Romania Glass Raw Materials and Products Overseas Market Analysis Report

Target Country: Romania

Category: Glass Raw Materials and Products

Report Period: July 2026

Report Update Date: July 1, 2026

Romania Glass Raw Materials and Products: Key Conclusions

Romania's glass market is characterized by "limited local capacity and deepening import dependency." In Q2 2026, flat glass import dependency is approximately 38%, and soda ash is almost entirely dependent on imports. China, the world's largest glass producer, continues to expand its market share in Eastern Europe, but faces dual pressures from low-price Turkish competition and the EU carbon tariff.

- Romania flat glass import dependency: approx. **38%** (Q2 2026 estimate)
- China's glass product exports to Romania YoY: ▲ 12.3% (Jan-May 2026)
- Soda ash CIF (Romania): approx. **345-365 €/t** (June 2026)
- ⚠ Risk Alert EU CBAM carbon tariff fully implemented in 2026, pushing up import costs

Sources: Eurostat, General Administration of Customs of China, Argus Media; Report Date: July 2026

Supply-Demand Fundamentals

Construction is the dominant driver of glass consumption in Romania (65% share). In 2026, driven by EU Recovery Fund-backed infrastructure projects, flat glass demand is steadily rising. Local production growth is constrained by energy costs, and the supply gap is filled by imports.

Indicator	2024	2025	Q2 2026 (Est.)
Flat Glass Consumption (10k t)	42.5	44.1	45.0
Local Production (10k t)	27.0	27.5	28.0
Net Imports (10k t)	15.5	16.6	17.0
Import Dependency (%)	36.5	37.6	37.8

Sources: National Institute of Statistics of Romania (INS), Eurostat; Q2 2026 values are industry estimates, following prior trends

China Market Status

In June 2026, China's soda ash market is well-supplied with prices at a low range; the flat glass industry operating rate is approximately 78%, with capacity utilization at the mid-level of the past three years. On the export side, glass product export growth to Eastern Europe is notable, with Romania serving as a key transit market in the Balkan region.

- Soda ash (light) ex-works price: **1,850-2,050 CNY/t** (June 2026, Longzhong)
- Flat glass national average price: **78.5 CNY/weight case** (June 2026, Sunsirs)
- Float glass operating rate: approx. **78%** , capacity utilization 74.2% (June 2026)
- China glass product exports to Romania: ▲ approx. 128M USD (cumulative Jan-May 2026)

Sources: Longzhong Information, Sunsirs, General Administration of Customs of China; Report Date: June-July 2026

Romania Market Status

Romania's local glass market is dominated by a few international groups, with flat glass prices suppressed by import competition. In Q2 2026, imported flat glass CIF is approximately 520-580 €/t, with major sources being Turkey (42%), China (18%), Bulgaria (15%), and Germany (10%).

- Flat glass wholesale price (Bucharest): **620-680 €/t** (incl. tax, June 2026)
- Container glass local capacity: Stirom (Yioula Group) holds approx. **55%** market share
- Construction glass consumption share: **65%** ; Automotive glass: 18%; Home appliances: 10%
- Top three import sources: Turkey 42%, China 18%, Bulgaria 15%

Sources: National Institute of Statistics of Romania (INS), IndustryARC Romania, Eurostat; June 2026

Segmented Product Structure

Romania's glass imports are dominated by flat glass (float) and container glass, together accounting for 78% of total imports. Specialty glass (automotive safety glass, Low-E energy-saving glass) has the fastest import growth, with a YoY increase of approximately 19% in Q2 2026, reflecting trends toward higher building energy-saving standards.

Product Segment	Import Share	Price Range (€/t)	YoY Trend
Float Flat Glass	48%	520-580	▲ 6%
Container Glass (Bottles/Jars)	30%	680-750	▲ 4%
Low-E/Energy-Saving Glass	12%	1,100-1,400	▲ 19%
Automotive Safety Glass	10%	850-1,050	▲ 8%

Sources: Eurostat Trade Database, Romanian Customs; Report Date: Q2 2026 Summary

Core Finished Product Supply and Demand

Flat glass as a core finished product has an annual demand of approximately 450,000 tons in Romania. Local enterprises Stirom and Geromed have a combined capacity of around 300,000 tons/year, leaving a gap of about 150,000 tons. Inventories remain low in 2026, with prices driven moderately upward by import cost pressures.

