Overseas Market Analysis Report

Romania Nonwoven Fabrics Overseas Market Analysis Report

Target Country: Romania | Main Category: Nonwoven Fabrics

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Key Conclusions on Romania Nonwoven Fabrics

The Romania nonwoven fabric market is highly import-dependent, with an import reliance of about 75%. China firmly holds the position of the largest supplier, accounting for about 25% of Romania's total nonwoven fabric imports. In the first half of 2026, global polypropylene raw material prices fluctuated within a narrow range, and the export price of Chinese spunbond nonwoven fabrics remained within a stable band. As a hygiene products manufacturing hub in Eastern Europe, Romania's demand has been steadily rising, while domestic production capacity expansion remains slow, leaving significant room for import substitution. Core risks lie in the potential trends of EU anti-dumping policies and fluctuations in the RON leu exchange rate.

~75%	€380M	~25%
Import Reliance	2025 Market Size	China Supply Share

Source: EDANA European Disposables and Nonwovens Association 2025 Annual Report, Romanian National Institute of Statistics (INS) 2025 Trade Data

Supply and Demand Fundamentals

Romania's annual consumption of nonwoven fabrics is approximately 100,000 tons, while its domestic production is only about 25,000 tons. The supply-demand gap of approximately 75,000 tons must be filled through imports. The consumption side is dominated by hygiene products (diapers, sanitary napkins), accounting for about 45%, followed by medical nonwoven fabrics (about 20%) and construction geotextiles (about 15%). Domestic manufacturers are relatively small in scale, and their technical equipment level lags behind that of Western Europe. High-end products are almost entirely dependent on imports.

Metric	Value	Year
Annual Consumption	~102 kt	2025
Domestic Production	~25 kt	2025
Imports	~91 kt	2025
Exports (Re-exports)	~14 kt	2025

Source: Romanian National Institute of Statistics (INS), EDANA 2025 Annual Statistics

Source: EDANA 2025 European Nonwoven Market Report, Romania INS Trade Database

Current Status of the Chinese Market

In the first half of 2026, the operating rate of China's nonwoven fabric industry remained at around 72%, indicating ample production capacity. The ex-factory price of PP spunbond nonwoven fabrics (mainstream specifications) in East China fluctuated narrowly within the range of 12,500-13,500 yuan/ton. In 2025, China's total nonwoven fabric exports were approximately 1.55 million tons, a year-on-year increase of about 5.2%, of which exports to the EU were about 300,000 tons. China's exports to Romania have continued to grow, maintaining a solid competitive position in the Eastern European market.

Metric	Data	Period
Industry Operating Rate	~72%	H1 2026
PP Spunbond Fabric Price	12,500-13,500 yuan/ton	Jun 2026
Annual Total Exports	~1.55M tons	Full year 2025
Exports to EU	~300k tons	Full year 2025

Source: China Nonwovens & Industrial Textiles Association, Sublime China Information Co. (SCI99) Jun 2026 Price Monitoring

Source: China Nonwovens & Industrial Textiles Association 2025 Operation Report, SCI99 Jun 2026

Current Status of the Romanian Market

The end-user price of nonwoven fabrics in Romania is influenced by both import costs and the euro exchange rate. In the first half of 2026, the tax-included price of spunbond nonwoven fabric (50gsm grade) in the local distribution market was approximately 2.8-3.2 €/kg. The top four import source countries, in order, are China (about 25%), Germany (about 18%), Turkey (about 15%), and Italy (about 12%). As an EU member state, Romania benefits from zero-tariff intra-regional trade, but imports from China are subject to the EU Common External Tariff (CET). The current basic tariff rate for nonwoven fabrics is about 4.5%-6.5%.

€2.8-3.2/kg
Local Distribution Price (50gsm)

4.5%-6.5%
EU CET Basic Rate

Source: Romania INS 2025 Import Statistics, EU TARIC Tariff Database 2026

Product Structure by Sub-Category

Spunbond nonwoven fabric is the largest category of Romania's nonwoven imports, accounting for approximately 55% of the total import volume, and is widely used in hygiene products and packaging. Meltblown nonwoven fabric accounts for about 8%, primarily used in filtration materials. Spunlace nonwoven fabric accounts for about 16%, concentrated in the wipes and medical fields. Needle-punched nonwoven fabric accounts for about 12%, serving the construction geotextile and automotive interior industries. Price trends differ across categories, with spunlace products having the highest added value.

Sub-Category	Import Share	Main Application
Spunbond	~55%	Hygiene products, packaging
Spunlace	~16%	Wipes, medical dressings
Needle-punched	~12%	Geotextiles, automotive interiors
Meltblown	~8%	Filtration, masks

Source: EDANA 2025 Category Structure Analysis, China Customs HS 5603 Segmented Statistics

Source: EDANA 2025 European Nonwoven Classification Report, Romania INS Import Segmented Data

Core Finished Products Supply and Demand

Hygiene products (diapers, sanitary napkins, adult incontinence products) constitute the largest downstream consumption sector for nonwoven fabrics in Romania, consuming approximately 46,000 tons of nonwoven fabric annually. Romania hosts several international brand OEM factories (such as the Procter & Gamble plant in Urlați), some of whose finished products are exported to neighboring countries. In 2025, Romania's hygiene product output grew by about 3.8%, but high-end top-sheet nonwoven fabrics remain heavily dependent on imports from China and Germany, with a persistent domestic supply gap.

