Hungary Nonwoven Fabric Overseas Market Analysis Report

Target Country: Hungary

Main Category: Nonwoven Fabric

Report Type: Overseas Market Analysis

 Report Updated: June 30, 2026

Hungary Nonwoven Fabric Key Conclusions

In 2026, Hungary's nonwoven fabric market consumption is approximately 88,000 tons, with import dependency remaining high at 65%. The automotive industry (needle-punched nonwovens) and medical hygiene (spunbond/meltblown) are the two core consumption engines, together accounting for over 55%. High polypropylene raw material prices support the nonwoven fabric price center, and China's supply share continues to expand. Key risks stem from the potential expansion of the EU Carbon Border Adjustment Mechanism (CBAM) and Central & Eastern European geopolitical supply chain disruptions.

Apparent Consumption **88,000 tons** (2025)

Import Dependency **65%** ↗

China Import Share **~18%** (2025, +2.3pct YoY)

Auto + Medical Consumption Share **56%**

Source: Hungarian Central Statistical Office (KSH), EDANA Annual Report, compiled June 2026

Supply and Demand Fundamentals

Hungary's nonwoven fabric market shows steady growth, with apparent consumption reaching 88,000 tons in 2025, up 8.6% year-on-year. Local production capacity is limited, with imports continuing to climb to 65,000 tons; the supply-demand gap is filled by imports. Automotive lightweighting trends and upgraded medical infection control standards jointly drive demand-side expansion.

Indicator	2024	2025	YoY Change
Local Production	32,000 tons	35,000 tons	+9.4%
Imports	60,000 tons	65,000 tons	+8.3%
Exports	11,000 tons	12,000 tons	+9.1%
Apparent Consumption	81,000 tons	88,000 tons	+8.6%

Source: KSH Trade Statistics, EDANA, May 2026

China Market Status

As the world's largest nonwoven fabric producer, China's industry operating rate remained around 72% in H1 2026. PP spunbond nonwoven fabric ex-factory prices fluctuated between 11,500-12,800 RMB/ton, slightly higher than the beginning of the year. China's nonwoven fabric exports to Central and Eastern Europe continue to grow, with Hungary being China's fifth-largest export destination in the CEE region.

PP Spunbond (SSS 30g/m²) Ex-factory Price **11,500-12,800 RMB/ton**

Industry Operating Rate **~72%** (June 2026)

China's Nonwoven Exports to Hungary **~11,700 tons** (Full year 2025)

Export YoY Growth Rate **+14.6%**

Source: Longzhong Information, China General Administration of Customs Statistical Bulletin, June 2026

Hungary Market Status

Hungary's nonwoven fabric import average price is approximately €3.10-3.45/kg (CIF), with prices stable-to-firm in H1 2026. Germany is the largest supply source (~28% share), followed closely by China (~18%), with Turkey and Italy ranking third and fourth. Local production is concentrated in the automotive needle-punched nonwoven fabric segment.

Source Country	Import Share	Main Category	Price Range (€/kg)
Germany	28%	Spunbond/Spunlace	3.40-3.80
China	18%	Spunbond/Meltblown	2.70-3.10
Turkey	14%	Needle-punched/Spunbond	2.90-3.30
Italy	11%	Spunlace/Hot-air	3.50-4.10

Source: KSH Import Statistics, Eurostat Comext, Q1 2026

Product Segmentation Structure

Spunbond nonwovens account for the largest share of Hungary's imports (~45%), widely used in packaging, agricultural coverings, and hygiene products. Needle-punched nonwovens benefit from automotive industry demand, with an import share of ~18% and the fastest growth rate. Spunlace nonwovens have stable demand in wipes and medical applications, while meltblown nonwovens serve the high-end filtration market.

Category	Import Share	Main Application	Demand Trend
Spunbond	45%	Packaging, Agriculture, Hygiene	Steady Growth
Spunlace	22%	Wipes, Medical Dressings	Stable
Needle-punched	18%	Automotive Interiors, Geotextiles	Rapid Growth ↗
Meltblown	8%	Filtration, Medical Protection	Flat

Source: EDANA European Nonwovens Market Segmentation Report, KSH, May 2026

Core Finished Product Supply & Demand

Medical protective products (surgical gowns, isolation gowns) and automotive acoustic/thermal insulation materials are the two core downstream finished products for nonwoven fabrics in Hungary. In 2026, demand for medical nonwoven products is supported by the EU medical supplies stockpiling policy, while automotive needle-punched nonwovens benefit from supporting demand generated by the expansion of Audi and Mercedes-Benz plants in Hungary.

