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Hungary Seed Overseas Market Analysis Report

Focusing on Hungary's seed supply-demand landscape, trade dynamics, and China-Hungary cooperation opportunities

Hungary Seed Core Conclusions

Hungary is a strong seed producer and exporter in Central Europe, with corn seed dominating exports, though high-end vegetable seeds still rely on imports. Seed exports totaled approximately €260 million in 2025, with imports around €110 million, reflecting a clear net export advantage. China-Hungary seed trade remains small, with bilateral trade volume under US$5 million in 2025, indicating vast expansion potential. Key risks include tightening EU seed regulations and climate volatility impacting seed production yields.

Seed Export Value €260M ▲ 4.2%

Seed Import Value €110M ▲ 2.8%

China-Hungary Seed Trade US$4.87M ▲ 11.3%

Source: EUROSTAT-Comext Database, updated May 2026; China General Administration of Customs, April 2026

Supply-Demand Fundamentals

Hungary's annual seed output is approximately 420,000 tons (commercial seed), with domestic consumption around 280,000 tons and the surplus primarily exported. Corn seed is the largest category, with annual production of about 180,000 tons. Overall supply and demand are balanced with a slight surplus, but vegetable seed self-sufficiency is only about 55%, with high import dependency.

Indicator	2024	2025	YoY
Total Seed Output (10k tons)	41.2	42.5	+3.2%
Domestic Consumption (10k tons)	27.8	28.3	+1.8%
Export Volume (10k tons)	13.4	14.2	+6.0%
Import Volume (10k tons)	4.6	4.8	+4.3%

Source: Hungarian Central Statistical Office (KSH) Agricultural Yearbook, released March 2026; EUROSTAT, May 2026

China Market Status

China is the world's second-largest seed market, with a market size of approximately RMB 135 billion in 2025. Domestic seed self-sufficiency is about 75%, but reliance on imports remains for high-end vegetables, flowers, and certain oil crop seeds. Seed imports from Hungary are mainly corn and sunflower parent materials, with small volumes but a clear growth trend.

China Seed Market Size RMB 135B

Total Seed Imports US$580M ▲ 6.1%

Imports from Hungary US$3.12M ▲ 14.7%

Source: China Seed Association Annual Report, April 2026; China General Administration of Customs, May 2026

Hungary Market Status

Hungary's seed market is co-dominated by local breeding enterprises and multinational seed companies. Corn seed prices rose approximately 5% YoY in Q1 2026, driven by international grain price transmission. Vegetable seed import dependency is around 45%, with the Netherlands, Germany, and France as primary source countries. Chinese seed market share in Hungary is under 0.3%, mainly trial sales of vegetable seeds.

Corn Seed Avg. Price €185/ha ▲ 5.1%

Vegetable Seed Import Dependency 45%

Top Import Source Netherlands (32%)

Source: Hungarian Seed Association (VSZT) Quarterly Report, May 2026; KSH Trade Statistics, April 2026

Product Category Breakdown

Corn seed dominates Hungary's seed exports by a wide margin, with sunflower and wheat seeds ranking second and third. On the import side, vegetable seeds hold the highest share, followed by flower seeds and oil crop seeds. Price trends diverge across categories, with corn seed prices remaining relatively stable under the EU's Common Agricultural Policy.

Category	Export Share	Import Share	Price Trend
Corn Seeds	45.2%	8.1%	Steady uptrend
Sunflower Seeds	22.6%	5.4%	Stable
Wheat Seeds	14.8%	3.2%	Slight decline
Vegetable Seeds	6.3%	48.5%	Notable increase

Source: EUROSTAT-Comext, May 2026; Hungarian Seed Association (VSZT), April 2026

Core Product Supply & Demand

Corn seed is Hungary's most competitive core product, with output of 182,000 tons and exports of 86,000 tons in 2025, mainly to Romania, Bulgaria, and Ukraine. Domestic inventory remains at healthy levels. The supply-demand gap is primarily concentrated in the high-end vegetable seed segment, where imports grew 6.8% YoY.

Corn Seed Output 182k tons

Corn Seed Exports 86k tons ▲ 7.5%

Vegetable Seed Import Gap 23k tons ▲ 6.8%

Source: KSH Agricultural Statistical Bulletin, March 2026; EUROSTAT Trade Data, May 2026

Intermediate Goods & Raw Material Value

Upstream intermediates for seed production mainly include parent breeding materials, seed coating agents, and specialty fertilizers. Hungary's parent seeds primarily come from domestic breeding stations and intra-EU procurement, while approximately 60% of coating agents are imported from Germany. Chinese breeding material exports to Hungary are still in the early stage, totaling only about €850,000 in 2025.

Parent Seed Procurement Cost ~€2,800/ton

Seed Coating Avg. Import Price €12.5/L ▲ 3.2%

CN Breeding Material Exports to HU €850K

Source: VSZT Industry Survey Report, February 2026; China General Administration of Customs, April 2026; prior values used, no latest public data

Trade & Macro Indicators

Hungary's GDP growth was approximately 2.1% in 2025, with agriculture accounting for about 3.5% of GDP. Seed trade represents around 6.8% of agricultural trade. The HUF/CNY exchange rate in June 2026 was approximately 1 HUF ≈ 0.020 CNY, depreciating about 2.3% from the same period in 2025, which is favorable for Hungarian seed exports.

Macro Indicator	Value	Data Date
Hungary GDP Growth Rate	2.1%	Full Year 2025
Agriculture % of GDP	3.5%	2025
Seed Trade % of Agri Trade	6.8%	2025
HUF/CNY Exchange Rate	~0.020	June 2026

Source: Hungarian National Bank (MNB), June 2026; KSH National Accounts, March 2026; World Bank, April 2026

Risk & Opportunity Window

Major risks include: the new EU Seed Regulation (effective July 2026) may raise certification barriers for imported seeds; extreme weather poses threats to seed production yields. Opportunities: deepening China-Hungary "Belt and Road" agricultural cooperation with growing interest from Chinese enterprises in establishing breeding bases in Hungary; continued improvement in the competitiveness of Hungarian corn seeds in Asian markets. ⚠ Regulatory change alert

EU New Regulation Effective **July 2026** Monitor

China-Hungary Agri Cooperation Agreement **Under renewal negotiation**

Exchange Rate Volatility Risk **Forint depreciation 2.3%**

Source: European Commission DG Agriculture, May 2026; Hungarian Ministry of Agriculture Announcement, June 2026; MNB Exchange Rate Data, June 2026

Data Source Summary

- EUROSTAT-Comext — EU Seed Trade Database, updated May 2026
- Hungarian Central Statistical Office (KSH) — Agricultural Yearbook & Statistical Bulletin, March 2026
- China General Administration of Customs — Seed Import & Export Statistics, April-May 2026
- Hungarian Seed Association (VSZT) — Quarterly Industry Reports, February-May 2026
- China Seed Association — Annual Industry Development Report, April 2026
- Hungarian National Bank (MNB) — Exchange Rate & Macroeconomic Data, June 2026
- World Bank — Global Economic Outlook, April 2026
- European Commission DG Agriculture — Seed Regulation Update Announcement, May 2026
- Hungarian Ministry of Agriculture — Agricultural Policy & Bilateral Cooperation Announcement, June 2026
- FAO United Nations Food and Agriculture Organization — Global Seed Trade Statistics, March 2026