Romania Papermaking Equipment Overseas Market Analysis Report

Report Update Date: July 1, 2026

Target Country: Romania | Main Category: Papermaking Equipment

Import-Dependent Market | Equipment Renewal Cycle

Romania Papermaking Equipment Core Conclusion

Romania's papermaking equipment market is highly import-dependent, with a market size of approximately **€210 million** in 2024. China's export share to Romania has risen to **12%**, becoming the third-largest source country. The arrival of the equipment renewal cycle and EU environmental upgrades are core drivers, but CE certification barriers and EUR exchange rate fluctuations pose major risks.

Import dependency: **78%** (limited domestic capacity)

China market share: **12%**, ▲ Up 4 percentage points in 3 years

Core demand areas: Tissue paper machines, corrugated board equipment, spare parts

Price trend: Chinese equipment CIF prices are **25%-35%** lower than German equivalents

Source: Eurostat trade data (updated March 2025); Romania National Institute of Statistics INS (Q1 2025 report)

Supply-Demand Fundamentals

Romania's paper industry annual output is approximately **850,000 tons**, with over 40% aging equipment stock. Domestic equipment manufacturing meets only about 22% of demand, with the remainder relying on imports. Total equipment imports in 2024 were approximately €208 million, up 6.3% from 2023.

Indicator	2022	2023	2024
Paper output (10k tons)	81	83	85
Equipment imports (€100M)	1.82	1.96	2.08
Domestic equipment supply share	24%	23%	22%
Equipment renewal demand (€100M)	1.4	1.55	1.67

Source: Romania National Institute of Statistics INS; CEPI Annual Report (published April 2025)

China Market Status

In 2024, China's total papermaking equipment exports reached approximately **US$2.86 billion**, with the EU share rising to 18%. The papermaking equipment industry's capacity utilization rate was about 76%, with export order share continuing to expand. Exports to Romania totaled approximately **US$35 million**, up 19% year-on-year.

2024 China papermaking equipment exports: **US$2.86 billion**, ▲ +11% YoY

Industry capacity utilization rate: **76%** (Zhuochuang Info, January 2025)

Exports to Romania: approx. **US$35 million**, ▲ +19% YoY

Main export categories: Small-to-medium paper machines, rewinders, paper roll accessories

Source: China General Administration of Customs (January 2025 export statistics); Zhuochuang Info Papermaking Equipment (Q1 2025)

Romania Market Status

Romania's papermaking equipment imports mainly come from Germany (35%), Italy (25%), and China (12%). In 2024, the local equipment procurement price index rose approximately 4.2% year-on-year, while the competitiveness of EUR-denominated Chinese equipment CIF prices continued to strengthen. Consumption structure is dominated by corrugated board equipment (38%) and tissue paper equipment (30%).

Import Source Country	2023 Share	2024 Share	Trend
Germany	37%	35%	Slight decline
Italy	26%	25%	Slight decline
China	10%	12%	▲ Rising
Finland	8%	7%	Slight decline

Source: Eurostat EU Trade Database (updated March 2025); Romanian Customs Authority

Segmented Product Structure

Romania's imported papermaking equipment can be divided into four categories: complete paper machines account for the largest share (approx. 38%), followed by paper processing equipment (28%), pulp preparation equipment (18%), and spare parts & consumables (16%). China has clear advantages in spare parts and small-to-medium complete machines.

Segment Category	Import Share	China Share	Price Competitiveness
Complete paper machines	38%	10%	Moderate
Paper processing equipment	28%	14%	Strong
Pulp preparation equipment	18%	8%	Average
Spare parts & consumables	16%	20%	**Strong**

Source: Romanian Customs Classification Statistics (HS Chapter 84); China Paper Association Equipment Branch (February 2025)

Core Finished Product Supply-Demand

Focusing on complete papermaking equipment (core finished products), Romania imported approximately **€79 million** in complete machines in 2024. Domestic capacity is limited to small auxiliary equipment, with medium and large paper machines entirely dependent on imports. The supply-demand gap is about €65 million, projected to widen to €72 million in 2025-2026.

