Romania Pesticide Overseas Market Analysis Report

 Target Country: **Romania** Primary Category: **Pesticides** Updated: July 1, 2026

Romania Pesticide Core Conclusions

Romania is a major EU agricultural country with rigid pesticide demand but limited domestic production capacity, with import dependence exceeding 75%. China remains the top source of supply, with imports of glyphosate, paraquat alternatives, and fungicides continuing to grow. The EU Farm to Fork strategy raises green barriers, expanding the window for biological pesticides.

Import Dependence	**~76%** ▲
China's Supply Share	**~32%**
Key Risks	**EU active substance bans, RON exchange rate volatility**

Source: National Institute of Statistics (INS) Romania, Eurostat June 2026 Trade Bulletin

Supply-Demand Fundamentals

Romania's annual pesticide consumption is approximately 38,000–42,000 tonnes (formulated products), with domestic production meeting only 25% of demand. Corn, wheat, and sunflower are the primary treated crops. Imports reached 31,000 tonnes in 2025 and continued to grow in H1 2026.

Indicator	2024	2025	2026H1 (Est.)
Domestic Consumption (10k tonnes)	3.9	4.1	2.2
Domestic Production (10k tonnes)	0.95	0.98	0.52
Import Volume (10k tonnes)	3.0	3.1	1.7

Source: Romanian Fertilizer and Pesticide Association (APPR), INS Trade Data June 2026

China Market Status

In July 2026, China's pesticide technical price index fluctuated within a narrow range, with glyphosate prices supported at elevated levels by yellow phosphorus costs. Domestic operating rate is approximately 68%, export orders are ample, and exports to Europe grew 11% year-on-year.

Glyphosate 95% TC Price	**38,500 CNY/tonne** ▲2.1%
Pesticide Industry Operating Rate	**68%**
Exports to Romania (2026H1)	**~5,200 tonnes**

Source: OilChem, 100ppi.com Pesticide Technical Price Briefing July 1, 2026

Romania Market Status

Local distribution is dominated by multinational corporations and large domestic dealers, with end-use prices significantly influenced by euro-denominated pricing. In July 2026, glyphosate formulation retail prices are approximately EUR 9.8–10.5 per litre, and Chinese CIF price competitiveness is clear.

Glyphosate Formulation Retail Price	**EUR 10.2/L (avg.)**
Top Import Sources	**China, Germany, France, Poland**
Consumption Structure	**Herbicides 48% / Fungicides 31% / Insecticides 21%**

Source: Agrointeligența, FMC Romania June 2026 Market Newsletter (some prior values carried forward)

Segmented Product Structure

Herbicides still account for the largest share, but fungicide demand is growing fastest due to disease pressures in rapeseed and wheat. Biological pesticide imports, though from a small base, are growing at an annual rate exceeding 18%.

Product Segment	Import Share (2025)	Demand Trend
Herbicides (Glyphosate etc.)	46%	Flat/slight growth
Fungicides (Triazoles etc.)	30%	↑ Significant growth
Insecticides (Neonicotinoid alternatives)	20%	Structural shift
Biological Pesticides	4%	↑ High growth

Source: Eurostat, Romanian Ministry of Agriculture Plant Protection Division, Annual Statistics May 2026

Core Finished Product Supply-Demand

Glyphosate formulation is the single largest imported product, with imports of approximately 9,000 tonnes in 2025. The supply-demand gap continues to be filled by China, with CIF prices edging up in Q2 2026.

Glyphosate Formulation Imports (2025)	**9,200 tonnes**
CIF Price (2026.07)	**USD 4.15–4.35/L**
Inventory Level	**Moderately low (distributor restocking)**

Source: Argus Agrochemicals, Romanian Customs Authority, Trade Details June 2026

Intermediates and Raw Material Value

The yellow phosphorus–glycine–glyphosate chain shows significant cost transmission. High yellow phosphorus prices in China's producing regions are supporting technical material prices, with Romanian importers closely watching dimethyl phosphite and other intermediate price fluctuations.

Yellow Phosphorus (Yunnan, China)	**26,800 CNY/tonne**
Glycine (East China)	**11,800 CNY/tonne**
Glyphosate TC FOB Shanghai	**USD 5,350/tonne**

Source: OilChem, SMM Phosphorus Chemicals and Pesticide Intermediates Daily, July 1, 2026

Trade and Macro Indicators

Romania's 2026 GDP growth is forecast at 2.8%, with agriculture accounting for approximately 4.2%. Sino-Romanian pesticide trade value is steadily rising, while the RON/CNY exchange rate has depreciated 2.3% since the start of the year.

Total Pesticide Imports (2025)	**EUR 186 million**
Imports from China	**EUR 61 million**

RON/CNY Exchange Rate	**1.582 (2026.07.01)**
EU Common Agricultural Policy Subsidies	**Cover ~65% of farmers**

Source: World Bank, National Bank of Romania (BNR), China General Administration of Customs, June 2026 Statistics

Risks and Opportunity Windows

Geopolitical tensions and tightening EU regulations are the principal risks, but there are clear opportunities in Sino-Romanian pesticide formulation localized repackaging and biological pesticide technology cooperation.

⚠ **Risks:** EU may further restrict glyphosate use; RON exchange rate volatility compresses import margins.

▯ **Opportunities:** Streamlined biological pesticide registrations; bonded warehouse repackaging in Romania can serve the Southeast European market.

Source: European Commission SANTE, Romanian Investment Agency, Policy Update June 2026

Key Data Sources

- OilChem – Pesticide TC/intermediate prices (2026.07)
- 100ppi.com – Glyphosate and other product daily commentary (2026.07)
- SMM – Yellow phosphorus price data (2026.07)
- Argus Agrochemicals – Global pesticide market (2026.06)
- National Institute of Statistics (INS) Romania – Trade data (2026.06)
- Eurostat – EU pesticide import statistics (2026.05)
- China General Administration of Customs – Export data (2026.06)
- National Bank of Romania (BNR) – Exchange rates (2026.07)
- Agrointeligența – Romanian agrochemical market (2026.06)