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Report Highlights:

Romania is a growing market for U.S. food and agriculture exports. Romania's total population is 18.8 million as of early 2026, representing a marginal decrease from the previous year, with about 48 percent still living in rural areas. The annual inflation rate in Romania was 9.7 percent in December 2025 (and reached 10.9 percent in May 2026), keeping it among the member states with the highest price levels in the European Union (EU). In 2025, Romania's total agricultural imports reached $16.1 billion, 5 percent more than 2024. Of this, approximately 8 percent were sourced from EU Member States. Germany, Hungary, Poland, and the Netherlands remained among Romania's major trading partners in 2025, with Ukraine also maintaining a notable presence. The top products imported from the United States were food preparations, soybeans, alcoholic beverages, tree nuts, oilseeds, and fruits and nuts.

Market Fact Sheet: Romania

Executive Summary

Romania is a growing market for U.S. food and agriculture exports. Romania's total population is 18.8 million as of early 2026**,** representing a marginal decrease from the previous year, with about 48 percent of people still living in rural areas. The annual inflation rate in Romania was 9.7 percent in December 2025 (and reached 10.9 percent in May 2026), keeping it among the member states with the highest price levels in the European Union (EU).

Imports of Consumer-Oriented Products

In 2025, Romania's total agricultural imports reached $16.1 billion, a 5 percent increase over 2024, of which 80 percent were sourced from EU Member States. Germany, Hungary, Poland, and the Netherlands remained among Romania's major trading partners in 2025.

Meat, dairy, grains, oilseeds, and beverages continued to be the primary product import categories. The United States is a top 22 supplier of food and agriculture to Romania. The top products imported from the United States were food preparations, soybeans, alcoholic beverages, tree nuts, oilseeds, and fruits and nuts.

Valued at $187.7 million in 2025 (up 2 percent from 2024), U.S. goods flow into Romania either directly from the United States (mainly bulk and intermediate products) or are transshipped through the other western (EU ports of entry in Italy, the Netherlands, and Germany (most common for consumer-oriented goods).

Food Processing Industry

Romania's food industry is comprised of 14,000 registered companies with a total turnover of $18.5 billion. The top segments include meat, milling and baking, and dairy.

Food Retail Industry

Grocery retailers continued to dominate retail value sales in 2025 as Romanians traditionally allocate a significant share of their expenditure to food. On August 1, 2025, the Value Added Tax (VAT) on food products increased from 9 to 11 percent, and on non-food products from 19 to 21 percent. This move contributed to rising inflation, which was immediately reflected in lower consumption, that had already been stagnant for almost 2 years.

SWOT Analysis	
Strengths	***Weaknesses***
Accessible by sea with an efficient distribution network. Romanians spend approximately 40 percent of incomes on food product purchases. Marketing costs are low.	Some U.S. exports are disadvantaged because of EU non-tariff barriers and import duties.
Opportunities	***Threats***
U.S. high-value products enjoy increasing demand (among some populations) due to growing incomes, a fast-developing food retail network, and changing consumption habits.	EU suppliers have competitive advantages due to geographic location and their ability to deliver small volumes.

Quick Facts CY 2025

Imports of Consumer-Oriented Products

$16.1 billion

Top 10 Growth Products Imported to Romania

1) Meat	2) Fruits & nuts
3) Dairy products	4) Baking products
5) Beverages and spirits	6) Vegetables
7) Cocoa	8) Oils
9) Coffee	10) Fish

Food Industry by Channels ($ billion) 2025

Food Exports – Agricultural and Related Products	14.3
Food Imports – Agricultural and Related Products	16.1
Food Retail	31.3

Gross Domestic Product (GDP)/Population

Population *(millions)*: 18.8
GDP *($ billion)*: 480
GDP per capita *($)*: 25,690
Exchange rate *(2025)*: 1$=4.47 RON
Exchange rate *(2025)*: 1€=5.04 RON

Sources: Euromonitor, Eurostat, Trade Data Monitor, World Bank, National Institute of Statistics, Statista, Ministry of Finance, ZF, Retail FMGC, Armo, Eurocommerce, and Datareportal.
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MARKET OVERVIEW

In 2025, Romania's total agricultural imports continued to increase, reaching $16.1 billion, 5.2 percent more than 2024. Of this, more than 80 percent was sourced from EU Member States, indicating a slight shift but still a strong reliance on intra-EU trade. Germany, Hungary, Poland, and the Netherlands remained among Romania's major trading partners in 2025. Meat, dairy, grains, oilseeds, and beverages remained the primary product import categories.

