

Romania Agricultural Products Overseas Market Analysis Report

Target Country: Romania • Key Category: Agricultural Products • Update Date: July 1, 2026

Romania Agricultural Products Executive Summary

Romania is the fifth-largest agricultural country in the EU, with overall grain and oilseed supply exceeding demand. Total grain output surpassed 25 million tons in 2024. However, protein products such as soybeans still rely on imports of around 450,000 tons per year, heavily dependent on South America. The Chinese market is showing rising demand for high-quality wheat and sunflower oil, creating structural complementarity in China-Romania agricultural trade. Key risks stem from climate volatility, EU Common Agricultural Policy adjustments, and Black Sea logistics uncertainties.

Wheat Production (2024)	~10.5 million tons
Maize Production (2024)	~12 million tons
Sunflower Seed Production (2024)	~3.2 million tons
Soybean Import Dependency	~78%

Sources: EU Commission Agricultural Reports (Mar 2025), Romania National Institute of Statistics INS (Feb 2025), FAO Database (2025); July 2026 data carries forward prior values with no latest public update.

Supply & Demand Fundamentals

Romania's agricultural products overall show a "grain surplus, protein shortage" profile. Total grain production in 2024 was about 25.8 million tons, with domestic consumption around 19 million tons, leaving an exportable surplus of approximately 6.8 million tons. The soybean supply-demand gap is notable, with annual consumption of about 580,000 tons against local production of only about 130,000 tons, with imports covering the shortfall.

Category	Production (10k tons)	Consumption (10k tons)	Net Export / Gap
Wheat	1,050	480	+570 (net export)
Maize	1,200	780	+420 (net export)
Sunflower Seed	320	280	+40 (net export)
Soybean	13	58	-45 (net import)

Sources: Romania National Institute of Statistics INS (Feb 2025), EU Eurostat (Jan 2025); July 2026 carries forward prior values.

Sources: INS Romania, Eurostat; data based on full-year 2024 statistics, no latest public update as of July 2026.

China Market Overview

China is the world's largest soybean importer, with import volume of about 102 million tons in 2024. Domestic wheat production stands at about 137 million tons, with supply-demand largely balanced but still importing high-gluten quality wheat. Sunflower oil consumption is growing notably; in 2024, China's imports of sunflower oil from Romania grew by about 12% year-on-year, reflecting rising recognition of Romanian agricultural products.

China Soybean Imports (2024)	~102 million tons
China Wheat Production (2024)	~137 million tons
Sunflower Oil Import Growth from Romania	▲ ~12%

Romania's Share in China Grain Imports

~4.2%

Sources: General Administration of Customs of China (issued Jan 2025), Shengyishe (Mar 2025), Longzhong Information (Feb 2025); July 2026 carries forward prior values with no latest public data.

Romania Market Overview

Romania's agricultural product market is predominantly locally produced, with grain self-sufficiency exceeding 130%. Imports are concentrated in protein feeds (soybeans, soybean meal) and some processed foods. In 2024, total agricultural product imports amounted to about €8.9 billion, with soybean and soybean meal accounting for about 18% of imports. Feed grains represent the largest share of consumption, at about 55% of total consumption.

Grain Self-Sufficiency Rate	~132%
Agri Imports Total (2024)	~€8.9 billion
Soybean/Soybean Meal Import Share	~18%
Feed Grain Consumption Share	~55%

Sources: Romanian Ministry of Agriculture (Jan 2025), Eurostat (Feb 2025); July 2026 carries forward prior values.

Product Segment Structure

Romania's agricultural exports are led by grains and oilseeds. Wheat accounts for about 38% of total export value, maize about 29%, and sunflower seeds and oil about 18%. Imports are mainly soybeans, soybean meal, and processed foods. Among niche categories, organic grains and high-protein wheat are high-value-added growth segments.

Segment	Export Share	2024 Trend	Target Markets
Wheat (incl. durum)	38%	↑ 6%	Middle East, North Africa, EU
Maize	29%	Stable	EU, Middle East
Sunflower Seed/Oil	18%	↑ 8%	EU, China
Soybeans (Import)	—	Import dependency 78%	Brazil, USA

Sources: Romania National Institute of Statistics INS (Feb 2025), EU Eurostat (Jan 2025); July 2026 carries forward prior values.

Sources: INS Romania, Eurostat; data based on 2024 statistics, no latest public update as of July 2026.

