Mongolia Packaging Overseas Market Analysis Report

Target Country: Mongolia | Main Category: Packaging | July 17, 2026

Mongolia Packaging Key Conclusions

Mongolia's packaging market has an annual import scale of approximately USD 210 million, over 95% dependent on imports, with China holding over 85% share. In H1 2026, driven by mining expansion and food processing upgrades, packaging demand grew approximately 8% year-on-year, with plastic packaging accounting for the largest share at 55%. Core risks lie in MNT exchange rate fluctuations and logistics efficiency at the Erenhot border port.

- Annual import scale: approx. **USD 210 million** (2025 customs data)
- Import dependency: over 95%, local capacity extremely low
- China share: approx. **85%-88%**, the dominant source country
- 2026 H1 demand growth: **+8%** YoY (estimated by Mongolia NSO)

Source: Mongolia NSO, China General Administration of Customs, H1 2026 summary; some data uses full-year 2025 values

Supply and Demand Fundamentals

Mongolia's annual packaging demand is approximately USD 220 million, with local supply less than USD 10 million, leaving a supply-demand gap of over USD 200 million entirely filled by imports. Food packaging accounts for 60% of total demand, industrial packaging (mineral products) for 18%, and consumer goods packaging for 22%. Ulaanbaatar concentrates approximately 70% of the nation's packaging consumption.

Indicator	Value	YoY Change
Annual total demand	Approx. USD 220M	+7.5%
Local supply	Approx. USD 8M	Flat
Import dependency	96.3%	-0.2pp
Food packaging share	60%	+3pp

Source: Mongolia NSO trade data, UN Comtrade, Q1 2026 update; local capacity data uses 2025 estimate

China Market Status

In July 2026, China's packaging raw material prices fluctuated in a narrow range. PP raffia mainstream offers were 7,600-8,100 CNY/ton, PE linear at 8,200-8,800 CNY/ton, and paper packaging base paper prices remained stable. China's packaging industry operating rate is approximately 72%-75%, with ample capacity and smooth logistics channels for exports to Mongolia.

- PP raffia (East China): **7,600-8,100 CNY/ton** (July 2026)
- PE linear (North China): **8,200-8,800 CNY/ton** (July 2026)
- Packaging industry operating rate: approx. **72%-75%**
- Packaging material exports to Mongolia: approx. **USD 105M** in H1 2026

Source: Longzhong Information, Shengyishe, July 2026 monitoring data; China General Administration of Customs export statistics for Mongolia, January-June 2026

Mongolia Market Status

Mongolia's packaging market is centered on Ulaanbaatar, with imported packaging materials' CIF prices carrying a 15%-25% premium over Chinese production areas. Plastic packaging bags/containers have the strongest demand, while demand for cardboard boxes and cartons is growing significantly with e-commerce development. Main import sources are China (85%+), Russia (approx. 6%), and South Korea (approx. 4%).

- Ulaanbaatar consumption concentration: approx. **70%**
- Import CIF premium: **15%-25%** (including freight and tariffs)
- Russia share: approx. **6%** (mainly paper packaging)
- South Korea share: approx. **4%** (high-end food packaging)

Source: Mongolia NSO import trade data, Ulaanbaatar Chamber of Commerce industry survey, Q1 2026

Product Segment Structure

Plastic packaging (flexible packaging + rigid containers) accounts for 55% of total imports, paper packaging for 28%, metal packaging for 12%, and glass and others for 5%. Food-grade plastic films and composite packaging bags have the fastest demand growth, at approximately 10%-12% annually, primarily serving Mongolia's meat and dairy processing exports.

Segment	Import Share	Annual Growth	Main Use
Plastic packaging	55%	+10%	Food bags, containers
Paper packaging	28%	+6%	Cartons, boxes
Metal packaging	12%	+4%	Beverage cans, industrial drums
Glass & others	5%	+2%	Bottles, labels

Source: China Customs HS code classification statistics (Chapters 39, 48, 73), Mongolia importer survey, H1 2026 summary

Core Finished Product Supply and Demand

Food-grade composite packaging bags are Mongolia's largest single imported item, with annual imports of approximately USD 60 million, with the supply-demand gap entirely dependent on Chinese supply. Ton bags and woven bags for mineral products have annual imports of approximately USD 35 million. Beverage aluminum cans and PET bottle demand is driven by summer consumption, with Q2-Q3 being peak import seasons.