At the same time, Romania's agricultural exports, predominantly consisting of grains, oilseeds, live animals, and fats, reached $14.3 billion in 2025, an increase of 22 percent compared with 2024.

The United States ranked 22nd among the world suppliers of food and agriculture to Romania in 2025. The top products imported from the United States were food preparations, soybeans, alcoholic beverages, tree nuts, oilseeds, and fruits and nuts. U.S. goods enter Romania either directly from the United States (mainly bulk and intermediate products) or by transshipment through other western EU ports of entry, such as Italy, the Netherlands, and Germany – which are the most common for consumer-oriented goods.

Table 1: Total Romanian Agricultural Trade

	2020	**2021**	**2022**	**2023**	**2024**	**2025**
Agricultural imports (Billion USD)	10.2	12	13.9	14.6	15.3	16.1
Agricultural exports (Billion USD)	7.9	11.2	12.5	13.2	11.7	14.3
Agricultural trade Deficit (Billion USD)	(2.2)	(0.8)	(1.4)	(1.4)	(3.6)	(1.8)

Source: Trade Data Monitor

Table 2: U.S. Agricultural Trade to Romania

	2020	**2021**	**2022**	**2023**	**2024**	**2025**
Direct imports (Million USD)	72.38	90.04	81.41	91.94	90.82	84.5 (-7 percent)
Indirect Imports (Million USD)	104.88	92.00	108.82	118.70	94.58	103.2 (+ 9 percent)
TOTAL (Million USD)	177.26	182.00	190.23	210.60	185.4	187.7 (+2 percent)

Source: Trade Data Monitor, National Institute of Statistics in Romania

II. EXPORTER BUSINESS TIPS

Romania has a population of approximately 18.8 million people, per the recent demographic census. Major Romanian cities and their respective populations include Bucharest (the capital, 2.11 million), Iasi (320,000), Timisoara (318,000), Cluj-Napoca (324,000), Constanta (305,000), Craiova (298,000), and Brasov (285,000).

Romania typically has 17 official public holidays (in both 2025 and 2026), an increase from previous years. Commonly, if official holidays fall on Tuesday or Thursday, they are often expanded to create a 4-day weekend. FAS Bucharest recommends interested U.S. stakeholders check an official holiday calendar in advance before planning to visit, to avoid local holidays. (Note: Romanian dates are written in the day/month/year format).

Introductions: U.S. stakeholders may directly contact Romanian companies, although in-person introductions are highly appreciated and can significantly help build credibility. There is usually only one primary decision maker in a company, and that person is not typically the purchasing manager.

Seasonal sales: The Christmas and Easter holidays continue to offer significant sales opportunities. December sales are consistently two to three times higher than during other months, and retailers often expand business hours to accommodate increased customer traffic. During these holiday periods, retailers typically focus on higher-end products, as consumers tend to increase their spending.

Consumer characteristics: Romanian food shopping has changed dramatically in recent years, with consumers increasingly shifting toward product variety and being influenced by international trends. Many Romanians also continue to look for the best cost-benefit ratio in their food and beverage purchases, balancing quality with affordability.

There are well-established brands in most food and beverage categories, and new-to-market products may require extra marketing efforts when first introduced. FAS Bucharest suggests visiting Romania for market-research, product testing, price comparisons, and to gain a deeper understanding of the local competition.

U.S. exporters should establish strong relationships with local importers, distributors, supermarkets, retailers, etc., as these stakeholders are critical in facilitating and promoting U.S. consumer-ready foods. Trade shows remain excellent platforms for raising product awareness and for meeting potential business contacts.

II. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

As an EU Member State, Romania follows EU standards and regulations. Details about food laws, food additive regulations, labelling, specific standards, and import procedures are available in the Romania and European Union Food and Agricultural Import Regulations and Standards (FAIRS) reports.

