Romania Seed Overseas Market Analysis Report

Target Country: Romania | Main Category: Seed | Report Updated: July 1, 2026

Data as of June 2026 | Some annual data uses 2024-2025 public reports

Romania Seed Core Conclusions

The annual import value of the Romanian seed market is approximately **€230 million**, with an overall import dependency of about **55%**. Corn and sunflower seeds are the core categories, accounting for **58%** of total imports. France, Hungary, and Germany are the main source countries. China's vegetable seed exports to Romania have shown significant growth, but the overall share is less than 3%. Stricter EU seed regulations and the Eastern European geopolitical situation are core risks.

Indicator	Value	Trend
Annual Total Imports	≈€230M	↑8% (YoY)
Import Dependency	≈55%	Stable
China Share	<3%	↑ Vegetable seed growth

Source: Eurostat, INS Romania, 2024 data and 2025 Q1-Q3 preliminary statistics; July 2026 based on previous values

Supply and Demand Fundamentals

The annual demand for seeds in Romania is approximately **€520 million** (at retail prices), with domestic production covering about 45%. The largest gap is in corn seeds, with annual imports exceeding **€85 million**. Vegetable seed self-sufficiency is less than 30%, heavily dependent on EU imports. In 2025, domestic seed production decreased by about 7% due to climate factors.

Category	Annual Demand (€M)	Import Share
Corn Seed	≈155	≈58%
Sunflower Seed	≈90	≈52%
Vegetable Seed	≈75	≈72%
Wheat/Barley Seed	≈60	≈30%

Source: Romanian Ministry of Agriculture Annual Report (2025), USDA FAS Romania Grain and Feed Report (October 2025); July 2026 based on previous values, no latest public data

China Market Overview

The size of the Chinese seed market is approximately **RMB 135 billion** (2025), with total seed exports of about **USD 380 million**. Vegetable seeds are the main export, with the EU share at about 12%. The capacity utilization rate of Chinese seed enterprises is about **68%**, significantly affected by seasonality. Exports to Romania are mainly vegetable seeds such as tomatoes, peppers, and cucumbers, with an export value of about **USD 6.5 million** in 2025.

Indicator	Value	Source
China Total Seed Exports	≈USD 380M	Customs 2025
Seed Exports to Romania	≈USD 6.5M	Customs 2025
Vegetable Seed Export Share	≈45%	China Seed Association 2025

Source: China Customs (2025 Annual Statistics), China Seed Association Industry Development Report (December 2025); July 2026 based on previous values

Romanian Market Overview

Romania is the fifth-largest agricultural country in the EU, with an arable land area of about **13 million hectares**. The seed market has high import dependency, especially for high-value hybrid seeds. Retail prices for corn seeds are about **€4-6/kg**, and for sunflower seeds about **€5-8/kg**. France has an import share of about **25%**, Hungary about **18%**. The overall Romanian seed retail market grew by about 6% in 2025.

Source Country	Import Share	Main Categories
France	≈25%	Corn, Sunflower Seeds
Hungary	≈18%	Corn, Wheat Seeds
Germany	≈14%	Vegetable, Rapeseed Seeds
Netherlands	≈10%	Vegetable Seeds

Source: Eurostat COMEXT Database (2025), ANSRS Romanian Seed Association Annual Report (September 2025); July 2026 based on previous values

Product Segmentation Structure

Romanian seed imports are dominated by field crop seeds, with corn seeds alone accounting for **37%** of import value. Vegetable seed imports are growing fastest, with a year-on-year increase of 12% in 2025, driven by strong demand for tomato and pepper seeds. The organic seed submarket, though small, is growing at over 20%.

Subcategory	Import Value (€M)	YoY Change
Corn Seed	≈85	+6%
Sunflower Seed	≈52	+4%
Vegetable Seed	≈38	+12%
Wheat/Barley Seed	≈18	Stable

Source: Eurostat Seed Trade Statistics (2025), Romanian Ministry of Agriculture (2025); July 2026 based on previous values

Core Finished Product Supply and Demand

Certified Seed is the core finished product in the Romanian market. In 2025, the supply of certified corn seeds was about **32,000 tons**, with imports at 58%. Certified sunflower seeds were about **11,000 tons**. The supply-demand gap is most prominent in vegetable seeds, with domestic production meeting only about 28% of demand.

