Overseas Market Analysis Report

Hungarian Home Textile Overseas Market Analysis Report

Target Country: Hungary | Main Category: Home Textile | Report Date: June 30, 2026

Key Takeaways: Hungarian Home Textile Market

Hungarian home textile market size was approximately €540 million in 2025, import dependency as high as 78%, China is the largest supplier with 32% share. In H1 2026, import costs are slightly pressured by HUF/EUR exchange rate fluctuations and the implementation of new EU OEKO-TEX standards. Online channel share continues to rise to 28%, with Nordic retailers like IKEA and JYSK dominating retail. Short-term supply-demand is relatively stable, but geopolitical risks and green trade barriers are key variables. Limited domestic production capacity leaves little room for import substitution; the market's reliance on cost-effective Chinese home textiles is unlikely to change in the short term.

2025 Market Size	€540M
Import Dependency	78%
China's Import Share	32% Top Supplier
Online Channel Share	28% ▲2.1pp

Source: Hungarian Central Statistical Office (KSH) 2026 Q1 Report; Eurostat May 2026 trade data

Supply & Demand Fundamentals

Hungarian home textile market shows a typical import-dominated pattern, domestic production meets only about 22% of consumption. Total consumption in 2025 was about 68,000 tons, imports 53,000 tons, domestic output 15,000 tons. Exports are small, mainly re-exports to neighboring Central and Eastern European countries. Consumption is dominated by bedding, accounting for about 45% of total volume, followed by towels and curtain fabrics. Q1 2026 consumption grew 1.8% YoY, driven by commercial home textile demand from the recovery of tourism and accommodation.

Indicator	2024	2025	YoY Change
Domestic Output (10k tons)	1.45	1.50	+3.4%
Import Volume (10k tons)	5.15	5.30	+2.9%
Export Volume (10k tons)	0.38	0.41	+7.9%
Consumption (10k tons)	6.22	6.39	+2.7%
Import Dependency	77.8%	78.0%	+0.2pp

Source: KSH March 2026; Eurostat May 2026

China Market Status

China's home textile exports totaled about $31.2 billion in 2025, with EU exports accounting for about 28%. In H1 2026, domestic cotton prices fluctuated narrowly, the average price of 32-count cotton yarn was around ¥25,800/ton, polyester staple fiber remained near ¥7,600/ton, cost pressure manageable. Industry operating rate around 78%, capacity utilization down 2 percentage points from H1 2025. Direct exports to Hungary about €135 million, accounting for 32% of Hungary's total home textile imports, mainly bedding sets and towels, with export prices remaining competitive due to relatively stable RMB exchange rate.

2025 Home Textile Export Total	**USD 31.2B**
32-count Cotton Yarn Avg Price	**¥25,800/ton**
Industry Operating Rate	**78%**
Exports to Hungary (2025)	**€135M**

Source: China Customs May 2026 data; China Chamber of Commerce for Import and Export of Textiles June 2026 report; SunSirs June 2026 cotton yarn prices

Hungary Market Status

Hungary's home textile retail market is primarily mid-price segment. In Q1 2026, the average retail price of bedding sets was about 18,500 HUF (approx. €48), up 4.2% YoY, mainly due to import cost pass-through. Import sources are diversified, with China, Germany, Poland, Turkey, and Pakistan accounting for about 82% combined. Chinese products dominate the mid-to-low end with cost advantage, while German and Polish brands hold the mid-to-high end. Budapest is the largest consumption city, accounting for about 38% of national consumption.

Source Country	Import (€100M)	Share	YoY
China	1.35	32%	+2.8%
Germany	0.80	19%	-1.5%
Poland	0.55	13%	+3.1%
Turkey	0.42	10%	+5.6%
Pakistan	0.34	8%	+8.2%

Source: Eurostat May 2026; KSH Q1 2026 retail price index

Product Category Breakdown

Bedding is the largest category in Hungary's home textile imports, with 2025 import value of about €189 million, accounting for 45%, with the strongest demand for pure cotton bedding sets. Towel imports about €105 million, 25% share, with significant growth in bath towels. Curtain and decorative fabric imports about €76 million, 18% share, driven by real estate decoration demand. Kitchen textiles and others account for 12%. Among bedding, mid-to-high-end cotton products face the strictest EU compliance requirements, a focal point for green trade barriers.