Annual Demand for Medical Nonwoven Products **~21,000 tons** (2025)

Automotive Needle-punched Nonwoven Demand **~16,000 tons** +12% YoY

Local Medical Nonwoven Capacity Gap **~75% reliant on imports**

Hungary Auto Production **~520,000 units** (2025)

Source: Hungarian Investment Promotion Agency (HIPA), EDANA, Hungarian Automotive Industry Association, June 2026

Intermediate Goods & Raw Material Value

Polypropylene (PP) is the core raw material for nonwoven fabrics, accounting for 60%-70% of spunbond/meltblown nonwoven costs. In June 2026, China's East China PP raffia grade price was approximately 7,600 RMB/ton, while European PP homopolymer spot price was approximately €1,120-1,180/ton. High crude oil prices and elevated European energy costs drive PP price firmness, squeezing downstream profit margins.

Raw Material	China Price	Europe CIF Reference Price	MoM Change
PP Raffia	7,600 RMB/ton	€1,120-1,180/ton	+1.8%
PP Fiber Grade	7,850 RMB/ton	€1,160-1,220/ton	+2.1%
PET Chip	6,500 RMB/ton	€980-1,040/ton	Flat

Source: Longzhong Information, Argus Media Europe, June 30, 2026

Trade & Macro Indicators

Hungary's GDP growth rate was approximately 1.8% in 2025, projected to rebound to 2.3% in 2026. The HUF/EUR exchange rate fluctuates in the 395-405 range, with import costs significantly affected by exchange rates. The EU "RePowerEU" initiative and Hungary's industrial subsidy policies provide certain support for local nonwoven fabric processing enterprises.

Hungary GDP Growth (2025) **1.8%** (2026 forecast 2.3%)

EUR/HUF Exchange Rate **395-405** (June 2026)

Total Nonwoven Imports **~€205 million** (2025)

Manufacturing as % of GDP **22.5%**

Source: World Bank, Hungarian National Bank (MNB), Eurostat, June 2026

Risks & Opportunity Windows

If the EU Carbon Border Adjustment Mechanism (CBAM) is expanded to plastic products, it will significantly increase the import cost of PP-based nonwoven fabrics. Supply chain localization trends create opportunities for Chinese enterprises with European production capacity. China-Hungary bilateral relations remain solid, and the Budapest-Belgrade railway improves logistics efficiency, reducing delivery lead times for Chinese goods.

⚠ Risk Alert: CBAM expansion expectations may raise PP nonwoven import costs by 8%-15%; HUF exchange rate volatility increases importer currency risk.

Opportunity: Localization Substitution Window

Chinese-funded production in Hungary can enjoy EU tariff preferences

Opportunity: China-Hungary Logistics Optimization **Rail transport shortened to 14-18 days**

Risk: EU New Regulation Compliance Cost **REACH regulation updates increase testing costs**

Source: European Commission CBAM Policy Notice, Hungarian Ministry of Foreign Affairs and Trade, June 2026

Data Sources Summary

- Hungarian Central Statistical Office (KSH) — Trade statistics and industrial data, full year 2025 and Q1 2026
- EDANA (European Disposables and Nonwovens Association) — European Nonwovens Market Annual Report and Segmentation Reports, May 2026
- General Administration of Customs of China — Nonwoven fabric export statistical bulletin, June 2026
- Longzhong Information — Polypropylene and nonwoven raw material price monitoring, June 30, 2026
- Argus Media Europe — European polymer spot price assessments, June 2026
- Eurostat Comext — EU Member State trade flow statistical database, Q1 2026
- World Bank — Hungary macroeconomic indicators, updated June 2026
- Hungarian National Bank (MNB) — Exchange rate and monetary policy report, June 2026
- Hungarian Investment Promotion Agency (HIPA) — Automotive industry and manufacturing investment data, 2026
- European Commission — CBAM policy notice and RePowerEU plan documents, 2026