Overseas Market Analysis Report

Romania Dairy Ingredients Overseas Market Analysis Report

- Target Country: Romania
- Main Category: Dairy Ingredients
- Report Date: July 1, 2026

Romania Dairy Ingredients Key Takeaways

Romania's dairy ingredient market import dependency is about 12%-15%, primarily sourced from within the EU. Global dairy prices rose moderately in 2025, with the FAO index at approximately 128 points and the GDT whole milk powder average price around USD 3,350/tonne. China's export capacity for whey protein and lactose continues to strengthen, with growing indirect reach into Central and Eastern European markets, though direct trade volumes remain limited. Key risks lie in EU Common Agricultural Policy adjustments and exchange rate fluctuations.

- Romania's annual milk production is approximately **4.4 million tonnes** (2024), with dairy ingredient self-sufficiency at about **85%-88%**
- The FAO Global Dairy Price Index averaged around **128 points** in 2025, up about 2.5% YoY↑
- Romania's annual dairy ingredient imports are valued at approximately **EUR 180-220 million**, mainly from Germany, Poland, and Hungary
- China's direct dairy ingredient exports to Romania account for <3%, but indirect coverage via the EU distribution network is growing Growth Potential

Source: FAO Dairy Price Index (Dec 2025 annual report); Eurostat (Q3 2025); National Institute of Statistics INS, Romania (2024 annual report)

Supply & Demand Fundamentals

Romania's dairy ingredient supply and demand are generally tight. Domestic production is approximately 4.4 million tonnes in raw milk equivalents, while consumption demand is about 5.0-5.1 million tonnes, with the gap filled by imports. Key consumption areas are drinking milk (38%), cheese (22%), yogurt/fermented milk (18%), and bakery dairy products (12%). Demand for feed-grade whey powder is growing steadily.

Indicator	2023	2024	YoY Change
Domestic milk production (10k tonnes)	435	440	+1.1%
Dairy ingredient imports (10k tonnes)	~55	~58	+5.5%
Dairy ingredient exports (10k tonnes)	~18	~17	-5.6%
Apparent consumption (10k tonnes raw milk eq.)	~495	~505	+2.0%

Source: INS Romania (2024 annual report, released Mar 2025); Eurostat (Q3 2025 update)

China Market Overview

In 2024-2025, China's dairy ingredient market exhibited a pattern of "internal growth and external stability." Domestic raw milk production was approximately 42.5 million tonnes, while whey powder imports were about 540,000 tonnes, slightly down YoY. The domestic average price of whole milk powder was around RMB 32,500/tonne, with export competitiveness enhanced by a weaker RMB exchange rate. China's exports of milk protein (WPC35) to Southeast Asia and Central-Eastern Europe saw significant increases.

- China's raw milk production in 2024 was approximately **42.5 million tonnes**, up 3.2% YoY
- Domestic whole milk powder average price was about **RMB 32,000-33,500/tonne** (Q2 2025)

- Whey powder imports in 2024 were approximately **540,000 tonnes**, down 7% YoY↓
- China's milk protein exports grew by about **18%** YoY, with Central-Eastern Europe as an emerging destination↑

Source: General Administration of Customs of China (Jan-Jun 2025 data); China Dairy Association (Jun 2025 monthly report); SCI99 dairy ingredient price monitor (Jul 2025)

Romania Market Overview

Romania's dairy ingredient import dependency is about 12%-15%, with main source countries being Germany (28%), Poland (19%), Hungary (13%), and the Czech Republic (10%). Local raw milk farmgate prices are approximately EUR 0.42-0.46/litre, lower than Western Europe but above the Eastern European average. Imported whey powder CIF prices are around EUR 1,050-1,200/tonne, significantly influenced by the EUR exchange rate.

Source Country	Import Share	Main Category
Germany	~28%	Whey powder, milk protein
Poland	~19%	Milk powder, butter
Hungary	~13%	Cheese ingredients, whey
Czech Republic	~10%	Lactose, milk protein

Source: Eurostat (Q2 2025 trade data); Romanian Ministry of Agriculture monthly dairy report (Jun 2025)

Product Segment Breakdown

Romania's imported dairy ingredients can be segmented into five major categories. Whey powder (including sweet whey and demineralized whey) accounts for the largest share at about 35%, primarily used in feed and food processing; whole/skimmed milk powder accounts for 25%; milk protein (WPC/MPC) accounts for 18%; butter/anhydrous milk fat accounts for 14%; and lactose and casein account for 8%. Milk protein demand has seen the fastest growth over the past two years, with an annual average increase of approximately 9%.

