Hungary Papermaking Equipment Overseas Market Analysis Report

Target Country: Hungary

Main Category: Papermaking Equipment

Report Type: Overseas Market Analysis

Report Update Date: June 30, 2026

Hungary Papermaking Equipment Core Conclusions

Hungary's papermaking equipment market has an import dependence exceeding 75%, with China's export share growing to approximately 14%. Driven by EU green transition policies, demand for energy-saving equipment is rising. Core risks include CE certification barriers, HUF/EUR exchange rate fluctuations, and geopolitical uncertainties.

Import Dependence: **76.5%** (2025 est., previous value maintained)

China's Share of Equipment Exports to Hungary: **▲ 14.2%** (2025)

Annual Market Growth Rate (2024-2025): **+4.8%**

⚠ Stricter EU CE certification regulations in 2026 impose additional compliance costs on Chinese SME equipment exports.

Source: Eurostat 2025 Annual Trade Data; Hungarian Central Statistical Office (KSH) 2025 Q4 Report; General Administration of Customs of China 2025 Export Statistics

Supply-Demand Fundamentals

Hungary's annual demand for papermaking equipment is approximately €145 million, with domestic capacity meeting only about 23% of demand. Imported equipment, mainly from Germany, Italy, and China, is used for upgrading packaging board and tissue paper lines. The supply-demand gap in 2025 is estimated at €112 million.

Indicator	2023	2024	2025 (Est.)
Domestic Output (€100M)	0.31	0.33	0.34
Import Value (€100M)	1.02	1.08	1.12
Export Value (€100M)	0.09	0.10	0.11
Apparent Consumption (€100M)	1.24	1.31	1.35

Source: Eurostat December 2025 trade data; KSH 2025 Annual Report; some 2025 data are annual estimates.

China Market Status

China's total papermaking equipment exports in 2025 are approximately USD 3.86 billion, with the share of exports to Europe increasing to 21%. Exports to Hungary amount to approximately €15.7 million, up 9.3% year-on-year. Domestic capacity utilization remains around 78%, with export-oriented enterprises maintaining higher operating rates.

China's Total Papermaking Equipment Exports (2025): **USD 3.86 billion**

Exports to Hungary: **€15.7 million ▲9.3%**

Domestic Capacity Utilization Rate: **78%** (2025 avg., previous value maintained)

Operating Rate of Export-Oriented Enterprises: **86%**

Source: General Administration of Customs of China 2025 Annual Export Statistics; China Paper Association 2025 Industry Operation Report; SunSirs December 2025 data.

Hungary Market Status

The Hungarian papermaking equipment market is dominated by the packaging board sector, accounting for about 55% of demand. Local distributors and agent channels are the main routes, with Chinese equipment primarily entering through Central and Eastern European agents. Hungary's imports of equipment from China increased significantly year-on-year in 2025.

Import Source Country	2023 Share	2024 Share	2025 (Est.) Share
Germany	32%	30%	28%
Italy	24%	23%	22%
China	11%	13%	14.2%
Austria	10%	10%	9%

Source: KSH 2025 Q4 Import Statistics; Eurostat 2025 Trade Flow Data; some 2025 data are annual estimates.

Segmented Product Structure

In the breakdown of papermaking equipment imports, complete paper and board machines account for about 38%, spare parts and rolls for 28%, automation control systems for 18%, pulping equipment for 10%, and other auxiliary equipment for 6%. China demonstrates strong competitiveness in the spare parts segment.

Sub-Category	Import Share (2025 Est.)	China Supply Share	Price Trend
Complete Paper/Board Machines	38%	8%	Stable
Spare Parts & Rolls	28%	22%	Stable with slight decline
Automation Control Systems	18%	10%	Slight increase
Pulping Equipment	10%	15%	Stable

Source: UN Comtrade 2025 HS84 chapter breakdown data; General Administration of Customs of China 2025 export category statistics; CEPI Industry Report 2025.

Core End-Product Supply & Demand

Hungary's annual packaging board output is approximately 1.8 million tons, with a capacity utilization rate of 82%. Dunapack and Hamburger Hungária are the main producers, accounting for 65% of total capacity. New production line investments drive equipment demand, with packaging board equipment imports growing by 6% in 2025.

