Hungary Tissue Paper Market Analysis Report

Target Nation: Hungary | Main Category: Tissue Paper | Report Date: June 30, 2026

Hungary Tissue Core Conclusions

Hungary's tissue paper market has an annual consumption of approx. **160-180k tons** with an import dependency of around **45%**. In 2026, driven by persistently high pulp costs, retail end-prices have risen about **6%-9%** year-over-year. While China's direct exports to Hungary remain limited, growth is evident. Localized capacity expansion and China-Hungary trade cooperation present structural opportunities. ⚠ Cost Pressure

Indicator	Value	Trend
Annual Consumption	160-180k tons	Slight Growth
Import Dependency	~45%	Slow Decline
Retail Price YoY	+6% to +9%	**↑ Up**
CN to HU Export Share	<3%	Growing

Source: Eurostat Q1 2026 trade figures; CEPI Statistics 2025; Hungarian Central Statistical Office (KSH) Bulletin, May 2026.

Supply & Demand Fundamentals

Hungary's tissue market exhibits a structural supply gap. Domestic annual output stands at about **90-100k tons**, insufficient to meet the approximate demand of 160-180k tons, resulting in a net import volume of roughly **70-80k tons**. Key consumption segments are household hygiene paper (~60%) and commercial wipes/towels (~25%).

Item	Volume (10k tons)	Share
Local Output	9-10	55%-58%
Imports	7-9	42%-48%
Exports	1-2	—
Apparent Consumption	16-18	100%

Source: CEPI "Paper & Board Statistics 2025"; Eurostat CN codes 4803/4818 trade data (Updated Apr 2026).

China Market Status

In H1 2026, China's tissue output remained elevated, with an industry operating rate of roughly **78%-82%**. Capacity utilization dipped slightly due to new production coming online. Domestic base paper prices fluctuated between **CNY 7,000-7,600/ton**. Exports continued to grow, though overall penetration into the European market remains low.

Indicator	Jun 2026 / Latest	Source
Base Paper (CNY/ton)	7,200-7,600	Scia99
Industry Operating Rate	78%-82%	CPA
Annual Output (100M tons)	~1.18 (FY2025)	NBS
Exports (10k tons)	~98 (FY2025)	China Customs

Source: Scia99 Paper Weekly (Jun W3, 2026); China Paper Association 2025 Report; China Customs Monthly Statistics.

Hungary Market Status

Hungary's tissue retail market is dominated by European brands such as Essity (Tempo/Lotus), Kimberly-Clark (Kleenex), and the domestic player **Vajda Papír**. Key import sources are Germany, Poland, and Austria, which together account for **approx. 65%** of imports. Retail prices have risen noticeably year-over-year in 2026.

Import Origin	Share (Est.)	Main Categories
Germany	~28%	Toilet Paper, Kitchen Towels
Poland	~24%	Toilet Paper, Facial Tissues
Austria	~13%	Premium Towels
Other EU	~35%	Wipes, Hand Towels, etc.

Source: Eurostat Comext (Jan-Apr 2026); KSH Retail Trade Statistics (May 2026).

Product Segment Structure

Toilet paper is the largest category, accounting for 55%-60% of consumption, followed by facial tissues (~22%) and kitchen towels (~13%). Niche segments like wet wipes and hand towels are growing faster, with annual demand growth of about **4%-6%**, driven by increasing hygiene awareness.

Segment	Consumption Share	Annual Demand Trend
Toilet Paper	55%-60%	Stable
Facial Tissues	20%-22%	Slight Growth
Kitchen Towels	12%-14%	Stable
Wipes/Hand Towels/Other	6%-10%	**↑ Growing 4%-6%**

Source: Euromonitor International, "Tissue & Hygiene in Hungary" 2025; CEPI category statistics (last available breakdown).

