Overseas Market Analysis Report

Romania Solvents Overseas Market Analysis Report

Target Country: Romania • Main Category: Solvents • Report Date: July 1, 2026 • Data as of: June 2026

Romania Solvents: Key Conclusions

Romania's solvents market in Q2 2026 shows an import dependency of ~78%, with annual consumption of approximately 165 kt. The coatings sector accounts for 42% of consumption, while pharmaceutical and industrial cleaning demand leads growth. Chinese aromatic solvent exports to Romania increased 12% YoY, but landed cost competitiveness is under pressure due to upgraded EU REACH regulations and Black Sea shipping cost volatility. Key risks stem from high naphtha feedstock prices and RON exchange rate fluctuations.

- Q2 2026 import dependency: **78%** (Eurostat, June 2026)
- Estimated annual consumption: **165 kt** (Romanian National Institute of Statistics, full-year 2025)
- Chinese solvent exports to Romania YoY: ↑12% (General Administration of Customs of China, May 2026)
- Coatings consumption share: **42%**; pharma solvent demand growth: ↑8.5%

Source: Eurostat, June 2026; Romanian National Institute of Statistics, 2025; General Administration of Customs of China, May 2026

Supply and Demand Fundamentals

Romania's domestic solvents production capacity is limited, with annual output of about 36 kt, far below the 165 kt consumption. The deficit is mainly covered by imports from Germany, Poland, Hungary, and China. Coatings, printing inks, and industrial cleaning are the three largest consumption segments, together representing ~72% of total demand. The supply-demand gap in Q2 2026 is estimated at 129 kt.

Indicator	Value	YoY Change
Domestic production	36 kt	-1.2%
Total imports	131 kt	+6.8%
Total consumption	165 kt	+4.2%
Supply-demand gap	129 kt	—

Source: Eurostat, May 2026; Romanian National Institute of Statistics, full-year 2025; Argus Media, June 2026

China Market Situation

In June 2026, China's overall solvents operating rate was 68%. East China spot toluene was approximately CNY 7,450/tonne, and ethyl acetate around CNY 5,450/tonne. Aromatic solvent exports to the EU grew 14% YoY in Q2, with Romania's share rising to 4.2%. Domestic capacity is ample, but intermittent environmental production restrictions affect North China production areas.

- East China toluene spot: **CNY 7,450/t** (Longzhong Information, June 28, 2026)
- Ethyl acetate spot: **CNY 5,450/t** (100ppi.com, June 27, 2026)
- Industry operating rate: **68%** (SCI99, June 2026)
- EU aromatic exports Q2 YoY: ↑14% (General Administration of Customs of China, May 2026)

Source: Longzhong Information, June 28, 2026; 100ppi.com, June 27, 2026; SCI99, June 2026; General Administration of Customs of China, May 2026

Romania Market Situation

Romania's solvents market is import-driven. In Q2 2026, the main suppliers were Germany (31%), Poland (22%), Hungary (16%), and China (11%). Local distribution prices are notably affected by the EUR exchange rate and logistics costs, with toluene landed/distribution prices at approximately EUR 1,350–1,420/tonne. The Bucharest area and surrounding industrial zones are the core consumption regions.

Country of Origin	Import Share	YoY Change
Germany	31%	-1.5%
Poland	22%	+2.1%
Hungary	16%	flat
China	11%	+2.8%

Source: Eurostat, May 2026; Argus Media, June 2026

Product Segment Structure

Imported solvents into Romania are dominated by aromatics (toluene, xylene) at ~48%, followed by ketones (acetone, MEK) at 22%, esters (ethyl acetate, butyl acetate) at 18%, and alcohols/others at 12%. Imports of high-purity pharmaceutical-grade solvents grew significantly, up 11% YoY in Q2 2026.

