

# Romania Rubber Raw Materials Overseas Market Analysis Report

● Target Country: Romania ● Main Category: Rubber Raw Materials ● Report Date: July 1, 2026

## Romania Rubber Raw Materials Key Conclusions

Romania's rubber raw materials market exhibits a pattern of **high import dependence**, with 100% of natural rubber sourced from overseas at an annual import volume of approximately **55,000 tonnes**. Synthetic rubber imports are around **100,000 tonnes** per year, primarily from within the EU. Tire manufacturing is the core consumption driver, accounting for **over 70%** of total rubber consumption. **EUDR Regulation** imposes new compliance requirements on natural rubber supply chains, which may push up import costs. In terms of pricing, natural rubber CIF prices are influenced by Southeast Asian producing regions and international futures, with persistent volatility risks.

Source: Romania National Institute of Statistics (INSSE) 2025 Annual Trade Report; Eurostat 2025 Q4 Data; International Rubber Study Group (IRSG) January 2026 Quarterly Report

## Supply and Demand Fundamentals

Romania has no domestic natural rubber cultivation, and **natural rubber supply is entirely dependent on imports**. There is limited local synthetic rubber production capacity, which falls far short of demand. In 2024, Romania's total rubber raw material consumption was approximately **160,000 tonnes**, with natural rubber accounting for about 34% and synthetic rubber about 66%. The consumption structure is dominated by tire manufacturing, with non-tire rubber products (hoses, seals, industrial goods) accounting for about 25%.

| Indicator                | 2023             | 2024               | YoY Change |
|--------------------------|------------------|--------------------|------------|
| Natural Rubber Imports   | 52,000 tonnes    | 55,000 tonnes      | +5.8%      |
| Synthetic Rubber Imports | 96,000 tonnes    | 101,000 tonnes     | +5.2%      |
| Tire Production (Est.)   | 31 million units | 32.5 million units | +4.8%      |

Source: Romania National Institute of Statistics (INSSE) Published March 2025; Eurostat 2025 Q4 Trade Data; IRSG January 2026 Report

## China Market Overview

China is the world's largest natural rubber consumer and importer, with natural rubber imports of approximately **6.2 million tonnes** in 2024. As of June 2026, China's natural rubber (SCRWF whole latex) spot price is approximately **CNY 14,500/tonne**, up about 8% from the beginning of the year. For synthetic rubber, SBR 1502 is priced at approximately **CNY 12,800/tonne**, and BR9000 at approximately **CNY 13,500/tonne**. Domestic tire manufacturers' operating rates remain high, sustaining robust demand for rubber raw materials.

| Product              | Price (CNY/tonne) | MoM Change |
|----------------------|-------------------|------------|
| Natural Rubber SCRWF | ~14,500           | ↑2.3%      |
| SBR 1502             | ~12,800           | →Flat      |
| BR9000               | ~13,500           | ↑1.8%      |

Source: 100ppi.com Rubber Sector Quotes June 2026; Longzhong Info Synthetic Rubber Weekly June 2026; China General Administration of Customs 2025 Import & Export Statistics

## Romania Market Overview

Romania's rubber raw materials market is driven by **international tire giants**, with plants operated by Continental (Timișoara), Michelin, and Pirelli (Slatina) forming the core demand base. Natural rubber CIF prices (Port of Constanța) reference the SICOM TSR20 futures benchmark, standing at approximately **USD 1,850/tonne** in June 2026. Import sources are predominantly Southeast Asian for natural rubber, while synthetic rubber mainly comes from EU partners such as Germany, France, and Italy.

| Import Source Country    | Natural Rubber Share | Synthetic Rubber Share |
|--------------------------|----------------------|------------------------|
| Indonesia                | 28%                  | —                      |
| Thailand                 | 22%                  | —                      |
| Germany / France / Italy | —                    | 55%                    |

Source: Eurostat 2025 Q4 Detailed Trade Data; Romania INSSE 2025 Import Report; SICOM Futures June 2026 Settlement Prices

## Product Segmentation Structure

Romania's imported rubber raw materials can be segmented into **natural rubber** (TSR20 technically specified rubber accounting for about 65%, RSS ribbed smoked sheets about 20%, latex about 15%) and **synthetic rubber** (SBR accounting for about 40%, BR about 25%, IIR about 18%, EPDM about 12%, others about 5%). Tire manufacturing primarily consumes TSR20 and SBR.