II. MARKET SECTOR STRUCTURE AND TRENDS

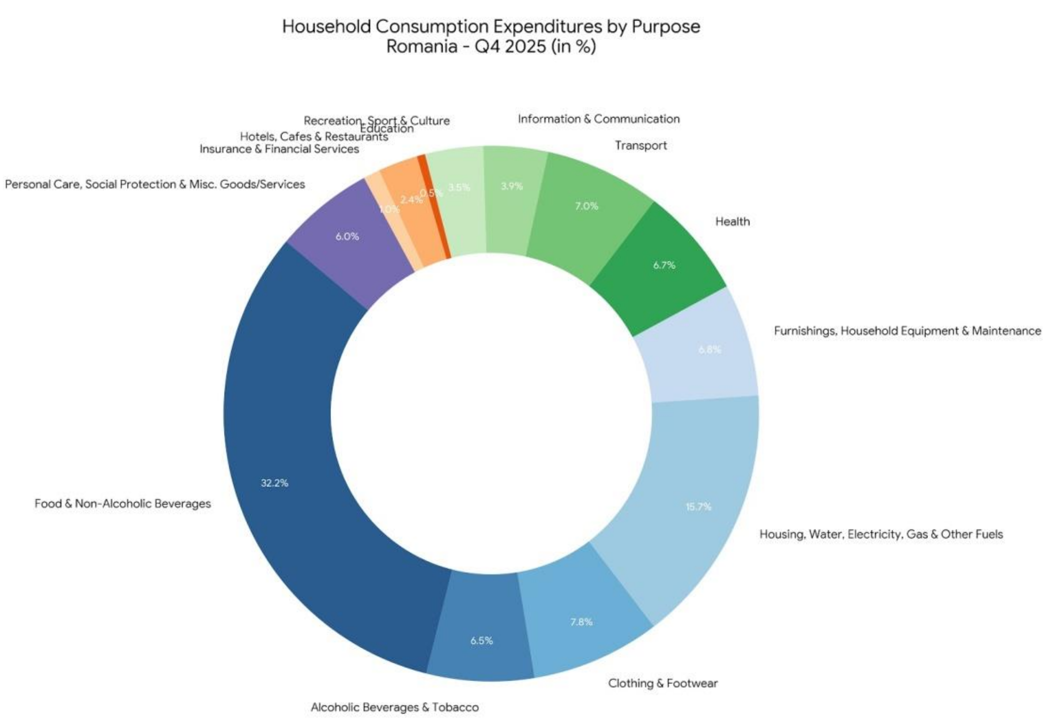
Consumer Demographics

Currently, Romanians aged 35-39 are the country's top-income earners, although by 2040, the top income age bracket will be 40-44. Given this, demand for family-related goods and services – including transport, education, and household products – is growing fast. However, the number of households in Romania is forecast to decrease moderately by 2040. In terms of household types, the decline will be mainly fueled by the shrinking number of couples with children, which is set to decline by 17.7 percent, accounting for 19.8 percent of all households by 2040.

Consumption patterns for people in their 20s tend to focus more on food and beverages, entertainment, and communications. As people in their late 20s and 30s begin to settle down and start families, they become more interested in family-oriented product categories.

According to the latest National Institute of Statistics (INSSE) data, in the last quarter of 2025, the average monthly revenue per household was $2,115 (a 13.3 percent increase over 2024). Total monthly expenditures per household were $1,806, which represents 13.9 percent increase over 2024. Food and non-alcoholic beverages accounted for 32.2 percent of consumer spending per household, and 6.5 percent of average income was spent on alcoholic beverages and tobacco. Only 2.4 percent was spent in hotels or restaurants. More information on income and consumption can be found in INSSE's latest report.

Figure 1. Household Consumption Expenditures by Purpose



Source: *National Institute of Statistics in Romania*

The Retail Market

At the end of 2025, the pace of inflation started to increase compared to previous years, contributing to the impact of rising living costs on Romania's retail sector. According to analysts, the long-term effect of earlier increases in energy and utility bills, alongside high general price points, kept consumers on the defensive regarding their budgets. On August 1, 2025, the value added tax (VAT) on food products increased from 9 to 11 percent, and on non-food products from 19 to 21 percent. This move, along with others by the authorities, again raised inflation to 9.7 percent in December 2025, which immediately was reflected in consumption that had already been stagnant for almost 2 years.

Grocery retailers continued to dominate the landscape at the end of 2025, as Romanian households consistently allocated a substantial portion of their budgets to food and non-alcoholic beverages. Industry analysts note that although food price inflation eased toward the end of the year, continuing high shelf prices kept affordability as the top priority for many households. In response, the Romanian Government maintained the "Support for Romania" (Sprijin pentru Romania) program throughout 2025, though the assistance was recalibrated down from 250 RON in 2024 to 125 RON in 2025* (down approximately from $55 in 2024 to $28 in 2025) distributed bimonthly via electronic social cards for food and hot meals. This targeted aid continued to support millions of vulnerable Romanians, with funds being heavily utilized across grocery retail chains and increasingly through foodservice partners to secure basic daily necessities.

