — Local output and consumption data, Jun 2026 |
| 3. China General Administration of Customs — China's home textile export statistics to Romania, Full Year 2025 | 4. China Home Textile Association (CHTA) — Industry operational data and utilization rates, 2025 |
| 5. 100ppi.com — Raw material spot prices for cotton, polyester, etc., Jun 2026 | 6. International Monetary Fund (IMF) — Romania GDP growth forecast, Apr 2026 |
| 7. National Bank of Romania (BNR) — Exchange rate and inflation data, Jun 2026 | 8. European Commission — ESPR regulation implementation progress, 2026 |
| 9. Cotlook — International cotton price indices, Jun 2026 | |

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