󠀠󠀠 Romania Agrochemical Overseas Market Analysis Report

Target Country: Romania

Main Category: Agrochemical (Phosphate Ore - Sulfuric Acid - Phosphate Fertilizer / Pesticides)

Report Update Date: July 1, 2026

Romania Agrochemical Key Conclusions

Romania's agrochemical market has an import dependency of 76%. In 2026, China's supply share in phosphate fertilizer and pesticide sectors increased to 16-18%. The EU CAP green transition policy drives biopesticide demand up 12% year-on-year, and the Russian-Belarusian supply gap creates a significant growth window for Chinese companies. Major risks include RON exchange rate fluctuations and tighter EU active substance renewal reviews for pesticides.

Fertilizer Import Dependency **76%** High

China's Share in Romania's Agrochemical Imports **16-18% ↑**

DAP CIF Price Range (June 2026) **610-640 USD/t CFR**

Biopesticide Demand Growth **+12% YoY**

Source: Eurostat June 2026 trade data; Argus Media fertilizer price report, June 28, 2026; Romania Ministry of Agriculture Q2 2026 briefing

Supply and Demand Fundamentals

Romania's annual fertilizer consumption is about 2.28 million tonnes (physical weight), with domestic production meeting only about 24% of demand, resulting in net imports of approximately 1.73 million tonnes. The pesticide market is valued at around €460 million annually, with 95% imported. The main consumption crops are corn, wheat, and sunflower, accounting for over 70% of fertilizer usage.

Indicator	Value	YoY Change
Total Fertilizer Consumption (physical)	2.28 million t	+1.8%
Domestic Fertilizer Production	0.55 million t	-3.2%
Net Fertilizer Imports	1.73 million t	+3.5%
Pesticide Market Size	€460 million	+2.1%

Source: Romania National Institute of Statistics (INS) May 2026 bulletin; Eurostat June 2026 trade monitoring

Source: INS May 2026; Eurostat June 2026

China Market Status

In June 2026, China's DAP ex-factory average price was 3,930 RMB/t; phosphate fertilizer industry operating rate was 68%, up 5 percentage points from the beginning of the year. The pesticide technical price index fell 8% year-on-year, with glyphosate technical staying in the range of 38,000-40,000 RMB/t. From January to May, China's total pesticide exports reached about 870,000 tonnes, with the EU share increasing to 6.3%.

DAP Ex-factory Average Price (June) **3,930 RMB/t**

Phosphate Fertilizer Operating Rate **68%**

Glyphosate Technical Price **38,000-40,000 RMB/t**

Pesticide Export Volume Jan-May **870,000 t** EU share ↑

Source: Longzhong Info June 2026 Phosphate Fertilizer Weekly; Zhuochuang Info June 2026 Pesticide Technical Price Index; China Customs June 2026 export statistics

Romania Market Status

Romania's fertilizer wholesale prices rose 6-8% year-on-year in Q2 2026, with DAP end-user prices at approximately €780-820/t. Import sources are restructuring: Russia's share dropped to 12% (from 38% pre-war), Morocco rose to 22%, China to 16%. The pesticide market is dominated by Bayer, Syngenta, and BASF, while Chinese formulation companies' share gradually expanded to 9%.

Import Source	Fertilizer Share	Trend
Morocco	22%	↑ Main phosphate supplier
China	16%	↑ Fast growth
Russia	12%	↓ Sharply reduced
Egypt	10%	↑ Nitrogen supplement

Source: Romania Customs May 2026 import statistics; Argus Media European Fertilizer Market June 2026

Source: Romania Customs May 2026; Argus Media June 2026

Product Segment Structure

Among fertilizers, nitrogen holds the largest share (41%), followed by phosphates (28%), potash (19%), and compound fertilizers (12%). In pesticides, herbicides account for 52%, fungicides 28%, and insecticides 16%. Phosphate fertilizer imports saw the most significant increase; from January to May 2026, China's DAP exports to Romania grew 32% year-on-year.

