OVERSEAS MARKET ANALYSIS REPORT

Romania Livestock Products Overseas Market Analysis Report

- Target Country: Romania
- Main Category: Livestock Products
- Report Date: July 1, 2026

Romania Livestock Key Conclusions

Romania's livestock market shows high pork import dependency and near self-sufficiency in poultry. In H1 2026, pork prices remained elevated due to rising feed costs and persistent African Swine Fever (ASF). Dairy export potential is growing. Structural complementarity exists between China and Romania in specialty cheeses and live animal trade, though attention must be paid to EU trade policies and animal disease risks.

- Annual pork consumption gap approx. **280–320,000 tonnes** , import dependency ~28%
- Annual poultry output approx. **520,000 tonnes** , basic self-sufficiency with minor exports
- Dairy exports to China grew ~ **14%** YoY in 2025, growth continuing in 2026

Sources: Eurostat 2025 annual data, Romanian National Institute of Statistics (INS) 2025 annual report, China General Administration of Customs 2025 trade statistics | Updated June 2026

Supply & Demand Fundamentals

Livestock production accounts for ~32% of Romania's agricultural output. Pork has the largest supply gap, poultry is broadly balanced, and beef shows a slight deficit. Overall, rising feed costs are squeezing farming margins.

Category	Annual Output (10k tonnes)	Annual Consumption (10k tonnes)	Net Imports (10k tonnes)
Pork	78–82	108–112	+28~32
Poultry	50–53	47–50	-2~4 (net export)
Beef	18–21	20–23	+2~3
Milk	1120–1160	1050–1100	-50~80 (net export)

Source: Eurostat livestock statistics 2025, Romanian INS 2025 annual report | figures carried forward as of July 2026

Sources: Eurostat, Romanian National Institute of Statistics (INS) | latest data as of December 2025

China Market Situation

China's livestock product market was generally stable in H1 2026. After destocking, pig herd recovery has gradually progressed, with pork prices trending mildly upward. Feed ingredient prices (soybean meal, corn) fluctuated with international markets. Imports of Romanian dairy products into China continued to expand in variety.

- China's dairy import value from Romania in 2025 approx. **€18.5 million** , +14% YoY
- Average live hog price in China in June 2026 approx. **CNY 15.8/kg** , +6.4% vs. start of year ▲
- China's spot soybean meal price June 2026 approx. **CNY 3,620/tonne** , high import dependency

Sources: China General Administration of Customs 2025 annual trade report, Ministry of Agriculture and Rural Affairs livestock price weekly June 2026, Business Community (Shengyishe) soybean meal quotes June 2026 | compiled July 1, 2026

Romania Market Situation

Romania's livestock market operates within the framework of the EU Common Agricultural Policy. Pork prices rose ~9% YoY in H1 2026, driven by both feed costs and ASF. Dairy prices remained relatively stable, while export competitiveness improved.

- Romanian pork wholesale price June 2026 approx. **€2.35/kg** (carcass), +9.3% YoY ▲
- Main pork import sources: **Germany (31%), Spain (24%), Poland (14%)**
- Poultry wholesale price approx. **€1.78/kg** , basically flat vs. start of year

Sources: Romanian Ministry of Agriculture monthly market report June 2026, Eurostat trade database | June 2026 data

Product Segment Structure

Romania's livestock products can be divided into five main categories: pork products, poultry products, dairy products, live animals, and beef. Imports of processed pork (ham, sausage) have notably increased, while cheese exports continue to expand.

Segment	Annual Imports (10k tonnes)	Main Sources	Trend
Fresh/Frozen Pork	22–26	Germany, Spain	▲ Volume & price up
Processed Pork	5–7	Italy, Germany	▲ Import growth
Cheese & Curd	Export 6–8	Italy, Bulgaria	▲ Export expansion
Live Cattle	Export 4–6 (10k head)	Middle East, North Africa	Stable

Source: Eurostat 2025 trade breakdown, Romanian INS | carried forward July 2026

Sources: Eurostat trade database, Romanian INS sector reports | 2025 annual data

Core End-Product Supply & Demand

Pork is Romania's largest meat category; the supply gap continues to widen. Domestic production in 2026 is expected to remain around 800,000 tonnes, while consumption is about 1.1 million tonnes, with imports filling the gap. Dairy butter and cheese production are growing, with a clear export orientation.

- Pork self-sufficiency rate approx. **72%** , the lowest in five years Gap widening
- Annual butter output approx. **42,000 tonnes** , export share ~35%
- Annual cheese output approx. **98,000 tonnes** , exports +11% YoY

Sources: Eurostat livestock statistics 2025, Romanian Ministry of Agriculture Q1 2026 report | updated June 2026

Intermediate Goods & Raw Material Value

Feed ingredients account for 60–70% of livestock production costs. Corn and soybean meal prices stayed relatively high in H1 2026. Veterinary medicines and feed additives saw modest price increases due to global supply chain factors.

Intermediate / Raw Material	China Ex-factory Price	Romania CIF Reference
Corn	~CNY 2,380/t	~€235–250/t (CIF)
Soybean meal	~CNY 3,620/t	~€420–445/t (CIF)
Feed additives	~CNY 8,500/t	~€1,050–1,150/t

Source: Business Community (Shengyishe) June 2026 quotes, EU Feed Industry Association (FEFAC) Q2 2026 report | compiled July 2026

Sources: Business Community, EU Feed Industry Association (FEFAC) | June 2026 data

Trade & Macro Indicators

Romania's 2025 GDP growth was ~2.1%. The share of livestock in agricultural GDP remains stable. China-Romania agricultural trade continues to grow; Romanian dairy exports to China benefit from preferential EU tariff arrangements.

- Romania's 2025 GDP approx. **€358 billion** , +2.1% YoY (World Bank)
- Romanian Leu to CNY exchange rate approx. **1 RON ≈ 1.58 CNY** (June 2026)
- China-Romania bilateral agricultural trade 2025 approx. **€320 million** , +11% YoY
- Livestock share in Romanian agricultural GDP approx. **32%**

Sources: World Bank 2025 country data, China General Administration of Customs, Romanian INS | updated June 2026

Risks & Opportunity Windows

African Swine Fever (ASF) remains the biggest risk variable for Romania's pork sector. Opportunities include rising Chinese demand for European specialty dairy products, Romania's cheese export potential, and complementarity in feed raw material trade.

- ⚠ Risk : Recurring ASF outbreaks could further increase pork imports and push up domestic prices
- ⚠ Risk : Stricter livestock emission requirements under the EU Green Deal raise compliance costs
- **√ Opportunity** : Growing Chinese demand for European-origin cheese; Romanian specialty cheeses have significant export space
- **√ Opportunity** : Price arbitrage windows exist in bilateral corn trade

Sources: World Organisation for Animal Health (WOAH) 2026 ASF report, European Commission agricultural policy documents | updated June 2026

Data Sources Summary

1. Eurostat – Livestock statistics and trade database, 2025
2. Romanian National Institute of Statistics (INS) – Agricultural statistics annual report 2025
3. Romanian Ministry of Agriculture – Monthly market report, June 2026
4. China General Administration of Customs – Annual trade statistics 2025
5. China Ministry of Agriculture and Rural Affairs – Livestock product price weekly, June 2026
6. Business Community (Shengyishe) – Commodity quotes, June 2026
7. World Bank – Romania country economic data, 2025
8. EU Feed Industry Association (FEFAC) – Q2 2026 report
9. World Organisation for Animal Health (WOAH) – ASF outbreak report, 2026
10. European Commission – Common Agricultural Policy related documents