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Report Name: Examining Direct and Indirect US Agricultural Trade with Romania

Country: Romania

Post: Bucharest

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Report Highlights:

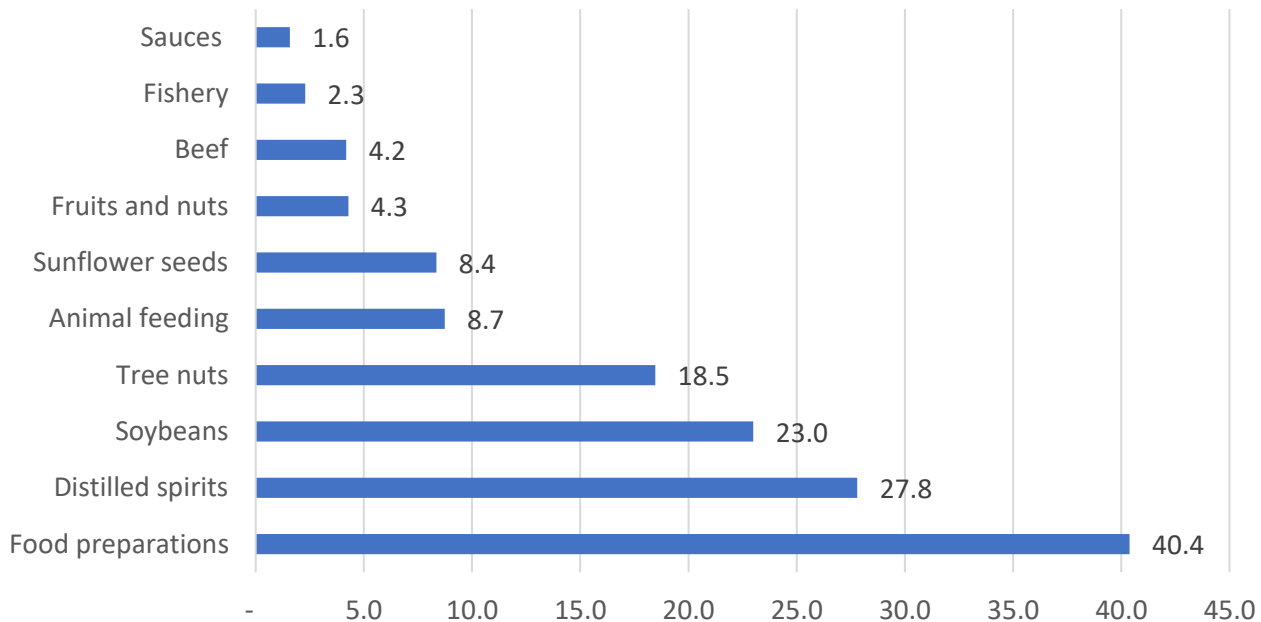
The U.S. Census Bureau (USCB) data shows that the United States shipped \$63.4 million worth of food and agricultural products to Romania in 2025. According to Romania's National Institute of Statistics (NIS), Romania imported \$188.5 million of U.S. food and agricultural products in 2025. The top U.S. products (in value) imported to Romania were food preparations, distilled spirits, and soybeans. The difference between the values reported by the two sources reflects the U.S. agricultural commodities reaching Romania through western European ports of entry, since USCB data tracks only U.S. food and agricultural trade shipped directly to Romania. By reviewing both data sets, USDA cooperators and U.S. food and agricultural exporters will gain different perspectives regarding the market of U.S. products in Romania.

Overview

Romania’s total agricultural imports reached \$16.2 billion in 2025, a 5.4 percent increase over 2024, of which more than 80 percent were sourced from EU Member States. Germany, Hungary, Poland, the Netherlands, and Italy were Romania’s major trading partners in 2025. Meat, edible fruits and nuts, and dairy were the top product import categories. Due to an agricultural export expansion, supported by a larger crop production, Romania’s total agricultural exports rose by 22 percent to \$14.3 billion in 2025, halving the annual agricultural trade deficit.

