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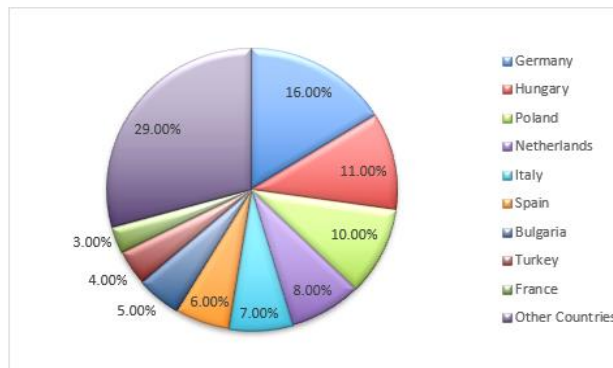
Report Highlights:

Romania continues to be a growing market for U.S. food and agriculture exports. Romania's total resident population was just over 19 million people as of early 2024, representing a marginal decrease from the previous year, with about 48 percent still living in rural areas. The annual rate of inflation saw a significant improvement, reaching an average of approximately 5.1 percent in 2024, a substantial drop from the 10.4 percent recorded in 2023. In 2024, Romania's total agricultural imports reached an estimated \$15.3 billion, marking a 4.6 percent increase over 2023. Of this, approximately 80 percent were sourced from EU Member States. Germany, Hungary, Poland, and the Netherlands remained among Romania's major trading partners in 2024, with Ukraine also maintaining a notable presence. Meat, dairy, grains, oilseeds, and beverages continued to be the primary product import categories.

Market Fact Sheet: Romania

Executive Summary Romania has been a growing market for food and agriculture imports. Romania's total resident population is just over 19 million people as of early 2024, representing a marginal decrease from the previous year, with about 48 percent still living in rural areas. The annual rate of inflation saw a significant improvement, reaching an average of 5.1 percent in 2024, a substantial drop from the 10.4 percent recorded in 2023.

Consumer-Oriented Agricultural Imports



In 2024, Romania's total agricultural imports reached \$15.3 billion, a 4.6-percent increase over 2023, of which 80 percent were sourced from EU Member States. Germany, Hungary, Poland, and the Netherlands remained among Romania's major trading partners in 2024, with Ukraine also maintaining a notable presence. Meat, dairy, grains, oilseeds, and beverages continued to be the primary product import categories. The United States is a top 23 supplier of food and agriculture to Romania.

Food Processing Industry Market data indicates that retail value sales for processed foods continued to increase in 2024, with current estimates placing the total market value at over \$1.4 billion. The meat and seafood substitutes category remained a top performer.

Food Retail Industry

Grocery retailers continued to dominate retail value sales in 2024 because Romanians traditionally allocate a significant share of their expenditure to food. According to Euromonitor, offline grocery sales reached \$40.5 billion (offline and e-commerce).

SWOT Analysis	
Strengths	Weaknesses
Romania is accessible by sea and has an efficient distribution network. Romanians spend about 40 percent of incomes for purchasing food products. 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 could enjoy increasing demand due to growing incomes, fast developing food retail networks, and consumption habits changing towards high-quality products.	EU suppliers have competitive advantages due to geographic location and the ability to deliver small volumes.

Quick Facts CY 2024

Imports of Consumer-Oriented Products (\$15.3 billion)

List of Top 10 Growth Products Imported to Romania

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

Food Industry by Channels (\$ billion) 2024

Food Exports – Agricultural and Related Products (2024)	11.7
Food Imports – Agricultural and Related Products (2024)	15.3
Retail total	61.5
Retail groceries	40

GDP/Population

Population (millions): 19.02
 GDP (\$ billion): 384
 GDP per capita (\$): 18,853
 Exchange rate (2024): 1 Euro =4.97
 Exchange rate (2024): 1\$ =4.59

Sources: Euromonitor, Eurostat, Trade data Monitor, World Bank, Nation Institute of Statistics.

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I. MARKET OVERVIEW

In 2024, Romania's total agricultural imports continued to increase, reaching an estimated \$15.3 billion, marking a 4.7 percent increase over 2023. Of this, approximately 80 percent were 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 2024, with Ukraine continuing to play a significant, albeit fluctuating, role in certain categories. 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 an estimated \$11.7 billion in 2024, experiencing a decrease of 11.3 percent. The United States ranked twenty-third among the world suppliers of food and agriculture to Romania in 2024. The top products imported from the United States were food preparations, soybeans, alcoholic beverages, tree nuts, oilseeds, and fruits, among others. U.S. goods flow into Romania either directly from the United States (mainly bulk and intermediate products) or are transshipped through other western EU ports of entry in Italy, the Netherlands, and Germany – which is most common for consumer-oriented goods. Please see Romania's latest [Indirect/Direct imports GAIN report](#).

