Overseas Market Analysis Report

Hungary Agricultural Film Overseas Market Analysis Report

Target Country: Hungary   Main Category: Agricultural Film   Update Date: June 30, 2026

Hungary Agricultural Film: Key Conclusions

Hungary's agricultural film market is approximately 40,000 tons/year, with **import dependence exceeding 75%** and limited domestic production capacity. In June 2026, China's LLDPE raw material price remained in the 8,200–8,600 CNY/ton range, indicating moderate cost pressure. Sino-Hungarian trade relations continue to deepen, and China's agricultural film exports to Hungary are price-competitive. However, EU green regulations (SUP Directive and recycling targets) pose medium-to-long-term substitution pressure on traditional PE agricultural films. ⚠ Monitor EU plastic tax policy developments , which may increase the overall cost of imported agricultural films.

- Hungary annual agricultural film consumption: **approx. 38,000–45,000 tons** (2025 estimate, carried forward)
- Import dependence: **approx. 78%**, only 2 small-to-medium domestic producers
- China LLDPE East China average price: **8,420 CNY/ton** (June 2026, Source: SCI99)
- Sino-Hungarian agricultural film trade YoY growth: ↑ approx. 12% (2025 vs 2024, Source: China Customs)

Source: SCI99 (2026-06-28), China Customs (2025 Annual), Eurostat (2025Q4)

Supply & Demand Fundamentals

Hungary's agricultural film market supply is predominantly import-driven, with domestic output below 10,000 tons/year. Demand is led by greenhouse film and mulch film, accounting for approximately 55% and 30% of consumption, respectively. Apparent consumption in 2025 was approximately 42,000 tons, with the supply gap filled by imports from Germany, Italy, and China.

Indicator	2023	2024	2025 (Est.)
Domestic Output (10k tons)	0.85	0.90	0.92
Imports (10k tons)	3.10	3.25	3.40
Exports (10k tons)	0.10	0.12	0.11
Apparent Consumption (10k tons)	3.85	4.03	4.21

Source: Eurostat, Hungarian Central Statistical Office (KSH) (2025Q4 data; 2025 figures are industry estimates, carried forward)

China Market Overview

China's agricultural film industry has ample capacity, with total output of approximately 2.78 million tons in 2025 and operating rates maintained at 64%–67%. In June 2026, mainstream LLDPE (7042) transaction prices in East China were **8,350–8,550 CNY/ton**, down 0.8% month-on-month. China's agricultural film exports are generally rising steadily, with significant growth in exports to Central and Eastern Europe.

- China annual agricultural film output (2025): **approx. 2.78 million tons** (SCI99, carried forward for 2026)
- Industry average operating rate: **approx. 65%**, with visible off-peak/peak fluctuations
- LLDPE East China average price: **8,420 CNY/ton** (June 2026, SCI99)
- China total agricultural film exports (2025): **approx. 195,000 tons**, Europe share approx. 18%

Source: SCI99 (2026-06-28), Longzhong Information (2026-06-27), China Customs (2025 Annual)

Hungary Market Overview

Hungary's agricultural film end-market prices are influenced by euro exchange rates and import costs. In June 2026, local wholesale prices were approximately **1,850–2,100 EUR/ton** (approx. 14,500–16,500 CNY/ton). Import sources are led by Germany (approx. 35%) and Italy (approx. 20%), with China's share rising to approximately 12%, showing a steady upward trend.

- Hungary agricultural film wholesale price: **1,850–2,100 EUR/ton** (June 2026, estimate carried forward)
- Top 3 import source countries: Germany 35%, Italy 20%, Poland 15%
- China's share of Hungary's agricultural film imports: **approx. 12%** (2025, +2 pct YoY)
- Consumption structure: Greenhouse film 55%, Mulch film 30%, Silage film 10%, Others 5%

Source: Eurostat, Hungarian Central Statistical Office (KSH) (2025Q4; June 2026 wholesale prices are industry estimates, carried forward)

Product Segment Structure

Hungary's imported agricultural films can be categorized by function into greenhouse film, mulch film, silage film, and functional films. Greenhouse film is dominated by three-layer co-extruded EVA/PE composite film with higher unit prices; mulch film is primarily LLDPE-based with higher price sensitivity. Chinese products have a significant cost-performance advantage in the mulch film segment.

Product Segment	Import Share	Reference Price (EUR/ton)	Demand Trend
Greenhouse Film (incl. EVA composite)	~50%	2,000–2,400	→ Stable
Mulch Film (mainly LLDPE)	~30%	1,600–1,900	↑ Growing
Silage Film	~12%	1,800–2,200	→ Stable
Functional Film (degradable, etc.)	~8%	2,500–3,200	↑ Rapid Growth

Source: Eurostat detailed HS code data (2025Q4), AMI Consulting European Agricultural Film Report (2025)

Core Product Supply & Demand

As the core agricultural covering material in Hungary, the supply-demand gap for agricultural film remains above 30,000 tons/year. In 2025, Hungary's domestic output was only 9,200 tons, while consumption reached 42,100 tons. **The gap is entirely filled by imports**. On the inventory side, importers typically maintain 1-2 months of safety stock, with seasonal restocking peaks in Q1 and Q4 each year.

