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Report Highlights:

In 2023, according to Romania's National Institute of Statistics (NIS), Romania imported \$211 million of U.S. food and agricultural products, up nearly 11 percent compared to 2022. According to the U.S. Census Bureau's bulk, intermediate, and consumer oriented (BICO), U.S. suppliers shipped \$79 million worth of food and agricultural products to Romania in 2023. The latter export data tracks U.S. food and agricultural trade shipped directly to Romania, but there are considerable U.S. agricultural exports reaching Romania through western European ports of entry, which are not captured by BICO. This report provides specific trade information for selected product categories.

Abbreviations:

NIS	National Institute of Statistics
BICO	U.S. Census Bureau's bulk, intermediate, and consumer-oriented

Overview

The United States is a top-20 supplier of food and agriculture to Romania. U.S. goods flow into Romania either directly from the United States (mainly bulk and intermediate products) or are transshipped through the other western European Union (EU) ports of entry in Italy, the Netherlands, and Germany – which is most common for consumer-oriented goods. Because BICO data only reflects direct U.S. exports to Romania, it does not include significant volumes of U.S. trade routed through distributors in large western European port cities, such as Rotterdam. 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 different data sources when considering resource allocation and market development strategies for Romania, to understand the true volumes and values of U.S. products consumed in Romania.

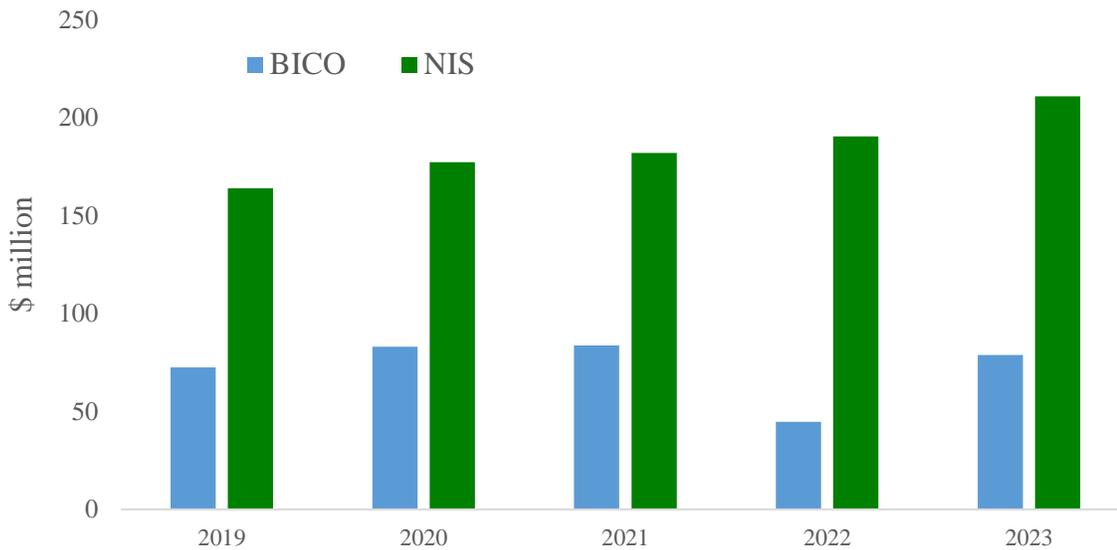
According to BICO data, direct U.S. exports to Romania rose by 76 percent to \$79 million in Romania (Table 1), particularly due to soybean meal exports. According to NIS data, however, Romanian importers sourced \$211 million of U.S. food and agricultural products in 2023, which is more than double what BICO data shows. This import number shows a nearly 11 percent growth from 2022, which is above the five percent year-on-year growth in Romania’s overall agri-food imports from all suppliers in 2023.

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

Source of Data	2019	2020	2021	2022	2023
U.S. Census Bureau (Direct U.S. exports to Romania)	72.5	83.1	83.7	44.8	78.8
NIS (Direct and Indirect imports from the United States)	164.1	177.3	182.1	190.4	211.0
Difference (Indirect exports)	91.5	94.3	98.4	145.6	132.2
<i>Percentage of indirect exports</i>	<i>56</i>	<i>53</i>	<i>54</i>	<i>76</i>	<i>63</i>

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

Chart 1: U.S. Food and Agricultural Trade to Romania



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

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

Direct U.S. agricultural exports to Romania generally consists 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 BICO 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 sales volumes that would be difficult for Romanian importers to match. 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 retail level, leads to EU-wide distribution from one member state. Finally, European distributors may incentivize Romanian importers with favorable terms of payments or advertising, particularly if there are longstanding commercial relationships. 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, potatoes, cranberries, groundnuts, fruits juices, and extracts.

