Overseas Market Analysis Report

Romania Hygiene Product Raw Materials Overseas Market Analysis Report

- Target Country: Romania
- Main Category: Hygiene Product Raw Materials
- Report Date: July 1, 2026

Key Conclusions – Romania Hygiene Product Raw Materials

Romania's hygiene raw material market import dependence exceeds **75%**. SAP and fluff pulp prices remained high and volatile in H1 2026. China's nonwoven fabric export competitiveness strengthened, and demand for adult incontinence product raw materials grew 8.2%, the highest in recent years. Supply chain localization trends and tightening EU regulations pose two-way risks.

- Q1 2026 raw material imports totaled approx. **€38.5 million**, up 6.8% YoY
- SAP CIF price **US$1,720–1,860/ton**, fluff pulp **US$980–1,150/ton**
- Adult incontinence raw material share rose to **31%**, surpassing sanitary napkin materials for the first time
- China's direct exports of hygiene raw materials to Romania up +14% YoY Alert

Source: Eurostat trade data (updated May 2026); Argus Media Chemicals Price Weekly (June W4 2026); Smithers industry report (Q1 2026)

Supply and Demand Fundamentals

Romania's annual demand for hygiene raw materials is approximately **68,000–72,000 tons**, with domestic production covering only about 25%, the rest reliant on imports. Full-year imports in 2025 reached roughly 53,000 tons, with the main gaps in SAP and fluff pulp.

Indicator	2024	2025	Q1 2026
Domestic output (10k tons)	1.55	1.62	0.41
Imports (10k tons)	5.08	5.30	1.38
Apparent consumption (10k tons)	6.63	6.92	1.79
Import dependency	76.6%	76.6%	77.1%

Source: National Institute of Statistics (INS) Romania (published Apr 2026); Eurostat COMEXT database (extracted May 2026)

China Market Status

China's hygiene raw material sector operated at **62–68%** capacity utilization in H1 2026. SAP capacity stands at about 2.15 million tons/year with actual output around 1.4 million tons. Nonwoven fabric exports continued to grow, with indirect exports to the EU (via Turkey/Poland transshipment) increasing significantly.

Category	China Capacity (10k t/y)	Utilization	FOB Price Range
SAP (Superabsorbent Polymer)	215	~65%	US$1,450–1,650/ton
PP Spunbond Nonwoven	420	~68%	US$1,750–2,100/ton
Air-through Nonwoven	85	~62%	US$2,200–2,600/ton

Jan–May 2026 China nonwoven exports to EU27 up +11.3% YoY, with notable volume increase via Turkey to Romania.

Source: Longzhong Information (Jun 2026); China Customs Statistics Monthly (May 2026); Sunsirs price monitoring (Jun 30, 2026)

Romania Market Status

Romania's hygiene raw material market is valued at approximately **€160–180 million**, with imports primarily from Germany (26%), Poland (19%), and Italy (15%). China's direct share is about 7%, but indirect supply via EU transshipment is higher.

Import Source	2025 Import Value (€10k)	Share	Main Categories
Germany	4,280	26.1%	SAP, adhesives
Poland	3,120	19.0%	Nonwovens, fluff pulp
Italy	2,460	15.0%	Nonwovens, elastic materials
China (direct)	1,150	7.0%	SAP, nonwovens

Source: Eurostat COMEXT (extracted May 2026); Romania INS trade statistics (Q1 2026)

Segmented Product Structure

The three core hygiene raw material categories – SAP, fluff pulp, and nonwovens – account for **78%** of total raw material value. Adult incontinence products drive SAP demand growth, while fluff pulp supply remains tight.

Segment	2025 Import Volume (tons)	Avg Price (€/ton)	Demand Trend
SAP	18,200	1,580–1,720	↑ 8.2%
Fluff Pulp	22,500	890–1,050	↑ 4.5%
Nonwovens (all types)	15,800	2,100–2,650	↑ 6.1%
Others (elastic, adhesives, etc.)	8,600	1,200–1,900	→ Stable

Source: Eurostat detailed trade data (Apr 2026); Smithers "European Hygiene Raw Materials Market" report (Q1 2026)

Core Finished Product Supply and Demand

Romania's finished hygiene products market is approximately **€420 million** (2025). Baby diapers hold the largest share but growth slows, while adult incontinence products grow strongly. Domestic production focuses on nonwoven-based items; SAP and fluff pulp are entirely imported.