Complete machine imports: **€79 million** (2024)

Domestic complete machine output: approx. **€14 million** (mainly small equipment)

Supply-demand gap: approx. **€65 million**

Tissue machine demand growth: ▲ 8%-10% annually (driven by Sofidel expansion)

Source: INS Romania Industrial Output Report (Q1 2025); Sofidel Romania Expansion Announcement (March 2025)

Intermediate Goods & Raw Material Value

Core raw materials for papermaking equipment include specialty steel, cast iron parts, bearings, and automation control systems. Chinese specialty casting prices are approximately **CNY 5,800-6,500/ton**, with Romania import CIF prices (including logistics) approximately **€980-1,100/ton**. Key components account for 45%-55% of total equipment cost.

Raw Material/Component	China Production Price	Romania CIF Estimate	Cost Share
Specialty cast steel	CNY 5,800-6,500/t	€980-1,100/t	18%
Paper rolls (finished)	CNY 25k-45k/piece	€4,200-7,500/piece	15%
Bearings (imported brands)	CNY 1,200-3,500/set	€200-580/set	8%
Automation control systems	CNY 80k-250k/set	€13k-41k/set	12%

Source: Shengyishe Steel Price Monitoring (June 2025); Chinese papermaking equipment supplier composite quotes (Q1 2025); prior values carried forward, no latest July public update

Trade & Macro Indicators

Romania's GDP growth rate in 2024 was approximately **2.8%**, with manufacturing accounting for about 19% of GDP. Bilateral trade between China and Romania reached **€9.8 billion**, with machinery and equipment accounting for about 15%. Romania's import tariff on papermaking equipment is 0% (EU member state), with a VAT rate of 19%.

Romania GDP growth: **2.8%** (2024, World Bank)

Manufacturing share: **19%**

China-Romania bilateral trade: approx. **€9.8 billion** (2024)

EUR/RON exchange rate: 1 EUR ≈ **4.97 RON** (June 2025 average)

Papermaking equipment import tariff: **0%** (EU single market)

Source: World Bank Romania Country Data (updated April 2025); National Bank of Romania BNR Exchange Rate Bulletin (June 2025)

Risks & Opportunity Window

Risks: EU CE certification audits are tightening ⚠ Caution, new machinery regulations in 2025 may extend certification periods to 6-8 months; EUR/CNY exchange rate fluctuations affect profit margins; German equipment suppliers have mature local service networks with intense competition. **Opportunities:** Romania's National Recovery Plan allocates funds to support manufacturing upgrades; Chinese papermaking equipment cost-performance advantages are expanding in small-to-medium projects.

Geopolitical risk: EU trade policy towards China involves uncertainty, but papermaking equipment has not yet been listed as sensitive

Exchange rate risk: EUR/CNY fluctuation range 7.6-8.1, recommend EUR-denominated contracts

Opportunity window: Romania's 2025-2027 paper industry planned investment exceeds **€300 million** for equipment renewal

Localization cooperation: Establishing after-sales alliances with Romanian engineering service providers can lower market entry barriers

Source: Romanian Government PNRR National Recovery Plan (updated 2025); EU Machinery Regulation (EU) 2023/1230 (effective January 2025)

Data Sources Summary

- Eurostat EU Statistical Office Trade Database (updated March 2025)
- Romania National Institute of Statistics INS (Q1 2025 report)
- China General Administration of Customs Export Statistics (published January 2025)

- Confederation of European Paper Industries CEPI Annual Report (April 2025)
- World Bank Romania Country Data (updated April 2025)
- Zhuochuang Info Papermaking Equipment (Q1 2025)
- National Bank of Romania BNR (June 2025 Exchange Rate Bulletin)
- Shengyishe Steel & Casting Price Monitoring (June 2025)
- Sofidel Romania Corporate Announcements & Annual Report (March 2025)
- Romanian Government PNRR National Recovery Plan Document (updated 2025)