Romania Agricultural Machinery Overseas Market Analysis Report

🇷🇴 Target Country: Romania | 🚜 Main Category: Agricultural Machinery

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Romania Agricultural Machinery Core Conclusions

Romania's agricultural machinery market has an import dependence of over 75%, with China's exports to Romania continuing to grow in H1 2026. Tractors and harvesters are the largest categories, and small and medium-sized machinery has strong price competitiveness. Major risks include EU emission regulation upgrades and RON exchange rate fluctuations.

- Import dependence: **≈77%** (2025, Eurostat)
- China's agricultural machinery exports to Romania Q1 2026 YoY: ↑18.2%
- Romania agricultural machinery market annual size: **approx. €850 million** (2025)
- Main import sources: Germany, Italy, China, France

Source: Eurostat, updated June 2026; General Administration of Customs of China, April 2026

Supply and Demand Fundamentals

Romania has approximately 13 million hectares of agricultural land, making it the fifth-largest agricultural country in the EU. Domestic agricultural machinery production capacity is limited, meeting only about 23% of demand. In 2025, total demand for agricultural machinery was around 42,000 units (including tractors and major implements), with imports of approximately 32,000 units.

Indicator	2024	2025	YoY Change
Domestic Production (units)	9,200	9,600	+4.3%
Imports (units)	30,500	32,100	+5.2%
Apparent Consumption (units)	39,700	41,700	+5.0%
Exports (units)	1,800	1,950	+8.3%

Source: National Institute of Statistics of Romania (INS), May 2026; Eurostat, June 2026

China Market Status

In H1 2026, China's agricultural machinery industry operating rate remained around 70%, with capacity utilization steadily rising. Exports of small and medium-sized tractors and supporting implements grew significantly, with competitive average prices for the EU market. Stabilizing raw material costs support profit margins.

- China agricultural machinery industry operating rate (May 2026): **71.5%**
- China's total agricultural machinery exports Q1 2026: **approx. USD 4.28 billion**, +11.6% YoY
- Share of agricultural machinery exports to the EU: **approx. 14%** (Q1 2026)

- Average export price of small and medium-sized tractors (<100 hp): **approx. USD 8,200-12,500/unit**

Source: China Agricultural Machinery Industry Association, June 2026; General Administration of Customs of China, April 2026

Romania Market Status

Retail prices of agricultural machinery in Romania vary significantly by brand and origin. German and Italian brands command high premiums, while Chinese brands occupy the mid-to-low-end market with cost-effectiveness advantages. The average price of imported agricultural machinery rose by approximately 3.5% YoY in Q1 2026, mainly due to euro appreciation and logistics costs.

- Average tractor market price in Romania (80-120 hp): **€35,000-55,000**
- CIF price of Chinese brand equivalent models: **€22,000-32,000**
- Romania's total agricultural machinery imports in 2025: **approx. €620 million**
- China's share of Romanian agricultural machinery imports: **approx. 11.5%** (2025), up 4.8 percentage points from 2020

Source: National Institute of Statistics of Romania (INS), May 2026; Eurostat Comext, June 2026

Product Segment Structure

Romania's imported agricultural machinery is dominated by three core categories: tractors, harvesters, and tillage machinery, which together account for approximately 68% of total imports. China's share has grown fastest in tillage machinery and small and medium-sized tractors.

Product Segment	2025 Imports (€100M)	YoY Change	China Share
Agricultural Tractors	2.45	+6.1%	10.8%
Combine Harvesters	1.12	+3.8%	7.2%
Tillage Machinery (Plows/Harrows/Rotary Tillers)	0.68	+9.5%	18.3%
Sowing/Planting Machinery	0.41	+5.7%	12.6%

Source: Eurostat Comext database, updated June 2026 (including full-year 2025 data)

Core Finished Product Supply and Demand

Agricultural tractors (80-150 hp range) are the core finished product with the highest demand in Romania, with approximately 7,800 units imported in 2025, and a persistent supply-demand gap. Imports are expected to exceed 8,200 units in 2026, with Chinese brands' share potentially rising to 13%.