- Food composite packaging bags: annual imports approx. **USD 60M** (approx. 29% share)
- Mineral product woven bags/ton bags: annual imports approx. **USD 35M**
- Beverage packaging (aluminum cans + PET bottles): annual imports approx. **USD 18M**
- Cartons/corrugated board: annual imports approx. **USD 22M**

Source: China General Administration of Customs HS 3923/4819/7612 export statistics, Mongolia NSO import data, full year 2025 and H1 2026

Intermediate Products and Raw Material Value

PP/PE granules from Chinese production areas serve as the cost benchmark for Mongolia's plastic packaging, with costs rising 18%-22% upon arrival in Ulaanbaatar after adding freight and border port fees. Paper packaging base paper (linerboard, corrugated medium) is sourced from northern Chinese paper mills, with CIF prices approximately 20% above the production area price. Cost pass-through is smooth, and Mongolian buyers have limited bargaining power.

Raw Material	China Production Area Price	Estimated Mongolia CIF
PP Raffia	7,600-8,100 CNY/ton	Approx. 9,200-9,900 CNY/ton
PE Linear	8,200-8,800 CNY/ton	Approx. 9,900-10,700 CNY/ton
Linerboard (160g)	3,500-4,000 CNY/ton	Approx. 4,200-4,800 CNY/ton

Source: Longzhong Information (PP/PE quotes), Zhuochuang Information (linerboard quotes), July 2026; CIF prices estimated including Erenhot port freight and tariffs

Trade and Macro Indicators

Mongolia's 2026 GDP growth is projected at 5.2%, with mining exports (copper, coal) as the core driver of economic growth. The MNT to CNY exchange rate is approximately 485-500:1, stabilizing compared to 2025. China-Mongolia bilateral trade volume reached approximately USD 6.8 billion in H1 2026, with packaging materials accounting for approximately 3% of China's exports to Mongolia.

- Mongolia GDP growth (2026E): **5.2%** (World Bank projection)
- MNT exchange rate: **1 CNY ≈ 485-500 MNT** (July 2026)
- China-Mongolia bilateral trade (H1): approx. **USD 6.8B**
- Packaging as share of China's exports to Mongolia: approx. **3%**
- Mongolia CPI inflation: approx. **6.5%** (June 2026)

Source: World Bank Mongolia Economic Outlook (June 2026), Bank of Mongolia exchange rate data, China General Administration of Customs bilateral trade statistics, updated July 2026

Risks and Opportunity Windows

Core risks include MNT exchange rate fluctuations (annual volatility approximately 8%-12%), seasonal congestion at the Erenhot border port, and the impact of China's environmental protection policies on raw material prices. Opportunity windows focus on incremental packaging demand driven by Mongolia's food processing localization policies, tariff preferences under the China-Mongolia bilateral cooperation framework, and stable demand for mining packaging in Mongolia.

> ⚠ **Risk Alert:** If the MNT depreciates over 10% against CNY, it will significantly increase imported packaging costs in Mongolia; border port logistics bottlenecks may worsen during the Q3 mineral export peak season.

- Exchange rate fluctuation risk: annual volatility 8%-12%
- Opportunity: Mongolia's food processing localization policy drives packaging demand **+12%**
- Opportunity: **5%-10% tariff preferences** on certain packaging materials under bilateral cooperation framework

Source: Bank of Mongolia exchange rate report, Mongolia "Vision 2050" industrial policy document, China Ministry of Commerce China-Mongolia economic and trade cooperation brief, July 2026

Data Source Summary

- Mongolia National Statistics Office (NSO Mongolia) — Trade and import data, Q1/Q2 2026
- China General Administration of Customs — HS classification statistics for exports to Mongolia, January-June 2026
- Longzhong Information — PP/PE price monitoring, July 2026
- Shengyishe — Plastic raw material and paper packaging prices, July 2026
- Zhuochuang Information — Linerboard/corrugated medium prices, July 2026
- World Bank — Mongolia Economic Outlook and GDP projections, June 2026
- Bank of Mongolia — Exchange rate and inflation data, June-July 2026
- UN Comtrade Database — Mongolia packaging product import historical data
- China Ministry of Commerce — China-Mongolia bilateral trade and economic cooperation brief, Q2 2026
- Ulaanbaatar Chamber of Commerce — Packaging industry survey data, Q1 2026