🇭🇺 Hungary Coffee Overseas Market Analysis Report

📅 Updated: June 30, 2026 ☕ Category: Coffee 🌍 Target Country: Hungary

Hungary Coffee Key Conclusions

Hungary relies entirely on imports to meet coffee demand, with total imports of approx. 71,000 tons in 2025. Affected by global Robusta bean production cuts and a weakening HUF, retail average prices rose approx. 11% YoY in H1 2026. Supply remains stable but cost pressure is significant.

Annual coffee imports (green beans + products)	**71,000 tons** ↑3.2%
Per capita coffee consumption	**4.3 kg/year**
Retail avg. price YoY change	+11% ⚠ Elevated
Import dependency	**~100%**

Source: Hungarian Central Statistical Office (KSH) May 2026 Trade Flash; ICO June 2026 Market Report

Supply & Demand Fundamentals

Hungary has no commercial coffee cultivation; supply is entirely import-dependent. Domestic consumption is primarily ground coffee and capsule coffee, with foodservice and household scenarios accounting for approx. 65%. Domestic consumption reached approx. 70,000 tons in 2025, with a slight inventory build-up.

Indicator	2024	2025	YoY
Import volume (10k tons)	6.88	7.10	+3.2%
Consumption (10k tons)	6.80	7.00	+2.9%
Est. ending inventory (10k tons)	0.55	0.65	-

Source: KSH Foreign Trade Statistics Database, May 2026; ICO Supply & Demand Balance, June 2026

China Market Overview

China's coffee consumption continues to grow, with Yunnan green coffee bean prices remaining elevated driven by international futures. In H1 2026, China's coffee exports were mainly instant powder and green beans, with increasing export attempts to Central and Eastern Europe, though Hungary's share remains low.

Yunnan green bean avg. price (Jun 2026)	**32.5 CNY/kg** ↑8% YTD
China coffee export volume (2025)	**42,000 tons**
Direct exports to Hungary	**Approx. €2.1 million (carried forward)**
Domestic chain brands going global	**Luckin & Cotti building E. Europe supply chains**

Source: General Administration of Customs of China, Apr 2026 Export Data; Yunnan Coffee Industry Association, Jun 2026 Price Brief

Hungary Market Overview

Hungary's coffee retail market is highly competitive, dominated by international brands. Affected by slow disinflation and logistics costs, the average ground coffee supermarket price rose to HUF 4,200/kg. Import sources are primarily EU redistribution and Vietnam.

Ground coffee retail avg. price	**4,200 HUF/kg** ↑10.5%
Top import origins (2025)	**Vietnam 28% / Poland 22% / Germany 18%**
Café average cup price	**850-1,150 HUF**
HUF/EUR exchange rate (Jun 2026)	**~385 HUF/EUR**

Source: KSH Consumer Price Report, Jun 2026; Eurostat Comext, May 2026

Product Segment Breakdown

Among imported products, unroasted green beans account for the largest share, mainly used for domestic roasting. Instant and capsule coffee have higher added value, with demand growing faster than traditional ground coffee. Single-serve capsule system penetration in Budapest has exceeded 40%.

Category	Import Share	Price Trend
Unroasted green beans	62%	↑14% YoY
Roasted ground coffee	21%	↑9% YoY
Instant & capsule	17%	↑7% YoY

Source: KSH HS Code 0901 Classification Statistics, Q1 2026

Core Finished Products Supply & Demand

Roasted ground coffee is the mainstream finished product, with local roasters' capacity utilization at approx. 78%. Due to high green bean costs, roasters face margin pressure. Some small and medium brands are shifting to lower-priced Vietnamese Robusta beans to maintain margins.

Local roasting capacity	**42,000 tons/year**
Roasting capacity utilization	**78%**
Ground coffee import dependency	**~35%**
Weighted avg. green bean purchase price	**5.8 €/kg**

Source: Hungarian Roasters Association (MKSZ) May 2026 Industry Brief; ICO Green Bean Composite Index, Jun 2026

Intermediate Goods & Raw Material Values

The global Arabica-Robusta futures spread has narrowed. Yunnan beans' CIF cost to Hungary is approx. €4.2/kg, offering no price advantage over Vietnam beans' CIF price of €3.1/kg, but specialty beans present differentiation opportunities.

ICE Arabica futures (Jun 2026)	**2.85 $/lb**
ICE Robusta futures (Jun 2026)	**4,520 $/ton** Historical high
Yunnan green bean FOB price	**3.6 $/kg**
Vietnam green bean FOB price	**2.5 $/kg**

Source: ICE Futures Europe, Jun 27, 2026 Close; Argus Media Agricultural Weekly, Jun 2026

Trade & Macro Indicators

Hungary's GDP growth is moderate, with coffee imports accounting for approx. 2.3% of total food imports. China-Hungary economic and trade relations remain stable, but there is still no direct preferential coffee tariff channel; re-export trade is the primary form.

Hungary total coffee imports (2025)	**€380 million**
GDP growth rate (Q1 2026)	**1.8%**
Food processing value-added share	**4.1%**
Applicable VAT rate	**27%**

Source: Hungarian Ministry of Finance 2026 Macro Forecast; World Bank Hungary Country Report, Apr 2026

Risks & Opportunity Windows

Main risks include Robusta bean supply shortages and HUF depreciation. Opportunities lie in Chinese specialty coffee entering Hungary via Belt and Road logistics networks and establishing local roasting and packaging centers to mitigate high VAT.

⚠ Supply chain risk	**Extreme weather in Vietnam/Indonesia impacts Robusta yields**
⚠ Exchange rate risk	**HUF depreciated approx. 4% YTD**
▯ Policy opportunity	**HIPA offers subsidies for food processing**
▯ Logistics upgrade	**Zhengzhou-Budapest direct cargo flights launched**

Source: USDA Coffee: World Markets and Trade, Jun 2026; Hungarian Investment Promotion Agency (HIPA) 2026 Incentive Policies

Primary Data Sources

- Hungarian Central Statistical Office (KSH) - May/Jun 2026
- International Coffee Organization (ICO) - Jun 2026
- General Administration of Customs of China - Apr 2026
- ICE Futures Europe - Jun 2026
- Argus Media Agricultural Weekly - Jun 2026
- Yunnan Coffee Industry Association - Jun 2026
- USDA Coffee: World Markets and Trade - Jun 2026
- Hungarian Investment Promotion Agency (HIPA) - 2026
- Eurostat Comext - May 2026
- Hungarian Roasters Association (MKSZ) - May 2026