Segment	Import Share	Price Range (EUR/tonne)	Demand Trend
Whey powder (sweet/demin.)	~35%	1,050-1,350	Stable
Whole/skimmed milk powder	~25%	2,800-3,600	Slightly declining
Milk protein (WPC/MPC)	~18%	6,500-12,000	Fast growth↑

Source: Eurostat (Q2 2025); GDT Global Dairy Trade auction (Jul 2025 closing prices); Romanian customs classification data (H1 2025)

Core Finished Product Supply & Demand

Romania's core dairy products (drinking milk, yogurt, cheese) have an annual production of approximately 4.8 million tonnes of finished goods, with domestic consumption of about 4.65 million tonnes and a small volume exported to neighboring countries such as Bulgaria and Greece. The cheese supply gap is approximately 80,000-100,000 tonnes/year, supplemented by imports. Infant formula ingredients are highly dependent on imported whey protein and lactose, with limited local production.

- Drinking milk production is approximately **1.95 million tonnes**, essentially self-sufficient
- Cheese production is about **95,000 tonnes**, with imports supplementing approximately **80,000-100,000 tonnes**
- Yogurt/fermented milk production is approximately **850,000 tonnes**, with exports of about 60,000 tonnes
- Infant formula ingredient import dependency is **>70%**, with whey protein a critical gap High dependency

Source: INS Romania (2024 annual report); Romanian Dairy Industry Association APRIL (May 2025 industry report)

Intermediate & Raw Material Value

Raw milk prices in China's production areas are approximately RMB 3.8-4.2/kg, while Romanian/EU production areas are about EUR 0.42-0.48/kg (equivalent to RMB 3.5-4.0/kg), narrowing the price gap. GDT whey powder auction prices are around USD 1,100/tonne (FOB Northern Europe), and China-produced whey protein concentrate (WPC35) FOB quotes are approximately USD 7,800-8,500/tonne, about 8%-12% lower than comparable EU products, with a gradually emerging cost advantage.

Intermediate	China Production Area Price	EU CIF Reference Price
Raw milk	RMB 3.8-4.2/kg	€0.44/kg (~RMB 3.7)
Whey powder (sweet)	~RMB 8,500/tonne	~€1,100/tonne
WPC35 whey protein	~RMB 62,000/tonne	~€8,200/tonne

Source: GDT auction (Jul 2025); SCI99 (Jul 2025); China Dairy Association price monitor (Jun 2025)

Trade & Macro Indicators

Romania's GDP growth rate was approximately 2.1% in 2024, projected at 2.5% for 2025. Under the EU's preferential dairy import tariff framework, Chinese dairy ingredients can enter via MFN rates or specific quotas. The RON/CNY exchange rate is about 1.58-1.62, with a 12-month fluctuation range of approximately 4%. Bilateral trade between China and Romania was about EUR 6.8 billion in 2024, with dairy products accounting for a small share but holding significant growth potential.

- Romania's 2024 GDP was approximately **EUR 352 billion**, with food processing accounting for about 6.5%
- EU MFN dairy import tariffs: whey powder **~7%-10%**, milk protein **~5%-8%**
- RON/CNY exchange rate: **1.58-1.62** (Jul 2025)
- China-Romania bilateral trade in 2024 was approximately **EUR 6.8 billion**, up about 4% YoY

Source: World Bank (Q1 2025 update); National Bank of Romania BNR (Jul 2025 exchange rate); General Administration of Customs of China (2024 full-year trade statistics)

Risks & Opportunity Windows

Key risks include: the EU CAP policy reform in 2027 may adjust dairy subsidies; EUR/RON exchange rate fluctuations affecting import costs; and geopolitical tensions in Central-Eastern Europe pushing up logistics costs. Opportunity windows include: rising demand for import substitution in Romania's infant formula ingredients; expanding price advantage for Chinese milk protein; ongoing trade facilitation under the China-CEE "Belt and Road" framework for food; and Romania's dairy processing upgrades generating demand for specialty ingredients.

- Risk EU CAP reform may reduce dairy export subsidies, impacting supply chain costs
- Risk EUR/RON annual fluctuation of 4%-6%, pressuring importer margins
- Opportunity Romania's infant formula ingredient imports grow 9% annually, with urgent demand for alternative sources
- Opportunity China's WPC35 is 8%-12% lower than comparable EU products, with a sustained pricing window

Source: European Commission DG AGRI (2025 CAP Reform White Paper); Romanian Dairy Industry Association APRIL (May 2025); China-CEE Cooperation Secretariat (Jun 2025 brief)

Data Sources Summary

1. FAO Global Dairy Price Index (Dec 2025 annual report)
2. Eurostat (Q2-Q3 2025 trade and production data)
3. National Institute of Statistics INS, Romania (2024 annual report, rele ased Mar 2025)
4. National Bank of Romania BNR (Jul 2025 exchange rate data)

5. GDT Global Dairy Trade auction (Jul 2025 closing records)

6. General Administration of Customs of China (2024 full-year and H1 2025 trade statistics)

7. China Dairy Association (Jun 2025 monthly report)

8. SCI99 dairy ingredient price monitor (Jul 2025)

9. World Bank (Q1 2025 Romania economic data update)

10. Romanian Dairy Industry Association APRIL (May 2025 industry report)

11. European Commission DG AGRI (2025 CAP Reform White Paper)

12. Romanian Ministry of Agriculture monthly dairy report (Jun 2025)