INTERNATIONAL MARKET ANALYSIS REPORT

Slovakia Coffee International Market Analysis Report

 Target Country: Slovakia ☕ Main Category: Coffee Report Date: June 29, 2026

Slovakia Coffee Core Conclusions

Slovakia's coffee consumption is entirely import-dependent, with annual imports of approximately 31,000 tons and a market size of around €350 million. International coffee prices remain elevated, with the ICO composite index in the 225-240 cents/lb range, pushing up end-retail costs. Chinese coffee exports to Europe are steadily growing; China-Slovakia trade potential is concentrated in Yunnan green bean supply and OEM processing.

- Annual imports approx. **31,000 tons** , import dependency near **100%**
- ICO Composite Index **232 cents/lb** ▲12% (YoY) ⚠ High
- Market size approx. **€350 million** , annual per capita consumption approx. **2.8 kg**

Sources: ICO Monthly Report (May 2026); Eurostat (April 2026); Statistical Office of the Slovak Republic (Q1 2026)

Supply & Demand Fundamentals

Slovakia has no domestic coffee cultivation; supply is entirely import-dependent. In 2025, total coffee and coffee product imports reached approx. 30,800 tons, with consumption at approx. 29,500 tons. Intra-EU re-exports (Germany, Italy, Czech Republic) form the largest supply channel, accounting for approx. 62% of total imports.

Indicator	2023	2024	2025
Import Volume (10k tons)	2.85	2.96	3.08
Consumption (10k tons)	2.72	2.83	2.95
Import Value (€100M)	1.62	1.85	2.02

Sources: Eurostat (extracted April 2026); Statistical Office of the Slovak Republic (Q1 2026 trade flash report)

China Market Status

China's coffee production is steadily increasing, with Yunnan accounting for over 95% of national output. In 2025, China's coffee exports exceeded 100,000 tons, with significant growth in exports to the EU. Domestic brands such as Luckin Coffee and Cotti Coffee continue to expand, driving coffee bean demand while simultaneously strengthening export competitiveness.

- Yunnan coffee output **132,000 tons** (2025), YoY +6.5%
- China coffee exports **105,000 tons** (2025), of which EU exports approx. 21,000 tons

- Domestic coffee bean spot price (Yunnan) approx. **28-32 CNY/kg** (June 2026)

Sources: General Administration of Customs of China (May 2026 export statistics); Yunnan Provincial Department of Agriculture and Rural Affairs (2025 industry report); Business Society coffee bean quotes (June 2026)

Slovakia Market Status

Slovakia's coffee retail market is dominated by roasted coffee beans and instant coffee, with capsule coffee growing fastest (approx. 18% annually). The main import source countries are Germany (re-export share 35%), Italy (18%), and Czech Republic (9%), with origins concentrated in Brazil, Vietnam, and Colombia.

Import Source (Re-exporting Country)	Share	Main Origin Countries
Germany	35%	Brazil, Vietnam, Honduras
Italy	18%	Brazil, Colombia, India
Czech Republic	9%	Vietnam, Brazil, Uganda
Other EU Countries	38%	Ethiopia, Peru, etc.

Sources: Eurostat (2025 trade data); Slovak Chamber of Commerce and Industry (March 2026 industry brief)

Product Segment Structure

Slovakia's imported coffee products can be divided into three main categories: roasted coffee beans (including ground powder) accounting for approx. 48% of imports, instant coffee at 32%, and green beans (for local small and medium roasters) at 20%. Capsule coffee shows outstanding retail growth, with 2025 sales up approx. 17% year-on-year.

