



COUNTRY SNAPSHOT: ROMANIA



Romania is the largest Southeast European country, the 6th most populous European Union (EU) member state and the 7th largest agricultural producer in the EU. Romania harvests more than 30 million tons of grains annually with its maize and sunflower crops ranking the largest in the EU. The feed and livestock sectors have gone through a rapid evolution in the past decade propelled by grain availability, increasing demand for animal products and new investments in processing facilities. These factors, combined with strategic access to the Constanta Port, make Romania the main soybean and meal importer and consumer in the Southeast Europe subregion.

U.S. Soy has collaborated with Romania since 2000.

COUNTRY STATS

POPULATION (2022):

19.053 million (Urbanization 54.19%)

POPULATION (2050):

~17.3 million (Urbanization 65%)

GDP (2022):

USD 289.88 billion

AVG. ECONOMIC GROWTH

(2022): 4.83%

PER CAPITA INCOME (2021):

USD 14,858

MARKET STATS

Soy usage market size by Volume, 2021 (Est. growth by 2035/40)

Animal Protein (total)	687,950 MT	Aquaculture	300 MT (40%)
Pork	240,100 MT (60%)	Oil	120,000 MT (20%)
Poultry	440,500 MT (50%)	Soy food	200 MT (100%)
Cattle & Sheep	7,350 MT (30%)	Any other soy usage (pet food)	300 MT (40%)

Soy market size by volume, U.S. Soy volume (MY2021/22)

- Soy complex (whole soybean, meal, oil): 806.452 MMT. U.S. Soy: N/A
- Whole bean: 271.057 MMT. U.S. Soy: N/A
- Soybean meal: 535.395 MMT. U.S. Soy: N/A

STRENGTHS

- Research conducted at reputable EU universities comparing soybeans of different origins helped Southeast European customers understand that U.S. Soy provides the nutritional bundle needed to optimize animal nutrition and profitability.
- The European Soy Innovation Center actively promotes the exceptional composition as a key element of the U.S. Soy advantage and is constantly supporting end-users in capturing the value of U.S. Soy and assisting manufacturers on innovating in the field of soy ingredients.
- Increasing animal production in Romania, while the EU's agricultural practices and animal production are under environmental scrutiny, creates more demand for sustainable soy and for U.S. Soy Sustainability Assurance Protocol (SSAP) shipments for the feed and oil industries.
- As part of the EU, Romania is enjoying the benefits of duty-free concession and trade agreements between the U.S. and EU.

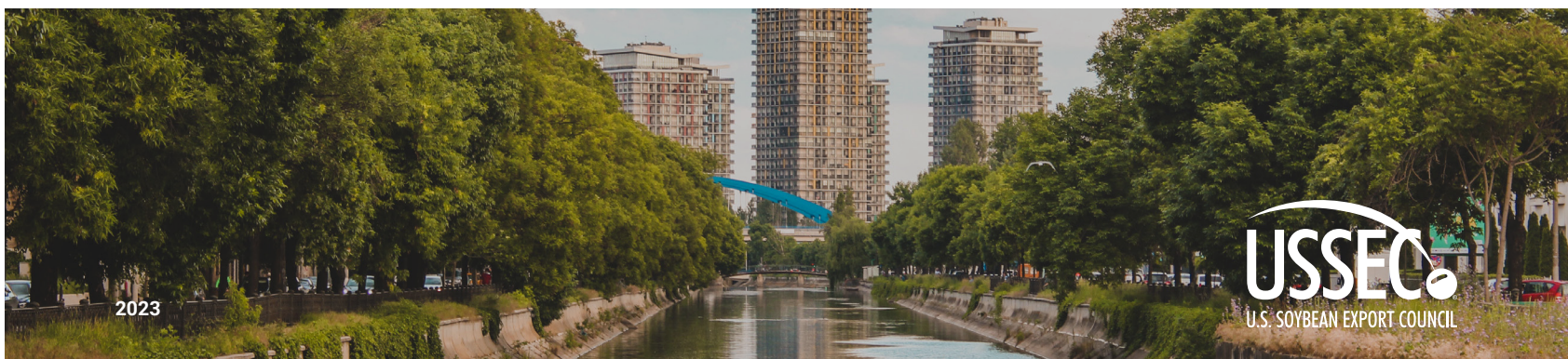
OPPORTUNITIES

- Meat consumption at 29 kg per capita is still lower than the EU average of 41 kg but per capita income and urbanization is estimated to increase this decade.
- The poultry sector is one of Romania's most dynamic agricultural industries in terms of growth, performance indicators and export markets.
- The soybean market is benefitting from the stagnating production of EU rapeseed because of the neonicotinoids bans with soybean meal replacing rapeseed meal in animal feed.
- Romania adhered to the European Feed Manufacturers' Federation Feed Sustainability Charter, promoting responsible sourcing practices and climate-neutral livestock production through feed.
- There is an increasing awareness of carbon footprint for feed ingredients as required by the EU's commitments to Carbon Peak/Neutrality.

CHALLENGES

- A long-range view, continuous education process is needed for the young generation of commercial nutritionists, scientists and quality control and purchasing managers in order to equip them with the right knowledge and skills to understand soy differentiation and the true value of amino acids and metabolizable energy.
- The spread of transboundary animal diseases, such African Swine Fever and Bird Flu, is threatening protein security and limiting pork and poultry production and trade.
- Grains export and soy import disruptions because of rising military tensions in the Black Sea area might impede market access and impact supply, availability and prices of raw materials, including U.S. Soy, for the Southeast European feed industry.

Sources:
- OECD
- USDA FAS



2023

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