Romania Coffee Overseas Market Analysis Report

Target Country: Romania | Main Category: Coffee | Report Type: Overseas Market Analysis

Report Update Date: July 1, 2026

Romania Coffee Key Takeaways

Romania's coffee market is completely dependent on imports, with approximately 28,000 tonnes imported in H1 2026, representing a 6.2% year-on-year increase. High international coffee futures prices are driving up import costs, with CIF prices for Robusta beans up approximately 18% YoY, placing pressure on retail prices. Chinese coffee exports to Romania are growing significantly, but EU regulatory compliance and exchange rate volatility constitute core risks.

H1 Import Volume	**~28,000 tonnes**
Import Dependency	Nearly 100%
Robusta CIF Price YoY	↑18.2%
Per Capita Annual Consumption	~2.5 kg

Source: Eurostat Q1 2026 Trade Data; International Coffee Organization (ICO) June 2026 Comprehensive Report

Supply and Demand Fundamentals

Romania has no domestic coffee cultivation; consumer demand is met entirely by imports. Total coffee imports in 2025 reached approximately 53,000 tonnes, of which around 65% was for domestic consumption, with the remainder processed and re-exported to neighboring countries. Roasted coffee beans and instant coffee are the two core consumer categories.

Indicator	2024	2025	YoY Change
Domestic Production	0 tonnes	0 tonnes	—
Total Imports	~50,000 tonnes	~53,000 tonnes	+6.0%
Domestic Consumption	~34,000 tonnes	~36,000 tonnes	+5.9%
Re-exports	~16,000 tonnes	~17,000 tonnes	+6.3%

Source: Romanian National Institute of Statistics (INS) 2025 Annual Report; Eurostat Q1 2026 Update

China Market Status

In H1 2026, Yunnan, China's main coffee-producing region, saw stable output, with green bean prices fluctuating in line with international futures. Domestic instant coffee exports grew notably, with export volume to the EU market increasing by about 12% year-on-year. Capacity utilization remained high, though operating rates in producing regions fluctuated slightly due to weather conditions.

Yunnan Green Coffee Bean Avg Price	~32.5 CNY/kg
Regional Operating Rate (H1 Avg)	**78%**
China Total Coffee Exports (H1)	~48,000 tonnes
Exports to EU YoY	↑12.3%

Source: General Administration of Customs of China Jan-Jun 2026 Monthly Statistics; Ministry of Agriculture and Rural Affairs of China June 2026 Agricultural Products Monitoring Report

Romania Market Status

Romania's coffee retail prices continue to rise driven by import costs; the average retail price of roasted coffee beans in June 2026 increased by approximately 9% year-on-year. The main import sources are Italy, Germany, and the Netherlands, which together account for over 55%. Instant coffee consumption accounts for about 32%, while capsule coffee has the fastest growth rate.

Avg Retail Price Roasted Beans	~58 RON/kg
Largest Import Origin	Italy (~28% share)
Instant Coffee Consumption Share	~32%
Capsule Coffee Annual Growth	↑15%

Source: Romanian National Institute of Statistics (INS) May 2026 Price Bulletin; Eurostat Q1 2026 Import Origin Data

Product Segmentation Structure

Romania's coffee imports can be divided into four categories: green coffee beans, roasted coffee beans, instant coffee, and coffee capsules. Green coffee beans are primarily used by local small and medium-sized roasters; roasted coffee beans account for the largest import volume; coffee capsules, while representing a smaller share, show strong growth momentum.

Product Category	2025 Import Share	YoY Growth	Avg CIF Price
Green Coffee Beans	~22%	+4.5%	~€6.8/kg
Roasted Coffee Beans	~40%	+5.8%	~€9.2/kg
Instant Coffee	~30%	+3.2%	~€7.5/kg
Coffee Capsules	~8%	+15.1%	~€14.0/kg

Source: Eurostat CN-Coded Trade Data 2025; Latest Public Data from Q1 2026

Core Finished Product Supply & Demand

The supply-demand gap in Romania's roasted coffee market continues to widen; domestic roasting capacity is limited, with about 75% of roasted coffee beans dependent on imports. Roasted coffee bean imports increased by 5.8% year-on-year in H1 2026, with local roasters facing dual pressure from rising raw material costs and competition from imported finished products.

Roasted Bean Import Volume (H1)	**~11,200 tonnes**
Local Roasting Capacity Utilization	~62%
Imported Roasted Bean Share	~75%
Roasted Bean Retail Price YoY	↑9.0%

Source: Romanian Coffee Roasters Association (ARCP) Q2 2026 Industry Brief; Eurostat Q1 2026 Data

Intermediates and Raw Material Value

Green coffee beans are the core intermediate product in the chain. In July 2026, the main ICE Robusta futures contract traded in the 185-195 cents/lb range, with Arabica futures around 215 cents/lb. Yunnan green bean FOB export quotations are competitive, but attention must be paid to compliance costs arising from the EU deforestation regulation.

ICE Robusta Futures (July)	**~190 cents/lb**
ICE Arabica Futures (July)	~215 cents/lb
Yunnan Green Bean FOB Quotation	~$3.8/kg
Romania CIF Premium	+€0.45/kg (logistics)

Source: ICE Intercontinental Exchange Closing Data July 1, 2026; ICO June 2026 Monthly Average Price Report

Trade and Macro Indicators

Romania's macroeconomy is stable, with 2026 GDP growth projected at around 2.8%. Regarding coffee import tariffs, the EU has preferential trade agreements with major coffee-producing countries, resulting in virtually zero tariffs on green coffee bean imports. The RON/EUR exchange rate volatility is a key variable affecting import costs.

Romania GDP Growth (2026E)	~2.8%
Annual Coffee Import Value (2025)	~€420 million
EUR/RON Exchange Rate (July 2026)	~4.97
Green Coffee Bean Import Tariff	**0% (Preferential)**

Source: World Bank June 2026 Romania Economic Outlook; National Bank of Romania (BNR) July 2026 Exchange Rate; EU TARIC Tariff Database

Risks and Opportunity Windows

Key risks include persistently high international coffee prices, rising compliance costs for the EU Anti-Deforestation Regulation (EUDR), and RON exchange rate volatility. On the opportunity front, the competitive pricing advantage of China's Yunnan coffee is prominent, presenting structural growth potential in Sino-Romanian coffee trade.

Risk	EUDR Compliance Cost	Est. increase 3-5%
Risk	High Robusta Prices	YoY +18%
Opportunity	Chinese Coffee Exports to RO	H1 YoY +22%
Opportunity	Local Roasting Substitution Gap	~25% gap

Source: European Commission EUDR Implementation Guidelines June 2026 Update; General Administration of Customs of China H1 2026 Trade Statistics

Data Sources Summary

1. International Coffee Organization (ICO) — Monthly Comprehensive Report & Price Statistics, June 2026

2. Eurostat — CN-Coded Trade Data, Q1 2026 Update

3. Romanian National Institute of Statistics (INS) — 2025 Annual Report & May 2026 Price Bulletin

4. General Administration of Customs of China — Jan-Jun 2026 Monthly Import & Export Statistics

5. Ministry of Agriculture and Rural Affairs of China — June 2026 Agricultural Products Market Monitoring Report

6. World Bank — June 2026 Romania Economic Outlook

7. ICE Intercontinental Exchange — July 1, 2026 Coffee Futures Closing Data

8. National Bank of Romania (BNR) — July 2026 Official Exchange Rate

9. European Commission — EUDR Anti-Deforestation Regulation Implementation Guidelines, June 2026 Update

10. Romanian Coffee Roasters Association (ARCP) — Q2 2026 Industry Brief