The United States ranked 22nd among the world suppliers of food and agricultural products to Romania in 2025. The top products imported from the United States were food preparations, distilled spirits, soybeans, tree nuts, animal feed, sunflower seeds, and fruits and nuts (Chart 1). U.S. goods flow into Romania either directly from the United States (mainly bulk and intermediate products) or are transshipped through other western European Union (EU) ports of entry in Italy, the Netherlands, and Germany – which is most common for consumer-oriented goods. Because USCB data only reflects direct U.S. exports to Romania, it does not include sizeable volumes of U.S. trade routed through distributors in large western European port cities. As a result, FAS Bucharest views Romania’s NIS data – which includes both direct and indirect trade – as a more accurate reflection of Romanian demand for U.S. food and agricultural products. FAS Bucharest encourages USDA cooperators and other U.S. food and agricultural exporters and stakeholders to review both data sets when considering resource allocation and market development strategies for Romania, to understand the true volumes of U.S. products consumed in Romania.

Chart 1. Top Romanian Agricultural Imports from the United States in 2025 (\$ million)



Source: National Institute of Statistics (NIS)

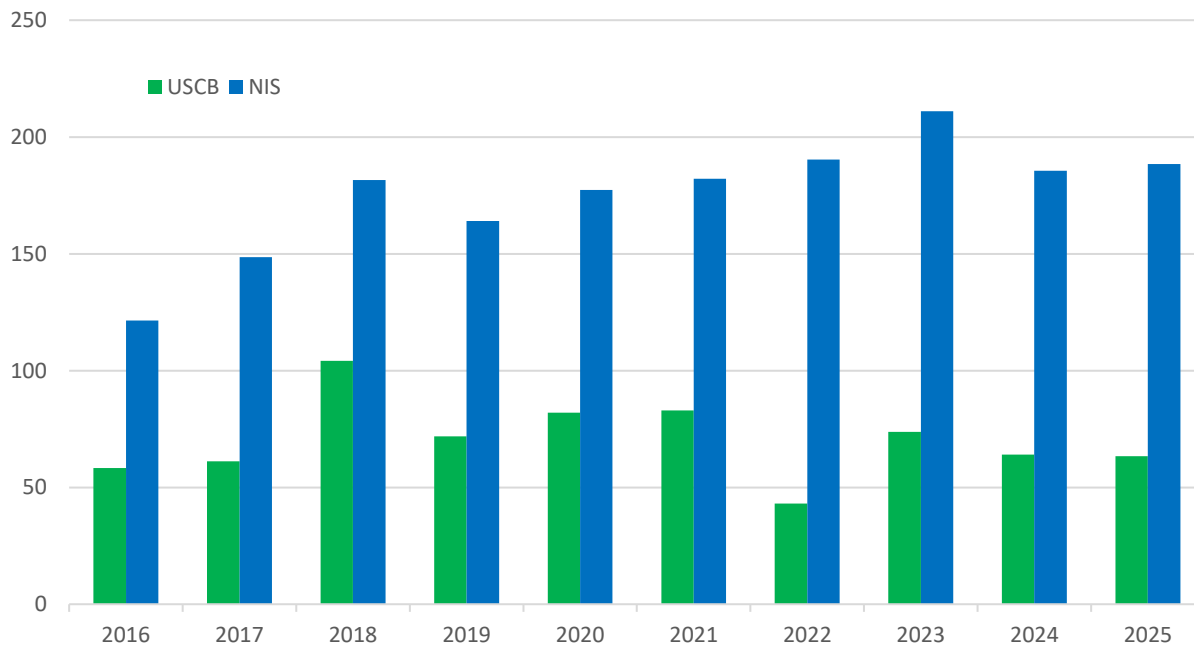
According to USCB data, direct U.S. exports to Romania fell in 2025 by 1.2 percent to \$63.4 million, primarily due to a reduction in soybean exports. According to NIS data, Romanian importers sourced \$188.5 million of U.S. food and agricultural products in 2025, 1.6 percent more than the previous year,

which is more than double USCB data (Table 1). The export value shown by NIS for both direct and indirect imports represents the third largest export value in the last 10 years (Chart 2).

