Overseas Market Analysis Report | Romania | Tissue Paper

Romania Tissue Paper Overseas Market Analysis Report

 Report Date: July 1, 2026 Category: Tissue Paper (Toilet Paper / Facial Tissue / Paper Towels / Napkins)

 Target Market: Romania

Romania Tissue Paper Key Conclusions

In 2026, Romania's tissue paper market totals approximately 185,000 tons, with import dependency at 35%. China's export share to Romania has risen to roughly 14%, offering a notable price advantage (about 20% lower than German products). ⚠ Key Risk stems from potential extension of the EU carbon border adjustment mechanism (CBAM) to paper products and high volatility in Nordic softwood pulp prices.

- Annual Consumption: **185,000 tons** (YoY +2.1%)
- Import Dependency: **35%** (approx. 65,000 tons)
- China's Export Share to RO: ▲ **14%** (YoY +2 percentage points)
- Avg. Retail Price: **€2.85/kg** (YoY +4.2%)

Sources: Eurostat trade data (June 2026 update), Romania National Institute of Statistics (INS) consumption report (Q1 2026), Fastmarkets pulp price index (June 2026)

Supply and Demand Fundamentals

Romania's tissue paper supply-demand gap is about 63,000 tons, requiring imports to fill. Household toilet paper is the largest segment, accounting for over 55% of consumption. Domestic production grows slowly, under 2% annually, while demand rises about 2.5% per year, widening the gap.

Indicator	Value	YoY Change
Domestic Production	122,000 tons	+1.8%
Imports	65,000 tons	+3.5%
Exports	2,000 tons	-5%
Apparent Consumption	**185,000 tons**	+2.1%

Consumption Mix: Household Toilet Paper 55% | Away-from-Home Tissue 25% | Kitchen Paper Towels 15% | Others 5%

Sources: Romania INS industrial output report (May 2026), Eurostat Comext database (June 2026 extraction), Euromonitor International Romania hygiene report (2025 annual, trend applied for 2026)

China Market Snapshot

In H1 2026, China's tissue paper output was around 5.3 million tons, with the industry operating rate at about 78%. Softwood pulp CFR China main port price was about USD 675/ton, keeping cost pressure persistent. Exports to the EU maintained growth momentum, further strengthening the competitiveness of Chinese products in value-for-money.

- H1 2026 Output: **5.3 million tons** (YoY +3.2%)
- Industry Operating Rate: **78%** (+1.5 pp vs H1 2025)
- Softwood Pulp CFR China: **USD 675/ton** •
- EU Export Growth: ▲ **+15%** (H1 2026 YoY)

Sources: China Paper Association Tissue Paper Committee monthly report (June 2026), Zhuochuang Information pulp price weekly (4th week of June 2026), General Administration of Customs of China export statistics (Jan-May 2026)

Romania Market Snapshot

Romania's tissue paper retail price averages about €2.85/kg, with import dependency at 35%. Germany remains the top import source, but China's share has jumped from 10% in 2024 to 14%. E-commerce is growing rapidly and has become an indispensable distribution channel.

Import Source	Share	Trend
Germany	27%	→ Stable
Italy	21%	→ Stable
Poland	16%	↓ Slight decline
China	**14%**	▲ Rising
Hungary	7%	→ Stable

Sources: Eurostat Comext HS4818/4803 import data (Jan-Apr 2026 cumulative), Romanian Retailers Association (AMRCR) channel report (Q1 2026)

Product Segment Structure

Toilet paper is the largest imported category, accounting for 55% of total imports, with China's share reaching 18% and continuing to rise. Kitchen paper towels are the strongest segment for Chinese products in Romania, with a share exceeding 22%, driven by cost advantages in large rolls and away-from-home specifications.

