□□ Romania Fertilizer Overseas Market Analysis Report

Target Country: Romania Main Category: Fertilizer

□ Updated July 1, 2026

Romania Fertilizer Key Conclusions

Romania's fertilizer market is highly import-dependent, with domestic capacity concentrated in nitrogen fertilizers and a small amount of compound fertilizers. Imports grew approximately 8% year-on-year in Q2 2026, with urea and NPK dominating. Prices are influenced by Black Sea logistics and EU carbon border adjustments, remaining highly volatile at elevated levels.

Import dependency **72%**

Urea share **34%**

⚠ **Rising Black Sea shipping risk premium**

Source: Romania National Institute of Statistics (INS), Argus Media Fertilizer Weekly Report July 2026

Supply-Demand Fundamentals

Romania's annual fertilizer consumption is approximately 2.1 million tonnes (nutrient basis), with domestic production at about 580,000 tonnes; the gap is filled by imports. H1 2026 imports reached 950,000 tonnes, mainly for grain cultivation of corn and wheat.

Indicator	2025	2026 H1
Domestic output (10k t)	56	29
Imports (10k t)	182	95
Exports (10k t)	8.5	4.3
Apparent consumption (10k t)	229.5	119.7

Source: Romania Ministry of Agriculture, Eurostat June 2026 data

China Market Status

Domestic fertilizer operating rates remain high, with daily urea output around 178,000 tonnes. Influenced by export inspection policies, exports to Romania are mainly DAP and compound fertilizers. FOB China prices recovered slightly in June 2026.

Urea FOB China **$325/t**

DAP FOB **$538/t**

Source: Longzhong Info Fertilizer Weekly July 2026, China General Administration of Customs monthly report

Romania Market Status

Romania urea CFR average price in June was $412/t, up 3.2% year-on-year. NPK 15-15-15 end-user retail price reached $585/t. Imports mainly originate from Russia, Egypt, China, and North Africa.

Product	CFR Price ($/t)	MoM
Urea	412	+1.8%
DAP	567	+0.5%
NPK 15-15-15	585*	-0.3%

Source: Argus Romania Fertilizer July 2026, *end-user retail reference price

Product Segmentation Structure

Among imported fertilizers, urea accounts for 34%, NPK compound fertilizers 28%, DAP 19%, with the remainder including potassium sulphate and calcium ammonium nitrate. Urea demand is the most rigid due to its widespread use as base fertilizer.

Category	Import share	Price trend
Urea	34%	Firm at highs
NPK compound	28%	Narrow fluctuations
DAP	19%	Moderate rise

Source: Romania INS trade data May 2026, Mysteel International Fertilizer section

Core Product Supply & Demand

Urea, as the core nitrogen fertilizer, has limited domestic production in Romania. Port inventory in June 2026 was approximately 125,000 tonnes, at a moderately low level. After the peak spring planting demand season, the supply-demand gap still relies on imports to fill.

Monthly urea output **32,000 t**

Monthly urea imports **76,000 t**

Source: Romanian Chemical Industry Association (APC) June 2026 report, partly using May inventory data

Intermediates & Raw Material Value

International phosphate rock Morocco FOB price stable at $115-125/t, sulphur China CFR price around $98/t. Romania's import indicative prices are affected by freight costs; raw materials account for about 42% of urea landed cost.

Raw material	China producing area price	Romania indicative price
Phosphate rock (30%)	¥680/t	$118/t(CFR)
Sulphur	¥970/t	$96/t(CFR)
Ammonia	¥3,100/t	$445/t(CFR)

Source: Longzhong Info, Shengyishe early July 2026 prices, Romania indicative prices assessed by Argus

Trade & Macro Indicators

Romania's Q1 2026 GDP growth was 1.9%, with agriculture accounting for about 4.2%. Fertilizer imports reached €630 million in H1. The RON/EUR exchange rate is relatively stable, and EU agricultural subsidies continue to support fertilizer demand.

Fertilizer import value **€630M**

RON/EUR **4.97**

Source: National Bank of Romania, European Commission Agricultural Outlook July 2026

Risks & Opportunity Windows

The Black Sea geopolitical situation continues to bring shipping risk premiums; the EU Carbon Border Adjustment Mechanism could push up import costs. Opportunities lie in improving competitiveness of China's fertilizer exports and the gap in Romania's domestic compound fertilizer substitution.

⚡ Risk: Potential Black Sea shipping disruption

√ Opportunity: China-Romania bilateral fertilizer trade agreement in progress

Source: World Bank Commodity Outlook, Romania Ministry of Finance Bulletin June-July 2026

▯ Main Data Sources

- Argus Media Fertilizer Market Weekly Report (July 2026)
- Longzhong Info Fertilizer Industry Chain Data (July 2026)
- Romania National Institute of Statistics (INS) Trade Monthly
- China General Administration of Customs Export Statistics (June 2026)
- Mysteel International Fertilizer Section
- Eurostat
- Shengyishe Raw Material Price Monitoring
- Romanian Chemical Industry Association (APC)
- World Bank Commodity Markets Outlook

⚠ Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk; decisions should be made with caution.