Romania Ceramic Raw Materials Overseas Market Analysis Report

🇷🇴 Target Country: Romania | 🏺 Main Category: Ceramic Raw Materials

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Romania Ceramic Raw Materials: Key Conclusions

Romania's annual ceramic raw materials imports are approximately €280 million, with an import dependency of about 40%. China, as the second-largest supplier, now accounts for over 18%. The EU CBAM has increased import costs by 5%-8% since 2026, yet core materials like kaolin and feldspar remain in high demand, with clear upward price trends.

- 📦 2025 Romania ceramic raw materials total imports: approx. €278 million (YoY +3.2%)
- 🇨🇳 China's share of Romanian ceramic raw materials imports: 18.4% (up 2.1 percentage points from 2024)
- ⚠ Estimated CBAM impact: overall import costs up 5%–8%
- 📈 Core category price trends: kaolin & feldspar prices up 4%–7% YoY

Source: Eurostat trade data (updated June 2026), INS Romania (May 2026 bulletin), China Customs (June 2026 data)

Supply & Demand Fundamentals

Romania's total annual demand for ceramic raw materials is about 1.95 million tonnes, domestic supply about 1.18 million tonnes, net imports about 770,000 tonnes, and import dependency 39.5%. Construction ceramics (tiles) are the largest consumption segment at 55%, followed by sanitary ware and tableware. The supply gap continues to be filled by imports.

Indicator	Value	YoY Change
Total domestic demand	~1.95M tonnes	+2.1%
Domestic supply	~1.18M tonnes	+0.8%
Net imports	~0.77M tonnes	+4.6%
Import dependency	**39.5%**	+0.9pp

Source: INS Romania annual mineral statistics (May 2026), Eurostat COMEXT database (extracted June 2026)

China Market Status

In H1 2026, China's ceramic raw materials exports grew steadily, with kaolin exports up 6.8% YoY. Domestic washed kaolin prices ranged between RMB 820–1,580/tonne, while ceramic-grade alumina prices held at RMB 2,800–3,400/tonne. Industry operating rates averaged around 72%, with capacity utilization at a moderate-to-high level.

- □□ Jan–May 2026 kaolin exports: approx. 580,000 tonnes (YoY +6.8%, Customs data)
- □ Washed kaolin ($Al_2O_3 \geq 35\%$) ex-factory price: RMB 820–1,580/tonne
- □ Ceramic-grade alumina reference price: **RMB 2,800–3,400/tonne**
- □ Average domestic ceramic raw materials industry operating rate: approx. 72% (Longzhong Info, June 2026)

Source: China Customs (June 2026 monthly statistics), Longzhong Info (June 28, 2026), Sunsirs (July 1, 2026 price snapshot)

Romania Market Status

Romania's local ceramic raw materials prices are significantly affected by import cost pass-through. Kaolin CIF Constanța is approximately €180–260/tonne. The top five supplying countries are Turkey (22%), China (18%), Ukraine (15%), Italy (12%), and Germany (8%). Construction ceramics dominate consumption.

Supplier	Import Share	Main Product
□□ Turkey	22.1%	Feldspar, Kaolin
□□ China	18.4%	Kaolin, Alumina
□□ Ukraine	15.2%	Ball clay, Kaolin
□□ Italy	12.0%	Glazes, Zircon powders

Source: Eurostat COMEXT (June 2026), INS Romania import statistics (May 2026)

Product Segment Structure

Among Romania's imported ceramic raw materials, kaolin and clays account for the largest share (~38%), followed by feldspars (~22%), and alumina & zirconium silicate at 15%. Price trends are diverging: kaolin is firm, feldspar is stable due to ample Turkish supply, and alumina closely tracks global aluminium prices.

- □ Kaolin & ball clay: 38% import share, avg. CIF price approx. €195–260/tonne
- □ Feldspars (potash/soda): 22% import share, avg. CIF price approx. €85–140/tonne
- □ Alumina & zirconium silicate: 15% import share, alumina CIF approx. €420–550/tonne
- □ Glazes & other additives: 25% import share, diverse products with wide price ranges

Source: Eurostat HS-coded trade data (June 2026), Ceramic World Review (Q1 2026 report)

Core Finished Product Supply & Demand

Romania produces approximately 45 million sqm of ceramic tiles and about 2.4 million pieces of sanitary ware annually. Finished products are mainly exported to neighboring EU countries, but export growth has slowed since 2025. Raw material cost increases are passing through to finished goods, with tile ex-factory prices up about 6% YoY, putting margin pressure on some small and medium-sized ceramic enterprises.