Table 2 shows the BICO and NIS data for U.S. agricultural trade to Romania for the major categories, while Chart 3 below depicts the dynamics of the U.S. exports for the major categories of high-value products.

Table 2. 2023 Direct and Indirect U.S. Ag, Food, and Fishery Trade to Romania (\$)

HS Code	Description	BICO (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		78,774,000	211,000,000	132,226,000	63
0201 - 0202	Meat of bovine animals, fresh, chilled, or frozen	-	2,581,412	2,581,412	100
0303-0307	Fishery Products	5,195,000	2,685,300	(2,509,700)	(93)
0701	Potatoes, fresh or chilled	-	1,224,354	1,224,354	100
0712	Dried vegetables	5,000	24,229	19,229	79
0714 20	Sweet potatoes	361,000	1,621,548	1,260,548	78
0802	Other nuts	7,096,000	13,166,565	6,070,565	46
0802 51 0802 52	Pistachios (in-shell and shelled)	3,840,000	6,628,716	2,788,716	42
0802 11 0802 12	Almonds (in-shell and shelled)	3,256,000	3,581,517	325,517	9
804	Dates, figs, pineapples	-	40,889	40,889	100
0810 40	Cranberries	-	85,687	85,687	100
1005	Maize (corn)	467,000	1,905,621	1,438,621	75
1006	Rice	86,000	13,608	(72,392)	(532)
1201	Soybeans	4,015,000	7,765,655	3,750,655	48
1202	Groundnuts	128,000	1,620,949	1,492,949	92
1206	Sunflower seeds	-	19,776,944	19,776,944	100
1209	Seeds, fruit and spores	72,000	1,212,063	1,140,063	94
1806	Chocolate and other food preparations containing cocoa	83,000	291,608	208,608	72
2008	Fruit, nuts, and other edible parts of plants	258,000	3,389,048	3,131,048	92
2008 11	Groundnuts	-	1,783,657	1,783,657	100
2008 93	Cranberries	-	195,264	195,264	100
2009	Fruit juices	-	107,412	107,412	100
2101	Extracts, essences, and concentrates, of coffee	-	439,475	439,475	100
2103	Sauces and preparations	823,000	1,774,061	951,061	54
2106	Food preparations not elsewhere spec.	6,089,000	37,580,156	31,491,156	84

2204	Wines	317,000	1,177,839	860,839	73
2208 30	Whiskies	10,904,000	15,319,321	4,415,321	29
2304	Soybean Meal	29,058,000	45,926,678	16,868,678	37
2309 10	Dog or cat food, put up for retail sale	1,880,000	3,170,059	1,290,059	41

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

As shown in the above table, BICO shows no data for U.S. beef trade to Romania, while NIS data reveals that U.S. beef trade reached \$2.58 million in 2023. Beef arrives in Romania mainly through the Netherlands, Italy, and Germany because of volume flexibility and the EU licensing requirements. In terms of volume, beef imports from the United States doubled in the last three years due to increased demand.

BICO data shows U.S. trade for sweet potatoes valued at \$361,000 in 2023, while NIS data reports a value close to \$1.6 million. U.S. sweet potatoes are shipped to Romania through Germany, Italy, and the Netherlands.

In the case of soybeans, BICO data shows that 2023 U.S. exports to Romania were \$4 million, while NIS data shows a nearly doubled value (\$7.8 million).

For tree nuts (fresh or dried), BICO data captured \$7 million, while NIS data show \$13.2 million of U.S. tree nuts. Most U.S. tree nuts, particularly almonds and pistachios, are shipped to Romania through Germany, the Netherlands, and Belgium. Due to improved price competitiveness and trade restrictions applied to other market players, U.S. pistachios exports to Romania grew by 151 percent in 2023 as compared to the previous year per NIS data.