Table 1: Total Romanian Agricultural Trade

	2020	2021	2022	2023	2024
Agricultural imports (Billion)	\$10.2	\$12	\$13.9	\$14.6	\$15.3
Agricultural exports (Billion)	\$7.9	\$11.2	\$12.5	\$13.2	\$11.7
Agricultural trade Deficit/Surplus (Billion)	(\$2.2)	(\$0.8)	(\$1.4)	(\$1.4)	(\$3.6)

Source: Trade Data Monitor

Table 2: U.S. Agricultural Trade to Romania

	2020	2021	2022	2023	2024
Direct imports (Million)	\$72.4	\$90.0	\$81.4	\$91.9	\$89.6 (-2 percent)
Indirect Imports (Million)	\$104.9	\$92.0	\$108.8	\$118.7	\$94.6 (-20 percent)
TOTAL (Million)	\$177.3	\$182.0	\$190.2	\$210.6	\$184.1 (- 12 percent)

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

Advantages and Challenges

ADVANTAGES	CHALLENGES
Retailers offer a different variety of products so new products are always a subject of interest and curiosity. Categories such as meat substitutes, vegan, bio, no sugar, and no gluten are increasing.	Romanians advertise for buying local products and are also still price sensitive.
Romania is accessible by sea and has an efficient distribution network. Romanians spend about 40 percent of incomes on purchasing food products. Marketing costs are low.	Some U.S. exports are disadvantaged because of EU non-tariff barriers and import duties.
U.S. high-value products could enjoy increasing demand due to growing incomes, fast developing food retail networks, and consumption habits changing towards high-quality products.	EU suppliers have competitive advantages due to geographic location and the ability to deliver small volumes.
A strategic location offering re-export potential.	Consumers perceive U.S. food products to be overly processed and relatively unhealthy.

II. EXPORTER BUSINESS TIPS

Romania has a total population of just over 19 million people as of early 2024, reflecting recent demographic trends. Major Romanian cities and their respective populations are Bucharest (capital, 1.87 million), Iasi (318,000), Timisoara (315,000), Cluj-Napoca (316,000), Constanta (303,000), Craiova (304,000), and Brasov (276,000).

Romania typically has 15 official public holidays in both 2024 and 2025, which is an increase from previous years. As is common, if official holidays fall on a Tuesday or Thursday, they are often officially expanded to create a four-day weekend. FAS Bucharest recommends that interested U.S. stakeholders check the official holiday calendar in advance before planning to visit, so to avoid local holidays. Keep in mind that 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 one's credibility. There is usually only one primary decision maker in a company, and that person is not typically the purchasing manager.

Seasonal sales: The holidays of Christmas and Easter 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.

III. IMPORT FOOD STANDARDS, REGULATIONS and 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 EU Food and Agricultural Import Regulations and Standards (FAIRS) [reports](#).

IV. 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 these age groups, demand for family-related goods and services – like transport, education, and household products – is growing fast. Still, 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 2024, the average monthly revenue per household was \$1,677, and \$670 per person (a 15.9 percent increase over 2023). Total monthly expenditures per household were \$1,430, which represents a 13.1 percent increase over 2023. Food and non-alcoholic beverages accounted for 35 percent of consumer spending per household, and 7.3 percent of average income was spent on alcoholic beverages and tobacco. Only 1.8 percent was spent in hotels or restaurants.

Retail Market:

In 2024, while the pace of inflation decelerated significantly compared to the previous year, rising living costs continued to present challenges for the retail sector in Romania. The sustained increase in energy and utility bills still prompted consumers to adapt their budgets. Reduced disposable incomes meant an ongoing focus on essential items, and purchasing power continued to shape consumer behavior, with a consistent emphasis on buying goods through deals and promotions to reduce spend per basket. As such, while price increases still contributed to positive retail value growth, the market largely saw constrained retail volume sales as consumers remained cautious.

Grocery retailers continued to dominate the landscape in 2024, as Romanians consistently allocated a significant portion of their spending to essential items, including food and drink. Although food price

inflation eased compared to 2023, it still placed pressure on consumers' expenditures, impacting many Romanian households and maintaining a focus on affordability. In response, the Government continued its program, "Support for Romania" (Sprijin pentru Romania), throughout 2024, offering vouchers valued at RON 250 (approximately \$55 USD). These vouchers were granted to over 2.6 million vulnerable Romanians (slightly increased from 2023) in six bimonthly installments and loaded on cards. This allowed consumers to use the money to purchase food through retail and increasingly through foodservice partners.

