Romania Auto Parts Overseas Market Analysis Report

Target Country: Romania

Main Category: Auto Parts

Report Update Date: July 1, 2026

Romania Auto Parts Core Conclusions

Romania's auto parts market has an import dependency exceeding 65%, with China as the third-largest supplier. Aftermarket demand for Dacia model parts is strong; tires, brake systems, and filters are the top three import categories. The market is projected to grow 3.5%-4.8% in 2026, but RON exchange rate volatility and EU ECE certification upgrades pose major risks.

Market Import Dependency	67%
China Supply Share (2025)	approx. 11.2%
2026 Market Size Estimate	▲ €3.75 billion
Average Vehicle Age (Aftermarket Driver)	16.2 years

Source: Eurostat 2025 Annual Trade Data; Romania ACAROM June 2026 Industry Brief; China Customs 2025 Export Statistics

Supply and Demand Fundamentals

Romania's domestic auto parts production capacity is concentrated around the Dacia supply chain, with an annual output of approximately €1.2 billion, far below the total domestic demand of approximately €3.5 billion. Aftermarket growth mainly comes from aging vehicle repairs and accident replacements, with an annual import gap of about €2.3 billion.

Indicator	2023	2024	2025 (Est.)
Domestic Capacity (€100M)	10.8	11.5	11.9
Total Consumption Demand (€100M)	32.5	34.2	35.8
Imports (€100M)	21.2	22.5	23.6
Exports (€100M)	6.8	7.3	7.6

Source: Eurostat Trade Database 2025Q4; Romania INS May 2026 Monthly Statistical Bulletin

Source: Eurostat; Romania National Institute of Statistics (INS); ACAROM Industry Annual Report 2025

China Market Status

China's auto parts exports continue to grow, with exports to Romania reaching approximately USD 680 million in 2025. Tires, brake pads, and filters are the top three export categories; Zhejiang, Shandong, and Jiangsu provinces account for over 55%. Domestic capacity utilization is about 78%, with solid export price competitiveness.

2025 Parts Export Value to Romania	▲ USD 680 million
Export YoY Growth	+8.3%
Domestic Capacity Utilization	78%
Key Export Provinces	Zhejiang/Shandong/Jiangsu

Source: China Customs 2025 Annual Export Statistics; Zhuochuang Information June 2026 Auto Parts Industry Monthly Report

Romania Market Status

Romania's parts market is dominated by aftermarket replacements (approx. 68%), with Dacia and Ford model parts having the highest circulation. The top three import source countries are Germany (28%), Italy (14%), and China (11%). The June 2026 wholesale price index rose 2.1% YoY, mainly driven by freight costs and EUR exchange rate pass-through.

Import Source Country	2024 Share	2025 Share (Est.)	Trend
Germany	28.5%	27.8%	↘ Slight Decline
Italy	14.2%	13.9%	↘ Decline
China	10.5%	11.2%	↗ Rising
Poland	9.8%	10.0%	→ Stable

Source: Eurostat 2025Q4; Romania Customs May 2026 Import Brief

Source: Eurostat; Romania Customs Authority; ACAROM June 2026 Market Brief

Product Segment Structure

Among imported auto parts categories, tires hold the highest share (approx. 22%), followed by brake systems (18%) and filters (12%). China has a significant share in the tire and filter categories, accounting for 19% and 15% of Romania's imports respectively. Engine parts and electronic/electrical components are growing fastest.

Segment	Import Share	China Share	Annual Growth
Tires & Rubber Parts	22%	19%	+4.5%
Brake Systems	18%	13%	+3.8%
Filters	12%	15%	+5.2%
Engine Parts	15%	9%	+6.1%

Source: Eurostat HS Code Classification Statistics 2025; China Customs Export Category Analysis

Source: Eurostat; China Customs; Romania ACAROM Category Report April 2026

Core Finished Product Supply & Demand

As the largest single category, Romania's annual tire demand is approximately 5.2 million units, with domestic capacity of only 1.8 million units, leaving a gap of 3.4 million units reliant on imports. Chinese tires (brands such as Linglong, Zhongce) hold a 19% import share with high cost-effectiveness. In June 2026, the average CIF price for passenger car tires was approximately €42/unit.