Product Segment	Import Share	Price Trend
Aromatic solvents (toluene/xylene)	48%	High, volatile
Ketones (acetone/MEK)	22%	↑3.2%
Esters (ethyl/butyl acetate)	18%	Relatively stable
Alcohols & others	12%	↑1.8%

Source: Eurostat, May 2026; Longzhong Information, June 2026

Key Downstream Product Supply and Demand

Coatings, as the largest downstream sector, saw Romania's Q2 2026 coatings output of approximately 42 kt, creating solvent demand of around 69 kt. Architectural coatings demand grew 5% driven by infrastructure investment, while automotive coatings demand was flat. Coatings-grade solvent inventories are at moderately low levels, suggesting restocking demand ahead of the Q3 peak season.

- Q2 coatings output: **42 kt** (Romanian Coatings Association, June 2026)
- Coatings solvent demand: **69 kt**, YoY ↑4.5%
- Architectural coatings demand growth: ↑5%; automotive: flat
- Solvent inventory level: **Moderately low** (Argus Media, June 2026)

Source: Romanian Coatings Association, June 2026; Argus Media, June 2026

Intermediates and Raw Material Value

Naphtha, the core feedstock for solvents, stood at a CIF NWE price of about USD 680–710/tonne in June 2026, up 8% YoY. Chinese ex-works naphtha prices were around CNY 5,200–5,500/tonne. The cost pass-through chain is clear: naphtha → aromatics → solvents. High feedstock costs support solvent prices, but downstream acceptance of high prices is limited, squeezing margins.

- NWE naphtha CIF: **USD 680–710/t** (Argus Media, June 2026)
- China naphtha ex-works: **CNY 5,200–5,500/t** (Longzhong Information, June 2026)
- Romania toluene import indication CIF: **EUR 1,280–1,360/t**
- Feedstock cost YoY: ↑8%, solvent price spread YoY shrinking ↓3%

Source: Argus Media, June 2026; Longzhong Information, June 28, 2026

Trade and Macro Indicators

Romania's Q1 2026 GDP growth was 2.8%, with the chemical industry contributing approximately 3.5% of GDP. The EUR/RON exchange rate is relatively stable at about 4.97. Bilateral trade between China and Romania rose 9% YoY in Q1, with chemicals taking a larger share. New restrictive provisions under the EU REACH regulation in 2026 are impacting the compliance costs of imported solvents.

Indicator	Value	Period
GDP growth	2.8%	Q1 2026
Chemical industry % of GDP	3.5%	2025
EUR/RON exchange rate	4.97	June 2026
China-Romania bilateral trade YoY	+9%	Q1 2026

Source: Romanian National Institute of Statistics, Q1 2026; World Bank, 2025; General Administration of Customs of China, May 2026

Risks and Opportunity Windows

Geopolitical tensions pushed up Black Sea shipping insurance premiums, with freight costs from China to Constanta port rising 6% QoQ in Q2. Risk New EU REACH restrictions may increase compliance costs. On the opportunity side, Romania's infrastructure investment plan is boosting coatings demand, and Chinese solvent companies could leverage China-Europe Railway Express land routes to optimize delivery lead times and capture market share in Central and Eastern Europe.

- Risk Black Sea shipping insurance premium QoQ ↑6% (Q2 2026)
- Risk REACH new regulation compliance cost estimated to increase by **5–8%**
- Opportunity: Romania infrastructure investment plan size **~EUR 12 billion**
- Opportunity: China-Europe Railway Express delivery lead time reduced to **18–22 days**

Source: European Commission, April 2026; Argus Media, June 2026; Romanian Government Gazette, March 2026

Data Sources Summary

- Eurostat — Trade and supply-demand data, May–June 2026
- Romanian National Institute of Statistics — Production, consumption, GDP data, 2025–Q1 2026

- General Administration of Customs of China — Export trade data, May 2026
- Longzhong Information — China solvents spot prices, June 28, 2026
- 100ppi.com — Chemical spot market prices, June 27, 2026
- SCI99 — China solvents operating rate data, June 2026
- Argus Media — International naphtha and solvent prices, June 2026
- Romanian Coatings Association — Coatings industry output data, June 2026
- World Bank — Macroeconomic and industrial structure data, 2025
- European Commission — REACH regulation update, April 2026