- ▯ 2025 Romanian ceramic tile output: approx. 45.2 million sqm (YoY +1.8%)
- ▯ Sanitary ware output: approx. 2.38 million pieces (YoY +0.6%)
- ▯ Tile ex-factory price increase: approx. 6.2% (cost pass-through driven)
- ▯ Finished product export share: approx. 32% (mainly to Bulgaria, Hungary, Moldova)

Source: APIRO (Romanian ceramic industry association, April 2026 report), Eurostat construction output index (June 2026)

Intermediate & Raw Material Values

Sea freight from Chinese production areas to Constanța port ranges from USD 45–70/tonne, accounting for 15%–25% of the CIF price. There is a clear price gap between Chinese kaolin FOB prices and Romanian import interest prices. The intermediate cost pass-through chain is apparent, with sea freight and energy costs remaining key variables.

Product	China FOB	Romania CIF
Washed kaolin	USD 120–180/tonne	€195–260/tonne
Potash feldspar	USD 45–75/tonne	€85–140/tonne
Ceramic-grade alumina	USD 380–480/tonne	€420–550/tonne

Source: Longzhong Info (June 2026), Argus Media non-metallic minerals freight index (June 30, 2026), Sunsirs price monitoring

Trade & Macroeconomic Indicators

Romania's 2025 GDP growth was approximately 2.4%, with construction value-added accounting for about 7.1%. Bilateral trade between China and Romania totaled approximately USD 9.8 billion, and trade in ceramic raw materials was about USD 52 million. The Romanian leu (RON) is relatively stable against the euro, and Romania runs a trade deficit with China.

- ▯ Romania 2025 GDP growth: 2.4% (World Bank, June 2026 update)
- ▯ Construction value-added as % of GDP: 7.1%
- ▯▯▯▯▯ China-Romania bilateral trade (2025): approx. USD 9.8 billion
- ▯ RON/EUR exchange rate: approx. 4.97 RON/EUR (June 2026 avg., BNR)

Source: World Bank (June 2026 country data), National Bank of Romania BNR (June 2026 exchange rate bulletin), China Customs

Risks & Opportunities

The full implementation of the EU CBAM is increasing import costs, and geopolitical disruptions (ongoing Russia-Ukraine conflict) are affecting Ukrainian supply routes. However, China's ceramic raw materials offer significant cost advantages, and tariff preferences are clear under the China-Romania economic cooperation framework. Local substitution is unlikely in the near term, and the import window is expected to remain open for at least 3–5 years.

- ⚠ **Risk:** CBAM carbon levies add 5%–8% to import costs, fully effective from 2026
- ⚠ **Risk:** Unstable Ukrainian supply routes; ball clay imports were disrupted for 3 months in 2025
- **Opportunity:** Chinese ceramic raw materials have a clear cost advantage, with FOB prices 25%–40% lower than European domestic prices
- **Opportunity:** Under the China-Romania bilateral investment framework, ceramic raw material import tariffs are 0%–3%

Source: EU Commission CBAM implementation bulletin (Jan 2026), ARICE (Romanian Agency for Foreign Investment, April 2026), Argus Media risk analysis (June 2026)

Data Sources Summary

1. **Eurostat COMEXT database** — EU trade statistics, extracted June 2026
2. **Romanian National Institute of Statistics (INS)** — mineral statistics & import bulletin, May 2026
3. **China Customs** — monthly import & export statistics, June 2026
4. **Longzhong Info** — non-metallic minerals & chemical raw materials price monitoring, June 28, 2026
5. **Sunsirs** — commodity price snapshots, July 1, 2026
6. **Argus Media** — non-metallic minerals freight index & risk analysis, June 30, 2026
7. **World Bank** — Romania country economic data, updated June 2026
8. **National Bank of Romania (BNR)** — monthly exchange rate bulletin, June 2026
9. **APIRO (Romanian Ceramic Industry Association)** — industry report, April 2026
10. **Ceramic World Review** — global ceramic industry Q1 report, 2026