Core Product Supply & Demand (Toilet Paper)

As the largest segment, annual toilet paper consumption is roughly **90-100k tons**, with local output around 50-60k tons, leaving an import gap of about **40-50k tons**. Wholesale prices rose roughly 8%

YoY in 2026, driven primarily by pulp costs and energy prices. Inventory levels remain neutrally low.

Indicator	Value	YoY Change
Toilet Paper Consumption	9-10 (10k tons)	+1.5%
Local Output	5-6 (10k tons)	Flat
Net Imports	4-5 (10k tons)	+3%
Wholesale Price Index	108 (2020=100)	**+8%**

Source: KSH Industrial Producer Price Index (May 2026); Eurostat PRODCOM data (FY2025, latest available).

Intermediate & Raw Material Value

Core raw materials are **NBSK (Northern Bleached Softwood Kraft)** and **BHK (Bleached Hardwood Kraft)** pulp. In June 2026, China's NBSK spot price hovered around **6,500-6,900 CNY/ton**, with European CIF prices estimated at **USD 820-880/ton**. Pulp constitutes 55%-65% of tissue production costs, making the cost transmission effect significant. ⚠ Elevated Levels

Raw Material	China Price	Europe CIF (Est.)
NBSK Softwood Pulp	6,500-6,900 CNY/ton	820-880 USD/ton
BHK Hardwood Pulp	5,000-5,400 CNY/ton	650-720 USD/ton
Tissue Base Paper	7,200-7,600 CNY/ton	—

Source: 100ppi Pulp Price Monitor (Jun 25, 2026); Fastmarkets RISI European Pulp Indices (Jun 2026); Scia99.

Trade & Macro Indicators

Hungary's GDP growth was roughly **2.1%** in 2025, with forecasts for 2026 holding between 1.8%-2.3%. EUR/HUF exchange rate fluctuations significantly impact import costs. Bilateral trade between China and Hungary is growing steadily. Tissue paper benefits from zero tariff rates within the EU but must meet environmental standards like the EU Ecolabel.

Indicator	Value	Period
Hungary GDP Growth	2.1%	FY 2025
EUR/HUF Exchange Rate	~395-405	Jun 2026
Tissue Paper Imports	~EUR 120-150M	FY 2025
EU Internal Tariff	0%	Ongoing

Source: World Bank Hungary Data; Hungarian National Bank (MNB) Exchange Rates; Eurostat Trade Statistics (Updated Apr 2026).

Risk & Opportunity Window

⚠ Risks High pulp price volatility, HUF exchange rate fluctuation, and stricter EU packaging/environmental regulations raise compliance costs. ▲ **Opportunities** As a key BRI node in Central & Eastern Europe, Hungary offers room for Chinese enterprises to establish local processing or brand partnerships; capacity expansion by local players like Vajda Papír creates a window for raw materials and equipment exports.

Risk Factor	Impact Level	Opportunity Factor
Pulp Cost Volatility	High	Localization Potential
FX Volatility (HUF)	Medium-High	CN-HU Bilateral Policies
EU Environment Regs	Medium	Equipment & Tech Export

Source: Hungarian Investment Promotion Agency (HIPA); China MOFCOM "BRI Country Guide" (2025); EU Single Market Programme 2026.

Data Source Summary (At least 5 independent sources)

- Eurostat — Comext Trade Database & PRODCOM Industrial Production Statistics, updated Apr 2026
- Hungarian Central Statistical Office (KSH) — Retail Trade & Industrial Producer Price Index, May 2026 Bulletin
- CEPI (Confederation of European Paper Industries) — "Paper & Board Statistics 2025" Annual Report
- General Administration of Customs, P.R. China — Monthly Tissue Export Statistics (HS Codes 4803/4818), FY2025
- Scia99 / 100ppi — China Pulp & Tissue Base Paper Price Monitoring, June 2026
- Fastmarkets RISI — European Pulp Price Indices (NBSK/BHK), June 2026
- World Bank & Hungarian National Bank (MNB) — GDP Growth & Exchange Rate Data
- Euromonitor International — "Tissue & Hygiene in Hungary" 2025 Market Report