According to Euromonitor, the total retail market reached \$61.5 billion in 2024 of which food retail was about \$40.5 billion (offline and e-commerce).

Table 3. Top 10 International Retailers in Romania

International Retailers in Romania	Turnover (Million USD)			Number of Stores	
	2023	2024	2024 vs 2023	2023	2024
Lidl	4,763	5,359	12.5	355	377
Kaufland	4,014	4,265	6.3	177	192
Profi	2,828	3,077	8.8	1,654	1,778
Carrefour	2,483	2,732	10.0	450	450
Metro	2,301	2,463	7.0	30	30
Mega Image	2,162	2,305	6.6	969	978
Rewe (Penny)	1,821	2,057	13.0	376	417
Auchan	1,587	1,687	6.3	440	460
Selgros	983	991	0.8	23	23
Cora	302	106	-64.9	10	0

**The values are different in USD than in RON due to exchange rate*

***The Belgian-Irish group Ahold Delhaize (Mega Image) took over the company Profi Rom Food (Profi).*

**** Carrefour took over Cora hypermarkets and closed the ones with a low rate of profitability*

Source: Ministry of Finance.

E-commerce continued its robust expansion throughout 2024, with the strong penetration of smartphones, tablets, and laptops continuously driving consumer engagement online. 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.

Romania's online e-commerce continued its expansion, registering a 10 percent growth in 2024. According to Euromonitor, the e-commerce market reached \$6.1 billion last year, of which \$1.6 billion was spent on fashion, \$1.26 billion on appliances and electronics, \$607 million on home products, \$406 million on health and beauty products, \$400 million on food and \$1.5 billion on other online products.

The market continues to develop due to significant investments made by industry players. According to Retail FMCG magazine, the e-commerce market leader eMAG, recorded a 14 percent growth in Romania and the upward trend is expected to continue, thanks to optimized logistics capabilities and

diversified payment methods. In addition, Turkish retailer Trendyol consolidated its position in the local market by opening a logistics center near Bucharest, which will manage at least 2.5 million deliveries per year.

The development of delivery infrastructure has also expanded with the use of easybox networks (the newest delivery option for orders). (Easybox deliveries have products delivered to a secure locker, available around the clock at multiple pick-up points in larger cities). Courier services in rural areas, as well as the diversification of payment solutions, are also key factors that will contribute to the 10 percent growth forecasted for 2025.

Romania is in a period of consolidation and expansion in the e-commerce market, with a constant annual growth of over 10 percent. Investments in logistics infrastructure, diversification of payment methods, adoption of 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.

The informal economy in Romania remains a persistent challenge. While the specific percentage for 2023 and 2024 is still being fully assessed, reports suggest it continues to represent a substantial portion of the GDP, following the 29 percent recorded in 2022. This places Romania among the EU countries with the largest informal economies, often attributed to a combination of high levels of taxes and social contributions (around 45 percent of gross income) and relatively lower wages compared to Western European counterparts.

The main sources for the informal economy persist as illegal employment, widespread tax evasion, and unregistered businesses, generated by underground production, illegal activities, and various unregistered transactions within households and other units. According to the National Institute of Statistics, the retail sector remains among the top three industries most significantly affected by these informal practices.

The economy still exhibits a notable reliance on cash, even as card transactions continue to increase steadily. This higher level of cash usage provides fertile ground for the underground economy. Accordingly, following a legislative initiative launched in October 2023 aimed at reducing cash use, the government passed Law 296/2023, with subsequent amendments in 2024 that introduced revised limits for cash transactions for both companies and the population. While less stringent than initially proposed due to public feedback and practical considerations, these measures signify an ongoing effort to formalize economic activity and improve tax collection.

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 2024. However, strong factors such as habit persistence and a more permanent change in purchasing behaviours remained significant positive drivers for e-commerce sales. 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 2024 – a phenomenon that continued to benefit retailers as consumers were often tempted to make impulse purchases when visiting an outlet to collect their orders. These inherent benefits consistently differentiate e-commerce, aiding its ongoing expansion.

Supermarkets remained highly popular throughout 2024, 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.

Hotel Restaurant & Institutional Food Service Sector:

High inflation and rising prices of food and utility bills continued to put pressure on household budgets and impacted purchasing in 2024, resulting in a declining number of transactions and reduced value growth for full-service restaurants. However, sales were sustained in the year by professionals and tourists in the capital and larger cities, with these consumer groups having less time for cooking with higher motivation to enjoy a tourist activity or have a business lunch or dinner. 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, which is appreciated by mass consumers.