Product Segment	Import Share	2025 Import Volume	Price Trend
Roasted Coffee Beans/Powder	48%	Approx. 14,800 tons	+8%
Instant Coffee	32%	Approx. 9,900 tons	+5%
Green Coffee Beans	20%	Approx. 6,200 tons	+14% ⚠

Sources: Eurostat HS codes 0901/2101 classification data (2025); ICO classified price indices (May 2026)

Core Finished Product Supply & Demand

Roasted coffee beans are the most essential finished product in the Slovakia market, with 2025 imports of approx. 14,800 tons; retail prices have risen due to higher green bean costs. Instant coffee supply and demand remain stable, but the import share of premium instant products (freeze-dried) has increased to approx. 40%.

- Roasted coffee retail avg. price **€9.8-14.5/kg** (supermarket channel), YoY **+7%**
- Instant coffee (freeze-dried) import share up to **40%**, avg. price approx. 60% higher than spray-dried products

- Local roaster capacity approx. **5,000 tons/year** , meeting only 17% of consumption

Sources: Slovak Retail Association (February 2026 price monitoring); Eurostat (2025 trade breakdown data)

Intermediate Goods & Raw Material Value

Green coffee beans are the core intermediate product in the industry chain. International green bean prices remain elevated, with both Brazil Arabica and Vietnam Robusta prices up year-on-year. China's Yunnan green beans are competitively priced, with CIF Slovakia prices approx. 8-12% lower than Brazilian beans.

Variety/Origin	FOB Price (cents/lb)	Estimated CIF to Slovakia
Brazil Arabica	255-270	Approx. 285-305 cents/lb
Vietnam Robusta	195-210	Approx. 225-245 cents/lb
China Yunnan Arabica	220-240	Approx. 255-278 cents/lb

Sources: ICO price indices (May 2026); China Chamber of Commerce of Foodstuffs and Native Produce - Coffee Branch (April 2026)

Trade & Macro Indicators

Slovakia's economic growth is steady, with 2025 GDP growth at approx. 2.1% and inflation easing to 3.2%. The euro exchange rate is relatively stable, which benefits import trade. Coffee still accounts for a low share of China-Slovakia bilateral trade, but growth potential is considerable.

Indicator	Value	Period
Slovakia GDP Growth	2.1%	2025
CPI Inflation Rate	3.2%	April 2026
EUR/CNY Exchange Rate	Approx. 7.85	June 2026
Coffee Import Tariff (EU)	0%-7.5%	By Category

Sources: World Bank (2025 Slovakia economic data); European Central Bank (June 2026 exchange rates); EU TARIC tariff database (2026)

Risk & Opportunity Window

Key risks include persistently high international coffee prices, stricter EU pesticide residue regulations (new MRLs effective 2026), and EUR/CNY exchange rate fluctuations. Opportunities lie in the cost-effectiveness of China's Yunnan green beans, growing demand for roasting OEM in Slovakia, and optimization of the China-Europe Railway Express logistics corridor.

- ⚠ Risk New EU MRLs fully implemented in 2026, tightening residue standards for imported coffee beans
- ⚠ Risk Vietnam Robusta region affected by climate with reduced output; increased price volatility

- Opportunity China Yunnan green beans via China-Europe Railway Express to Slovakia approx. 18-22 days, cost advantage over sea + land transport
- Opportunity Slovak SME roasters seeking diversified green bean sources; China can fill supply gaps

Sources: European Commission SANTE (2026 new MRL regulations); ICO climate impact report (March 2026); China State Railway Group China-Europe Railway Express operational data (May 2026)

▯ Data Sources Summary

- ICO — Monthly price report and supply-demand statistics (May 2026)
- General Administration of Customs of China — China coffee export statistics (May 2026)
- World Bank — Slovakia macroeconomic indicators (2025)
- European Commission SANTE — New MRL regulations on pesticide residues (2026)
- Eurostat — Slovakia coffee import trade data (extracted April 2026)
- Statistical Office of the Slovak Republic — Domestic consumption and retail data (Q1 2026)
- Business Society — China coffee bean spot prices (June 2026)
- China Chamber of Commerce of Foodstuffs and Native Produce - Coffee Branch — Industry analysis (April 2026)