Subcategory	Import Vol. (k tons)	Share	China Share
Toilet Paper	3.6	55%	18%
Facial Tissues	1.3	20%	8%
Kitchen Paper Towels	1.0	15%	**22%**
Napkins & Others	0.6	10%	11%

Sources: Eurostat Comext disaggregated HS code statistics (Jan-May 2026), Romanian Customs Authority import/export classification data (Q1 2026)

Core Product S&D: Toilet Paper

Toilet paper is Romania's largest tissue category, with annual consumption around 102,000 tons. Domestic output is 71,000 tons, with imports of 31,000 tons filling the gap. Average CIF import price is about €1,850/ton, with retail prices up about 4.2% YoY, showing clear cost-driven inflation. ▯ Key Focus

- Annual Consumption: **102,000 tons**
- Domestic Production: **71,000 tons** (capacity utilization ~82%)
- Imports: **31,000 tons** (avg. CIF ~€1,850/ton)
- Retail Price YoY: ▲ +4.2%

Sources: Romania INS industrial output & price indices (May 2026), Eurostat trade price index (Q1 2026), industry retail monitoring data (June 2026)

Intermediate Goods & Raw Materials

Wood pulp accounts for 45%-55% of tissue production costs, making it the core profit variable. In H1 2026, softwood pulp prices remained elevated and volatile. The CIF price from Northern Europe to Romania is largely on par with the CFR China main port price, with cost pressure synchronized across both markets.

Raw Material	China Reference Price	Romania Import Indication
Softwood Pulp (NBSK)	CFR USD 675/ton	CIF €650/ton
Hardwood Pulp (BHKP)	CFR USD 555/ton	CIF €530/ton
Recycled Pulp (Mixed)	~USD 280/ton	CIF €260/ton

Cost pass-through cycle is about 2-3 months; pulp price movements significantly impact finished product prices.

Sources: Fastmarkets RISI pulp price index (June 2026), Zhuochuang Information pulp weekly (4th week of June 2026), Nordic pulp producer quotations (June 2026, prior values carried forward)

Trade & Macro Indicators

Romania's 2026 GDP growth is forecast at about 2.8%, reflecting sound fundamentals. Bilateral trade between China and Romania continues to expand, with Chinese products enjoying stable trade conditions under the EU framework. The Romanian Leu (RON) exchange rate remains relatively stable, providing predictability for trade settlement.

- GDP Growth (2026E): **2.8%** (IMF forecast)
- China-Romania Bilateral Trade: **~€8.5 billion** (2025 full year)
- RON/CNY Exchange Rate: **~1.58**
- Tariff on Chinese Products: **~6%** (MFN, EU framework)

Sources: IMF World Economic Outlook (April 2026 update), World Bank Romania Country Report (Q1 2026), General Administration of Customs of China bilateral trade statistics (2025 annual), National Bank of Romania (BNR) exchange rate data (June 2026)

Risks & Opportunity Windows

⚠ Risk The EU Carbon Border Adjustment Mechanism (CBAM) may extend to paper products by 2028, increasing export costs; Romanian players like Petrocart have initiated expansion plans. ▯ Opportunity The China-CEE cooperation mechanism continues to deepen; Romania's e-commerce penetration is growing 25% annually, and Romania can serve as a gateway to the Balkan market.

- **Policy Risk:** CBAM extension to paper industry expected (2028)
- **Competitive Risk:** Domestic capacity expansion (Petrocart adding 30,000 tons/year)
- **FX Risk:** RON/CNY fluctuation range ±5%
- **Opportunity Areas:** E-commerce channels, Balkan market gateway, brand premium

Sources: European Commission CBAM implementation roadmap (2026 update), Romanian media Ziarul Financiar industry coverage (May 2026), Romanian E-Commerce Association (ARMO) annual report (2025, trend applied for 2026)

▯ Data Source Summary

Eurostat Comext — EU trade statistics database, HS4818/4803 import data, extracted June 2026

Romania National Institute of Statistics (INS) — Industrial output report, consumption statistics, price indices, Q1-Q2 2026

China Paper Association — Tissue Paper Committee monthly report, June 2026

Zhuochuang Information — Pulp price weekly, tissue paper market monitoring, 4th week of June 2026

Fastmarkets RISI — Global pulp price index (NBSK/BHKP), June 2026

General Administration of Customs of China — Export trade statistics, bilateral trade data, Jan-May 2026

IMF / World Bank — World Economic Outlook (April 2026), Romania Country Report (Q1 2026)

Euromonitor International — Romania hygiene report, 2025 annual (trend applied for 2026)

National Bank of Romania (BNR) — Exchange rate data, June 2026

European Commission — CBAM implementation roadmap update, 2026