Despite an e-commerce surge, physical stores retained significant advantages in 2025, continuing to offer consumers the crucial benefit of being able to test products before purchasing and providing the immediate possession of goods, which remains a key differentiator. Analysts note supermarkets remained highly popular throughout 2025, with consumer demand for proximity and a wide range of products consistently driving their growth. Supermarkets actively continued to meet the demand for more affordable products through the ongoing development and expansion of private label options across an increasing number of goods. For instance, the "Mega" private label line, launched by Mega Image supermarket at the end of 2021 and widely available by the end of 2022, continued to be a strong example of successful strategies adopted by major retailers to address consumer needs for value.

Table 3. International Retailers in Romania

International retailers in Romania	Turnover (mil. USD)			No. of stores	
	2024	2025	2025 vs 2024	2024	2026
Lidl	5,359.00	5,964.00	11.29	377	390
Kaufland	4,265.00	4,691.00	9.99	192	200
Profi	3,077.00	3,239.00	5.26	1,778	1,756
Carrefour	2,732.00	3,173.00	16.14	450	478
Mega Image**	2,305.00	2,741.00	18.92	978	1,000
Metro	2,463.00	2,665.00	8.20	30	30
Rewe (Penny)	2,057.00	2,391.00	16.24	417	456
Auchan	1,687.00	1,838.00	8.95	460	500
Selgros	991.00	997.00	0.61	23	24

**The values are different in USD than in RON due to exchange rates in 2025 (1$= 4.47 RON)*

*** Starting from March 31, 2026, Mega Image also incorporates the business of the Profi chain, as the two entities operating the Mega Image and Profi chains merged through absorption following the acquisition in which Ahold Delhaize bought Profi Rom Food from the investment fund Mid Europa Partners. Ahold Delhaize, with its two brands Mega Image and Profi, thus becomes the largest grocery retailer in Romania. The merger of Mega Image and Profi into a single legal entity will not change the identity of the stores, which will retain their format and offering.*

Source: Ministry of Finance.

Growth of E-Commerce

E-commerce continued to expand throughout 2025 – registering 8 percent growth in 2025 – with the strong penetration of smartphones, tablets, and laptops continuously driving consumer engagement online, according to analysts. According to published data, the e-commerce market reached $8.3 billion in physical products delivered by courier. This persistent shift in consumer behavior has compelled retailers to further refine and expand their omnichannel strategies**,** blurring the lines between online and offline shopping experiences. According to the Romanian Association of Online Stores (ARMO), sustained success of pure e-commerce retailers has led traditional offline retailers to intensify their investments in enhancing their online presence and digital capabilities to remain highly competitive and appeal to the ever-increasing number of online consumers. Investments in logistics infrastructure, diversification of payment methods, adoption of artificial intelligence (AI) and the expansion of online commerce in rural areas are just a few of the factors that will contribute to the sector's development.

E-commerce in Romania reached almost 3.5 percent of Gross Domestic Product (GDP) in 2025, consolidating its position in the top 10 EU Member States, according to the European E-Commerce Report 2025. Romania ranks ninth in Europe and third in Central and Eastern Europe, after Poland and the Czech Republic. According to data published by the National Institute of Statistics, 74.3 percent of people aged 16 to 74 who used the internet in the last 12 months ordered or purchased goods and services online, up 1.4 percentage from the previous year. This mass use of E-commerce also changes expectations. The consumer no longer "tests" online, but includes it in their routine, and the criteria become predictable: time saved, availability, delivery options, assortment, price and associated services.

According to the above-mentioned report, the persisting high costs of raw materials, energy, transportation, and storage continued to influence price points and slightly temper the growth dynamics of e-commerce in 2025. Romanians consistently sought the convenience of home delivery, the wide range of products and brands from which to choose, competitive prices, and flexible return policies. Additionally, the number of online orders collected in-store continued its upward trend in 2025 – a phenomenon that continued to benefit retailers as consumers were often tempted to make impulse purchases when visiting an outlet to collect their orders.

The Romanian buyer is increasingly present in the social ecosystem. According to Data Reportal, Romania has 12.9 million active accounts on social media (October 2025), (68.3 percent of the population), and among adults (18+) there are 11.5 million (75 percent of the 18+ population). This directly supports the role of product discovery through social media (including ads), online reviews, and influencers in the decision-making process. Romanians are pragmatic and price-sensitive, prioritizing essential products and strong promotions, especially in an economic context with high inflation.