Table 1. U.S. Food and Agricultural Trade to Romania (\$ million)

Source of Data	2019	2020	2021	2022	2023	2024	2025
U.S. Census Bureau (Direct U.S. exports to Romania)	71.9	81.9	82.9	43.1	73.8	64.1	63.4
NIS (Direct and Indirect imports from the United States)	164.1	177.3	182.1	190.4	211.0	185.6	188.5
Difference (Indirect exports)	92.1	95.4	99.1	147.3	137.2	121.5	125.1
<i>Percentage of Indirect Exports</i>	<i>56</i>	<i>54</i>	<i>54</i>	<i>77</i>	<i>65</i>	<i>65</i>	<i>66</i>

Chart 2: U.S. – Romania: Food and Agricultural Trade (\$ million)



Sources: U.S. Census Bureau (USCB) and National Institute of Statistics (NIS)

U.S. Food and Agricultural Trade with Romania by Major Category

Direct U.S. agricultural exports to Romania generally consist of bulk commodities shipped as sea freight, including soybeans, soybean meal, sunflower seeds, and fishery products. The trade data for these categories are captured by both USCB and NIS data. Indirect trade tends to include products that are shipped in smaller quantities, or that may require more flexible terms of trade than U.S. suppliers are willing to provide. In other cases, western European distributors can offer U.S. shippers volumes that would be difficult for Romanian importers to match. Likewise, many U.S. exporters also find it more efficient to simply ship larger volumes to well-established distribution hubs in Western Europe and rely on those channels to supply other EU markets.

In addition, some Romanian importers prefer to work through European distributors and find it convenient for intermediaries to handle EU customs clearance for U.S. products. For new-to-market products, some Romanian importers prefer to purchase smaller volumes to test consumer demand and to build distribution channels. In other cases, the business model of centralized acquisition of goods at the retail level leads to EU-wide distribution from a member state. The main countries in which U.S. goods arrive before being shipped to Romania are Germany, the Netherlands, Italy, Spain, and Belgium. There are several product categories which are imported exclusively or nearly exclusively through other EU Member States, among which are beef, sweet potatoes, cranberries, groundnuts, fruits juices, chocolate, and extracts.

Table 2 shows the USCB and NIS data for U.S. agricultural trade to Romania for the major product categories.

Table 2: U.S. Agricultural Trade to Romania for Main Categories, USCB and NIS Data (\$)

HS Code	Description	USCB (Direct U.S. exports to Romania)	NIS (Direct and Indirect imports from the United States)	Difference (Indirect U.S. exports to Romania)	% of indirect exports
Agricultural and fishery products		63,355,000	188,500,000	125,145,000	66
Consumer Oriented Products					
0201 - 0202	Meat of bovine animals, fresh, chilled or frozen	-	4,189,740	4,189,740	100
0303-0307	Fishery Products	2,134,000	2,288,271	154,271	7
0701	Potatoes, fresh or chilled	-	143,830	143,830	100
0712	Dried vegetables	4,000	788,097	784,097	99
0714 20	Sweet potatoes	-	788,630	788,630	100
0802	Other nuts	3,388,000	18,464,805	15,076,805	82
0802 51 0802 52	Pistachios (in-shell and shelled)	1,230,000	12,900,697	11,670,697	90
0802 11 0802 12	Almonds (in-shell and shelled)	2,043,000	2,968,773	925,773	31
0804	Dates, figs, pineapples	-	43,925	43,925	100
0810 40	Cranberries	-	54,165	54,165	100
1202	Groundnuts	-	412,883	412,883	100
1806	Chocolate and other food preparations containing cocoa	-	530,557	530,557	100
2008	Fruit, nuts and other edible parts of plants	254,000	4,287,798	4,033,798	94
2008 93	Cranberries	254,000	372,353	118,353	32
2008 11	Groundnuts	-	1,014,311	1,014,311	100

2009	Fruit juices	-	495,562	495,562	100
2101	Extracts, essences and concentrates, of coffee	-	487,659	487,659	100
2103	Sauces and preparations	289,000	1,583,715	1,294,715	82
2106	Food preparations not elsewhere specified	11,901,000	40,383,784	28,482,784	71
2204	Wine	96,000	574,291	478,291	83
2208	Undenatured ethyl alcohol of an alcoholic strength	15,149,000	27,807,035	12,658,035	46
220830	Whiskies	14,815,000	17,591,228	2,776,228	16
2309	Preparations of a kind used in animal feeding	2,272,000	8,736,120	6,464,120	74
230910	Dog or cat food, put up for retail sale	1,485,000	2,882,328	1,397,328	48
Intermediate Products					
1209	Seeds, fruit and spores	106,000	824,178	718,178	87
2304	Soybean Meal	12,497,000	20,239,869	7,742,869	38
Bulk Products					
1005	Maize (corn)	231,000	271,368	40,368	15
1006	Rice	-	94,475	94,475	100
1201	Soybeans	994,000	2,750,474	1,756,474	64
1206	Sunflower seeds	10,000	8,351,029	8,341,029	100

Sources: U.S. Census Bureau (USCB) and National Institute of Statistics (NIS)

As shown in Table 2, USCB shows no data for U.S. **beef** trade to Romania, while NIS data reveals that U.S. beef trade reached nearly \$4.2 million in 2025. Beef arrives in Romania mainly through the Netherlands, Italy, and Germany because of volume flexibility and the EU licensing requirements. The value of beef imports from the United States almost quadrupled in the last five years due to increased consumer awareness about the quality and taste following targeted marketing strategies, apart from the global beef price increases.