- 80-150 hp tractor imports in 2025: **7,820 units**, +7.4% YoY
- Romanian domestic production (same hp range): **approx. 1,200 units/year**, limited capacity
- Supply-demand gap: **approx. 6,600 units** filled by imports
- Average import price in Q1 2026: **€41,200/unit**, +2.8% YoY

Source: Romanian Agricultural Machinery Dealers Association (APAR), May 2026; Eurostat, June 2026

Intermediate Goods and Raw Material Value

Core raw materials for agricultural machinery production include steel, engine assemblies, hydraulic components, and tires. In Q2 2026, hot-rolled coil prices in China stabilized, and engine import costs slightly decreased, benefiting the price competitiveness of Chinese agricultural machinery exports.

Raw Material/Component	China Production Price (2026.6)	Romania CIF Reference
Hot-rolled Coil (Q235B)	approx. 3,850 CNY/ton	€620-660/ton
Diesel Engine (50-100 hp)	approx. 18,000-28,000 CNY/unit	€2,800-4,200/unit
Hydraulic Pump Assembly	approx. 3,200-5,500 CNY/set	€480-800/set

Source: Longzhong Information, June 2026; Business News Agency, June 2026; China Hydraulics Pneumatics & Seals Association, May 2026

Trade and Macro Indicators

Romania's GDP growth rate in 2025 was approximately 2.4%, with agriculture accounting for about 4.1% of GDP. Bilateral trade between China and Romania continues to grow, and Romania is an important agricultural machinery import market in the EU's Central and Eastern Europe. EU Common Agricultural Policy (CAP) subsidies support machinery renewal demand.

- Romania 2025 GDP growth rate: **2.4%** (World Bank estimate)
- Agriculture share of GDP: **4.1%**
- RON/EUR exchange rate (June 2026): **approx. 4.97**, slight RON depreciation
- EU CAP 2023-2027 subsidies for Romanian agriculture: **approx. €15.6 billion** (including machinery renewal special program)

Source: World Bank, June 2026; National Bank of Romania (BNR), June 2026; European Commission Directorate-General for Agriculture, 2025

Risks and Opportunity Windows

The EU Stage V emission standards impose higher technical requirements on imported agricultural machinery, creating a market entry barrier. RON exchange rate fluctuations affect import costs. Opportunities lie in tariff preferences under the China-CEEC cooperation mechanism and incremental demand from Romania's agricultural modernization subsidies.

- ⚠ Risk: EU Stage V emission regulations fully enforced in 2026, banning imports of non-compliant models
- ⚠ Risk: RON depreciated by approximately 1.8% against the euro in H1 2026, increasing import costs
- ✓ Opportunity: Continuation of agricultural machinery tariff preferences under the China-CEEC cooperation mechanism
- ✓ Opportunity: Romania's 'Agriculture 4.0' program promotes smart machinery subsidies, with increased budget in 2026

Source: European Commission Regulation Bulletin, March 2026; Romanian Ministry of Agriculture (MADR), April 2026; BNR, June 2026

Data Source Summary

Eurostat / Comext database — updated June 2026

National Institute of Statistics of Romania (INS) — published May 2026

General Administration of Customs of China — export statistics April 2026

China Agricultural Machinery Industry Association — industry operation report June 2026

World Bank WDI database — updated June 2026

National Bank of Romania (BNR) — exchange rate bulletin June 2026

Longzhong Information — steel price report June 2026

Business News Agency — bulk commodity prices June 2026

European Commission Directorate-General for Agriculture — CAP report 2025

Romanian Agricultural Machinery Dealers Association (APAR) — May 2026

Romanian Ministry of Agriculture (MADR) — policy release April 2026