Core Finished Products Supply & Demand

Sunflower oil is Romania's most competitive core finished product, with 2024 production of about 1.2 million tons and exports of about 750,000 tons, accounting for about 28% of EU sunflower oil exports. Wheat flour production is about 3.2 million tons, with domestic consumption of about 2.4 million tons and exports of about 800,000 tons. Both finished products have stable supply-demand fundamentals and strong export price competitiveness.

Sunflower Oil Production (2024)	~1.2 million tons
Sunflower Oil Exports (2024)	~750,000 tons
Share of EU Sunflower Oil Exports	~28%
Wheat Flour Exports (2024)	~800,000 tons

Sources: EU Commission Agricultural Market Observatory (Mar 2025), Romanian Millers' Association (Feb 2025); July 2026 carries forward prior values.

Intermediate & Raw Material Value

Intermediate cost transmission has a significant impact on the competitiveness of Romanian agricultural products. In 2024, the average price of diammonium phosphate (DAP) in China producing regions was about RMB 3,850/ton, with a Romania CIF reference of about USD 520–560/ton. For seed costs, about 60% of hybrid maize seeds in Romania rely on imports. Feed additives (such as lysine) are approximately 45% imported from China.

Intermediate Product	China Reference Price	Romania CIF Reference
Diammonium Phosphate (DAP)	~RMB 3,850/ton	~USD 520–560/ton
Hybrid Maize Seeds	—	Import dependency ~60%
Feed-grade Lysine	~RMB 8,200/ton	~USD 1,100–1,250/ton

Sources: Longzhong Information (Mar 2025), Shengyishe (Feb 2025), Argus Media (Jan 2025); July 2026 carries forward prior values.

Sources: Longzhong Information, Shengyishe, Argus Media; no latest public update as of July 2026, carries forward prior values.

Trade & Macro Indicators

Romania's GDP growth rate in 2024 was about 2.1%, with agriculture accounting for about 4.3% of GDP. Bilateral trade between China and Romania totaled about USD 10.8 billion in 2024, of which agricultural product trade was about USD 680 million. The Romanian Leu (RON) to USD exchange rate fluctuated within the 4.45–4.75 range throughout the year, providing some support for export competitiveness.

GDP Growth (2024)	~2.1%
Agriculture Share of GDP	~4.3%
China-Romania Bilateral Trade (2024)	~USD 10.8 billion
Of which: Agri Trade	~USD 680 million
RON/USD Exchange Rate Range	4.45–4.75

Sources: World Bank (Jan 2025), General Administration of Customs of China (Jan 2025), National Bank of Romania BNR (Feb 2025); July 2026 carries forward prior values.

Risks & Opportunity Windows

▲ Risk The geopolitical situation in the Black Sea continues to affect logistics corridor stability; rising frequency of extreme weather threatens grain yields; EU CAP reforms may adjust subsidy structures.	
✓ Opportunity Deepening China-Romania agricultural cooperation under the Belt and Road Initiative; ample growth potential for Romanian organic agricultural exports to China; investment window exists for localized protein feed substitution solutions.	
Black Sea Logistics Risk Level	Medium-High
Extreme Weather Impact Probability	~30%/year
China-Romania Agricultural Cooperation Agreement	Renewed in 2025
Organic Product Export Growth to China	▲ ~18%

Sources: Romanian Ministry of Foreign Affairs (Feb 2025), EU Commission Climate Report (Mar 2025), Ministry of Commerce of China (Jan 2025); July 2026 carries forward prior values.

Data Sources Summary

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| 1. National Institute of Statistics of Romania (INS) — Feb 2025, full-year 2024 agricultural data | 7. Shengyishe — Feb 2025, commodity price monitoring data |
| 2. Eurostat — Jan–Feb 2025, agricultural trade and production statistics | 8. Argus Media — Jan 2025, international fertilizer market quotations |
| 3. EU Commission Agricultural Market Observatory — Mar 2025, grains and oilseeds market report | 9. National Bank of Romania (BNR) — Feb 2025, exchange rate data |
| 4. General Administration of Customs of China — Jan 2025, full-year 2024 import/export statistics | 10. FAO Database — 2025, global agricultural product supply and demand statistics |
| 5. World Bank — Jan 2025, Romania macroeconomic indicators | 11. Romanian Ministry of Agriculture — Jan 2025, agricultural policy and production reports |
| 6. Longzhong Information — Mar 2025, phosphate fertilizer and chemical raw material price data | 12. Ministry of Commerce of China — Jan 2025, China-Romania bilateral trade data |

Note: Data in this report as of July 2026 carries forward the latest publicly available values from 2024–2025, marked "carries forward prior values with no latest public data."

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