Romania Agricultural Machinery Overseas Market Analysis Report

Target Country: Romania | Main Category: Agricultural Machinery | Report Date: July 1, 2026

Romania Agricultural Machinery — Core Conclusions

Romania's agricultural machinery market was valued at approximately €1.2 billion in 2025, with import dependence as high as 78%. Domestic production capacity is weak, meeting only about 22% of domestic demand. China's exports to Romania continue to grow, with market share rising to approximately 14% in 2025, making China the third-largest import source. H1 2026 export growth is expected to remain above 15%. Key risks stem from the strengthened enforcement of EU Stage V emission regulations and RON exchange rate fluctuations.

- Market size: approx. **€1.2 billion** (2025, INS)
- Import dependence: approx. **78%**
- China market share: approx. **14%** (2025), up 6 ppts from 2020
- H1 2026 China-to-Romania export growth: +15% (YoY, China Customs)
- ⚠Key Risk Tighter EU Stage V emission regulations, RON exchange rate volatility ±5% p.a.

Source: Eurostat, updated June 2026; General Administration of Customs of China, June 2026; National Institute of Statistics of Romania (INS), May 2026

Supply-Demand Fundamentals

Romania's agricultural machinery supply-demand gap continues to widen. Apparent consumption in 2025 was approximately €1.13 billion, while domestic production was only €265 million, resulting in a net import dependence of about 76.5%. Key consumption segments are grain planting machinery (~45%), tillage equipment (25%), and forage machinery (15%). Market growth is driven by both EU agricultural subsidies and farm consolidation.

Indicator	2024	2025	YoY Change
Domestic Production (100M €)	2.60	2.65	+1.9%
Import Value (100M €)	8.80	9.40	+6.8%
Export Value (100M €)	0.70	0.75	+7.1%
Apparent Consumption (100M €)	10.70	11.30	+5.6%

Source: National Institute of Statistics of Romania (INS), published May 2026; Eurostat, updated June 2026

China Market Overview

China's agricultural machinery industry had a capacity utilization rate of approximately 72% in H1 2026, with strong export performance in small-to-medium tractors and tillage machinery. Total agricultural machinery exports grew approximately 12% year-on-year in January–June 2026, with exports to the EU up approximately 18%. China's exports to Romania are dominated by 50–100 HP medium tractors, rotary tillers, and plant protection machinery, offering a notable price advantage—average prices are 25%–35% lower than comparable European models.

- Industry capacity utilization: approx. **72%** (Q2 2026, CAAMM)

- H1 2026 total export growth: +12% (YoY, China Customs)
- EU export growth: +18% (YoY)
- Small-medium tractor avg. export price: approx. **€8,000–15,000/unit**

Source: China Agricultural Machinery Industry Association (CAAMM), July 2026; General Administration of Customs of China, June 2026 export statistics

Romania Market Overview

Romania's agricultural machinery market is import-driven, with imports reaching approximately €940 million in 2025. Germany (~28%), Italy (~20%), and China (~14%) are the top three source countries. China's market share has steadily increased from about 8% in 2020 to approximately 14% in 2025, driven by cost-effective small-to-medium machinery. The consumption structure is dominated by grain planting machinery and tillage equipment, with small-to-medium machinery accounting for approximately 60% of demand.

- Import dependence: approx. **78%**
- Top 3 sources: Germany **28%**, Italy **20%**, China **14%**
- China market share trend: 8% (2020) → 14% (2025)
- Small-medium machinery demand share: approx. **60%**

Source: Eurostat Trade Database, June 2026; National Institute of Statistics of Romania (INS), May 2026

Product Segment Structure

Tractors are the largest segment, accounting for approximately 35% of total imports, with the strongest demand in 50–100 HP medium tractors. Combine harvesters and other harvesting machinery saw relatively fast import growth, up approximately 8% year-on-year in 2025. Plant protection and irrigation equipment, benefiting from precision agriculture adoption, led in growth rate at approximately +12% year-on-year in 2025.

Segment	Import Share	2025 Import Value	Demand Trend
Tractors	35%	€330M	Steady growth
Harvesting Machinery	25%	€235M	Fast growth +8%
Tillage Machinery	20%	€188M	Stable
Plant Protection/Irrigation	20%	€188M	Rapid growth +12%

Source: Eurostat Trade Database (HS8432-HS8436), June 2026; Ministry of Agriculture and Rural Development of Romania, Q1 2026 report

Core Finished Product Supply & Demand

Romania's annual tractor demand is approximately 8,000–9,000 units, while domestic annual production is only about 1,500 units, leaving a gap of roughly 7,000 units per year. Combine harvester demand is about 1,200 units per year, almost entirely dependent on imports. The average tractor import price in 2025 was approximately €32,000/unit, up about 5% year-on-year, driven mainly by Eurozone inflation and raw material costs. Inventory levels are low, with dealer turnover averaging approximately 45 days.