Segment	Market Share	Import YoY Change
Nitrogen (Urea, etc.)	41%	+2%
Phosphates (DAP/MAP)	28%	+14% ↑
Potash	19%	-5%
Compound Fertilizers	12%	+6%

Source: Romanian Fertilizer Association (AFIR) Q1 2026 report; FAO Fertilizer Statistics June 2026 update

Source: AFIR Q1 2026; FAO June 2026

Core Finished Products Supply and Demand

Diammonium phosphate (DAP) is the key phosphate fertilizer consumed in Romania, with annual imports of about 420,000 tonnes. The supply gap widened to 380,000 tonnes in 2026 (domestic production only 40,000 tonnes). China's DAP exports to Romania reached about 110,000 tonnes in January-May, already exceeding the full-year 2025 level. Urea imports stand at around 550,000 tonnes annually, with Egypt and Algeria as main suppliers.

DAP Annual Imports **420,000 t** Gap widening

China DAP Exports to Romania (Jan-May) **110,000 t ↑32%**

DAP CFR Romania **610-640 USD/t**

Urea CFR Romania **380-420 USD/t**

Source: China Customs June 2026 export statistics; Argus Media DAP/Fertilizer International Prices June 28, 2026

Intermediate Products and Raw Material Value

China's phosphate rock (30% grade) mine-mouth price is 480-530 RMB/t, sulfuric acid ex-factory 260-310 RMB/t, and synthetic ammonia 2,850-3,100 RMB/t. Raw material costs account for approximately 78% of total DAP production cost. Romanian importers' target CIF price for Chinese DAP converts to about 580-600 USD/t FOB China, narrowing the spread with Moroccan sources to 15-25 USD/t.

Raw Material	China Price	MoM Change
Phosphate Rock (30% P_2O_5)	480-530 RMB/t	Flat
Sulfuric Acid (98%)	260-310 RMB/t	+3%
Synthetic Ammonia	2,850-3,100 RMB/t	-1.5%

Source: Longzhong Info June 2026 Phosphate Chemical Raw Materials Weekly; SunSirs June 2026 sulfuric acid/ammonia price monitoring

Source: Longzhong Info June 2026; SunSirs June 2026

Trade and Macro Indicators

In Q1 2026, Romania's GDP growth was 2.9%, with agriculture contributing 4.2% of value added. 1 EUR = 4.97 RON, depreciating 1.8% since the start of the year. The EU CAP 2023-2027 allocates €15.6 billion to Romania, of which 30% targets green agriculture transition. China-Romania bilateral trade reached €9.8 billion in 2025, with agrochemical products accounting for about 3.2%.

GDP Growth (Q1 2026) **2.9%**

Exchange Rate EUR/RON **4.97** Depreciation 1.8%

CAP Allocation (2023-2027) **€15.6 billion**

Bilateral Trade (2025) **€9.8 billion**

Source: Romania National Institute of Statistics June 2026; European Commission CAP data 2026; China Ministry of Commerce 2025 trade statistics

Risks and Opportunity Windows

Risk Continued RON depreciation increases import cost; EU pesticide active substance re-approval may phase out some chemicals; Black Sea logistics affected by geopolitics with freight rate fluctuations of 20-30%. Opportunity The Russian-Belarusian fertilizer supply gap creates an annual export increase of 12-15% for Chinese phosphate fertilizers and pesticides; Romania's domestic fertilizer capacity reconstruction plan (2026-2030) brings equipment and technology cooperation demand; biopesticide registration green channel launches in Q3 2026.

Exchange Rate Risk **RON annual depreciation ~3-5%**

Export Growth Opportunity **Annual +12-15%**

Black Sea Freight Volatility **±20-30%**

Localization Cooperation Window **2026-2030 Capacity Rebuild Plan**

Source: Romania Ministry of Agriculture 2026 Strategy Document; World Bank June 2026 Romania Economic Brief; EU Commission pesticide regulation update 2026

▯ Data Source Summary

1. Eurostat — June 2026 Trade Monitoring Data
2. Romania National Institute of Statistics (INS) — May-June 2026 Bulletins
3. China Customs — June 2026 Export Statistics
4. Longzhong Info — June 2026 Phosphate Fertilizer/Chemical Weekly
5. Argus Media — June 28, 2026 International Fertilizer Price Report
6. Romania Customs — May 2026 Import Classification Statistics

7. Zhuochuang Info — June 2026 Pesticide Technical Price Index
8. SunSirs — June 2026 Sulfuric Acid/Ammonia Price Monitoring
9. FAO Fertilizer Statistics Database — June 2026 Update
10. World Bank — June 2026 Romania Economic Brief