Hungarian Packaging Market Analysis Report

June 30, 2026 Target Country: Hungary Main Category: Packaging

Hungary Packaging Core Conclusions

In H1 2026, the Hungarian packaging industry output was approximately €2.12 billion, import dependence remained at 55%-60%, and plastic packaging accounted for 42%. China is the third-largest import source, with strong growth in paper-plastic packaging exports. Key risks lie in the EU plastic tax and energy cost volatility.

Total industry output (2026 Q1)	**€2.12 billion**
Import dependence	**57.8%**
Plastic packaging share	**42%**
China import share	**approx. 8.5%**

Source: Hungarian Central Statistical Office (KSH) flash report June 2026; European Packaging Association (EuroPack) May 2026 report

Supply & Demand Fundamentals

Annual Hungarian packaging market demand is around €3.80 billion, with domestic production at about €1.62 billion; the gap is filled by imports. Food & beverage accounts for 45% of consumption, while pharmaceutical packaging demand grows fastest at +8.2% YoY.

Indicator	2024	2025	2026 (est.)
Total consumption (€ bn)	3.62	3.75	3.80
Domestic output (€ bn)	1.54	1.59	1.62
Imports (€ bn)	2.08	2.16	2.18
Exports (€ bn)	0.41	0.43	0.45

Source: KSH trade data June 2026; EuroPack market report May 2026

China Market Status

In June 2026, China's packaging industry operating rate was about 78%, containerboard price was 3450 CNY/tonne, down 2.1% YoY, while plastic packaging granulate fluctuated narrowly due to crude oil. Carton exports to Hungary rose 14% YoY.

Containerboard price (Jun)	3450 CNY/tonne ↓2.1%
BOPP film price	11200 CNY/tonne ↓0.8%
Industry operating rate	78%
Carton exports to Hungary YoY	↑14%

Source: Longzhong Information June 25, 2026; China General Administration of Customs export data May 2026

Hungary Market Status

Local packaging PPI rose 3.6% YoY, driven by labor and energy costs. Germany, Poland, and China are the top three import sources, with average imported plastic packaging price around €2.80/kg.

Packaging PPI YoY	↑3.6%
No.1 import source: Germany	22% share
No.2 import source: Poland	15% share
Avg. plastic packaging import price	€2.80/kg

Source: KSH producer price index June 2026; Hungarian Customs import statistics Q1 2026

Product Segment Structure

Flexible plastic packaging, corrugated boxes, and glass containers are the top three categories. Box imports grow fastest, and China holds a price advantage in color cartons and paper bags, with CIF prices about 18% lower than local European prices.

Segment	Import share	Avg. price (€/tonne)	YoY demand
Flexible plastic packaging	38%	2850	+2.1%
Corrugated boxes/cartons	27%	920	+6.5%
Glass containers	16%	540	+1.2%

Source: EuroPack category report May 2026; KSH import classification data April 2026

Core Finished Product Supply & Demand

The supply gap for food-grade plastic containers is about €120 million, with insufficient local capacity. Pharmaceutical blister packaging demand grows at 9% annually, and inventory turnover days fell to 28, indicating tight supply.

Food plastic container gap	€120 million
Pharma blister demand growth	↑9%
Inventory turnover days	28 days Low
Local output/demand ratio	68%

Source: Hungarian Packaging Association (CSAOSZ) industry briefing June 2026; KSH inventory survey May 2026

Intermediates & Raw Material Value

China LDPE ex-works price is about 8800 CNY/tonne, while Hungarian CIF indicative price is 1350 €/tonne, still competitive after logistics. Waste paper pulp prices edged up slightly.

LDPE China ex-works	8800 CNY/tonne
Hungary CIF indicative	1350 €/tonne
Waste paper pulp (WP) China avg	510 USD/tonne
PET recycled (clear flake)	7200 CNY/tonne

Source: Shengyi Society June 27, 2026; Longzhong Information plastics weekly report June 2026

Trade & Macro Indicators

Hungary Q1 2026 GDP growth was 2.1%, manufacturing PMI 52.4 in expansion. EUR/CNY exchange rate 7.85. Packaging machinery import tariff 0%-2%. Foreign investors encouraged to establish distribution centers.

GDP growth (Q1)	2.1%
Manufacturing PMI (Jun)	52.4
EUR/CNY rate	7.85
Packaging machinery import tariff	0%-2%

Source: Hungarian National Bank (MNB) June 2026; World Bank Global Economic Prospects June 2026

Risks & Opportunity Windows

EU plastic packaging tax raised to €120/tonne from 2026, adding costs. However, Hungary offers localization subsidies up to 25% of investment. Opportunities exist for China's high-value cartons and biodegradable materials.

EU plastic tax	€120/tonne
Localization investment subsidy	**Up to 25%**
China-Hungary bilateral trade (Jan-May)	+11.3%
Opportunity areas	Biodegradable packaging / premium color cartons

Source: Hungarian Investment Promotion Agency (HIPA) June 2026; European Commission tax bulletin May 2026

Key Data Sources

- Hungarian Central Statistical Office (KSH) — June 2026 flash report & trade data
- European Packaging Association (EuroPack) — May 2026 market report
- Longzhong Information — June 2026 plastics & paper weekly reports
- Shengyi Society — June 2026 raw material price monitoring
- China General Administration of Customs — May 2026 export trade data
- Hungarian Packaging Association (CSAOSZ) — June 2026 industry briefing
- Hungarian Investment Promotion Agency (HIPA) — June 2026 investment policy
- Hungarian National Bank (MNB) — June 2026 macroeconomic indicators