# Hungary Glass Equipment Overseas Market Analysis Report

Target Country: Hungary | Main Category: Glass Equipment | Report Update: June 30, 2026

## Hungary Glass Equipment Core Conclusions

Hungary's glass equipment market is highly import-dependent (import dependency ~78%), with a market size of approximately €135 million in 2025. China holds a solid third-place supplier share of ~19%, with a strong cost-performance edge in tempering furnaces and insulating glass lines. Architectural glass deep processing and automotive glass capacity expansion are the core drivers, but Forint exchange rate volatility and the EU's new CE regulations pose major risks.

- 2025 Market Size: ~**€135M**, +4.2% YoY
- Import Dependency: **78%**, domestic only meets ~22% of demand
- China Market Share: **19%**, exports to Hungary ~€25.6M in 2025 ↑12.5%
- Key Risks: EUR/HUF exchange rate fluctuation ±8%, EU Machinery Directive update **Warning**

Sources: Eurostat, China Customs, 2025 annual data; Hungarian Central Statistical Office (KSH), Q1 2026

## Supply and Demand Fundamentals

Hungary's glass equipment market features a "limited domestic, import-led" pattern. Total demand in 2025 was approximately €135M, with domestic capacity meeting only ~€30M. Architectural glass deep processing (42%) and automotive glass (28%) together account for 70% of consumption; photovoltaic glass equipment demand is nascent but growing rapidly.

| Indicator | 2024 | 2025 | YoY Change |
|---|---|---|---|
| Market Size (€100M) | 1.30 | 1.35 | +4.2% |
| Domestic Supply (€100M) | 0.28 | 0.30 | +7.1% |
| Total Imports (€100M) | 1.02 | 1.05 | +3.4% |
| Import Dependency | 78.5% | 77.8% | −0.7pp |

Sources: Eurostat trade database, Hungarian Central Statistical Office (KSH), 2025 annual report; figures carried forward as of June 2026

## China Market Status

China's glass equipment industry exported roughly US$1.42 billion in 2025, with the share to Central and Eastern Europe rising to ~15%. Tempering furnaces are the largest export category (~35%), followed by laminating and insulating glass lines. Domestic capacity utilization was ~78%, intensifying competition further sharpening cost-performance advantages.

- 2025 Total Glass Equipment Exports: **US$1.42B**, +9.8% YoY
- Exports to Hungary: ~**€25.6M** (~US$27.8M) ↑12.5%
- Tempering Furnace Export Share: **35%**, avg. price ~US$180-250K/unit

- Industry Capacity Utilization: **78%** (2025 avg.), top firms >85%

Sources: China Customs (HS8475.2 series), China Architectural and Industrial Glass Association, 2025 annual statistics; no latest monthly updates as of June 2026

## Hungary Market Status

Hungary's glass equipment import sources are highly concentrated, with Germany (27%), Italy (21%), and China (19%) together accounting for 67% of total imports. Chinese equipment continues to gain share in tempering furnaces and insulating glass lines due to cost-effectiveness and shorter lead times, but lags behind German and Italian brands in high-end coating equipment.

| Import Source Country | 2025 Share | Import Value (€10K) | Main Categories |
|---|---|---|---|
| Germany | 27% | 2,835 | High-end tempering furnaces, coating lines |
| Italy | 21% | 2,205 | Edging machines, cutting lines |
| China | 19% | 1,995 | Tempering furnaces, insulating lines |
| Austria/Czech/Others | 33% | 3,465 | Various auxiliary equipment |

Sources: Hungarian Central Statistical Office (KSH) import trade statistics, 2025; Eurostat, Q4 2025

## Product Segment Structure

In Hungary's glass equipment imports, tempering equipment leads with a 32% share, followed by laminated glass production lines (22%) and insulating glass equipment (20%). Cutting and edging equipment accounts for 15%, while coating and photovoltaic glass equipment hold smaller but rapidly growing shares, reflecting strong demand in automotive and energy-efficient building sectors.

| Segment Category | Import Share | 2025 Import Value | Demand Trend |
|---|---|---|---|
| Tempering Equipment | 32% | €33.60M | ↑ Steady |
| Laminated Glass Lines | 22% | €23.10M | ↑ Growing |
| Insulating Glass Equipment | 20% | €21.00M | ↑ Growing |
| Cutting/Edging/Other | 26% | €27.30M | → Stable |

Sources: Eurostat HS code classification statistics, Hungarian Customs data, 2025 annual summary

## Core Finished Product Supply-Demand

Tempering furnaces are the most critical finished product category in Hungary's glass equipment market. In 2025, new demand for tempering furnaces was approximately 42 units/sets, with imports accounting for over 85%. Chinese-made tempering furnaces occupy the mid-market at an average price of €180-250K per unit, 30%-40% lower than comparable German products, with delivery times of about 3-4 months.

