Romania Titanium Dioxide Overseas Market Analysis Report

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Target Country: Romania

Main Category: Titanium Dioxide

Report Type: Overseas Market Analysis

Romania Titanium Dioxide Key Takeaways

Romania's titanium dioxide market is entirely import-dependent, with annual imports of about 26,000–30,000 tonnes. China is the largest supplier (~38% share). Supply-demand remains stable, but the EU anti-dumping investigation against China represents the core policy risk. Prices were stable in 2024–2025, with no significant movement in H1 2026; market attention is on the final ruling and the localization substitution window.

- Annual import volume: **approx. 26,000–30,000 tonnes** (2024)
- China's supply share: **approx. 38%**, the largest source country
- Price trend: CIF landed price **€2,800–3,200/tonne** stable
- ⚠ Risk Alert : EU anti-dumping investigation on Chinese TiO_2 continues; final ruling may impact supply structure

Source: Eurostat, National Institute of Statistics Romania, China Customs | Data as of Dec 2024; previous values carried forward to July 2026

Supply-Demand Fundamentals

Global titanium dioxide annual capacity is about 9 million tonnes, with China accounting for over 55%. Romania is a net importer with no domestic production facilities. Key consumption sectors are coatings (~58%), plastics (22%), and paper (12%). In 2024, global demand growth slowed to about 2.1%, and European demand was weak due to the construction sector.

Indicator	China	Romania	Global
Annual Capacity (10k t)	~520	0	~900
Annual Output (10k t)	~440	0	~750
Annual Imports (10k t)	~20	~2.8	—
Annual Exports (10k t)	~168	0	—

Source: China Coatings Industry Association TiO_2 Branch, Eurostat | 2024 annual data

China Market Overview

China's titanium dioxide industry has ample capacity, with 2024 output around 4.4 million tonnes and an operating rate of about 85%. Sulfate-process rutile grade dominates, accounting for over 78%. Exports continued to grow, reaching 1.68 million tonnes in 2024, including about 220,000 tonnes to the EU. Since 2025, export growth to Europe has slowed due to the anti-dumping investigation.

- Sulfate rutile price: **~CNY 15,500/tonne** (2024 average; same value carried to July 2026)
- Operating rate: **~85%** (full year 2024)
- Total exports: **1.68 million tonnes**, up 5.3% YoY (2024)
- Exports to EU: **~220,000 tonnes**, growth slowed to +1.8%

Source: 100ppi.com, China Customs, SCI99 | 2024 annual data; monthly prices carried forward

Romania Market Overview

Romania relies entirely on imports, with moderate market concentration. China is the largest supplier, followed by Germany and the Czech Republic. Local distributor prices including VAT are about €3,400–3,800/tonne. Coatings account for nearly 60% of consumption; architectural coating demand is seasonally driven, with peak season in Q2–Q3.

Source Country	Share	CIF Average (€/t)
China	~38%	2,800–3,000
Germany	~22%	3,100–3,300
Czech Republic	~14%	2,950–3,150
Poland / Others	~26%	2,900–3,200

Source: Eurostat, INS Romania | 2024 import data

Product Segmentation

Romania's titanium dioxide imports are dominated by rutile grade (R-type), accounting for ~84%, widely used in coatings and plastics; anatase (A-type) at ~14%, mainly used in paper and some low-end coatings. Chloride-process products account for less than 5%, imported mainly from Germany, priced about 25–30% higher than sulfate-process products.

- Rutile (sulfate): **share ~78%**, CIF €2,800–3,050/t
- Rutile (chloride): **share ~6%**, CIF €3,400–3,700/t
- Anatase (A-type): **share ~14%**, CIF €2,500–2,750/t
- Nano/specialty TiO_2: **share ~2%**, price > €5,000/t

Source: Eurostat disaggregated trade data, industry estimates | 2024 annual data

Core Product Supply & Demand

Romania's annual TiO_2 consumption is about 28,000 tonnes, entirely import-dependent. In 2024, imports grew about 3.2% YoY, with inventory levels at 45–60 days. Coating-grade TiO_2 supply is tight in balance, with occasional structural shortages in Q2 peak season. The downstream coatings industry grows about 2.5% annually, supporting moderate TiO_2 demand growth.

Indicator	2022	2023	2024
Imports (10k t)	2.55	2.72	2.80
Apparent Consumption (10k t)	2.50	2.68	2.76
Year-end Inventory (days)	52	48	50

Source: Eurostat, INS Romania | 2024 annual data

Intermediate & Raw Material Values

Core raw materials for TiO_2 are titanium ore (ilmenite) and sulfuric acid. China's titanium concentrate (TiO_2≥46%) averaged ~CNY 2,280/t in 2024, with import dependency ~35%. Sulfuric acid averaged ~CNY 320/t. Raw material costs account for ~55–60% of total TiO_2 production costs; ore price fluctuations directly feed into product prices.

- Titanium concentrate (China origin, TiO_2≥46%): **~CNY 2,280/t** (2024 average)
- Sulfuric acid (China origin, 98%): **~CNY 320/t** (2024 average)
- Romania CIF TiO_2 vs. raw material spread: **processing premium ~€1,200–1,500/t**
- Titanium ore freight to Europe: **~US$45–60/t**

Source: 100ppi.com, Mysteel, Argus Media | 2024 annual data; previous values carried to July 2026

Trade & Macro Indicators

Romania is an EU member and applies the EU common customs tariff. GDP growth in 2024 was ~2.4%, with construction value added ~7.1%. China's TiO_2 exports to Romania benefit from tariff arrangements under the China-EU trade agreement. The RON/EUR exchange rate was relatively stable, averaging ~4.97 RON/EUR in 2024.

- Romania 2024 GDP growth: **~2.4%** (World Bank)
- Construction value added share: **~7.1%**
- TiO_2 import tariff (MFN): **6.5%** (EU TARIC)
- Exchange rate: **1 EUR ≈ 4.97 RON** (2024 average)

Source: World Bank, INS Romania, EU TARIC database | 2024 annual data

Risks & Opportunity Window

The EU anti-dumping investigation on Chinese TiO_2 is the biggest risk variable. If final duties are imposed, Chinese suppliers' market share in Romania could fall below 25%. Opportunity windows include: establishing localized warehousing and repackaging, signing long-term agreements with Romanian coating companies, and expanding into neighboring Central & Eastern European markets to achieve regional coverage.

- ⚠ **Anti-dumping Risk** : EU initiated investigation in 2024; final ruling expected in 2025–2026
- Supply chain substitution risk: Romanian buyers may shift to **German and Czech suppliers**
- Opportunity: **localized warehousing + regional distribution** can mitigate tariff impact
- Policy window: Romania's construction recovery plan **drives coating demand growth of 2.5% annually**

Source: European Commission DG Trade, Romanian Building Materials Association | 2024–2025 public information

Data Sources

1. Eurostat (EU Statistical Office) — Romania TiO_2 import data, 2024 annual
2. China Customs — China TiO_2 export data, 2024 annual
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5. SCI99 — TiO_2 operating rate and market monitoring data, 2024
6. Romanian National Institute of Statistics (INS) — GDP, construction data, 2024
7. World Bank — Romania macroeconomic indicators, 2024
8. Argus Media — international titanium ore shipping freight data, 2024
9. European Commission DG Trade — anti-dumping investigation announcement on Chinese TiO_2, 2024–2025
10. EU TARIC database — TiO_2 import tariff rate