- Annual flat glass demand: approx. **450,000 tons** (2026 estimate)
- Annual local production: approx. **280,000 tons** , capacity utilization approx. 93%

- Supply-demand gap: approx. **170,000 tons/year** , filled by imports
- Inventory days: approx. **22 days** (major Bucharest distributors, June 2026)

Sources: Romanian Building Materials Association (APMCR), INS; Q2 2026 data

Intermediate Products and Raw Material Value

Soda ash is the most critical raw material for glass production, accounting for approximately 25-30% of costs. Romania has no soda ash capacity and relies entirely on imports. The CIF price of Chinese soda ash exports to Romania is approximately 8-12% lower than Turkish sources, but overall competitiveness is weakened by shipping cycles and CBAM carbon costs.

Raw Material	China Ex-works Price	Romania CIF Price	Price Difference Notes
Soda Ash (Light)	1,850-2,050 CNY/t	345-365 €/t	incl. freight + carbon tariff
Silica Sand	120-180 CNY/t	55-70 €/t	local resources available
Limestone	60-90 CNY/t	25-35 €/t	ample local supply

Sources: Longzhong Information, Argus Media, Romanian Mining Association; June 2026

Trade and Macro Indicators

Romania's GDP growth is projected at approximately 3.2% in 2026, with the construction sector expanding steadily thanks to EU funds. China-Romania bilateral trade is growing steadily, with glass and products in surplus on the Chinese side. The RON/CNY exchange rate is relatively stable, favorable for import settlement.

- Romania GDP growth: **3.2%** (2026 forecast, World Bank)
- Construction share of GDP: approx. **7.8%** , YoY growth 4.5%
- China-Romania bilateral trade: approx. **9.6B USD** (2025 full year), projected to exceed 10B in 2026
- Exchange rate: 1 RON ≈ **1.58 CNY** (June 2026 avg.); Tariff: EU-China WTO basic rates

Sources: World Bank, National Bank of Romania (BNR), Ministry of Commerce of China (MOFCOM); Q2 2026

Risks and Opportunity Windows

Key risks include the full implementation of the EU CBAM carbon tariff raising import costs, Black Sea shipping disruptions due to geopolitical factors, and low-price competition from Turkey. On the opportunity side, Romania's building energy-saving renovation plan is driving Low-E glass demand; Chinese enterprises can set up warehouses in Eastern Europe to bypass certain tariffs and improve response times.

- ⚠ Carbon Tariff CBAM fully implemented in 2026, estimated glass import carbon cost increase of 12-18 €/t
- ⚠ Geopolitical Risk Occasional disruptions in Black Sea shipping routes, raising freight costs and extending delivery cycles

- ✓ Opportunity Romanian government allocates 420M EUR in 2026 for public building energy-saving renovations; Low-E glass demand surges
- ✓ Opportunity Under the China-CEEC cooperation mechanism, glass product tariff negotiations continue to advance

Sources: European Commission CBAM Announcement, Romanian Ministry of Development, China-CEEC Cooperation Secretariat; July 2026

Data Sources Summary

- Eurostat EU Statistical Office Trade Database — Q2 2026
- General Administration of Customs of China Monthly Import/Export Statistics — Jan-May 2026
- Longzhong Information Soda Ash/Glass Market Weekly — June 2026
- Sunsirs Commodity Price Monitoring — June 2026
- Argus Media European Soda Ash and Glass Price Assessment — June 2026
- National Institute of Statistics of Romania (INS) — Q2 2026
- National Bank of Romania (BNR) Exchange Rates and Macroeconomics — June 2026
- World Bank Romania Economic Update — 2026 Forecast
- European Commission CBAM Implementation Announcement — 2026
- Romanian Building Materials Association (APMCR) Industry Quarterly — Q2 2026