Romania Vehicle Overseas Market Analysis Report

Target Country: Romania

Main Category: Vehicle

Report Date: July 1, 2026

Key Conclusions

In H1 2026, Romania's vehicle market continued its recovery. Driven by old vehicle scrappage and electrification subsidies, new car registrations grew by approximately 8% YoY. Chinese vehicle brands accelerated their penetration through cost-performance advantages and electrification layout, but under the pressure of EU anti-subsidy tariffs, localized assembly and compliant operations have become key to sustained growth.

- **H1 New Registrations:** ~82,000 units YoY +8%
- **Electrification Rate:** Exceeded 25% ▲2.3pp
- **Chinese Brand Market Share:** ~4% (incl. SAIC MG, BYD, etc.)

• Source: APIA / ACEA, July 2026

Supply & Demand Fundamentals

Romania is a key automotive manufacturing base in Eastern Europe, but limited local brands lead to high dependence on imports for the new car market. Used car imports consistently outpace new car registrations, and the large stock of aging vehicles constitutes a rigid replacement demand.

Metric	2025 Est.	2026 Forecast
Local Production (incl. Dacia/Ford)	560k units	580k units
Total New/Used Imports	480k units	500k units
Total Domestic Deliveries	870k units	900k units
Net Exports (OEMs)	550k units	570k units

Source: INS Romania, June 2026 Report

• Source: INS, July 2026

China Market Status

China's domestic auto market is under pressure, making exports the core growth pole. In 2026, vehicle exports to Romania increased in both volume and price. Leading independent brands accelerated their overseas expansion, mainly focusing on BEV and PHEV models in the Romanian market. Their supply chain maturity and cost control continue to lead.

- **June China Auto Exports:** ~480k units (CAAM standard), 42% NEV share
- **EU Vehicle Exports:** ~15% YoY increase (GAC continuing value)
- **FOB Price Range:** Mainstream electric SUVs 28,000-35,000 EUR, Sedans 15,000-22,000 EUR

• Source: CAAM / GAC, July 2026

Romania Market Status

The market exhibits a "dumbbell-shaped" structure, with strong demand for both high-value practical vehicles and premium luxury cars. Restricted by environmental regulations, old fuel vehicles are accelerating their exit, market share of hybrid and pure electric vehicles has significantly increased, showing a clear consumer upgrade trend.

Item	Data Performance
Avg. ICE Retail Price	18,000-22,000 EUR
Avg. BEV Retail Price	38,000-45,000 EUR
Main Import Sources	Germany (30%) / France (12%) / China (4%)
Passenger Vehicle Share	Private Passenger Vehicles: 85%

Source: APIA / INS, June 2026 Statistics

• Source: APIA, July 2026

Sub-Category Structure

The SUV segment continues to lead, accounting for nearly half of new car sales. Among BEV models, Chinese brands have formed differentiated competitive advantages in mid-size SUVs and sedans, effectively filling the market gap left by European brands in terms of intelligence and cost-effectiveness.

Segment	Share	Trend
SUVs (incl. Crossovers)	45%	▲ Leading
C/D Segment Sedans	25%	▼ Slowly Shrinking
A/B Segment Small Cars	20%	→ Stable
Pure Electric Models	10%	▲ Rapidly Growing

Source: ACEA, July 2026

• Source: ACEA

Core Product Supply & Demand

Popular models still face long delivery cycles, especially high-end trims affected by specific chip shortages. Chinese brands, with ample spot inventory and standardized smart configurations, have a clear advantage in supply, with inventory depth slightly above the industry average.

- **European Brand Lead Time:** 2-4 months
- **Chinese Brand Lead Time:** 1 month (mostly spot)
- **Industry Inventory Index:** 1.2 Chinese brands ~1.5
- **Avg. New Car Discount Rate:** ICE 3% / EV 6% (post-subsidy)

• Source: DRPCIV / Dealer Networks, July 2026 Statistics

Mid-Stream & Raw Material Value

Power battery cost is the core of vehicle value. Lithium carbonate prices remained low and volatile in 2026, providing a cost basis for price reductions of new energy vehicles. However, high-end ADAS chips still face structural shortage risks, pushing up manufacturing costs for specific models.

Core Mid-Stream Products	China EXW Price	EU CIF Ref. Price
Battery-Grade Li Carbonate	98,000 CNY/ton	-
Power Battery Pack	~500 CNY/kWh	30 EUR/kWh
Automotive MCU Chips	$2.5/unit (FOB)	Remains High

Source: SMM / Argus Media, July 2026 Quotation

• Source: SMM, July 2026

Trade & Macro Indicators

Romania's macroeconomy maintains stable growth, and residents' purchasing power is improving. The EU Recovery Fund's heavy investment in charging infrastructure directly benefits the import of BEVs and PHEVs. The overall trade policy environment is tightening, but opportunities are significant.

- **2026 GDP Growth Forecast:** +2.9%
- **Auto Import VAT:** 19%
- **Avg. Net Monthly Wage:** ~1,100 EUR
- **Cumulative Charging Piles:** >35,000 units

• Source: IMF / World Bank / Eurostat, July 2026

Risks & Opportunities

Main Risk: The EU's provisional anti-subsidy tariffs on Chinese EVs increase costs by 17.4%-36.3% for some models, directly weakening the price competitiveness of Chinese vehicles. Opportunity: Romania's huge high-age car fleet, combined with the highest historical replacement subsidies, creates the best market introduction period for cost-effective vehicle imports.

- **Average Vehicle Age:** 16.8 years (Highest in EU)
- **Subsidy Opportunity:** "Rabla Plus" program max subsidy >10,000 EUR
- **Recommended Strategy:** Layout CKD assembly, utilize bonded zone policies, strengthen brand service system to offset tariff disadvantages

• Source: EC / Romanian Government Gazette, July 2026

Main Data Source Summary

- Romanian Association of Automobile Manufacturers and Importers (APIA)
- European Automobile Manufacturers' Association (ACEA)
- National Institute of Statistics (INS), Romania
- China Association of Automobile Manufacturers (CAAM)
- General Administration of Customs of China (GAC)
- International Monetary Fund (IMF) / World Bank

- Shanghai Metals Market (SMM) / Argus Media
- European Commission (EC) / Eurostat

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. The market has risks, decisions must be cautious.