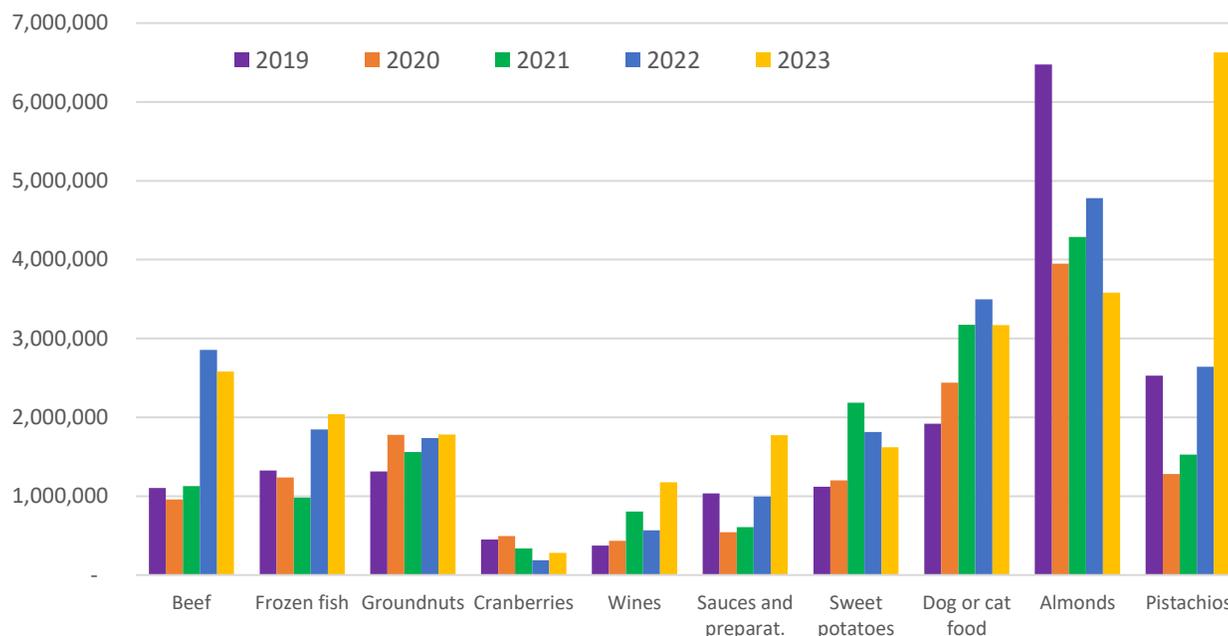
In the category of fruits, nuts, and other edible parts of plants prepared or preserved (#2008), BICO shows no value for groundnuts or cranberries exported to Romania in 2023, while NIS data shows trade valued at \$1.8 million for groundnuts and at nearly \$200,000 for cranberries. This pattern is similar for raw groundnuts (#1202), where about 92 percent of the volume lands in another EU member state first (BICO shows a value of \$128,000 in 2023 versus NIS revealing a value of \$1.6 million). In the case of chocolate, BICO reports a value \$83,000 of products shipped from the United States to Romania in 2023, while NIS data shows that \$291,000 worth of chocolate was imported by Romania last year.

For food processing ingredients, BICO data shows no value for extracts and essences, while NIS data reflects almost \$439,000. In case of sauces and preparations, about half of the volume arrived directly from the United States in 2023. BICO data reflects that \$823,000 were traded to Romania, while NIS cites that the export was worth nearly \$1.8 million. Most U.S. sauces and preparations are routed through Germany, and the Netherlands. Food preparations not elsewhere specified are mostly protein concentrates and foods containing/non-containing milk fats, sucrose, and starch. According to BICO data, the U.S. trade of these products to Romania in 2023 was \$6 million, while NIS data shows \$37 million.

Wine represents a category which witnessed a significant growth, tripling in three years. Most U.S. trade is routed through other EU member states. BICO data indicates that the 2023 U.S. wine exports to Romania were valued at \$317,000, while NIS data cites the record value of \$1.2 million of U.S.-origin

wine. The Netherlands, Germany, and France are, in general, the main points of entry in the EU. In case of distilled spirits (whiskies), the large part of the volume arrives directly in Romania, BICO data showing \$10.9 million, versus NIS showing \$17.7 million.

