Hungary Feed Additives Overseas Market Analysis Report

Target Country: Hungary | Category: Feed Additives | Report Date: June 30, 2026

Hungary Feed Additives Key Conclusions

Hungary's feed additives market has an import dependency of approximately 65%, with total imports reaching around €210 million in 2025, and China as the largest supplier (approx. 28% share). Amino acid products dominate the import structure, with sustained growth in lysine and methionine demand. European CIF prices remained stable with slight increases in Q2 2026. HUF exchange rate volatility and tightening EU green regulations are the core risks; deepening China-Hungary cooperation opens new opportunities for localized warehousing and premix processing.

- 2025 Hungary feed additives total imports approx. **€210 million**, up approx. 7.8% YoY.
- China supply share approx. **28%**, ranking first among source countries (Germany ~22%, Netherlands ~16%).
- Q2 2026 European CIF lysine price approx. **€1.45–1.58/kg**, up slightly by 2.3% from Q1.
- Hungary's 2025 compound feed output approx. **4.65 million tons**, feed additives consumption approx. 95,000 tons.

Sources: Eurostat trade data update May 2026; Hungarian Central Statistical Office (KSH) livestock report April 2026; Argus Media European amino acid pricing June 2026.

Supply-Demand Fundamentals

Hungary's domestic feed additives production capacity is limited, with annual output of approximately 32,000 tons, far below the consumption demand of about 95,000 tons, leaving a supply gap of around 63,000 tons to be filled by imports. Pig and poultry farming are the main consumption sectors, together accounting for approx. 78%. The supply-demand gap is expected to widen slightly to 65,000 tons in 2026.

Indicator	2024	2025	2026E
Domestic Output (10k tons)	3.0	3.2	3.3
Consumption (10k tons)	8.9	9.5	9.8
Net Imports (10k tons)	5.9	6.3	6.5

Sources: FEFAC European Feed Production Annual Report March 2026; KSH Q1 2026 livestock statistics; Eurostat Comext database extracted May 2026. E denotes trend-based forecast.

China Market Status

As the world's largest feed additives producer, China maintained strong lysine exports in H1 2026 with capacity utilization rates at 78%–82%. Domestic prices are supported by corn raw material costs, with lysine (98.5%) ex-factory prices at approx. RMB 8,200–8,600/ton, sustaining solid export competitiveness to Hungary.

- May 2026 China lysine (98.5%) average ex-factory price approx. **RMB 8,380/ton**, up 0.8% MoM.
- Q1 2026 China total feed additives exports approx. **680,000 tons**, EU share approx. 18%.
- Domestic lysine industry operating rate approx. **80%**, capacity utilization within a reasonable range.
- Corn raw material price (Shandong region) approx. **RMB 2,420/ton**, providing bottom support for amino acid costs.

Sources: Zhuochuang Information weekly amino acid pricing June 2026; GACC monthly export statistics April 2026; Shengyishe corn price monitoring June 2026.

Hungary Market Status

Hungary's feed additives market is import-driven, with 2025 import value at approx. €210 million. Chinese products, leveraging price advantages, hold approx. 35% share in the amino acid segment. H1 2026 HUF/CNY exchange rate fluctuated by approx. 4.2%, impacting import costs to some extent. Local distribution is centered in Budapest, radiating to eastern farming regions.

- 2025 Hungary's feed additives imports from China approx. **€58.8 million**, up 11.3% YoY.
- Hungary feed additives import dependency approx. **65.6%** (2025).
- Local distribution markup typically **12%–18%** above CIF (incl. 27% VAT).
- June 2026 HUF/CNY exchange rate approx. **52.3 HUF/CNY**, depreciation of approx. 3.1% from start of year. ⚠ FX Risk

Sources: Eurostat Comext May 2026 data; KSH June 2026 exchange rate bulletin; Hungarian Feed Association (MKSZ) Q1 2026 industry brief.

Product Segmentation Structure

Among Hungary's imported feed additives, amino acids hold the largest share (approx. 42%), followed by vitamins (approx. 20%) and minerals (approx. 16%). Lysine and methionine are the largest individual import items. Enzyme preparations and acidifiers show relatively fast demand growth, with annual growth rates of approximately 6%–8%.

Sub-Category	Import Share (2025)	Annual Growth	Main Source Countries
Amino Acids (Lys/Met/Thr, etc.)	42%	+8.5%	China, Germany
Vitamins (VA/VE/VD3, etc.)	20%	+5.2%	China, Netherlands
Minerals (Cu/Zn/Mn, etc.)	16%	+4.8%	Germany, Belgium
Enzymes & Acidifiers	14%	+6.9%	Netherlands, Denmark

Sources: Eurostat Prodcom & Comext data extracted March 2026; MKSZ 2025 annual classified import statistics.

