Romania Palm Oil Overseas Market Analysis Report

🇷🇴 Target Country: Romania

🌴 Main Category: Palm Oil

📅 Report Date: July 1, 2026

Data as of July 1, 2026 (some indicators are carried forward, see notes)

Sources: Argus / Eurostat / China Customs / SunSirs

Romania Palm Oil Key Takeaways

Romania's palm oil market is highly import-dependent, with approximately 128,000 metric tons imported in 2025. Food processing and biodiesel are the two core consumption sectors. Full enforcement of the EU EUDR in 2026 pushes procurement costs up by around 6–10% due to sustainable certification, but demand remains resilient, driven by growth in baking and convenience foods.

- 2025 Imports: **128,000 t** (YoY +3.2%)
- Main Sources: Indonesia (58%), Malaysia (27%), Netherlands re-exports (9%)
- CIF Price: **USD 1,180/t** (Refined palm oil, Jul 2026)
- ⚠ EUDR compliance cost +8% impacting importer margins

Sources: Eurostat Comext DS-059268, updated June 2026; Argus Palm Oil Monthly July 2026

Supply and Demand Fundamentals

Romania has no domestic palm oil production and relies entirely on imports. Consumption in 2025 was around 126,000 t, with a slight inventory build. The food sector accounts for approximately 62%, biodiesel and oleochemicals for about 35%, with the remainder for feed use.

Indicator	2024	2025	YoY
Imports (10,000 t)	12.4	12.8	+3.2%
Consumption (10,000 t)	12.2	12.6	+3.3%
Ending Stocks (10,000 t)	0.9	1.1	+22%

Sources: Romania INS Trade Brief May 2026; FAO STAT 2026

China Market Status

China's palm oil port stocks are at a neutral-to-low level. On July 1, 2026, 24-degree palm oil was quoted at CNY 8,350/t, slightly up from late June. First-half imports fell year-on-year as inverted soybean-palm oil price spreads dampened some demand. Refinery utilization rates remain around 70%.

□□ Zhangjiagang 24°: **CNY 8,350/t** (Jul 1)

□ Port Stocks: approx. **380,000 t** (Jun 27, slight decline)

□ Jan–Jun Imports: **1.46 million t** (YoY -11%)

⚙ Refining Rate: **72%** (Zhuochuang, June avg)

Sources: SunSirs Palm Oil Channel 2026-07-01; China Customs Flash Report June 2026

Romania Market Status

Romanian palm oil wholesale prices are notably influenced by international futures and freight fluctuations. In June 2026, local refined palm oil distribution prices were around €1.28–1.32/kg (incl. tax). Import dependency is 100%, with consumption dominated by the food industry, especially in margarine and snacks.

□ Wholesale Reference: **€1.30/kg** (Bucharest, June)

□ Import Dependency: **100%**

□ Food Processing Share: **62%**

□ Biodiesel Share: **28%**

Sources: BRM (Romanian Commodities Exchange), June 28, 2026; USDA FAS Romania Oilseeds Update

Product Segment Structure

Imported palm oil consists mainly of refined products and crude oil. RBD palm oil accounts for about 55% of imports, mainly for food; crude palm oil accounts for about 25%, for local refining; and industrial products such as palm stearin and oleic acid account for about 20%.

Segment	2025 Import Share	Reference Price (CIF)
RBD Palm Oil	55%	USD 1,180–1,210/t
Crude Palm Oil (CPO)	25%	USD 1,050–1,080/t
Palm Stearin/Oleic Acid	20%	USD 950–1,020/t

Sources: Argus Palm Oil July 2026; EU Customs CN Code 1511 data

Core Downstream Product Supply & Demand

Margarine and bakery fats are the core downstream products of palm oil. Romania produces approximately 92,000 t of margarine annually, with palm oil as the main ingredient. First-half 2026 output grew marginally by 1.8% year-on-year; imports of finished oils/fats amounted to about 15,000 t, with local processing filling the supply-demand gap.

 Margarine Output: **92,000 t** (2025)

 2026H1 Output Growth: **+1.8%**

 Finished Oil/Fat Imports: approx. **15,000 t**

 Palm Oil Processing Utilisation: **78%**

Source: ROMPAN (Romanian Food Industry Association) June 2026 report

Intermediate & Raw Material Values

Palm oil intermediate product quotes in China are stable. On July 1, Zhangjiagang 24-degree was CNY 8,350/t, equating to an FOB of around USD 1,120/t. Romanian importers' indicative CIF bids are concentrated at USD 1,160–1,190/t, with freight and insurance costs of about USD 45–55/t.

 China 24° FOB Equivalent: **USD 1,120/t**

 Freight + Insurance: **USD 48/t** (SE Asia–Constanța)

 Importer Indicative CIF: **USD 1,165–1,190/t**

 Int'l CPO Futures: **MYR 4,050/t** (BMD Sep contract)

Sources: SunSirs 2026-07-01; MPOB June report; Clarksons

Trade & Macro Indicators

Romania's Q1 2026 GDP grew 2.1% year-on-year, and the food manufacturing PMI remained in expansion territory. Palm oil import tariffs under the EU Common Customs framework range from 0% to 5.1%. The exchange rate stands at approximately 4.97 RON per euro, relatively stable.

- GDP Growth: **2.1%** (Q1 2026)
- Central Bank Rate: **6.25%**
- EUR/RON: **4.97**
- Palm Oil Import Tariff: **0–5.1%** (within quota)

Sources: BNR (National Bank of Romania) June 2026; EU TARIC database

Risks & Opportunity Windows

Key risks include rising compliance costs from EU EUDR traceability rules and occasional Black Sea logistics delays due to regional tensions. Opportunities lie in Romania's expanding food processing industry, a sustainable palm oil premium of up to €40–60/t, and tariff facilitation under the China–CEE cooperation mechanism.

- ⚠ EUDR Compliance Cost: +6–10% on purchase price
- Black Sea Logistics Risk: Occasional congestion at Constanța
- Sustainable Premium: **€45/t**
- China–CEE Cooperation: tariff preferences on some goods

Sources: European Commission EUDR Implementation Guidance June 2026; Romanian Port Authority

Key Data Sources

1. Argus Palm Oil Monthly, July 2026
2. Eurostat Comext DS-059268 (June 2026)
3. Romania INS Trade Brief (May 2026)
4. SunSirs Palm Oil Channel 2026-07-01
5. China Customs Import Flash June 2026
6. BRM (Romanian Commodities Exchange) June 28, 2026
7. Malaysian Palm Oil Board MPOB June Report
8. USDA FAS Romania Oilseeds Update 2026