USCB data shows no trade for **sweet potatoes** in 2025, while NIS data reports a value close to \$0.8 million. U.S. sweet potatoes are shipped to Romania through Germany, Italy, and the Netherlands. USCB data captured \$3.4 million for **tree nuts** (fresh or dried), while NIS data show \$18.5 million worth U.S. tree nuts imported by Romania in 2025. Most U.S. tree nuts, particularly almonds and pistachios, are shipped to Romania through Germany and the Netherlands.

In the case of **chocolate and other food preparations containing cocoa**, USCB reports no value for products shipped from the United States to Romania in 2025, while NIS data shows \$530,000. Within the category of **fruits, nuts, and other edible parts of plants** prepared or preserved, USCB shows no value for groundnuts and \$254,000 for cranberries exported to Romania in 2025, while NIS data shows trade valued at \$1 million for groundnuts and \$372,000 for cranberries. This pattern is similar for **raw groundnuts**, where the entire volume lands in another EU member state first.

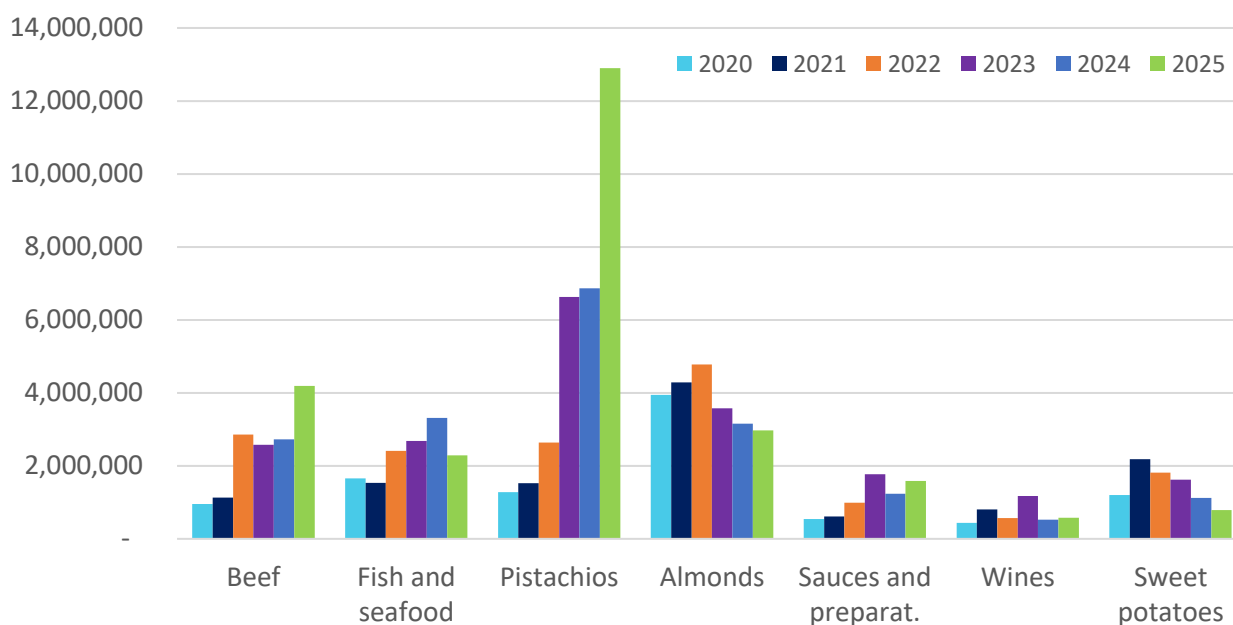
In the case of **sauces and preparations**, only a small share of products arrived directly from the United States in 2025. USCB data reflects that \$289,000 were traded to Romania, while NIS cites that the export was worth nearly \$1.6 million. Most sauces are routed through Germany and the Netherlands. **Food preparations**, not elsewhere specified, consist mostly of protein concentrates and foods containing/non-containing milk fats, sucrose, and starch. According to USCB data, the U.S. export value for these products was almost \$12 million in 2025, while NIS data shows \$40 million.