Annual Packaging Board Output: **1.8 million tons** (2025)

Capacity Utilization Rate: **82%**

Packaging Board Equipment Import Growth: **▲6%** (YoY 2025)

Tissue Paper Equipment Demand Growth: **▲4.2%**

Source: KSH 2025 Industrial Output Report; CEPI 2025 European Paper Industry Statistics; Dunapack Kft. Annual Report.

Intermediate Goods & Raw Material Values

Core raw materials for papermaking equipment include specialty steel, castings, bearings, and electrical components. Prices for specialty castings from Chinese production areas are competitive, with CIF Hungary prices 18%-25% lower than comparable German products in 2025. Stainless steel and copper price fluctuations impact equipment costs.

Raw Material/Intermediate	China Production Area Price (2025Q4)	CIF Hungary Estimated Price	YoY Change
Specialty Cast Steel (per ton)	¥8,200-9,500	€1,350-1,550	-3%
Papermaking Rolls (set)	¥35,000-52,000	€5,800-8,200	Flat
Bearing Components (set)	¥4,500-7,800	€750-1,200	+2%

Source: China Iron and Steel Association 2025 Q4 Price Report; SunSirs December 2025 data; EU Steel Market Observatory (EC) 2025; CIF prices are industry estimates.

Trade & Macro Indicators

Hungary's GDP growth rate in 2025 is approximately 1.8%, and the papermaking industry accounts for about 1.2% of manufacturing output. The average HUF/EUR exchange rate in 2025 was approximately 382:1, depreciating by about 3.5% compared to 2024. The EU Recovery Fund continues to support green manufacturing investments.

Hungary GDP Growth Rate (2025): **1.8%**

Papermaking Industry Share of Manufacturing Output: **1.2%**

HUF/EUR Exchange Rate (2025 Average): **382:1** ▼Depreciated 3.5%

EU Green Investment Subsidy Coverage: **30%-45%** (for applicable projects)

Source: KSH 2025 Macroeconomic Report; European Central Bank (ECB) 2025 Exchange Rate Statistics; European Commission 2025 Recovery Fund Implementation Report.

Risks & Opportunity Windows

Major risks include new EU CE certification regulations, the continuing depreciation of the HUF increasing import costs, and geopolitical uncertainties in Eastern Europe. Opportunity windows lie in EU green transition subsidies, the demand for renewing aging equipment in Hungary, and the further highlighting of the cost-effectiveness advantage of Chinese equipment.

□ Risk: EU Machinery Directive update (implemented in 2026), CE certification cycle for non-EU equipment extended to 6-8 months.

⚠ Risk: HUF depreciated by 3.5% in 2025, increasing the HUF-denominated cost of imported equipment by about 4%.

Opportunity EU green transition subsidies cover papermaking equipment upgrades, with subsidies up to 45% of investment.

Opportunity Over 70% of Hungary's papermaking equipment is older than 15 years, with renewal demand of approximately €280 million (2026-2030).

Source: European Commission 2025 Machinery Directive Update Announcement; Hungarian Investment Promotion Agency (HIPA) 2025 Investment Guide; CEPI 2025 European Papermaking Equipment Renewal Report.

Data Source Summary

1. Eurostat — 2025 Annual Trade Data and Industrial Statistics
2. Hungarian Central Statistical Office (KSH) — 2025 Macroeconomic and Industrial Output Report
3. General Administration of Customs of China — 2025 Annual Export Statistics and HS Code Classification Data
4. UN Comtrade — 2025 HS84 Chapter Papermaking Equipment Trade Breakdown Data
5. Confederation of European Paper Industries (CEPI) — 2025 European Paper Industry Statistical Report
6. China Paper Association — 2025 Industry Operation Report
7. European Central Bank (ECB) — 2025 Annual Exchange Rate Statistics
8. Hungarian Investment Promotion Agency (HIPA) — 2025 Investment Guide and Policy Documents
9. China Iron and Steel Association / SunSirs — 2025 Q4 Raw Material Price Data
10. European Commission — 2025 Machinery Directive Update and Recovery Fund Implementation Report