- Supply-demand gap: **approx. 33,000 tons/year** (2025 estimate)
- Domestic output growth rate: approx. 2–3% annually, limited expansion potential
- Importer inventory cycle: **30–60 days** (normal level)
- Seasonal pattern: Q1/Q4 restocking peak, Q2/Q3 consumption peak

Source: Hungarian Central Statistical Office (KSH) (2025Q4), Eurostat Trade Data (2025 Annual)

Intermediate & Raw Material Value

The core raw material for agricultural film is LLDPE, accounting for approximately 60%–70% of cost. In June 2026, the average LLDPE price in East China was 8,420 CNY/ton, while spot LLDPE in Antwerp, Europe, was approximately 1,080–1,140 EUR/ton. The price differential from Chinese production areas to Hungary's CIF price is mainly reflected in freight and tariff costs.

Raw Material / Intermediate	China Origin Price	Hungary CIF Estimate	Spread Range
LLDPE (7042)	8,420 CNY/ton	1,050–1,120 EUR/ton	approx. 18–22%
EVA (agricultural film grade)	12,800 CNY/ton	1,650–1,780 EUR/ton	approx. 15–20%
HDPE (blown film grade)	8,100 CNY/ton	980–1,050 EUR/ton	approx. 16–21%

Source: SCI99 (2026-06-28), Longzhong Information (2026-06-27), Platts Petrochemical Price Assessment (June 2026)

Trade & Macro Indicators

Hungary's GDP growth was approximately 1.2% in 2025, with expectations improving to 1.8%–2.2% in 2026. Agriculture accounts for approximately 3.8% of GDP. Sino-Hungarian bilateral trade volume was approximately USD 15.8 billion in 2025, making China Hungary's largest trading partner outside the EU. The exchange rate is approximately **1 CNY ≈ 52 HUF** (June 2026).

- Hungary GDP growth: **1.2%** (2025 actual) / forecast 1.8–2.2% (2026)
- Agriculture share of GDP: **approx. 3.8%** (World Bank 2025 data)
- Sino-Hungarian bilateral trade: **approx. USD 15.8 billion** (2025, China Customs)
- Exchange rate: 1 CNY ≈ 52 HUF, 1 EUR ≈ 400 HUF (June 2026)
- EU CAP subsidies: Hungary receives approx. **EUR 1.2 billion** annually in agricultural subsidies

Source: World Bank (2025), China Customs (2025 Annual), Hungarian National Bank (MNB) (2026-06), European Commission CAP Database

Risks & Opportunity Windows

⚠ Risks: Tightening EU SUP Directive and plastic packaging recycling regulations may increase compliance costs for traditional PE agricultural film; high HUF exchange rate volatility affects importer purchasing willingness; geopolitical uncertainty persists.
▲ Opportunities: Chinese agricultural films offer clear cost-performance advantages; deepening Sino-Hungarian Belt & Road cooperation brings trade facilitation; degradable agricultural films and high-performance greenhouse films present substitution and upgrade opportunities in the Hungarian market, with Chinese enterprises possessing technical reserves in the functional film segment.

- EU plastic tax expansion risk: may add **approx. 5–8%** surcharge on PE agricultural film imports
- HUF volatility range: 2025 to date fluctuation vs CNY **±6%**
- Degradable film market growth: Hungary annual increase approx. 18–22% (low base)
- Sino-Hungarian bilateral cooperation: Ningbo-Budapest direct flights and China-Europe Railway Express improving logistics efficiency

Source: European Commission Official Journal (2025-2026), Hungarian National Bank (MNB) (2026-06), China Ministry of Commerce (2025 Annual)

Data Sources Summary

1. SCI99 — LLDPE prices, China agricultural film output & operating rates (2026-06-28)

2. Longzhong Information — Polyethylene market data, EVA prices (2026-06-27)

3. China Customs — China agricultural film export data, Sino-Hungarian bilateral trade volume (2025 Annual)

4. Eurostat — Hungary agricultural film import value/volume, segment trade data (2025Q4)

5. Hungarian Central Statistical Office (KSH) — Hungary domestic output, consumption & agricultural economic

6. World Bank — Hungary GDP growth, agriculture share of GDP (2025)

data (2025Q4)

7. Hungarian National Bank (MNB) — HUF exchange rate data (2026-06)

8. Platts / AMI Consulting — European LLDPE spot prices, European Agricultural Film Industry Report (2025-2026)

Note: Data items marked "carried forward" indicate that as of June 30, 2026, the latest publicly available monthly update is not yet released, and the most recent available official or industry data is used.