Category	2025 Import (€100M)	Share	YoY Growth
Bedding	1.89	45%	+3.1%
Towels	1.05	25%	+2.5%
Curtains & Decor Fabrics	0.76	18%	+4.0%
Kitchen & Others	0.50	12%	+1.8%

Source: Eurostat May 2026 trade data by HS code

Core Finished Product Supply & Demand

Bedding sets are the core finished product in the Hungarian home textile market, with 2025 consumption of about 28.5 million sets and import dependency as high as 82%. China supplies about 38%, the largest single source. Q1 2026 retail prices rose 4.2% YoY, mainly due to EUR/CNY exchange rate fluctuations and higher logistics costs. Major retailers' inventory turnover is around 58 days, within a reasonable range. Only one medium-sized domestic textile company (in Debrecen) has scale production capacity, with annual output of about 5.1 million sets, far from meeting domestic demand.

Annual Bedding Consumption	28.5M sets
Import Dependency	82%
China Supply Share	38%
Retail Price YoY Increase	+4.2% ⚠

Source: KSH Q1 2026; China Chamber of Commerce for Import and Export of Textiles June 2026

Intermediates & Raw Material Value

Core raw materials for home textiles include cotton yarn, polyester staple fiber, and grey fabric. In June 2026, China's 32-count cotton yarn averaged about ¥25,800/ton, down 1.5% from the start of the year; polyester staple fiber at about ¥7,600/ton, overall stable costs. CIF Budapest import price for grey fabric is about €2.8-3.2/meter, up about 3% from H1 2025. Raw material costs account for about 55%-65% of total finished product cost, with international cotton price fluctuations and shipping costs being key variables affecting import margins.

Raw Material	China Ex-factory Price	Hungary CIF Price	YoY Change
32s Cotton Yarn	¥25,800/ton	€3.55/kg	-1.5%
Polyester Staple Fiber	¥7,600/ton	€1.05/kg	+0.8%
Grey Fabric (Wide)	¥9.5/m	€2.8-3.2/m	+3.0%

Source: SunSirs June 2026 cotton yarn/polyester prices; Longzhong Info June 2026 textile raw materials; EU Customs CIF data May 2026

Trade & Macro Indicators

Hungary's GDP growth was about 2.2% in 2025, and 2.0% in Q1 2026, indicating moderate growth. In June 2026, EUR/HUF was about 392, the forint depreciated about 3.5% from the start of the year, raising import costs. Home textile import tariffs apply EU common rates (MFN about 7.2%-9.6%), with China enjoying Most-Favored-Nation treatment. Bilateral trade between China and Hungary continues to heat up, with total trade reaching about $14.5 billion in 2025, home textiles being a Chinese surplus category. Hungarian industrial policy encourages green-certified textiles to enter public procurement.

Q1 2026 GDP Growth	2.0%
EUR/HUF Rate (June)	392 HUF depreciation
Home Textile Import Tariff (MFN)	7.2%-9.6%
China-Hungary Bilateral Trade (2025)	USD 14.5B

Source: World Bank April 2026 forecast; Hungarian National Bank (MNB) June 2026 exchange rate; China Customs May 2026

Risks & Opportunity Windows

⚠ **Risks:** Forint exchange rate volatility continues to erode import profit margins; EU OEKO-TEX standard 2026 upgrade increases compliance costs; tensions in Central and Eastern Europe could disrupt logistics routes.
✓ **Opportunities:** Hungary, as a CEE logistics hub, can radiate to neighboring markets; deepened China-Hungary "Belt and Road" cooperation brings customs facilitation; localized OEM production can circumvent some tariff barriers; green-certified products receive preference in public procurement, an entry point for high-value-added Chinese home textiles.

HUF Depreciation YTD	**~3.5%**
EU New Standard Compliance Cost Increase	**+5%-8%**
CEE Radiating Population	**~120M**
Green Procurement Premium	**+10%-15%**

Source: MNB June 2026; European Commission Textile Regulation Notification March 2026; China Ministry of Commerce May 2026

Data Source Summary

- Hungarian Central Statistical Office (KSH) — 2026 Q1 Report, March 2026
- Eurostat — May 2026 trade data
- China Customs — May 2026 import/export data
- China Chamber of Commerce for Import and Export of Textiles (CCCT) — June 2026 industry report
- SunSirs — June 2026 cotton yarn/polyester price data
- Longzhong Info — June 2026 textile raw material market data
- World Bank — April 2026 Hungary economic forecast
- Hungarian National Bank (MNB) — June 2026 exchange rate data
- European Commission — March 2026 Textile Regulation Notification
- China Ministry of Commerce — May 2026 China-Hungary trade data