⚠ The 2025 drought reduced domestic seed production by 7%-10%

Certified Seed Category	Supply (Tons)	Import Share
Corn	≈32,000	58%
Sunflower	≈11,000	52%
Vegetable (Various)	≈2,800	72%

Source: ANSRS Romanian Seed Association (2025 Annual Report), USDA FAS (October 2025); July 2026 based on previous values

Intermediate Goods and Raw Material Value

The upstream seed industry chain includes pre-basic/basic seed, parental materials, and seed coatings. Romania's pre-basic seed imports come mainly from France and Germany, with CIF prices of about **€12-25/kg** (depending on variety). The seed coating market is dominated by Bayer, Syngenta, etc., with Romania's seed coating imports at about **€32 million** in 2025.

Intermediate/Raw Material	Price Range	Main Source
Corn Pre-basic Seed	€15-25/kg	France, Germany
Vegetable Parental Seed	€30-80/kg	Netherlands, France
Seed Coating (Imported)	€8-15/L	Germany, Switzerland

Source: Eurostat Trade Data (2025), Industry Interviews and ANSRS Report (2025); China pre-basic seed reference prices from China Seed Association (2025); July 2026 based on previous values

Trade and Macroeconomic Indicators

Romania's GDP growth rate in 2025 was about **2.4%**, with agriculture accounting for about **4.1%** of GDP. Seed import tariffs follow EU common tariff policies, with most seed categories enjoying **zero or low tariffs** (0%-3%). The Romanian leu to RMB exchange rate is about **1 RON ≈ 1.58 CNY** (June 2026). EU agricultural subsidy policies continue to support seed industry upgrades.

Indicator	Value	Note
GDP Growth (2025)	2.4%	World Bank estimate
Agriculture GDP Share	4.1%	Romanian INS
Seed Import Tariff	0%-3%	EU TARIC
RON/CNY Exchange Rate	≈1.58	June 2026 reference

Source: World Bank (2025), Romanian National Institute of Statistics INS (2025), EU TARIC Tariff Database (June 2026), European Central Bank Exchange Rate Reference (June 2026)

Risks and Opportunity Windows

Risks: The new EU seed regulation (2026 revision) raises market access standards; the Eastern European geopolitical situation affects logistics costs; climate anomalies threaten domestic seed production; exchange rate fluctuations affect import seed pricing.

Opportunities: Chinese vegetable seeds have a clear cost-performance advantage, with a compound annual growth rate of about 18% in exports to Romania over the past three years; expansion of organic agriculture area in Romania drives demand for organic seeds; the China-Romania Agricultural Cooperation Memorandum (signed in 2025) provides policy convenience.

Risk Factor	Impact Level	Opportunity Factor
EU Regulation Tightening	Medium-High	Chinese Vegetable Seed Substitution
Geopolitical Logistics Cost	Medium	Organic Seed Demand Growth
Climate Anomaly	Medium-High	Deepening China-Romania Agricultural Cooperation

Source: European Commission Agricultural Legislation Announcement (March 2026), China Ministry of Commerce China-Romania Economic and Trade Brief (December 2025), USDA FAS (October 2025); July 2026 comprehensive assessment

Data Sources Summary

- Eurostat - COMEXT Trade Database (2024-2025)
- Romanian National Institute of Statistics INS (2024-2025 Reports)

- China Customs - Seed Export Statistics (2025)
- USDA FAS - Romania Grain and Feed Report (October 2025)
- Romanian Seed Association ANSRS - Annual Report (September 2025)
- China Seed Association - Industry Development Report (December 2025)
- World Bank - Romania Macroeconomic Data (2025)
- EU TARIC Tariff Database (June 2026 Query)
- European Commission Agricultural Legislation Announcement (March 2026)
- China Ministry of Commerce China-Romania Economic and Trade Brief (December 2025)