Overseas Market Analysis Report

Romania Refractory Materials Overseas Market Analysis Report

- Target Country: Romania
- Main Category: Refractory Materials
- Report Date: July 1, 2026

Romania Refractory Materials Core Conclusions

Romania's refractory materials market has an import dependency exceeding 80%, with China firmly the largest supplier. In H1 2026, magnesia refractory prices rose about 6% year-on-year, while alumina-silica product demand grew steadily driven by infrastructure. The steel sector accounts for 60% of consumption, with moderate demand from cement and glass. Core risks lie in rising compliance costs from the EU Carbon Border Adjustment Mechanism (CBAM) expansion and potential adjustments to China's magnesia export policies.

80%+ import dependency, limited local capacity

38% China's share of Romania's refractory imports (2025)

↑6% YoY CIF price increase for magnesia refractories

CBAM Impact 2026 carbon tariff coverage expands to refractory-related categories

Sources: National Institute of Statistics (INS) Romania, General Administration of Customs of China, Mysteel; compiled from publicly available data through June 2026

Supply & Demand Fundamentals

Romania's annual refractory materials consumption is approximately 115,000–130,000 tonnes, of which the steel industry consumes about 70,000 tonnes, the cement industry about 25,000 tonnes, and the glass industry about 12,000 tonnes. Local annual output is only about 22,000 tonnes, leaving a supply gap filled by imports. In 2025 total imports reached about 98,000 tonnes, while exports were under 5,000 tonnes, showing a clear net import structure.

Indicator	2024	2025	2026E
Local output (10k tonnes)	2.1	2.2	2.3
Imports (10k tonnes)	9.3	9.8	10.2
Exports (10k tonnes)	0.4	0.45	0.5
Apparent consumption (10k tonnes)	11.0	11.55	12.0

Sources: INS Romania, UN Comtrade; 2026 figures are estimates based on H1 trends

China Market Status

In H1 2026, China's refractory industry operating rate was about 72%, down 3 percentage points from H1 2025, mainly due to environmental production restrictions and weaker downstream steel demand. The ex-works average price of magnesia (MgO≥97%) was around RMB 3,150/tonne, and bauxite (Al_2O_3≥85%) was about RMB 1,950/tonne, with overall stable prices. In 2025, China's total refractory exports were approximately 7.48 million tonnes, with the EU accounting for about 18% of export volume.

72% industry average operating rate (June 2026)

RMB 3,150/tonne ex-works magnesia (MgO≥97%) average price

RMB 1,950/tonne ex-works bauxite (Al_2O_3≥85%) average price

7.48 million tonnes China's total refractory exports in 2025

Sources: Mysteel, Zhuo Chuang Information, General Administration of Customs of China; price data through June 2026

Romania Market Status

Romania's refractory market is import-driven, with an import value of approximately EUR 142 million in 2025. Chinese products hold the largest share based on cost-effectiveness, followed by Turkey and Germany. Local distribution prices carry an 18–25% premium over CIF landed price, mainly due to logistics and distribution layers. Magnesia-carbon bricks are locally sold at about EUR 1,050–1,250/tonne.

Source Country	Import Share (2025)	Main Categories	Avg. CIF Price (EUR/tonne)
China	38%	Magnesia-carbon, alumina-magnesia-carbon bricks	680–950
Turkey	22%	Magnesia-based shaped products	720–1,000
Germany	15%	High-end alumina-silica	1,100–1,500

Sources: INS Romania, EUROSTAT; full-year 2025 trade data

Product Segment Structure

Among Romania's imported refractories, magnesia-based products account for about 42% (mainly for steel converters and electric arc furnaces), alumina-silica products about 35% (cement and glass kilns), and carbon-composite refractories about 18%. Magnesia-carbon brick import prices rose about 6% year-on-year, alumina-silica prices remained relatively stable, while carbon-composite products edged up due to graphite cost fluctuations.

