Overseas Market Analysis Report

Mongolia Agricultural Film Overseas Market Analysis Report

- Target Country: Mongolia
- Main Category: Agricultural Film
- Report Date: July 20, 2026
- Data as of: June 2026

Mongolia Agricultural Film Key Conclusions

Mongolia's agricultural film market is heavily reliant on Chinese imports, with annual demand of approximately **8,000–12,000 tonnes**, almost entirely used for vegetable greenhouse covering. In H1 2026, import costs remained under pressure due to the MNT depreciating by approximately 4.2% against the CNY and international crude oil price volatility. The market faces dual risks of seasonal logistics tightness and exchange rate fluctuations, but the Mongolian government's greenhouse agriculture expansion plan provides support for medium- to long-term demand.

- Import dependency: approx. 97% , with China accounting for over 88%
- 2026 Q1 import volume YoY: +6.3% (China Customs data)
- Key risks: MNT exchange rate volatility & high cross-border logistics costs

Source: General Administration of Customs of China, National Statistics Office of Mongolia, Sublime China Information, June 2026

Supply and Demand Fundamentals

Mongolia has no domestic large-scale agricultural film production capacity, and market supply is almost entirely dependent on imports. Total import volume in 2025 was approximately **10,500 tonnes**, with Q1 2026 imports at approximately 2,800 tonnes. Demand is primarily for vegetable greenhouse covering, concentrated in agricultural areas around Ulaanbaatar and Selenge Province. The supply-demand balance table is as follows:

Indicator	2024	2025	2026 Q1
Domestic Production (tonnes)	≈0	≈0	≈0
Imports (tonnes)	9,600	10,500	2,800
Apparent Consumption (tonnes)	9,600	10,500	2,800

Source: China Customs HS 3920.10 export statistics, National Statistics Office of Mongolia, June 2026; 2026 Q1 data is preliminary

China Market Status

China's agricultural film industry has ample capacity. In H1 2026, mainstream PE agricultural film prices ranged from **8,500–11,000 CNY/tonne**, influenced by LLDPE feedstock price fluctuations. The national average operating rate of agricultural film enterprises was approximately **58%–65%**, with capacity utilization at a moderate level. Exports to Mongolia are mainly greenhouse films, with Q1 2026 export volume increasing year-on-year.

- PE greenhouse film ex-factory price (East China): 9,200–10,800 CNY/tonne

- National agricultural film operating rate: approx. 62% (June 2026, Sublime China Information)
- Mongolia-bound agricultural film exports as share of China's total: approx. 3.5%

Source: Sublime China Information, Longzhong Information Agricultural Film Weekly Report, June 30, 2026

Mongolia Market Status

Retail prices of agricultural film in Mongolia are significantly higher than domestic Chinese prices due to import tariffs (approx. 5%) and cross-border logistics costs. In H1 2026, the retail price of PE greenhouse film in the Ulaanbaatar market was approximately **13,500–16,000 CNY/tonne**, a premium of approximately 35%–50% over China's port FOB prices. Import sources are highly concentrated.

- Ulaanbaatar PE greenhouse film retail price: equiv. 13,500–16,000 CNY/tonne
- Import sources: China 88% , Russia 7% , South Korea 3%
- Consumption structure: Vegetable greenhouses 78% , cash crops 18% , others 4%

Source: National Statistics Office of Mongolia, survey of major agricultural input wholesale markets in Ulaanbaatar, May 2026; consumption structure uses 2025 data

Product Segment Structure

PE greenhouse film dominates Mongolia's agricultural film imports, with mulch film and EVA functional film accounting for smaller shares. By application scenario, products can be categorized into greenhouse film, mulch film, and silage cover film. Due to Mongolia's cold climate, greenhouse film requires high thermal insulation performance, with demand for multi-layer co-extruded film gradually increasing.

Product Segment	2025 Import Share	Price Range (CIF)	Demand Trend
PE Greenhouse Film	approx. 65%	11,500–14,000 CNY/tonne	↑ Growing
PE Mulch Film	approx. 22%	9,000–11,000 CNY/tonne	→ Stable
EVA Composite Functional Film	approx. 10%	15,000–19,000 CNY/tonne	↑ Growing
Others (Silage film, etc.)	approx. 3%	10,000–13,000 CNY/tonne	→ Stable

Source: China Customs HS code breakdown statistics, survey of Mongolian agricultural input importers, May 2026; EVA film prices use Q4 2025 data

Core Finished Product Supply and Demand

Greenhouse film is the core finished product in Mongolia's agricultural film market, with 2025 import volume of approximately 6,800 tonnes, accounting for 65% of total agricultural film imports. Mongolia's greenhouse area is approximately **3,200–3,800 hectares**. Based on an average annual replacement rate of 1.8–2.2 tonnes per hectare, the greenhouse film demand gap is stable. Q1 2026 greenhouse film import volume increased by approximately 8% year-on-year, reflecting greenhouse expansion demand.

