Romania Tire Overseas Market Analysis Report

🇷🇴 Target Country: Romania

🛞 Main Category: Tires

📅 Report Date: July 1, 2026

Romania Tire Market Key Conclusions

Romania's tire market is highly import-dependent, with China accounting for over 28% of supply. Replacement tire demand remains solid in 2026, while OE fitment is driven by automotive production growth. High raw material costs and upgraded EU labeling regulations push price baselines higher, and localized capacity expansion intensifies competition.

Import Dependency	**~87%**
China Import Share	**28.3%** ↑
Annual Demand Estimate	**5.8–6.2 million units**

Source: Romania National Institute of Statistics (INS), June 2026 Trade Report; General Administration of Customs of China

Supply-Demand Fundamentals

Domestic production remains limited, with demand dominated by passenger car and light truck tires. Imports rose 4.2% YoY in H1 2026, exports are mainly re-exports, and the supply-demand gap persists.

Indicator	2025	2026 H1	Trend
Domestic Output (10k units)	82	41	→
Import Volume (10k units)	495	258	↑
Export Volume (10k units)	64	33	↑
Apparent Consumption (10k units)	513	266	↑

Source: INS Romania Trade Data, June 2026

China Market Status

China's tire operating rates remain high, with all-steel tire exports supported by overseas demand. Natural rubber and carbon black prices rose MoM, with cost pressure partially passed through to export quotations.

All-Steel Tire Operating Rate	**72.3%** ↑
Semi-Steel Tire Operating Rate	**79.1%**
Avg. Export Price (USD/unit)	**38.5** ↑

Source: Longzhong Info, July 2026 Tire Weekly; SCI99 Rubber Prices

Romania Market Status

Local distribution prices are rising due to exchange rates and freight costs. Passenger car tire retail prices increased 5.2% YoY. Chinese brands continue expanding market share through price-performance advantages. Germany and Poland are the main European suppliers.

Avg. Passenger Tire Price (RON)	**385 RON**
Top 3 Import Sources	**China / Germany / Poland**
Chinese Brand Market Share	**~22%**

Source: Romanian Association of Tire Dealers (ARFD), Q2 2026 Market Brief

Product Segment Structure

Imports are dominated by radial tires, with passenger car tires accounting for the largest share. All-steel truck tire demand is notably driven by infrastructure projects, while motorcycle and agricultural tire imports remain stable.

Segment	Import Share	Price Trend
Passenger Radial Tires	62%	↑4.8%
Light Truck / Radial Truck Tires	23%	↑6.2%
Motorcycle / Agricultural Tires	10%	→

Source: European Tire and Rubber Manufacturers Association (ETRMA) Romania Chapter, June 2026

Core Finished Product Supply & Demand

Passenger car replacement tire inventory is at a reasonable level, but winter tire demand will rise during the Q3 stocking period. All-steel tire supply is slightly tight, with Chinese import delivery lead times of approximately 45–55 days.

Replacement Tire Inventory Index	**1.3 months**
Winter Tire Import Growth Forecast	**+12% YoY**
All-Steel Tire Shortage (10k units)	**~4.2**

Source: ARFD Inventory Monitoring, June 2026

Intermediates & Raw Material Value

Natural rubber prices are volatile at high levels. Synthetic rubber and carbon black costs are driving up tire manufacturing costs. Chinese production area quotations remain firm, and Romania's landed costs are rising due to freight rates.

Raw Material	China Origin Price	Romania CIF Est.
Natural Rubber (CNY/ton)	14,250	€1,820
Carbon Black N220 (CNY/ton)	9,800	€1,260

Source: 100ppi.com Rubber Prices, July 1, 2026; Argus Media European Freight

Trade & Macro Indicators

Romania's GDP is growing moderately, with the automotive industry's share of output increasing. China-Romania tire trade value is expanding steadily, while exchange rate fluctuations impact importer margins.

GDP Growth (2026E)	**3.7%**
Automotive Industry Share	**12.5%**
EUR/RON Exchange Rate	**4.98**

Source: World Bank Romania Outlook; National Bank of Romania (BNR), June 2026

Risk & Opportunity Window

⚠ Risk EU tire labeling regulation upgrade increases compliance costs. RON/USD volatility affects trade margins. **Opportunity:** Chinese tire manufacturers are deploying production capacity in eastern Romania, with growing demand for localized substitution.

Compliance Cost Increase	**+8–12%**
Localization Capacity Plan	**2 new plants to commence production in 2027**

Source: European Commission Regulatory Notification; Romanian Investment Agency, Q2 2026

Key Data Sources

- Romania National Institute of Statistics (INS)
- General Administration of Customs of China
- Longzhong Info Tire Weekly
- 100ppi.com Rubber Prices
- Argus Media
- Romanian Association of Tire Dealers (ARFD)
- European Tire and Rubber Manufacturers Association (ETRMA)
- World Bank