Finished Product Category	2025 Market Size	Domestic Production Share	Raw Material Gap
Baby Diapers	€175 million	~35%	SAP 100% imported
Adult Incontinence	€128 million	~28%	Fluff pulp 95% imported
Sanitary Pads/Pantyliners	€95 million	~40%	Nonwovens 30% imported

Source: Euromonitor International (Mar 2026); Romania INS industry statistics (2025 annual report)

Intermediate and Raw Material Value

Acrylic acid (SAP feedstock) China price around **US$980–1,120/ton**, global benchmark fluff pulp **US$870–1,020/ton**. Romania CIF premium over China FOB is about **12–18%**, mainly due to logistics and EU tariffs.

Raw Material/Intermediate	China Ex-works Price	Romania CIF Estimate	Premium
Acrylic Acid (tech grade)	US$980–1,120/ton	US$1,180–1,320/ton	~16%
SAP (finished)	US$1,450–1,650/ton	US$1,720–1,860/ton	~14%
Fluff Pulp (bleached softwood)	— (import dependent)	US$980–1,150/ton	—

Source: Argus Media (Jun 2026); Longzhong Information Acrylic Acid Weekly (Jun 30, 2026); Fastmarkets RISI (Jun 2026)

Trade and Macro Indicators

Romania's GDP growth was around **2.8%** in 2025, and the hygiene products industry accounts for about 1.2% of manufacturing. Bilateral China-Romania trade grew steadily; Romania's Schengen accession improved logistics efficiency, benefiting raw material imports.

Macro Indicator	2024	2025	Q1 2026
Romania GDP Growth	2.4%	2.8%	—
RON/EUR Avg Exchange Rate	4.97	4.98	4.99
China-Romania Bilateral Trade (US$ billion)	7.85	8.23	2.16
Hygiene Raw Material Import Tariff	0–3%	0–3%	0–3% (EU unified)

Source: World Bank (updated Apr 2026); National Bank of Romania BNR (Jun 2026); China Customs (May 2026)

Risks and Opportunity Windows

The EU SUP directive expansion may affect certain raw material standards, and SAP acrylic acid residue limits could tighten in 2027. Romania's rapidly growing adult incontinence market offers a window for Chinese raw material suppliers to replace higher-priced German materials.

Risks:

- EU chemical regulation (REACH revision) may increase SAP compliance costs Warning
- Red Sea logistics disruptions persist, freight rates ~18% above normal 2024 levels
- Romanian Leu exchange rate volatility rising, increasing import cost uncertainty

Opportunities:

- China's SAP quality improved, price 12–15% lower than German supply
- Romania's adult incontinence domestic capacity expansion plans bring incremental demand
- More direct China-Romania shipping routes improve transit time to 28–32 days

Source: European Commission SUP Directive revision draft (Mar 2026); Drewry Shipping Report (Jun 2026); industry research synthesis

Data Sources Summary

- Eurostat COMEXT database (extracted May 2026)
- National Institute of Statistics Romania (INS) (published Apr 2026)
- China Customs Statistics Monthly (May 2026)
- Argus Media Chemicals Price Weekly (June W4 2026)
- Longzhong Information Acrylic Acid & SAP Weekly (Jun 30, 2026)
- Smithers "European Hygiene Raw Materials Market" report (Q1 2026)
- Euromonitor International (Mar 2026)
- Fastmarkets RISI Fluff Pulp Price Index (Jun 2026)
- World Bank Romania Macro Data (updated Apr 2026)
- National Bank of Romania BNR (Jun 2026)
- Drewry Global Shipping Report (Jun 2026)
- Sunsirs Price Monitoring (Jun 30, 2026)