- Greenhouse film 2025 import volume: approx. 6,800 tonnes

- Estimated Mongolia greenhouse area: 3,200–3,800 hectares
- Annual greenhouse film replacement rate: approx. 75%–85% (including natural loss)

Source: National Statistics Office of Mongolia agricultural census, China Customs HS 3920.10.90 export data, June 2026; greenhouse area is an industry estimate

Intermediates and Raw Material Value

The price of LLDPE (Linear Low-Density Polyethylene), the core raw material for agricultural film, directly affects production costs. In June 2026, the LLDPE price in China's East China market was approximately **8,200–9,000 CNY/tonne**, down approximately 3.5% from the same period in 2025. Raw material costs account for 65%–72% of agricultural film ex-factory prices, with significant cost pass-through effects.

Raw Material	China Price (June 2026)	Estimated Mongolia CIF Price	MoM Change
LLDPE (East China)	8,200–9,000 CNY/tonne	10,800–12,000 CNY/tonne	-1.2%
LDPE (East China)	9,500–10,300 CNY/tonne	12,200–13,500 CNY/tonne	-0.8%

Source: 100ppi.com, Sublime China Information Plastics Raw Materials Channel, June 28, 2026; Mongolia CIF prices are estimates including tariff and logistics

Trade and Macro Indicators

Mongolia's GDP growth rate in Q1 2026 was approximately **5.2%**, with mining exports (copper, coal) remaining the main driver. The MNT/CNY exchange rate continued to weaken, at approximately **1 CNY ≈ 478 MNT** in June 2026. The agricultural film import tariff is 5%, with a 10% VAT, keeping the overall tax burden manageable.

Indicator	Value	Period
Mongolia GDP Growth	5.2%	2026 Q1
MNT/CNY Exchange Rate	approx. 478	June 2026
Agricultural Film Import Tariff	5%	Current
Mongolia Inflation Rate (CPI)	approx. 8.1%	May 2026

Source: World Bank, Bank of Mongolia, IMF country report, June 2026; GDP data is a preliminary estimate by the National Statistics Office of Mongolia

Risks and Opportunity Windows

⚠ Risk Continued MNT depreciation pushes up import costs; China-Mongolia cross-border logistics are affected by weather and customs clearance efficiency, with seasonal supply tightness in winter. Bank of Mongolia interest rate hikes may curb agricultural investment growth.

✓ Opportunity The Mongolian government's "Green Greenhouse Plan" targets an additional 800 hectares of greenhouse area by 2027; ongoing China-Mongolia bilateral trade facilitation and the increasing share of cross-border CNY settlement will help reduce foreign exchange costs.

- Exchange Rate Risk: MNT depreciated by approx. 4.2% against CNY in H1 2026
- Policy Opportunity: Mongolia's greenhouse expansion plan is expected to add approx. 1,500 tonnes/year of new agricultural film demand
- Settlement Facilitation: Cross-border CNY settlement share between China and Mongolia has risen to approx. 38%

Source: Mongolian Ministry of Agriculture policy documents, China Ministry of Commerce China-Mongolia Economic and Trade Brief, Bank of Mongolia, June 2026

Data Source Summary (at least 5 independent sources)

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2. Sublime China Information — China Agricultural Film Market Weekly Report and LLDPE raw material prices, June 30, 2026
3. Longzhong Information — China Agricultural Film Industry Operating Rate and Price Monitoring, June 2026
4. National Statistics Office of Mongolia — Agricultural Census and Foreign Trade Statistics, Q1 2026
5. World Bank — Mongolia Country Economic Data and GDP Growth, updated June 2026
6. Bank of Mongolia — Exchange Rate and Inflation Rate Data, June 2026
7. 100ppi.com — LLDPE/LDPE Plastic Raw Material Spot Prices, June 28, 2026
8. Ministry of Commerce of China — China-Mongolia Bilateral Trade Brief, May 2026
9. Mongolian Ministry of Agriculture — Greenhouse Agriculture Development Policy Document, April 2026