Chart 2. U.S. High-value products direct and indirect exports to Romania (\$)



Source: National Institute of Statistics (NIS)

Highlighted Category: Fish and Seafood Products

Fish and seafood consumption is expected to continue rising in Romania. The experience gained by travelling abroad, and the curiosity and the need for diet diversification may contribute to boosted demand. Due to insufficient domestic production, fish and seafood demand is largely covered by imports. Regarding the differences between the sources of data, FAS Bucharest believes products worth \$5.2 million captured by BICO were not consumed in Romania and were transshipped to other markets, since NIS data shows that products worth only \$2.7 million were imported. Table 3 below provides the trade data on the major categories of fishery products as shown by BICO and NIS.

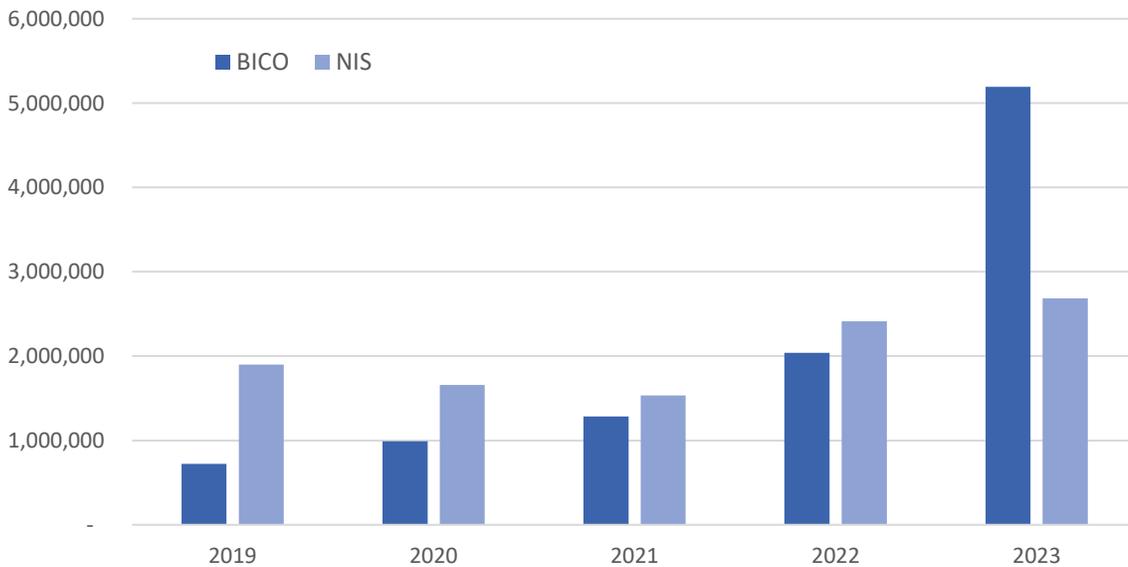
Table 3. Romanian Imports of fish and seafood products from the United States (\$)

HS Code	Description	Source of data	2019	2020	2021	2022	2023
0303 - 0307	Fish and seafood products	BICO	721,000	989,000	1,284,000	2,039,000	5,195,000
		NIS	1,901,333	1,657,344	1,531,978	2,413,319	2,685,300
0303	Fish, frozen	BICO	534,000	645,000	1,020,000	1,818,000	4,864,000
		NIS	1,327,178	1,235,765	982,071	1,847,081	2,039,149
0304	Fish fillets and other fish meat,	BICO	-	82,000	-	-	58,000

	fresh, chilled or frozen	NIS	127,087	54,936	65,177	26,506	33,091
0305	Fish, dried, salted or in brine; smoked fish	BICO	-	210,000	126,000	68,000	-
		NIS	151,753	254,589	24,695	68,742	66,312
0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen,	BICO	184,000	52,000	138,000	153,000	273,000
		NIS	203,511	60,446	184,093	292,379	330,909
0307	Mollusks, whether in shell or not, live, fresh, chilled, frozen	BICO	3,000	-	-	-	-
		NIS	91,535	51,608	59,642	61,385	118,670

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

Chart 3. U.S. Fish and seafood products traded to Romania, by source of data (\$)



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

Attachments:

No Attachments.