Segment	Import Share	CIF Price Range (EUR/tonne)	YoY Trend
Magnesia refractories	42%	850–1,250	↑6%
Alumina-silica refractories	35%	550–900	→ Stable
Carbon-composite refractories	18%	1,000–1,400	↑3%

Sources: EUROSTAT, Mysteel International; data from 2025 to June 2026

Core Finished Product Supply & Demand

Magnesia-carbon bricks are the most consumed refractory product in Romania's steel industry, with annual imports of about 38,000 tonnes and China supplying over 50%. In H1 2026, the average CIF price of magnesia-carbon bricks was about EUR 980/tonne, up approximately 6.5% from 2025. Alumina-magnesia-carbon brick imports stood at around 16,000 tonnes, with a price range of EUR 850–1,100/tonne. Local inventories are maintained at 45–60 days of consumption, with supply somewhat tight but no disruptions.

38,000 tonnes annual magnesia-carbon brick imports (2025)

EUR 980/tonne magnesia-carbon brick average CIF price (June 2026)

50%+ China's share in magnesia-carbon brick imports

55 days average local inventory days

⚠ If magnesia raw material prices continue to rise, Q3 magnesia-carbon brick prices could increase by a further 3–5%.

Sources: Mysteel, Romanian Steel Association (UNSIR); June 2026 data

Intermediate Products & Raw Material Value

In the refractory cost structure, raw materials account for approximately 55–65%. The price spread between Chinese magnesia (Liaoning) ex-works and Romania's CIF price is about USD 280–380/tonne, mainly consisting of sea freight, insurance, and EU tariffs. Graphite prices remain high, driven by new energy battery demand, providing cost support for carbon-composite refractories.

Raw Material	China Origin Price (USD/tonne)	Romania CIF (USD/tonne)	Spread
Magnesia MgO≥97%	430–480	740–830	290–350
Bauxite Al_2O_3≥85%	260–300	480–560	200–260
Flake graphite +195	680–750	960–1,080	260–330

Sources: 100ppi.com, Mysteel, Argus Media; June 2026 data, spread includes freight and tariffs

Trade & Macro Indicators

Romania's GDP growth rate was about 2.8% in 2025 and is forecast at 2.5–3.0% for 2026. Investment growth in construction and manufacturing supports demand for refractories. Bilateral China-Romania trade continues to expand, with China's refractory exports to Romania reaching approximately EUR 54 million in 2025. EU import tariffs for refractories are 2–4%, with no additional trade barriers currently.

2.8% Romania 2025 GDP growth

EUR 54 million annual China-to-Romania refractory export value

2–4% EU refractory import tariff rate

4.98 RON/USD Romanian Leu exchange rate (June 2026)

Sources: World Bank, INS Romania, General Administration of Customs of China; 2025 and H1 2026 data

Risks & Opportunity Windows

Major risks include: EU CBAM carbon tariffs extended to the full steel supply chain in 2026, indirectly raising refractory compliance costs; potential tightening of China's magnesia export quota policy; and RON exchange rate fluctuations affecting import costs. Opportunities: Romania's infrastructure investment plan (2026–2030) will drive cement kiln refractory demand; there is significant scope for localization, where Chinese enterprises could explore joint-venture plants; and China's refractory technology upgrades create high-value product export opportunities.

⚠ The CBAM transitional period ends by late 2026; from 2027, refractory imports may face additional carbon costs estimated at 5–8%.

Opportunity Romania's infrastructure investment plan exceeds EUR 12 billion

Risk China magnesia export policy adjustment window Q4 2026

Opportunity Localized joint-venture production can bypass tariffs and access EU subsidies

Sources: European Commission CBAM announcements, Romanian Ministry of Transport and Infrastructure; 2026 policy documents

Data Sources Summary

- National Institute of Statistics (INS) Romania – Trade & production data
- General Administration of Customs of China – China refractory export data
- Mysteel – Refractory prices & operating rates
- EUROSTAT – EU trade statistics
- UN Comtrade – International trade classification data
- Zhuo Chuang Information – Raw material price data
- 100ppi.com – Commodity price monitoring
- Argus Media – International raw material price references
- World Bank – Macroeconomic indicators
- European Commission – CBAM policy documents
- Romanian Steel Association (UNSIR) – Industry consumption data
- Romanian Ministry of Transport and Infrastructure – Infrastructure investment plan