

DEEPENING DROUGHT IN WESTERN ROMANIA THREATENS DEVELOPMENT OF SUNSEED

Spring crops (including sunseed) sowing rates were low in Romania due to cold weather in April and early May. Currently, temperature returned closer to normal, favorable for the further development of spring crops.

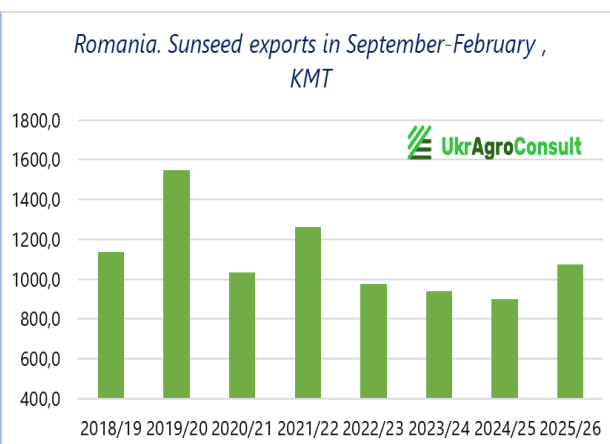
Soil moisture content is close to sufficient in the upper soil layer for the early stages of development almost all over the country. However, farmers are worried about its deficit in the 0-100 cm layer to give plants consistent conditions for later development stages, critical for yield and quality formation. The situation is the worst in the western part, which is not usual for this part of the country. Here the lack of rains is reported since March, despite the forecasted rains.

Spring and summer weather are getting more and more unpredictable, increasing uncertainty in spring seeding. Romania planned relaunch of the anti-hail system by 2028. This also highlights how nervous the market is now regarding weather management. Minister of agriculture claims that inaction of the system is costing too much, but some farmers say that in areas where the anti-hail system was stopped, rains have returned. Crops look better than in previous years and they benefit from rains. Even rainfall itself is now turning into a political and economic debate.

UkrAgroConsult`s yield expectation for 2026 sunseed is at 1.5 mt/ha, which is below the 5-year average. Summer temperatures and timely rains will be critically for the final yield.

Sunseed	2026/27		2025/26	
	APR	MAY	APR	MAY
Opening stocks	12	50	21	21
Area seeded Th ha	1220	1220	1205	1205
Yield, MT/ha	1,75	1,5	1,5	1,71
Production	2135	1830	1808	2058
Imports	280	350	300	280
SUPPLY	2427	2230	2129	2359
Crushing	950	900	850	920
Other uses	10	10	10	10
Seeds	16	20	17	19
Exports	1390	1250	1230	1350
Losses	10	10	10	10
DEMAND	2376	2190	2117	2309
Ending stocks	51	40	12	50

Source: UkrAgroConsult estimations



Source: EuroStat

Experts of MARS monitoring agency are more optimistic, expecting the sunseed yield closer to average - at 1.75 mt/ha (5-year average - 1.83 mt/ha). However, currently rains are predicted all across Romania, but not in the western and north western area - at least till the end of May. At the same time, torrential rains are seen in the south-east - usually very dry region. Such rains are not favorable for spring as well for the winter crops.

Romanian processors, still interested in the old 2025 crop, offered USD 650-655/mt for sunseed last week, which is close to record levels. New crop sunseed processors currently are ready to buy at USD 545-550/mt (up 10/mt w/w), which is about USD 100/mt higher y/y to secure raw material supply. Processors say about almost non-existent margins due to high prices of sunseed.

However, Romanian sunflower seed exports in 2025/26 are above all expectations, despite the poor production and high domestic demand.

According to EuroStat, in Sep-Feb 2025/26 the exports exceeded 1 MMT, more by 19% vs. previous season of 2024/25. According to UkrAgroConsult estimates, the exports may increase up to 1.35 MMT, some cargoes from Romanian port were shipped to Turkey in March and April.

In their turn, processors imported sunflower seed from Moldova (about 200 KMT according to EuroStat data) to cover their needs. Imports of Ukrainian sunseed remains minimal (below 1 KMT), same as in the previous two seasons. Before the introduction of licensing system, in 2021/22 Romania imported 251 KMT of Ukrainian sunseed.

Romania imported about 65.8 KMT of Argentinian sunseed in March and April, with another 40.7 KMT expected to arrive in May, port data suggests.

In case of further rain deficit, UkrAgroConsult expects that 2026/27 sunflower seed prices will go up closer to July and may reach new record level. In 2026/27 MY oilseed complex is strongly supported by the crude oil market. Additional factor of support is unstable logistics for sunoil exports in Ukraine, exporters are searching for other sunoil export routes, avoiding the shipments via big ports.

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