| Subcategory          | Annual Import Volume (10,000 tonnes) | Primary Application         |
|----------------------|--------------------------------------|-----------------------------|
| TSR20 Natural Rubber | ~3.6                                 | Tire treads                 |
| SBR                  | ~4.0                                 | Tires, rubber footwear      |
| BR                   | ~2.5                                 | Tires, wear-resistant parts |

Source: Eurostat HS Code 4001-4002 Classified Data 2025; IRSG Natural Rubber Classification Report December 2025

## Core Finished Product Supply & Demand

Tires are the **core finished product** of Romania's rubber raw materials sector, with 2024 output at approximately **32.5 million units**, of which about 80% are exported to EU markets. Passenger car tires account for about 70%, and truck and OTR tires about 25%. Affected by rising EUDR compliance costs, average tire export prices in 2025 increased by approximately **3%-5%** year-on-year. The local replacement tire market demand remains stable, with annual consumption of about 6 million units.

| Indicator                             | 2023            | 2024            |
|---------------------------------------|-----------------|-----------------|
| Tire Production (10,000 units)        | 3,100           | 3,250           |
| Tire Export Ratio                     | 78%             | 80%             |
| Non-Tire Rubber Products Output Value | EUR 680 million | EUR 720 million |

Source: Romanian Tire Manufacturers Association 2025 Industry Report; Continental Romania Annual Report 2024; Eurostat Industrial Output Data 2025 Q3

## Intermediate Goods and Raw Material Value

The rubber raw material cost transmission chain is clear: upstream crude oil/butadiene prices affect synthetic rubber costs, while Southeast Asian plantation climates and futures markets influence natural rubber pricing. In June 2026, China's domestic natural rubber raw material latex purchase price was approximately **CNY 13,200/tonne**, and butadiene (key synthetic rubber intermediate)

in East China was priced at approximately **CNY 8,500/tonne**. Romania's CIF natural rubber commands a premium of approximately **8%-12%** over China spot prices, reflecting freight and compliance premiums.

Source: Longzhong Info June 2026 Butadiene and Synthetic Rubber Raw Materials Weekly; 100ppi.com Natural Rubber Quotes June 2026; Argus Media European Rubber Raw Material CIF Assessment May 2026

## Trade and Macro Indicators

Romania's macroeconomy is stable, with 2024 GDP at approximately **EUR 324 billion** and a growth rate of 2.4%. Rubber raw material imports reached approximately **EUR 480 million** (2024), accounting for 6% of chemical raw material imports. The Romanian Leu exchange rate is relatively stable, at approximately 1 EUR ≈ 5.0 RON. EU membership grants it the convenience of a customs union, with zero tariffs on rubber raw materials circulating within the EU.

| Macro Indicator             | 2024 Value      |
|-----------------------------|-----------------|
| GDP (EUR billion)           | 324             |
| GDP Growth Rate             | 2.4%            |
| Rubber Raw Material Imports | EUR 480 million |

Source: World Bank 2025 Romania Country Report; Romania INSSE 2025 Foreign Trade Statistics; IMF World Economic Outlook October 2025

## Risks and Opportunity Windows

**Key Risks** **EUDR Compliance:** Full enforcement from December 2025, natural rubber must demonstrate deforestation-free origin; compliance costs may increase by **5%-10%**. **Supply Chain Disruptions:** The Red Sea shipping crisis has pushed up Asia-Europe freight rates and extended CIF lead times. **Exchange Rate Fluctuations:** RON depreciation against the USD may increase import costs.

**Opportunity Windows** **Localization Substitution:** Local synthetic rubber capacity expansion receives policy support; **China-Romania Cooperation:** China's cost-competitive synthetic rubber has potential to expand in the Romanian market.

Source: European Commission EUDR Implementation Guidelines Updated December 2025; InvestRomania 2025 Investment Promotion Policies; Argus Media Shipping & Supply Chain Analysis June 2026

## Data Sources Summary

- Romania National Institute of Statistics (INSSE) — 2025 Annual Trade and Industry Report
- China General Administration of Customs — 2025 Import & Export Statistical Yearbook
- Longzhong Info — June 2026 Synthetic Rubber and Butadiene Weekly Reports
- World Bank — 2025 Romania Country Economic Report
- SICOM Singapore Commodity Exchange — June 2026 TSR20 Futures Settlement Prices
- Eurostat — 2025 Q4 Detailed Trade Data
- 100ppi.com — June 2026 Rubber Sector Spot Quotes
- International Rubber Study Group (IRSG) — January 2026 Quarterly Report
- Argus Media — May 2026 European Rubber Raw Material CIF Assessment
- European Commission — EUDR Implementation Guidelines Updated December 2025

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk; decisions should be made with caution.