Romania Coatings Overseas Market Analysis Report

Report Update Date: July 1, 2026

Target Country: Romania

Main Category: Coatings

Report Type: Overseas Market Analysis

Romania Coatings Key Conclusions

The Romanian coatings market has grown steadily, with a market size of approximately €380 million in 2024, dominated by architectural coatings. Import dependency is around 45%, and China's position in raw material supply is rising rapidly. Tightening EU environmental regulations and expanding infrastructure investment constitute the medium-to-long-term themes, with price volatility and supply chain resilience as core concerns.

- Market size: approximately **€380 million** (2024), annual growth ▲3.2%
- Import dependency: approximately **45%**, higher for high-end industrial coatings
- China's coatings exports to Romania: approximately **$9.2 million** in 2024, ▲18%
- Key risks: EU REACH regulation amendments, titanium dioxide price volatility, regional supply chain restructuring

Sources: Eurostat, 2025 data; China General Administration of Customs, 2025 Q1 data; European Coatings Journal, June 2025

Supply and Demand Fundamentals

There is a structural gap in Romania's coatings supply and demand, with domestic production at approximately €210 million and imports supplementing nearly €170 million. The construction sector accounts for over 55% of consumption, with significant demand growth in automotive refinish and industrial anti-corrosion coatings.

Indicator	2023	2024	YoY
Domestic production (€100M)	2.05	2.10	+2.4%
Imports (€100M)	1.62	1.68	+3.7%
Exports (€100M)	0.48	0.50	+4.2%
Apparent consumption (€100M)	3.19	3.28	+2.8%

Sources: Eurostat Comext, 2025 data; National Institute of Statistics (INS), 2025

Sources: Eurostat, 2025; Romania INS, 2025; 2025 data used, no latest public update as of July 2026

China Market Status

China's coatings industry has ample capacity, with an estimated output of 36 million tonnes in 2025 and continued export growth. Prices of core raw materials such as titanium dioxide stabilized in the second half of 2025, providing cost support for export-oriented coatings enterprises.

- China coatings output: **36 million tonnes** (2025 est.), capacity utilization approx. 71%
- Total coatings exports: approximately **330,000 tonnes** (2025), ▲9%
- Titanium dioxide (rutile) price: approximately **CNY 15,200/tonne** (July 2025, SunSirs)
- Coatings exports to Romania: approximately **$9.2 million** (2024), low share but high growth rate

Sources: China National Coatings Industry Association, 2025; China General Administration of Customs, 2025; SunSirs, July 2025

Romania Market Status

Retail prices of coatings in Romania are influenced by euro-denominated pricing and import costs, with architectural coating retail prices ranging from €3.5 to €7 per liter. Import sources are primarily Germany, Italy, and Poland, with China's share small but growing the fastest.

Import Source	2024 Share	YoY Change
Germany	24%	+1%
Italy	18%	Flat
Poland	12%	+2%
China	5.5%	+1.2pp

Sources: Eurostat Comext, 2025 data

Sources: Eurostat, 2025; Romania INS, 2025; local market research, Q4 2025

Product Segment Structure

Architectural coatings (water-based) are the largest segment, accounting for over 55% of consumption; industrial and anti-corrosion coatings together represent approximately 28%, driven by infrastructure projects with the fastest growth. Powder coatings show strong growth momentum due to their environmental advantages.

Segment	Consumption Share	Annual Growth	Import Dependency
Architectural (water-based)	55%	+3.0%	Moderate (30%)
Industrial coatings	18%	+4.5%	High (55%)
Anti-corrosion/Protective	10%	+5.2%	High (60%)
Powder coatings	8%	+6.5%	Moderate (40%)

Sources: European Coatings Journal, June 2025; industry estimates, 2025

Sources: European Coatings Journal, June 2025; Romanian Coatings Association (ARPV), 2025

Core Finished Product Supply & Demand

For architectural coatings (water-based) as the core finished product, Romania's domestic production is approximately €115 million, with imports supplementing approximately €55 million. Retail prices remained stable in 2025, with raw material cost pass-through lagging by about 1-2 quarters.

- Domestic architectural coatings output: approximately **€115 million** (2024)
- Import supplement: approximately **€55 million**, mainly from Germany and Poland
- Retail price range: **€3.5-7/liter** (VAT inclusive)
- Inventory level: distributor inventory approx. **45-55 days**, within normal range

Sources: Eurostat, 2025; Romania Building Materials Retail Association, Q4 2025; previous values used, no latest public data

Intermediates & Raw Material Value

Titanium dioxide and acrylic resins are core raw materials for coatings, with competitive pricing from Chinese production regions. The CIF Constanta price carries a premium of approximately 12-18% over China's FOB price, mainly due to freight and EU tariff impacts.

Raw Material	China Origin Price	Romania CIF Estimate	Spread
Titanium dioxide (rutile)	CNY 15,200/tonne	Approx. €2,150/tonne	+15%
Acrylic resin	CNY 12,500/tonne	Approx. €1,780/tonne	+14%
Epoxy resin	CNY 18,000/tonne	Approx. €2,550/tonne	+16%

Sources: SunSirs, July 2025; Argus Media, June 2025; industry CIF estimates, 2025

Sources: SunSirs, July 2025; Argus Media, June 2025; exchange rate reference 1 EUR ≈ 7.8 CNY

Trade & Macro Indicators

Romania's GDP growth is steady, and construction output continues to expand. The Romanian Leu exchange rate remains relatively stable, and EU structural funds continue to flow in, providing macro support for the coatings market.

- Romania GDP growth: **2.4%** (2024), 2025 forecast 2.6% (IMF)
- Construction output growth: ▲3.8% (2024), driving coatings demand
- Exchange rate: 1 EUR ≈ **5.0 RON**, 1 EUR ≈ 7.8 CNY (2025 reference)
- Romania total coatings imports: approximately **€168 million** (2024), HS 3208-3210 combined

Sources: IMF World Economic Outlook, 2025; Romania INS, 2025; Eurostat, 2025

Risks & Opportunity Windows

Tightening EU environmental regulations impose higher requirements on coating formulations, but also create substitution opportunities for water-based and powder coatings. Chinese raw material suppliers have advantages in pricing and capacity, with significant potential for localization cooperation.

- ⚠ Risk EU REACH regulation amendments may restrict imports of certain solvent-based coatings, increasing compliance costs
- ⚠ Risk Titanium dioxide price volatility (18% amplitude in 2024), affecting coatings enterprise profitability
- ✓ Opportunity Romania's infrastructure investment plan (including EU funds) is expected to drive coatings demand growth of 4%+ annually from 2025 to 2027
- ✓ Opportunity Chinese coatings raw material localized supply offers clear cost advantages, with expanding cooperation potential

Sources: European Chemicals Agency (ECHA), 2025; Romanian government infrastructure plan, 2025; Argus Media, June 2025

Data Sources Summary

- Eurostat Comext Database — EU trade statistics
- National Institute of Statistics (INS) — Romania macroeconomic and industry data
- China General Administration of Customs — China coatings and raw material import/export data
- China National Coatings Industry Association — China coatings industry statistics
- SunSirs — Bulk raw material price data
- Argus Media — International chemical price benchmarks
- European Coatings Journal — European coatings industry reports
- IMF World Economic Outlook — Macroeconomic forecasts
- European Chemicals Agency (ECHA) — EU chemical regulations
- Romanian Coatings Association (ARPV) — Local industry information