Overseas Market Analysis Report | Pesticide Industry

Hungary Pesticide Overseas Market Analysis Report

Target Country: Hungary • Main Category: Pesticide • Report Update Date: June 30, 2026

Hungary Pesticide Core Conclusions

Hungary is a major pesticide consumption market in Central and Eastern Europe, with a market size of approximately €280 million in 2025 and an annual growth rate of about 3.5%. About 85% of the country's demand relies on imports, and China is the third largest source country, accounting for approximately 14%. Driven by the EU Green Deal and Farm to Fork Strategy, traditional chemical pesticides face pressure to reduce, while demand for biopesticides grows rapidly. In 2026, key risks lie in potential restrictions on certain active ingredients due to the implementation of new EU pesticide regulations, as well as the trend toward supply chain diversification.

Market size **€280M** | Import dependency **85%** | China supply share **14%** | Annual growth **+3.5%**

Source: Eurostat trade database, Hungarian Central Statistical Office (KSH), report dated Dec 2025 / values carried forward to June 2026

Supply & Demand Fundamentals

Hungary's domestic pesticide production is limited, with only one medium-sized formulation processing enterprise producing about 1,800 tons annually. Imports reached approximately 9,200 tons in 2025, exports were around 600 tons (mainly re-exports), and apparent consumption was about 10,400 tons. Herbicides dominate the consumption structure at 55%, followed by fungicides at 28% and insecticides at 17%. Major application crops are maize, wheat, sunflower and rapeseed.

Indicator	2024	2025	YoY Change
Domestic production (tons)	1,750	1,800	**+2.9%**
Imports (tons)	8,900	9,200	**+3.4%**
Exports (tons)	550	600	**+9.1%**
Apparent consumption (tons)	10,100	10,400	**+3.0%**

Source: Hungarian Central Statistical Office (KSH), FAO statistical database, report dated Dec 2025 / values carried forward to June 2026

China Market Situation

In 2025, China's pesticide technical output was about 3.8 million tons (100% basis), with a capacity utilization rate of around 72%. Glyphosate technical price was around RMB 28,000–32,000 per ton at the end of 2025, down about 8% from the same period in 2024. China's pesticide exports to the EU have grown steadily, with exports to Hungary reaching approximately USD 32 million in 2025. Chinese pesticide enterprises face dual pressures from rising environmental costs and increasing EU technical barriers, accelerating industry consolidation.

Glyphosate TC **28k–32k** RMB/ton | Capacity utilization **72%** | Exports to Hungary **$32M**

Source: Longzhong Information, General Administration of Customs of China, report dated Dec 2025 / values carried forward to June 2026; no latest public data

Hungary Market Situation

End-user pesticide prices in Hungary are 15–20% lower than in Western Europe, and imported pesticides account for about 85% of market share. Main import sources are Germany (28%), France (18%), China (14%), Poland (10%) and Belgium (8%). Distribution channels are dominated by large agricultural input distributors, with the top three controlling about 60% of market share. Hungary's total pesticide import value in 2025 was approximately €240 million.

Import Source Country	Share	Import Value (€M)
Germany	28%	67
France	18%	43
China	14%	34
Poland	10%	24
Belgium	8%	19

Source: Eurostat, report dated Nov 2025 / values carried forward to June 2026

Product Segment Structure

Herbicides are the largest category of Hungary's pesticide imports, accounting for 55% of total import value, while fungicides and insecticides account for 28% and 17% respectively. Among herbicides, glyphosate, nicosulfuron and acetochlor are the top three varieties; fungicides are dominated by azoxystrobin, tebuconazole and mancozeb; insecticides see the highest demand for imidacloprid and lambda-cyhalothrin.

Category	Import Share	Import Value (€M)	Main Varieties
Herbicides	55%	132	Glyphosate, Nicosulfuron, Acetochlor
Fungicides	28%	67	Azoxystrobin, Tebuconazole, Mancozeb
Insecticides	17%	41	Imidacloprid, Lambda-cyhalothrin

Source: Eurostat, European Crop Protection Association (ECPA), report dated Oct 2025 / values carried forward to June 2026

Core Product Supply & Demand

Glyphosate is the largest single pesticide product used in Hungary, with annual demand of approximately 1,800–2,200 tons (equivalent to 4,500–5,500 tons of 41% SL formulation). Hungary has no domestic production of glyphosate and relies entirely on imports. China supplies about 35% of glyphosate imports, with the remainder mainly from Bayer (Germany) and Belgium. Supported by policy expectations that the EU may extend glyphosate approval until 2033, market supply remains stable.

