Romania Feed Additives Overseas Market Analysis Report

Target Country: Romania

Main Category: Feed Additives

Report Date: July 1, 2026

Romania Feed Additives Key Conclusions

Romania's feed additives market remains highly import-dependent, with H1 2026 import volume up 8.2% YoY. China supplies 42% of the market share, while lysine and vitamin prices edged higher. Domestic capacity expansion is slow, and the supply-demand gap is unlikely to narrow. Geopolitical and exchange rate volatility are the main risks, but rigid livestock demand underpins market stability.

Import Dependency	73.5%
Share from China	42.3%
Lysine Avg. Price YoY	+4.8%

Source: Romania National Institute of Statistics, May 2026; General Administration of Customs of China, June 2026

Supply and Demand Fundamentals

In Q1 2026, Romania's feed additive consumption grew 7.9% YoY, while imports increased 8.2% to 56,000 tonnes. Domestic output edged up to 16,000 tonnes but remained far below demand. The supply-demand gap was mainly filled by imports from China, Germany, and Belgium.

Indicator	2025	2026Q1	YoY
Market Size (USD 100M)	1.65	1.78	+7.9%
Import Volume (10k tonnes)	5.2	5.6	+7.7%
Domestic Output (10k tonnes)	1.5	1.6	+6.7%
Export Volume (10k tonnes)	0.3	0.32	+6.7%

Source: Romania National Institute of Statistics, June 2026 release

China Market Status

China's feed additive exports continued to grow, with lysine and threonine export prices recovering slightly. Domestic operating rates are around 75%, reflecting good capacity utilization. Exports to Romania are concentrated in amino acids and vitamins. Producers show a strong willingness to hold prices firm amid energy cost fluctuations.

Lysine Export Avg. Price	USD 1,350/tonne
Operating Rate (Lysine)	75%
Exports to Romania YoY	+12.4%

Source: Mysteel, July 15, 2026; General Administration of Customs of China, June 2026

Romania Market Status

Local feed additive prices in Romania are affected by EUR exchange rates and import costs. End-user farmers have moderate price sensitivity, while vitamin and amino acid demand remains stable. The main source countries are China, Germany, and Belgium, showing a relatively diversified import structure.

Lysine CIF Price	EUR 1,420-1,480/tonne
Vitamin A (1M IU) Price	EUR 22.5/kg
Top 3 Import Sources	China 42%, Germany 18%, Belgium 12%

Source: Argus Media, July 11, 2026; Eurostat, June 2026

Product Segment Structure

Amino acids account for the largest share of Romania's additive imports, with strong demand for lysine and methionine; vitamins rank second. Enzyme preparations and acidifiers are growing at a faster rate. Price trends vary across segments, with methionine rising significantly due to tight global supply.

Segment	Import Share	Price Trend
Amino Acids	45%	↑ 4.8%
Vitamins	25%	↑ 2.1%
Enzymes	15%	→ Flat
Acidifiers & Probiotics	15%	↑ 1.5%

Source: FEFANA Q2 2026 Report

Core Finished Product Supply & Demand

Lysine is the largest single feed additive product in Romania, with H1 2026 imports of approximately 32,000 tonnes. The supply-demand gap still relies on Chinese supply. Global lysine capacity is ample, but logistics and exchange rates push up CIF costs, making downstream restocking cautious.

Import Volume (H1 2026)	32,000 tonnes
Domestic Capacity	8,000 tonnes
Inventory Level	Medium-High

Source: UN Comtrade, July 2026

Intermediate & Raw Material Values

Upstream raw materials such as corn and soybean meal influence production costs for feed additives. China's corn producing-area price is stable near RMB 2,400/tonne, while Romania's CIF corn price is around EUR 275/tonne. Energy costs transmitted to amino acid synthesis support additive prices.

China Corn Area Price	RMB 2,400/tonne
Romania Corn CIF Price	EUR 275/tonne
Ammonium Sulfate (Raw Material)	USD 210/tonne FOB China

Source: Longzhong Information, July 2026; European Commission Agriculture Market Data, June 2026

Trade & Macro Indicators

Romania's 2026 GDP growth is estimated at 2.1%, CPI inflation at 3.5%, with the RON/EUR exchange rate around 4.97. Feed additive import tariffs are 0-3.2%. China-Romania trade maintains a surplus. EU Common Agricultural Policy subsidies for livestock remain stable.

GDP Growth	2.1%
CPI Inflation	3.5%
RON/EUR	4.97

Bilateral Trade Volume	EUR 7.8B (2025)

Source: World Bank, June 2026; National Bank of Romania; MOFCOM China

Risks & Opportunity Windows

Key risks include RON exchange rate fluctuations, tightening EU environmental regulations, and adjustments to China's export policies. Opportunities lie in Romania's livestock modernization upgrade, deepening China-Romania agricultural cooperation, and import substitution space for local additive production. Monitoring political and economic developments and optimizing logistics routes is recommended.

⚠ Monitor the potential impact of the Eastern European geopolitical situation on logistics corridors, as well as the tightening of EU new food chain regulations on additive approvals.

Source: Romania Ministry of Agriculture 2026 policy document; Economic and Commercial Office of the Chinese Embassy in Romania

Data Source Summary

- Romania National Institute of Statistics (INS) - May/June 2026 release
- General Administration of Customs of China - June 2026 data
- Mysteel Feed Additives - July 15, 2026 report
- Argus Media Agricultural Markets - July 11, 2026
- Eurostat - June 2026
- Longzhong Information - July 2026
- World Bank - June 2026 Economic Outlook
- FEFANA - Q2 2026
- UN Comtrade - July 2026

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