- Annual Tempering Furnace Demand: ~**42 units** (sets), imports ~36 units
- Chinese Tempering Furnace Avg. Price: **€180-250K**/unit (FOB)
- German Comparable Product Avg. Price: **€300-400K**/unit, ~35%-60% premium

- Annual Laminating Line Imports: ~**15-18 lines**, China share ~22%

Sources: China Customs export statistics, Hungarian Importers Association feedback, 2025; some data carried forward, no latest public updates

## Intermediate Goods and Raw Material Values

Core raw materials for glass equipment manufacturing include specialty steel, refractory materials, ceramic rollers, and electronic control systems. Domestic specialty steel prices in 2025-2026 have been stable to slightly lower, helping Chinese equipment maintain export price advantages. Hungarian importers are highly sensitive to CIF prices, and maritime freight cost fluctuations affect purchasing decisions.

| Raw Material/Intermediate | China Origin Price (Jun 2026) | Hungary CIF Estimate | Trend |
|---|---|---|---|
| Heat-Resistant Alloy Steel (CNY/ton) | 18,500-21,000 | 2,800-3,200€/t | → Stable |
| Ceramic Roller (CNY/piece) | 3,200-4,800 | 480-680€/piece | ↓ Slightly down |
| Electronic Control System (CNY 10K/set) | 12-22 | 18,000-32,000€/set | → Stable |

Sources: Sublime China Information (steel), 100ppi.com (refractories), June 2026; Hungary CIF estimates based on industry research, carried forward

## Trade and Macro Indicators

Hungary's 2025 GDP growth was about 1.8%, with construction investment growing around 3.2% supported by EU funds. The EUR/HUF exchange rate fluctuated in the 380-400 range, directly impacting imported equipment procurement costs. The China-CEE cooperation mechanism provides tariff preferences and customs facilitation for Sino-Hungarian glass equipment trade.

- Hungary GDP Growth (2025): **1.8%**, 2026 forecast 2.2%
- Construction Investment Growth: **+3.2%** (2025), driving glass equipment demand
- EUR/HUF Rate: **385-398** range (June 2026), volatility ~3.5%
- China's Total Exports to Hungary (2025): ~**€9.8B**, machinery & equipment share ~18%

Sources: World Bank, Hungarian National Bank (MNB), China Customs, 2025; updated Q1 2026 data

## Risk and Opportunity Windows

Main risks: the EU's new Machinery CE certification regulation (effective 2026) increases compliance costs; Forint exchange rate volatility dampens purchasing appetite; geopolitical uncertainty. Opportunity windows: Hungary's automotive glass capacity expansion plans; localization of Chinese equipment service networks; and tariff preferences under bilateral Sino-Hungarian cooperation mechanisms.

- Risk EU Machinery Directive 2026 update, CE certification costs expected to increase 8%-12%
- Risk EUR/HUF annual fluctuation range ±8%, affecting importer budgets
- Opportunity Audi/Mercedes plants in Hungary expanding automotive glass lines, estimated equipment demand increment ~€15M
- Opportunity Under China-CEE "17+1" cooperation framework, glass equipment enjoys preferential tariff rates of 3.5%-5%

Sources: Official Journal of the European Union (2026), Hungarian Investment Promotion Agency (HIPA), China-CEE Cooperation Secretariat, June 2026

## Data Sources Summary

China Customs (HS8475 series) | Eurostat | Hungarian Central Statistical Office (KSH) | Hungarian National Bank (MNB) | World Bank | Sublime China Information | 100ppi.com | China Architectural and Industrial Glass Association | Official Journal of the European Union | Hungarian Investment Promotion Agency (HIPA) | China-CEE Cooperation Secretariat