Romania Feed Raw Materials Overseas Market Analysis Report

Target Country: Romania | Main Category: Feed Raw Materials | Report Update Date: July 1, 2026

Romania Feed Raw Materials Key Conclusions

Romania's feed raw material market features **self-sufficiency in energy feed and high dependence on imported protein raw materials**. In 2025, compound feed output was approximately 5.8 million tons, with soybean meal import dependency exceeding 70%, mainly sourced from Brazil and the United States. Affected by the 2025 drought, local corn output dropped to approximately 9.8 million tons, narrowing the energy feed surplus. Chinese feed additives (vitamins, amino acids, calcium phosphates) continue to increase their market penetration in Romania, with exports reaching approximately US$180 million in 2025. Core risks lie in **global soybean price fluctuations** and cost pressure from EUR/RON exchange rate movements.

Source: EU Compound Feed Manufacturers' Federation (FEFAC) 2025 Annual Report; Romania National Institute of Statistics (INS) March 2026; General Administration of Customs of China April 2026 data

Supply and Demand Fundamentals

Item	2024	2025	YoY Change
Compound Feed Output (10,000 tons)	595	580	-2.5%
Soybean Meal Imports (10,000 tons)	128	120	-6.3%
Local Corn Output (10,000 tons)	1010	980	-3.0%
Feed Additive Imports (US$100 million)	3.6	3.8	+5.6%

Source: INS March 2026; FEFAC 2025 Annual Report; Eurostat February 2026

China Market Status

In H1 2026, China's soybean meal prices fluctuated, with the June average price at approximately RMB 3,180/ton, slightly lower than the beginning of the year. The feed additive industry operating rate remained at 75%–80%, and the capacity utilization rate of feed-grade calcium phosphates was approximately 72%. China's feed additive exports to Romania continued to grow, with dicalcium phosphate, B vitamins, and lysine as the main categories.

- Soybean meal spot price (East China): approx. RMB 3,180/ton (June 2026)
- Feed-grade DCP ex-factory price: approx. RMB 2,850/ton
- Additive exports to Romania: approx. US$98 million (Jan–May 2026)

Source: 100ppi.com June 28, 2026; Sublime China Information June 2026; General Administration of Customs of China June 2026

Romania Market Status

Romania's feed raw material market has an import dependency of approximately 35% (by value), with protein raw material import reliance exceeding 70%. Soybean meal CIF prices (Constanța Port) range from approximately €420–445/ton (June 2026), with main source countries being Brazil (55%), the United States (22%), and Ukraine (8%). Local corn feed usage accounts for approximately 65%, with the remainder used for export and industrial consumption.

- Soybean meal CIF: €420–445/ton
- Protein raw material import dependency: approx. 72%
- Main source countries: Brazil 55%, US 22%, Ukraine 8%

Source: Argus Media June 2026; Romania Ministry of Agriculture (MADR) March 2026 report; Eurostat February 2026

Product Segment Structure

Product Segment	Annual Import Volume (10,000 tons)	CIF Price Range	Demand Trend
Soybean Meal	120	€420–445/t	Steady Growth
Rapeseed Meal	18	€300–330/t	Stable
Feed Additives	4.2	€1,800–3,500/t	Rapid Growth
Corn (Feed-grade)	Locally Self-sufficient	€190–210/t	Output Volatility

Source: Eurostat February 2026; INS March 2026; Argus Media June 2026

Core Finished Products Supply and Demand

As the core finished product, Romania's compound feed output in 2025 was approximately 5.8 million tons, with domestic consumption at approximately 5.6 million tons and a small volume exported to Bulgaria and Moldova. Poultry feed accounts for the largest share (approx. 45%), followed by pig feed (approx. 30%). The protein raw material gap is approximately 1.3 million tons (soybean meal equivalent), which must be filled through imports. In Q1 2026, the feed price index rose approximately 4.2% year-on-year, mainly driven by soybean costs.

- Compound feed output: 5.8 million tons (2025)
- Poultry feed 45%, pig feed 30%, ruminant feed 20%
- Protein gap: approx. 1.3 million tons soybean meal equivalent

Source: FEFAC 2025 Annual Report; Romanian Feed Industry Association (ANFNC) January 2026; MADR March 2026

Intermediates and Raw Material Value

Raw Material / Intermediate	China Production Area Price	Romania CIF Price	Cost Pass-through
Phosphate Rock (30% P_2O_5)	approx. RMB 580/t	-	→ Calcium Phosphate
Sulfuric Acid (98%)	approx. RMB 320/t	-	→ DCP
Soybeans (Imported)	approx. RMB 4,200/t	€480–510/t	→ Soybean Meal
Feed-grade DCP	approx. RMB 2,850/t	€520–560/t	→ Compound Feed

Source: 100ppi.com June 2026; Longzhong Information June 2026; Argus Media June 2026; General Administration of Customs of China May 2026

Trade and Macro Indicators

Indicator	Value	Period
Romania GDP Growth	2.4%	2025
Agriculture as % of GDP	4.1%	2025
EUR/RON Exchange Rate	approx. 4.97	June 2026
China-Romania Feed Trade Volume	approx. US$210 million	2025

As an EU member state, Romania applies the EU Common Customs Tariff to feed raw material imports, with 0%–3% tariffs on soybeans and soybean meal from non-EU countries. In 2026, the new EU CAP regulations provide subsidy preferences for sustainable feed raw materials, benefiting green categories such as organic trace mineral additives.

Source: World Bank April 2026; National Bank of Romania (BNR) June 2026; European Commission January 2026

Risks and Opportunity Windows

⚠ Romania experienced severe drought in 2025, with corn output declining by approximately 3%; the 2026 climate outlook remains uncertain, and the energy feed surplus could narrow further.

Risks: Global soybean supply chains face geopolitical disruptions (Brazil logistics bottlenecks, Red Sea shipping risks); EUR/RON exchange rate fluctuations affect import costs; EU CAP policy adjustments may alter subsidy allocation.
Opportunities: Significant room for Chinese feed-grade calcium phosphates and vitamins to increase market share in Romania; growing demand for localized substitution (e.g., sunflower meal partially replacing soybean meal); Romania's Black Sea port location advantage facilitates re-export trade to Central and Eastern Europe.

Source: MADR March 2026; World Bank Commodity Outlook April 2026; China Ministry of Commerce Trade Alert May 2026

Data Source Summary

- Romania National Institute of Statistics (INS) – March 2026
- EU Compound Feed Manufacturers' Federation (FEFAC) – 2025 Annual Report
- Eurostat – February 2026
- 100ppi.com – June 2026
- Argus Media – June 2026
- General Administration of Customs of China – April–June 2026
- Sublime China Information – June 2026
- Longzhong Information – June 2026
- World Bank – April 2026
- National Bank of Romania (BNR) – June 2026
- Romania Ministry of Agriculture (MADR) – March 2026
- Romanian Feed Industry Association (ANFNC) – January 2026

Note: Some full-year 2026 data has not yet been published; the latest available public values have been used. All price data are open market quotations or statistical values during the reporting period, for reference only.