Families with children and the population segment of those 35-54 are among the most active buyers. Women generate approximately 60 percent of retail transactions. Criteria such as free or fast delivery and detailed product descriptions matter a lot in the purchase decision.

Hotel Restaurant & Institutional Food Service Sector

High inflation and rising prices of food and utilities continued to put pressure on households budgets and impacted purchasing in 2025, according to Euromonitor. This resulted in a declining number of transactions and reduced value growth for full-service restaurants. However, sales were sustained by professionals and tourists in the capital and larger cities, with these consumer groups having less time for cooking with higher motivation to enjoy tourist activities or business lunches or dinners. While fine dining became more visible in Bucharest and large cities, which have invested in rehabilitating historic downtowns and benefit from business and leisure tourism, smaller cities remained focused on traditional Romanian cuisine, favored by domestic consumers.

According to sector analysts, growth of full-service restaurants is forecast to be driven by professionals and tourists dining out. International cuisine is set to perform better than traditional European offerings, with widespread availability and many operators available in areas with lower purchasing power. Growth will be increasingly associated with tourism and traditional cuisine. As sustainability becomes more important, the focus on shortening the distance from farm to plate will be increasingly important. On the other hand, the development of full-service restaurants in the capital and larger cities will focus on new formats, such as raw-vegan, vegetarian, molecular cuisine, and fish-based dishes, which are increasingly popular amongst food enthusiasts who are able to spend more on sophisticated meals.

Continuing high inflation and a 2 percent increase in VAT in 2025 added to costs for both operators and consumers. As a result, limited-service restaurants benefited due to their affordability. According to Euromonitor, consumer food service is shifting toward convenience and value, with both limited-service restaurants and online delivery thriving. However, at the same time, consumers are also prioritizing health-focused and fresh food. An increase in foreign tourists has also been a positive trend, according to analysts. Foodservice value sales rose by 6 percent in 2025 to $6.75 billion. Outlet numbers increased by 1 percent to 23,791, and limited-service restaurants were the best performing category in 2025, with foodservice value sales rising by 11 percent in current terms to $1.87 billion.

With inflation remaining high, operators looked to cut costs. According to business analysts, this included reduced portion sizes, simplified ingredients, and narrowed menu choice. Also, with staff shortages contributing to high costs, many businesses focused on digitalization, including introducing self-order kiosks, mobile apps for ordering, and contactless payments.

While in-restaurant dining still leads the market, analysts note online ordering and home delivery continued to grow and are increasingly seen as key supplementary revenue channels. More and more operators are signing up for food delivery apps such as Glovo, Wolt, and Bolt Food. Also, some operators have their own proprietary apps, including McDonald’s and KFC, as well as pizza outlets, such as Jerry’s Pizza and Domino’s Pizza.

Food Processing Sector

Romania's food industry is comprised of 14,000 registered companies with a total turnover of $18.5 billion. The top segments include meat, milling and baking and dairy. According to market analyses, the increasing inflation in 2025 continued to exert pressure on the purchasing power of most of the Romanian population. This financial strain remained a significant factor, further compounded by the elevated average shelf prices of processed meat and seafood. Consumers continued to adapt their purchasing patterns to cope with the cost-of-living challenges. Despite Romania's standing as a traditional producer of processed meat with a multitude of regional and national suppliers, the sustained surge in raw meat prices at the farm gate, coupled with increased energy costs for meat processing, elevated packaging expenses, and amplified logistics and retailing costs, collectively continued to prevent the maintenance of affordable shelf prices. Consequently, consumers increasingly gravitated towards more budget-friendly options, leading to a continued resurgence in demand for unpackaged chilled meat**,** particularly in specialist stores and dedicated sections within international grocery chains. This trend reinforces a focus on prioritizing daily needs, as many small local grocers continued to adopt the norm of selling unpackaged chilled processed meat over the counter.

Traditional consumption of processed meat continued to drive sales as the largest product area in 2025, albeit still facing challenges from consumer caution. Continued growth in average prices resulted in a sustained pressure on volume sales, impacting both shelf-stable and chilled processed meat categories. Despite this, the overall interest in chilled processed meat remains robust, underpinned by strong manufacturing and consumption traditions that offer a wide array of popular products such as salami, sausages, hot dogs, ham, and bacon.

