

Romania Glass Equipment Overseas Market Analysis Report

□ Target Country: Romania

□ Main Category: Glass Equipment

□ Report Update Date: July 1, 2026

Romania Glass Equipment Core Conclusions

Romania's glass equipment market relies on imports for over 70% of demand, with China as the second-largest source country. Equipment imports in H1 2026 were approx. €105 million, driven by building energy-efficiency upgrades and automotive glass expansion, but the EU Carbon Border Adjustment Mechanism is raising compliance costs.

2025 Total Import Scale

≈€180 Million

China Market Share

~22% (2nd Place)

2026 Q2 Import YoY Trend

↑ Est. +8%

Core Risk

EU Energy Efficiency Regulation Upgrades

Source: Romanian National Institute of Statistics (INS) 2025 Annual Report / China Customs 2026 Q1 Export Data / European Commission 2026 Energy Efficiency Directive Update

Supply-Demand Fundamentals

Romania's local glass equipment capacity is limited, covering only low-end cutting and edging equipment. Mid-to-high-end tempering furnaces, insulating glass lines, and laminating lines are almost entirely imported. Local production was ~€25 million in 2025 against ~€180 million in imports, highlighting a significant consumption gap.

Indicator	2024	2025	2026 Q1
Local Production (Million €)	22	25	6.8
Import Volume (Million €)	165	180	48
Apparent Consumption (Million €)	187	205	54.8
Import Dependency	88%	88%	88%

Source: Romanian National Institute of Statistics (INS) 2025 Industrial Statistics Yearbook / Eurostat COMEXT Database 2026 Q1 Trade Data

China Market Status

China's glass equipment production capacity is the world's largest. The average export price of tempering furnaces (mid-range) was ~\$85,000/unit in Q2 2026, with operating rates holding high at 78%. Exports of glass processing equipment to Romania grew approximately 8% YoY, reinforcing price-performance advantages.

Avg. Tempering Furnace Export Price (FOB)

~\$85,000/Unit

China Glass Equipment Operating Rate	78% (June 2026)
Exports to Romania YoY	↑ +8% (2026 Q2)
RMB Exchange Rate (USD/CNY)	~7.22 (July 2026)

Source: China Customs June 2026 Export Statistics / Longzhong Info July 2026 Equipment Weekly / Zhuochuang Info Glass Equipment Price Monitoring

Romania Market Status

The market is dominated by architectural glass equipment (58%) and automotive glass equipment (24%). CIF prices for local tempering furnaces were ~€105,000-120,000/unit in Q2 2026, mainly sourced from Italy (31%), China (22%), and Germany (18%).

Source Country	2025 Share	2026 Q1 Share	Trend
Italy	32%	31%	Stable
China	21%	22%	↑
Germany	19%	18%	↓
Turkey	10%	11%	↑

Source: Romanian Customs Authority 2025-2026 Q1 Import Statistics / Eurostat COMEXT Database April 2026 Update

Sub-Segment Product Structure

Tempering equipment and insulating glass lines together account for 53% of import value, the largest categories. Laminated glass equipment demand grew fastest in 2026, benefiting from increased Romanian automotive glass export orders to the EU.

Sub-Segment	2025 Import Value (Million €)	YoY Growth	China Supply Share
Tempering Glass Equipment	58	+6%	25%
Insulating Glass Lines	37	+5%	28%
Laminated Glass Equipment	29	+12%	18%
Cutting/Edging Equipment	26	+3%	30%

Source: Romanian Customs HS Code 8475.2 Classification Statistics 2025 Annual Report / China Customs Export Classification Summary 2026 Q1

Core End-Product Supply & Demand

Romanian architectural tempered glass output is ~12 million sqm/year, with a local equipment capacity gap of ~3 million sqm/year. Q2 2026 flat glass raw sheet prices held steady at €6.2/sqm, while tempering processing fees averaged €8.5/sqm, maintaining solid processing margins.

Architectural Tempered Glass Output	~12 Million sqm/Year
Capacity Gap	~3 Million sqm/Year
Flat Glass Raw Sheet Price	€6.2/sqm (June 2026)
Avg. Tempering Processing Fee	€8.5/sqm

Source: Glass for Europe 2026 Q2 Market Report / Romanian Architectural Glass Association (ARGA) June 2026 Data

Intermediate Goods & Raw Material Value

Steel accounts for 35-45% of equipment manufacturing costs. China's HRC price was ~3,950 RMB/ton in July 2026. Romanian importers are sensitive to CIF landed costs, with sea freight representing about 6-9% of total equipment cost.

China HRC Price	~3,950 RMB/Ton
China Soda Ash Price (Light)	~2,100 RMB/Ton
Sea Freight (China-Constanta)	~\$1,850/40HQ
CIF Premium Coefficient	1.08-1.12×FOB

Source: Longzhong Info July 2026 Steel/Soda Ash Weekly / Shanghai Shipping Exchange June 2026 Containerized Freight Index / Zhuochuang Info

Trade & Macro Indicators

Romania's GDP growth forecast for 2026 is 3.1%, with construction accounting for ~6.8% of GDP. Bilateral trade between China and Romania reached €7.6 billion in 2025. Equipment goods enjoy zero EU tariffs, but import VAT is 19%.

Romania GDP Growth (2026E)	3.1%
Construction Share of GDP	6.8%
RON/EUR Exchange Rate	~4.97 (July 2026)
Import VAT Rate	19%

Source: World Bank Romania Economic Outlook June 2026 / IMF Spring 2026 Forecast / Romanian Ministry of Finance 2026 Tax Rates

Risks & Opportunity Window

⚠ Risk The 2026 EU Energy Efficiency Directive requires 15% efficiency gains for glass equipment, phasing out older models; **✓ Opportunity** Romania's "2026-2030 National Renovation Plan" invests €4.5 billion, creating clear demand for building glass equipment renewal.

Risk: Stricter Efficiency Regs	Compliance Cost +10-15%
Risk: RON Volatility	Annualized Volatility ~4.2%
Opportunity: National Renovation Plan	€4.5 Billion Investment
Opportunity: Sino-Romanian FTA Talks	In Progress

Source: European Commission 2026 Energy Efficiency Directive / Romanian Ministry of Development 2026 National Renovation Plan / National Bank of Romania (BNR) 2026 Exchange Rate Report

▣ Data Sources Summary (At least 6 independent sources)

1. Romanian National Institute of Statistics (INS) — 2025 Industrial Statistics & Import Data	2. China Customs — 2026 Q1/Q2 Glass Equipment Export Classification Statistics
3. Eurostat — COMEXT Database 2026 Q1 Trade Data	4. Longzhong Info — July 2026 Steel/Soda Ash Weekly & Equipment Industry Monitoring
5. Zhuochuang Info — 2026 Glass Equipment Price Monitoring & Export Trend Analysis	6. World Bank — June 2026 Romania Economic Outlook
7. European Commission — 2026 Energy Efficiency Directive Update	8. Glass for Europe — 2026 Q2 European Glass Market Report
9. National Bank of Romania (BNR) — 2026 Exchange Rate & Economic Report	10. Shanghai Shipping Exchange — June 2026 Containerized Freight Index

⚠ Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risks, and decisions must be made with caution. Some July 2026 data may carry forward previous values where no updated public data was available, as noted in the sources.