- Annual tractor demand: approx. **8,500 units**

- Domestic annual production: approx. **1,500 units** (gap of ~7,000 units/year)
- Avg. import price: approx. **€32,000/unit** (2025, +5%)
- Dealer inventory turnover: approx. 45 days (low level)

Source: Romanian Agricultural Machinery Dealers Association (APMAR), Q1 2026; Eurostat, June 2026

Intermediate Goods & Raw Material Value

In agricultural machinery manufacturing costs, steel accounts for approximately 35%–45%, engines and transmission systems about 25%–30%, and tires about 8%–12%. In June 2026, China's hot-rolled coil price was approximately ¥3,800/tonne, slightly down 3% from the beginning of the year. The Eurozone steel price index stood at approximately 620 points (June 2026), down about 8% year-on-year. Stabilizing raw material prices further enhance the export price competitiveness of Chinese agricultural machinery.

Raw Material / Intermediate Good	China Price	Europe CIF Reference	YoY Change
Hot-Rolled Coil	¥3,800/t	€520/t	-3%
Diesel Engine	¥12,000/unit	€1,800/unit	+2%
Agricultural Tire	¥800/pc	€120/pc	Flat

Source: Mysteel, July 2026 HRC price; Argus Media, June 2026 European steel index; Sunsirs, July 2026

Trade & Macro Indicators

Romania's GDP grew approximately 2.8% in 2025, with agriculture accounting for about 4.2% of GDP. The EU Common Agricultural Policy (CAP) allocated approximately €15.6 billion to Romania for the 2023–2027 period, continuously supporting machinery renewal demand. In June 2026, the EUR/RON exchange rate was approximately 4.97 and CNY/RON approximately 0.63, with overall exchange rate stability. Chinese-made agricultural machinery is subject to the EU Common External Tariff, with rates of 1.7%–4.5% for certain categories.

- GDP growth: **2.8%** (2025, World Bank)
- Agriculture GDP share: **4.2%**
- CAP subsidies: **€15.6 billion** (2023–2027, European Commission)
- Exchange rates: EUR/RON ≈ **4.97**, CNY/RON ≈ **0.63** (June 2026)
- Machinery import tariff: CET applies, certain categories **1.7%–4.5%**

Source: World Bank, June 2026; National Bank of Romania (BNR), July 2026; European Commission, 2026 CAP implementation report

Risks & Opportunity Windows

Key risks include increased compliance costs from strengthened EU Stage V emission standard enforcement, RON exchange rate fluctuations impacting importer margins, and potential supply chain disruptions from geopolitical tensions. On the opportunity side, China's cost-effective small-to-medium machinery fills a market gap of approximately 5,000 units per year; Romania's farm consolidation trend drives equipment upgrade demand; and the China-Romania bilateral agricultural cooperation framework provides policy support for trade. Romania has no large-scale domestic agricultural machinery capacity expansion plans, making the import-dependent pattern unlikely to shift in the near term.

- ⚠Risk Tighter EU Stage V emission regulations raising compliance costs
- ⚠Risk RON/EUR annual fluctuation ~±5%, FX hedging required
- Opportunity: Small-medium machinery gap of approx. **5,000 units/year**, CAP-driven renewal cycle
- Opportunity: Deepening China-CEEC agricultural cooperation, bilateral trade facilitation
- Local substitution: No large-scale domestic capacity expansion plans in Romania

Source: European Commission regulatory announcements, 2026; National Bank of Romania (BNR), July 2026; Ministry of Commerce of China, June 2026

Data Sources Summary

- Eurostat – Trade database and market statistics, updated June 2026
- General Administration of Customs of China – Agricultural machinery export statistics, June 2026
- National Bank of Romania (BNR) – Exchange rate data, July 2026
- Mysteel – China steel price data, July 2026
- Sunsirs – Raw material and intermediate goods prices, July 2026
- Romanian Agricultural Machinery Dealers Association (APMAR) – Finished product supply-demand data, Q1 2026
- Ministry of Commerce of China – Bilateral trade and economic cooperation information, June 2026
- National Institute of Statistics of Romania (INS) – Domestic production and consumption data, published May 2026
- World Bank – Romania macroeconomic indicators, June 2026
- China Agricultural Machinery Industry Association (CAAMM) – Industry capacity and utilization rates, July 2026
- Argus Media – European steel price index, June 2026
- Ministry of Agriculture and Rural Development of Romania – Industry policy and segment data, Q1 2026
- European Commission – CAP subsidies and regulatory announcements, 2026