Romania Construction Machinery Overseas Market Analysis Report

 Updated July 1, 2026

Target Country: Romania

Main Category: Construction Machinery

Data as of: June 2026

Romania Construction Machinery Core Conclusions

The Romanian construction machinery market is valued at approximately €850 million in 2025, with import dependency reaching 75%. China's export share to Romania has risen to 15%, driven mainly by construction and infrastructure projects. New EU environmental regulations are boosting demand for electric equipment, while exchange rate volatility and carbon tariffs are the primary risks.

Market Size (2025)	**€850 million**
Import Dependency	**75%** ▲
China's Export Share	**15%** ▲
Annual Growth Rate	**4.2%**

Source: European Construction Equipment Association (CECE), 2025 Market Report; National Institute of Statistics Romania (INSSE), queried June 2026

Supply and Demand Fundamentals

Romania's domestic construction machinery production is limited, with apparent consumption of approximately 15,700 units in 2025, of which 12,500 were imported. Imports from China increased to 1,800 units. Construction and mining are the main consumption sectors, and the supply-demand gap continues to be filled by imports.

Indicator	2023	2024	2025
Domestic Production (units)	3,000	3,100	3,200
Total Imports (units)	11,000	11,800	12,500
Imports from China (units)	1,200	1,500	1,800
Apparent Consumption (units)	14,000	14,900	15,700

Source: National Institute of Statistics Romania (INSSE), General Administration of Customs of China, June 2026; CECE 2025 Report

China Market Status

China's construction machinery sector has ample capacity, with total exports of approximately USD 48.5 billion in 2025. As of June 2026, the industry operating rate is around 68%. Exports to Romania are primarily loaders and excavators, with an export value of about €120 million, maintaining a competitive price advantage.

China Total Exports (2025)	**USD 48.5 billion**
Exports to Romania (2025)	**€120 million**
Avg. Excavator Export Price	**~US$45,000/unit**
Industry Operating Rate (Jun 2026)	**68%**

Source: General Administration of Customs of China, July 2026; China Construction Machinery Association, June 2026 Monthly Report

Romania Market Status

Germany, Italy and China are the top three import sources, together accounting for over 60%. The end-equipment price index rose 3.5% in 2025, and the rental market penetration reached 32%. There are about 450 local distributors, and after-sales service remains a competitive differentiator for imported brands.

Top 3 Import Sources	**Germany 28% / Italy 18% / China 15%**
Price Index (2025)	**108.5 (2024=100)**
No. of Distributors	**~450**
Rental Market Penetration	**32%**

Source: National Institute of Statistics Romania (INSSE), June 2026; CECE 2025 Report

Product Segmentation

Excavators hold a 40% market share, the largest category; demand for mini excavators grew by 12%, showing outstanding performance. Loaders and bulldozers rank second and third respectively, while cranes have the highest unit price. Chinese brands continue to expand their share in the small- and medium-sized excavator segment.

Product Category	Import Volume (units)	Market Share	Avg. Price (€10k)
Excavators	5,000	40%	8.5
Loaders	3,200	26%	5.2
Bulldozers	1,800	14%	12.0
Cranes	1,200	10%	18.5

Source: National Institute of Statistics Romania (INSSE), 2025 disaggregated trade data

Core Finished Product Supply & Demand

Excavators are the core product in the Romanian market, with apparent consumption of 5,800 units in 2025. Local assembly amounts to only 800 units, and the gap is fully covered by imports. Chinese brands' market share in small and medium excavators has climbed to 18%, with a clear price advantage.

Excavator Consumption	**5,800 units**
Domestic Assembly	**800 units**
Import Gap	**5,000 units**
Chinese Brand Share	**18%** ▲

Source: CECE 2025 Report; General Administration of Customs of China, June 2026

Intermediate Goods & Raw Material Value

Steel, a core raw material for construction machinery, remained stable in Q2 2026. China's hot-rolled coil FOB is around US$520/tonne, and Romania's CFR Black Sea port is about US$580/tonne. Hydraulic components and engines remain highly dependent on Western European suppliers, accounting for 25%-35% of total machine cost.

China HRC FOB	**US$520/tonne**
Romania Steel CIF	**US$580/tonne**
Engine Cost Share	**15%-20%**
Hydraulic Component Cost Share	**10%-15%**

Source: Mysteel, July 2026; Argus Media, June 2026 Black Sea steel prices

Trade & Macro Indicators

Romania's GDP grew by 2.8% in 2025, with construction industry output up 5.1%. Romania-China trade volume is approximately €8.5 billion. Machinery and equipment benefit from EU low tariffs of 0-2%. EU-funded infrastructure projects are a key policy support for construction machinery demand.

GDP Growth (2025)	**2.8%**
Construction Output Growth	**5.1%**
Romania-China Trade Volume	**€8.5 billion**
Import Tariff	**0-2% (EU)**

Source: World Bank, June 2026; National Institute of Statistics Romania, June 2026; EU TARIC

Risks & Opportunity Windows

The EU Carbon Border Adjustment Mechanism (CBAM) could push up equipment costs, with carbon prices around €85/tonne Risk. Chinese equipment offers a significant cost-performance advantage (20-30% lower than Western Europe). Romania's green transition and Belt and Road cooperation create incremental opportunities.

EU Carbon Price (Jul 2026)	**€85/tonne** High
Public Investment/GDP	**4.5%**
China Price Advantage	**20-30% lower**
Potential Infrastructure Investment	**€20 billion (2021-2027)**

Source: European Commission, June 2026; Romanian Ministry of Finance, June 2026; European Construction Equipment Association

Main Data Sources

- European Construction Equipment Association (CECE) — 2025 Market Report
- National Institute of Statistics Romania (INSSE) — data query June 2026
- General Administration of Customs of China — export statistics July 2026
- China Construction Machinery Association — June 2026 monthly report
- Mysteel (Shanghai Ganglian) — steel prices July 2026
- Argus Media — Black Sea steel prices June 2026
- World Bank — Romania macro data June 2026
- European Commission / TARIC — carbon price and tariff query June 2026
- Romanian Ministry of Finance — public investment data June 2026