Core Product Supply & Demand

Lysine (98.5% feed grade) is the most tightly supplied finished product in the Hungarian market, with 2025 imports of approx. 18,000 tons, expected to reach 19,500 tons in 2026. European local lysine capacity is limited, and Hungary relies almost entirely on imports. Methionine demand is approx. 7,000 tons/year, with diversified supply sources but China's share continues to expand.

- Lysine (98.5%) 2025 Hungary import volume approx. **18,000 tons**, 2026E approx. 19,500 tons.
- Methionine 2025 imports approx. **7,000 tons**, China supply share rising to approx. 32%.
- European lysine local capacity approx. **120,000 tons/year** (mainly in France, Poland); Hungary has no domestic capacity.
- Q2 2026 European lysine spot inventory approx. **4–5 weeks** of consumption, at a neutral-to-low level.

Sources: Argus Media European amino acid market weekly June 2026; Eurostat April 2026 import details; FEFAC Q1 2026 supply-demand brief. E denotes trend-based forecast.

Intermediates & Raw Material Value

Upstream raw material prices directly impact finished feed additive costs. Corn and sulfuric acid prices in Chinese production regions are stable, providing a steady cost base for amino acid manufacturing. Hungary's local corn price is approx. €210/ton, slightly above the EU average, but offers raw material convenience for local premix processing.

Raw Material / Intermediate	China Price (Jun 2026)	Hungary CIF/Local Price	MoM Change
Corn (Feed Grade)	RMB 2,420/ton	€208/ton (local)	-0.6%
Sulfuric Acid (98%)	RMB 380/ton	€58/ton (CIF)	+1.2%
Lysine HCl	RMB 8,380/ton	€1.52/kg (CIF)	+0.8%

Sources: Zhuochuang Information weekly corn/sulfuric acid report June 2026; Shengyishe amino acid price monitoring June 2026; Hungarian Grain Association local pricing May 2026.

Trade & Macro Indicators

Hungary's 2025 GDP growth rate was approx. 2.1%, with agriculture accounting for approx. 4.2% of GDP. China-Hungary trade relations are solid, with 2025 bilateral trade volume at approx. €13.5 billion. The EU Common Agricultural Policy (CAP) 2023–2027 framework provides Hungary's livestock sector with annual subsidies of approx. €350 million, underpinning feed additives demand.

- Hungary 2025 GDP growth **2.1%** (preliminary verification Q1 2026), 2026 forecast approx. 2.4%.
- 2025 China-Hungary bilateral trade approx. **€13.5 billion**; China is Hungary's largest trading partner outside the EU.
- Hungary 2025 livestock output value approx. **€2.8 billion**, accounting for approx. 48% of total agricultural output.
- EU CAP subsidies average approx. **€350 million/year** flowing into Hungary's livestock sector, stabilizing farmer purchasing power.

Sources: KSH May 2026 GDP flash report; GACC China-Hungary trade annual report January 2026; European Commission CAP implementation report December 2025.

Risks & Opportunity Windows

HUF exchange rate volatility (approx. 3.1% depreciation against CNY in H1 2026) is the primary short-term risk for importers. The EU regulation on reducing antibiotic use (EU 2019/6) continues to drive demand growth for alternative feed additives, creating new opportunities for botanical extracts, probiotics, and other green additives. Deepening China-Hungary Belt and Road cooperation provides policy dividends for localized warehousing and transit distribution.

- **⚠ Risk: HUF/CNY exchange rate fluctuated by 4.2% in H1 2026, increasing import cost uncertainty.**
- ⚠ Risk: The EU may revise the feed additives authorization catalog in Q4 2026; some existing products may face re-evaluation.
- ▲ Opportunity: EU 2019/6 regulation drives demand for antibiotic alternatives; botanical feed additives market growing at over 12% annually.
- ▲ Opportunity: Under China-Hungary cooperation framework, Budapest as a Central-Eastern European logistics hub is ideal for establishing regional warehousing centers.

Sources: Hungarian National Bank (MNB) June 2026 exchange rate report; European Commission SANTE regulatory update March 2026; Commercial Office of the Chinese Embassy in Hungary Q1 2026 bilateral cooperation brief.

Data Sources Summary (8 Independent Sources)

1. Eurostat Comext Database — Hungary feed additives import data, extracted May 2026

2. Hungarian Central Statistical Office (KSH) — Livestock statistics, GDP, exchange rates, published April–June 2026

3. General Administration of Customs of China (GACC) — Feed additives export statistics, April 2026 monthly report

4. Zhuochuang Information / Shengyishe — China amino acid, corn, sulfuric acid prices, June 2026 weekly reports

5. Argus Media — European amino acid CIF prices and spot inventory, June 2026 weekly

6. FEFAC (European Feed Manufacturers' Federation) — European feed production annual report, March

2026

7. Hungarian Feed Association (MKSZ) — Sub-category import data and industry briefs, 2025 annual / Q1 2026

8. European Commission / Hungarian National Bank (MNB) — CAP reports, regulatory updates, exchange rate reports, 2025–2026