⚠ EU glyphosate renewal vote expected by end of 2026

Annual glyphosate demand **1,800–2,200** tons

China supply share **35%**

Fully import dependent **100%**

Source: Hungarian Ministry of Agriculture, ECPA industry reports, report dated Sep 2025 / values carried forward to June 2026

Intermediates & Raw Material Values

Key intermediate prices in Chinese producing regions remained relatively stable at the end of 2025. The CIF price of imported pesticides in Hungary carries a premium of about 25–35% over Chinese FOB prices, mainly consisting of sea freight costs (8–12%), EU pesticide registration cost amortization (10–15%), and distributor tier margins. The Red Sea shipping crisis continues to push up freight rates on the Asia–Europe route, with sea freight costs rising about 18% year-on-year in 2025.

Intermediate / Raw Material	Avg Price in China	Hungary CIF Premium
Glycine (glyphosate intermediate)	RMB 11,500/ton	+28%
Phosphorus trichloride	RMB 5,200/ton	+25%
Diethanolamine	RMB 7,800/ton	+30%

Source: Longzhong Information, 100ppi.com, report dated Dec 2025 / values carried forward to June 2026; no latest public data

Trade & Macro Indicators

Hungary's macro environment is stable, with a corporate income tax rate of 9%, the lowest in the EU. Agriculture accounts for about 3.5% of GDP. The EU Common Agricultural Policy (CAP) provides Hungary with an average of approximately €1.3 billion in agricultural subsidies annually, strongly supporting pesticide consumption. Sino-Hungarian bilateral trade volume is approximately USD 12 billion, and deepening Belt and Road cooperation brings convenience to pesticide trade.

Indicator	Value	Remarks
GDP growth (2025)	1.8%	World Bank data
Agriculture share of GDP	3.5%	Hungarian Central Statistical Office
HUF/CNY exchange rate	1 CNY ≈ 51 HUF	Hungarian National Bank, 2025 average
Corporate income tax rate	9%	Lowest in EU
Average annual CAP subsidy	~€1.3 billion	European Commission

Source: World Bank, Hungarian Central Statistical Office (KSH), European Commission, report dated Dec 2025 / partially carried forward to June 2026

Risks & Opportunity Windows

⚠ Risk New EU pesticide regulations scheduled for 2026 may ban more active ingredients, affecting some Chinese export products; HUF exchange rate volatility (±8% in 2025) increases import cost uncertainty; the Red Sea shipping crisis continues to push up logistics costs.

▲ **Opportunity** Biopesticide market growing at over 15% annually; Chinese enterprises can build green product lines; Hungarian government provides a fast-track for new pesticide registrations; deepening China-Hungary Belt and Road cooperation brings trade facilitation opportunities. Hungary is gradually opening mutual recognition policies for registrations from non-EU suppliers.

Biopesticide growth **+15%** /year

Exchange rate volatility **±8%**

Corporate income tax **9%** EU lowest

Source: European Commission Directorate-General for Agriculture, Hungarian Investment Promotion Agency (HIPA), ECPA, report dated Nov 2025 – Mar 2026

Data Sources Summary

1. Eurostat trade database — https://ec.europa.eu/eurostat — Nov/Dec 2025
2. Hungarian Central Statistical Office (KSH) — https://www.ksh.hu — Dec 2025
3. General Administration of Customs of China — http://www.customs.gov.cn — Dec 2025
4. Longzhong Information — https://www.oilchem.net — Dec 2025
5. 100ppi.com — https://www.100ppi.com — Dec 2025
6. FAO Statistical Database — https://www.fao.org/statistics — Oct 2025
7. European Crop Protection Association (ECPA) — https://www.ecpa.eu — Sep/Oct 2025
8. World Bank — https://www.worldbank.org — Dec 2025
9. European Commission Directorate-General for Agriculture — https://agriculture.ec.europa.eu — Nov 2025
10. Hungarian Investment Promotion Agency (HIPA) — https://hipa.hu — Mar 2026

Note: Some June 2026 data carry forward the latest publicly available 2025 values, as indicated in each card's source.