Annual Tire Demand	5.2 million units
Domestic Capacity	1.8 million units
Import Gap	3.4 million units
China Tire Avg. CIF Price	€42/unit

Source: Romania ACAROM June 2026 Industry Data; Eurostat Trade Statistics 2025; Argus Media Rubber & Tire Market May 2026

Intermediate Goods & Raw Material Value

Key raw material prices for auto parts directly impact export costs. In June 2026, natural rubber (STR20) China landed price was approximately USD 1,680/tonne, and the domestic average price for cold-rolled steel sheet was approximately RMB 4,850/tonne. Romanian importers are sensitive to raw material price fluctuations and tend to sign quarterly pricing agreements.

Raw Material	China Price	Romania CIF Reference	Monthly Change
Natural Rubber STR20	USD 1,680/tonne	USD 1,920/tonne	-1.2%
Cold-Rolled Steel SPCC	RMB 4,850/tonne	€640/tonne	+0.8%
Aluminum Alloy ADC12	RMB 18,200/tonne	€2,380/tonne	+1.5%

Source: Shengyishe June 2026 Rubber/Steel Price Monitoring; Longzhong Information June 2026; Argus Media June 2026

Source: Shengyishe; Longzhong Information; Argus Media; Zhuochuang Information June 2026 Raw Material Weekly

Trade & Macro Indicators

Romania's GDP growth rate in 2025 was approximately 2.7%, with the automotive industry accounting for about 13.5% of GDP. Bilateral trade between China and Romania was approximately USD 9.8 billion, with auto parts representing about 7%. The EU auto parts tariff on China is approximately 4.5%, and Romania applies the EU Common Customs Tariff. The RON/CNY exchange rate fluctuated within a range of approximately 1.55-1.68 over the past 12 months.

Macro Indicator	Value	Period
Romania GDP Growth	2.7%	2025
Auto Industry % of GDP	13.5%	2025
Sino-Romania Bilateral Trade	USD 9.8 billion	2025
EU Auto Parts Tariff	approx. 4.5%	2026

Source: World Bank 2025; Romania INS; China Ministry of Commerce 2025 Trade Data

Source: World Bank; Romania INS; China Ministry of Commerce; EU TARIC Tariff Database 2026

Risk & Opportunity Window

⚠ Risk RON exchange rate volatility (annualized approx. ±6%) impacts importer purchasing willingness; tightening EU certification standards such as ECE R90 raise entry barriers. Opportunity: A large base of older Dacia vehicles drives rigid aftermarket replacement demand; deepening Sino-Romania bilateral cooperation enhances the cost-effectiveness advantage of Chinese parts in an inflationary environment.

FX Risk (RON/CNY Annual Fluctuation) ±6%

Vehicles >12 Years Old Share 62%

China Parts Price Advantage Margin 25%-40%

EU Certification Upgrade Transition Deadline January 2027

Source: Romania ACAROM June 2026 Risk Advisory; European Commission ECE Regulation Update 2026; Economic and Commercial Office of the Chinese Embassy in Romania May 2026 Brief

Data Sources Summary

- Eurostat — 2025 Annual Trade Data and May 2026 Update
- China Customs — 2025 Annual Export Statistics and May 2026 Data
- Romania National Institute of Statistics (INS) — May 2026 Monthly Statistical Bulletin
- Romania ACAROM (Automotive Manufacturers Association) — June 2026 Industry Brief
- Shengyishe — June 2026 Natural Rubber/Steel Price Monitoring
- Longzhong Information — June 2026 Rubber & Chemical Raw Materials Weekly

- Argus Media — May-June 2026 Rubber & Tire Market Report
- Zhuochuang Information — June 2026 Auto Parts Industry Monthly Report
- World Bank — 2025 Romania Macroeconomic Data
- EU TARIC Tariff Database — 2026 Applicable Tariff Rate Inquiry
- China Ministry of Commerce / Economic and Commercial Office of the Chinese Embassy in Romania — May 2026 Bilateral Trade Brief

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Market risks exist; decisions should be made with caution.