In the case of **wine**, most U.S. trade is routed through other EU member states. USCB data indicates that the 2025 U.S. wine exports to Romania were valued at \$96,000, while NIS data cites a value of \$574,000 of U.S.-origin wine. The Netherlands, Germany, and France are, in general, the main points of entry for U.S. wine in the EU. In case of **whiskies**, more than 80 percent arrived directly in Romania – USCB data showing \$14.8 million, versus NIS showing almost \$17.6 million. Differences between the values reported by USCB and NIS may also be observed for the intermediate and bulk commodities, such as soybeans. According to USCB, U.S. exports of **soybeans** to Romania in 2025 reached \$1 million, while NIS data shows \$2.7 million.

Fluctuations in the Romanian Imports of Consumer-Oriented Products

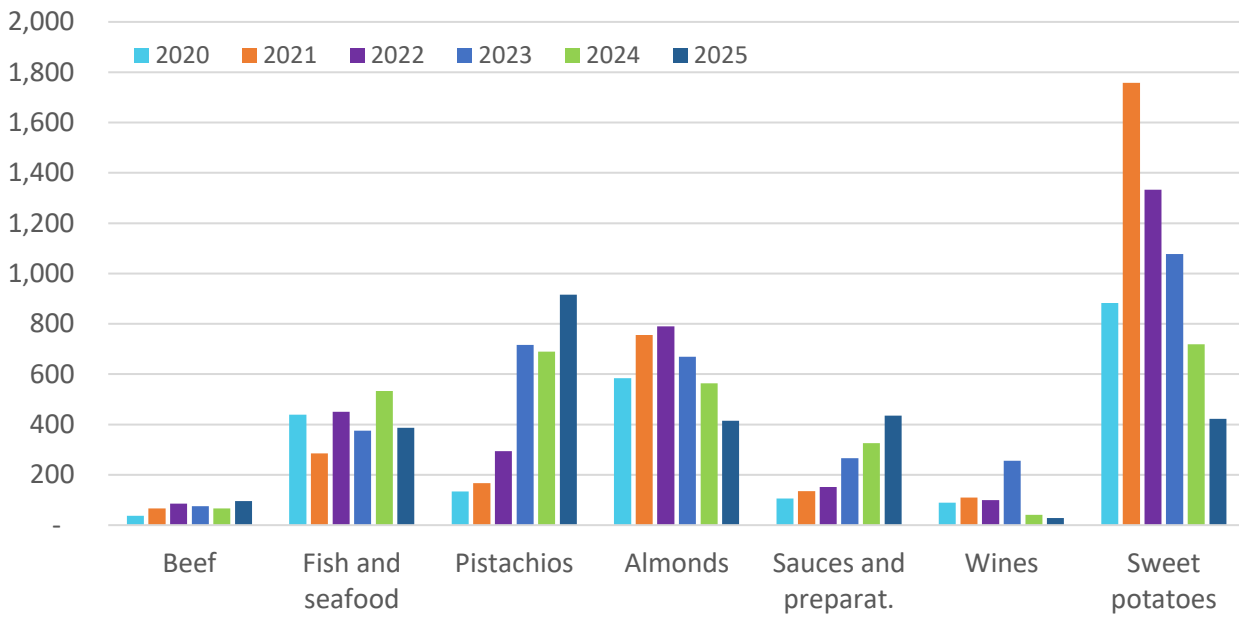
The dynamics of the Romanian imports of selected consumer-oriented products are shown in Chart 2 (by value) and Chart 3 (by volume). Strong competition on the Romanian market for some products, such as sweet potatoes and almonds, and the deteriorating consumer power, to some extent, negatively impacted some of the categories in 2025. Conversely, demand for certain foods generated by trends drove an increase in imports, such as beef and pistachios (both shelled and in-shell).

Chart 2. Value of Romanian Imports of Selected Consumer-Oriented Products from the U.S. (\$)



Source: National Institute of Statistics (NIS). Note: It includes direct and indirect imports.

Chart 3. Volume of Romanian Imports of Selected Consumer-Oriented Products from the U.S. (MT)



Source: National Institute of Statistics (NIS). Note: It includes direct and indirect imports.

Attachments:

No Attachments.