According to market data, the growing dynamics within meat and seafood substitutes continued to accelerate in 2025, largely driven by an increasing consumer orientation towards a healthier lifestyle and, notably, a growing demand for more affordable protein alternatives. Historically associated primarily with religious fasting, these products have witnessed expanding demand in Romania though the category remains relatively small in overall market size.

Entry Strategy

The best strategy for U.S. food ingredients exporters to enter the Romanian market is to contact local importer/distributors or food manufacturers directly. The main food manufacturers/ importers/distributors understand the market and how to contact key stakeholders. Trade shows are also an effective way to promote new food ingredients products. The best method to reach Romanian retail buyers and prospective importers is to contact them directly via e-mail or to reach out to FAS Bucharest for additional guidance.

V. AGRICULTURAL AND FOOD IMPORTS

Romanian importers generally view U.S. suppliers as reliable sources of well-known brands and high-end products. They usually prefer products with at least six months of shelf-life. Besides the product itself, packaging implies status, and innovation is also important. Products that combine these characteristics are more likely to succeed in Romania. U.S. food categories most often exported to Romania are tree nuts, fish and seafood, and pet food.

Table 4. 2025 Imports by Product Category, Main Suppliers, & Key Constraints/Opportunities

Product Category Imports 2025 (product code)	Main Suppliers	Key Constraints for Market Development	Market Attractiveness for U.S. Products
Fish and seafood (03/1604/1605) Total imports: $572.1 million	Netherlands - $76.8 million Spain - $60.1 million Poland - $42.3 million Italy - $39.6 million United States - $2.3 million	Romanian fish consumption is below the EU average. Price-quality ratio remains the main purchase criteria.	In 2025, exports to Romania from all partners increased by 8.5 percent showing growing consumption interest. Due to price sensitivity, U.S. fish exports decreased by 32 percent.
Beef (0201/0202) Total imports: $154.2 million	Netherlands - $48 million Lithuania - $34.9 million Germany - $27.3 million Poland - $13.5 million United States - $4.16 million	Market access is restricted because of EU non-tariff barriers. The EU tariff rate quota for beef also restricts U.S. access to this market.	The United States and the EU agreed to grant the United States a country specific share of 45,000 MT duty-free high-quality beef (HQB) quota. General imports increased by 26 percent, and U.S. beef total exports to Romania increased by 52 percent, showing growing consumption interest.
Nuts (0802) Total imports: $99.4 million	United States - $18.4 million Ukraine - $14.6 million China - $13.9 million Czech Republic - $13.9 million Germany - $10.9 million	Pricing may restrict target customers. The processing industry remains price sensitive. Sixty-one percent of U.S. imports come from indirect imports.	Lifestyle changes spur growth. Food processing industry focuses on healthful products. General imports increased by 59 percent, and imports of U.S. origin products increased by 55 percent.
Wine (2204) Total imports: $172.5 million	Italy - $52.4 million Moldova - $44.5 million France - $24.6 million Spain - $18.8 million United States - $572,000	Consumption of Romanian products and local brands are very well represented.	Total imports increased by 20 percent. U.S. wine imports had a slight increase of 9 percent in 2025.
Distilled spirits (whiskey - 220830) Total imports: $142.9 million	United Kingdom - $59.9 million Netherlands - $22.7 million	Significant domestic production and consumption. High excise taxes.	Total imports decreased by 4 percent and the consumer allocated less funds per year for alcoholic beverages.

	Latvia - $22.7 million United States - $17.5 million Germany - $10 million		
Pet food (230910) Total imports: $418 million	Hungary - $178.4 million Poland - $71.3 million Germany - $33.6 million Czech Republic - $21.5 million United States - $2.88 million	Price range restricts target consumers and puts U.S. pet foods in the premium price category.	Imported pet food dominates in Romania. Market grows yearly. U.S. exports decreased by 10 percent due to higher prices.
Sauces, condiments, mustards (2103) Total imports: $209.2 million	Germany - $46.9 million Hungary - $29.2 million Italy - $21.9 million Poland - $21.2 million United States - $1.57 million	Price range restricts target consumers.	Sales of sauces, dressings, and condiments, particularly linked to international cuisines, increased by 4 percent in 2025. U.S. exports increased by 30 percent.

Source: Trade Data Monitor, National Institute of Statistics Romania

I. KEY CONTACT AND FURTHER INFORMATION

For specific stakeholder contact information, or further information regarding this report, please contact our office:

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Attachments:

No Attachments