Finished Product Area	Annual Nonwoven Consumption	Self-sufficiency Rate
Hygiene products (Diapers etc.)	~46 kt	~30%
Medical nonwoven products	~20 kt	~20%
Construction geotextiles	~15 kt	~35%

Source: EDANA 2025 End-Use Application Report, Romania INS Industrial Statistics

Source: EDANA 2025 End-Use Consumption Report, Romania INS Industrial Output Data

Intermediate Goods and Raw Material Values

The core raw materials for nonwoven fabrics are polypropylene (PP) pellets and polyester staple fiber. In June 2026, the price of PP raffia grade (T30S) in East China was approximately 7,600-7,900 yuan/ton, and polyester staple fiber was approximately 7,100-7,400 yuan/ton. When Romanian importers purchase Chinese nonwoven fabrics, the CIF Constanța Port price is approximately 8%-12% higher than the FOB China price (including sea freight and insurance). Raw material costs account for 65%-70% of the total cost of spunbond nonwoven fabrics, so PP price fluctuations are directly transmitted to nonwoven fabric pricing.

Raw Material / Intermediate	China Ex-Factory Price	Romania CIF Reference
PP Raffia Grade T30S	7,600-7,900 yuan/ton	€1,050-1,120/ton
PET Staple Fiber 1.4D	7,100-7,400 yuan/ton	€980-1,050/ton
Spunbond Nonwoven 50gsm	12,500-13,500 yuan/ton	€1,750-1,950/ton

Source: SCI99 Jun 2026, 100ppi.com PP/PET Staple Prices, Freight rate estimates based on Baltic Dry Index/Freightos Baltic Index

Source: SCI99 Jun 2026 PP & PET Staple Price Monitoring, Argus Media Petrochemical Feedstock Weekly Report

Trade and Macro Indicators

In 2025, China's exports of nonwoven fabrics (under HS code 5603) to Romania amounted to approximately $35 million, a year-on-year increase of about 4.5%. Romania's GDP growth in 2025 was about 2.6%, and industrial output grew by about 3.1%. The EU Recovery Fund continues to provide financial support for the upgrading of Romania's infrastructure and manufacturing sectors. The RON leu-to-euro exchange rate remained roughly within the 4.97-5.02 range in the first half of 2026, depreciating slightly by about 1.5% compared to the same period in 2025, which is favorable for China's export competitiveness.

Macro Indicator	Value	Year/Period
Romania GDP Growth	~2.6%	2025
China-Romania Nonwoven Trade Value	~$35M	2025
RON/EUR Exchange Rate	4.97-5.02	H1 2026
EU Recovery Fund Allocation (RO)	~€29.2B	Total 2021-2027

Source: General Administration of Customs of China (GACC) 2025 Export Statistics, National Bank of Romania (BNR), European Commission

Source: GACC, BNR 2026 Exchange Rate Bulletin, European Commission Recovery Fund Progress Report

Risk and Opportunity Windows

Regarding geopolitics, the situation in Ukraine continues to pose potential disruptions to Eastern European supply chains, but the port of Constanța in Romania has enhanced its role as a Black Sea logistics hub. A supply chain risk involves the potential initiation of anti-dumping investigations by the EU against Chinese nonwoven fabrics Monitor closely. The window of opportunity lies in the rising demand for localization and substitution in Romania, where Chinese enterprises establishing distribution centers or joint venture plants locally can circumvent tariff barriers. The EU's green transition policy is driving demand for bio-based biodegradable nonwoven fabrics, creating a new track for China's PLA nonwoven fabric exports.

↑ Opportunity	↑ Opportunity	⚠ Risk
Localization Substitution Demand	PLA Bio-based Track	EU Anti-dumping Developments

Source: EU Official Journal Trade Defense Notices, Romanian Investment Promotion Agency, EDANA Sustainability Report 2025

Data Source Summary

- EDANA (European Disposables and Nonwovens Association) — 2025 European Nonwoven Market Annual Report
- Romanian National Institute of Statistics (INS) — 2025 Trade Database and Industrial Statistics
- General Administration of Customs of China (GACC) — 2025 HS 5603 Nonwoven Export Statistics
- China Nonwovens & Industrial Textiles Association — 2025 Industry Operation Report
- Sublime China Information Co. (SCI99) — Jun 2026 PP Pellet and PET Staple Fiber Price Monitoring
- 100ppi.com — Jun 2026 Nonwoven Raw Material Spot Prices
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- National Bank of Romania (BNR) — H1 2026 Exchange Rate Bulletin
- European Commission — Recovery Fund Progress Report and TARIC Tariff Database
- Official Journal of the European Union — Trade Defense Measure Notifications (2025-2026)