As online ordering and delivery have become commonplace due to the pandemic, these methods will continue to post an upward trend. Online ordering and delivery through third-party platforms will increase, with players such as Glovo, Tazz by eMAG, and Bolt Food available in larger cities. In addition, many full-service restaurants will implement their own websites or telephone systems for ordering takeaways and deliveries. For smaller players, takeaway is expected to be the norm, with the telephone remaining the main tool to be used for ordering, followed by collection or delivery.

Food Processing Sector:

Consumers continued to adapt their purchasing patterns to cope with the persistent cost of living. 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 truly affordable shelf prices. Consequently, consumers increasingly gravitated towards more budget-friendly options, leading to a continued resurgence in demand for unpackaged chilled meat, particularly observed 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.

The traditional consumption of processed meat continued to drive sales as the largest product area in 2024, albeit still facing challenges from consumer caution. The 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 remained 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.

The surging dynamics within meat and seafood substitutes continued to accelerate in 2024, 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 from individuals adopting diets excluding animal proteins year-round. Although the category remains relatively small in overall market size, it boasts high growth potential, despite still contending with pronounced seasonality dictated by religious fasts. Notably, shelf-stable meat and seafood substitutes, initially crafted to meet demand during fasting periods, continued to dominate the category's largest segment.

Market data indicates that retail value sales for processed foods continued to increase in 2024, with current estimates placing the total market value at over \$1.4 billion. The meat and seafood substitutes category remained a top performer, with retail value sales continuing their strong growth trend.

Market 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 email 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 an important attribute. 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.

Product Category Imports 2024 (product code)	Main Suppliers	Key Constraints for Market Development	Market Attractiveness for U.S. Products
Fish and seafood (03/1604/1605) Total imports: \$546.4 million	Netherlands - \$66 million Spain - \$47.1 million Germany - \$45.3 million Poland - \$43 million United States - \$3.4 million	Romanian fish consumption is below the EU average. Price-quality ratio remains the main purchase criteria.	In 2024, U.S. exports to Romania increased by 36 percent, which shows growing interest for consumption. We can also see a 4.6 percent increase in the first quarter of 2025.
Beef (0201/0202) Total imports: \$97.3 million	Netherlands - \$36.6 million Lithuania - \$21.7 million Germany - \$17.6 million Poland - \$15.3 million United States - \$2.72 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	U.S. 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 5.4 percent which shows growing interest for

		market.	consumption.
Nuts (0802) Total imports: \$64.1 million	United States - \$11,8 million Ukraine - \$12 million Germany - \$12 million Hungary - \$8 million Moldova - \$6 million	Pricing may restrict target customers. The processing industry remains price sensitive. Ninety percent of U.S. imports come from indirect imports.	Lifestyle changes will spur growth. Food processing industry will focus on healthful products. General imports increased by 26 percent, but U.S. imports decreased by 10 percent.
Wine (2204) Total imports: \$142.9 million	Italy - \$44.7 million Moldova - \$38.3 million France - \$21.8 million Spain - \$11 million United States - \$525k	Own consumption and local brands are well represented.	U.S. wine imports decreased by 50 percent in 2024 due to higher prices.
Distilled spirits (whiskey) (220830) Total imports: \$148 million	United Kingdom - \$77.4 million United States - \$24.2 million Netherlands - \$22 million Ireland - \$7 million Germany - \$7 million	Significant domestic production and consumption. High excise taxes.	Total imports increased by 76.4 percent in 2024 and U.S. imports by 58 percent.
Pet food (230910) Total imports: \$385.8 million	Hungary - \$152.3 million Poland - \$83.1 million Germany - \$34.1 million France - \$19.9 million United States - \$3.3 million	Price range restricts target consumers and puts U.S. pet food in the premium price category.	Imported pet food dominates in Romania. Market grows early. Although U.S direct imports decreased by 28 percent, the imports remained the same due to indirect imports.
Sauces, condiments, mustards (2103) Total imports: \$199.5 million	Germany - \$42.6 million Hungary - \$26.4 million Italy - \$23.2 million Poland - \$21 million United States - \$1.2 million	Price range restricts target consumers.	Sales of sauces, dressings, and condiments, particularly linked to international cuisines increased by 12 percent in 2024. Unfortunately, US exports decreased by 32 percent.

Source: Trade Data Monitor, National Institute of Statistics Romania

VI. KEY CONTACT AND FURTHER INFORMATION

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Attachments:

No Attachments