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Hungary

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Report Highlights:
Hungarian consumers are becoming more segmented and the retail food sector continues to consolidate. Tourism is also becoming more important and hotels and restaurants are demanding higher quality foods and services. Hungary will become a member of the European Union in May 2004. The new import tariffs and the EU wide distribution systems will facilitate US imports, but for some commodities the implementation of restrictive EU trade regimes may reduce sales

Includes PSD Changes: No
Includes Trade Matrix: No
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SUMMARY

After a period of decline, Hungary's production and consumption of processed foods is now on the rise. The economic situation continues to improve as the Hungarian government prepares for EU accession in May 2004. The Hungarian food distribution system has changed drastically in the past five years. There has been an infusion of foreign capital into the retail food sector resulting in the opening of state-of-the-art hypermarkets. These provide 'wide channels' of distribution for new products. Hungarian consumers are becoming more and more quality conscious and opportunities exist for high quality U.S. foods and beverages. Tourism is growing and hotels and restaurants are demanding higher quality foods and services. U.S. exporters are well positioned to take advantage of this growing market segment. EU membership will reduce tariffs on many U.S. agricultural exports to Hungary but this gain is more than offset by the implementation of the full range of EU phyto-sanitary barriers. Distribution of imported food products will be easier on the enlarged European market.

I. MARKET OVERVIEW

Overall Business Climate
Hungary is a middle-income country with a developed and export-oriented food processing industry. Hungary's GDP growth is forecast to be 3.6 percent for 2002 and GDP is now back above the 1989 real GDP level. Hungary is expected to show strong growth again in 2003. High export growth and large privatization receipts in the last three years have allowed Hungary to rapidly reduce its foreign debt load. Hungary is expected to continue its careful handling of its now manageable debt burden in order to maintain a favorable credit rating and borrowing terms. The inflation rate continued to fall in 2002 (5.3%) and the 12-month inflation rate to May of 2002 was 5.9 percent.

Since 1990 wave upon wave of foreign companies have come into Hungary and invested more than $25 Billion into production and service facilities throughout the country. From the American side, for example, "Fortune 500" companies first arrived in the early 90's like General Electric, Alcoa, IBM, Ford, Dow, Citibank, Ernst & Young, AES, Coca-Cola, Pepsi-Cola, Proctor & Gamble, Sara Lee etc. In the late 90's and the new millennium, the second wave of companies coming to Hungary consisted of subcontracts to the "Fortune 500." Then a third wave of suppliers to the subcontractors have been making their way to Hungary selling their products through agents and distributors. Due to Hungary's geographic location in the center of Europe, all three waves of companies are looking to do business not only with Hungary, but also with the rest of the European Union and the "frontier markets" of Eastern Europe (e.g. Romania, Ukraine and former Yugoslavia).

The agri-food sector has a slowly declining but fundamental role in the national economy and in the trade balance. Agricultural trade accounted for $ 2.67 billion in exports and $1.3 billion in imports in 2002. More than sixty percent of Hungary's agri-food exports went to the OECD countries; the share going to EU countries was 45 percent. Imports of bulk agricultural products and intermediary goods (such as protein meals, coffee, cocoa and spices, meat, livestock genetics, fruit and nuts) make up 80 percent of total agricultural imports. Processed foods and beverages account for about 20 percent of the total, and these are imported mainly from the countries of the EU.

The agricultural sector has many traditional ties to the United States, especially in the area of genetics. Some consumer-oriented products also come from the United States. Purchases of U.S. agricultural and food items accounted for $48 million in 2002. Hungarian sales to the United States were $12 million in the same period.

Consumer Food Market

Food consumption dropped considerably after the political and economic changes of the late 1980s. The main reasons for the decline were a decline in real income and high inflation. However, consumption began to rebound in 1997/1998 as macroeconomic conditions improved and inflation cooled.

The gap between the rich and poor in Hungary is widening and the less fortunate tend not to shop at large commercial retailers. Also, in response to high taxes, the black market has taken on an increasing role in supplying food to lower income families and subsistence farming and unregistered farm food sales are on the rise. At the same time, disposable income for the top strata of society has expanded rapidly and these consumers are adopting consumption patterns similar those found in wealthy western European countries.

The last few years have seen interesting changes in consumer preferences. For example, pork consumption has decreased from 39 kg in 1990 to 28.5 kg currently but consumption of cheaper meat cuts and low priced frankfurters has increased. Similarly, demand for poultry has increased in recent years and currently exceeds pork. Turkey and frozen oven-ready poultry products have seen the most growth.

Demand for fish and seafood is low in (landlocked) Hungary and stands at 3kg per capita annually. Demand for frozen fish, particularly breaded products and more expensive restaurant cuts, is on the rise.

Although total consumption of milk products declined in recent years, sales of yogurt and innovative convenience products have reversed this trend and consumption now stands at 163.7 kg per capita annually.

Cereal consumption has dropped in recent years except for rice, where a widening array of brands and products has stimulated consumer interest.

There has been an increase in the consumption of fresh and preserved vegetables, although sales of these items appear to be highly price sensitive. Given current consumption trends, canned products will probably gradually lose market share to frozen foods in the coming year.

At present, there is a small but growing market for health foods. The emerging Hungarian middle-class is adopting Western attitudes towards health and well-being, including those towards food. This trend is particularly evident in the sale and marketing of breakfast cereals and snacks. Natural products such as granola bars, dried fruits and fruit mixtures, soybean and wheat-based meat substitutes are also increasingly popular. Demand for vitamin enhanced products as well as those for diabetics (sugar free chocolate bars, light soft drinks, etc.) are growing.

Currently, food and beverages account for about 25 percent of the household expenditures. The percentage of income spent on food has been decreasing and is trending toward Western levels. Hungary's population (currently about 10 million) is gradually decreasing and the population is aging. Because of this, there is growing demand for high value specialty products, convenience foods, and pet food. According to a 2002 survey, food consumption outside the home accounts for 7.8 percent of total food expenditures.

Ninety percent of Hungarian households have a refrigerator with a freezer compartment. However, because freezing capacity in an average household is still limited, the unit size of retail frozen food packages is smaller than in the United States. According to trade estimates, 37 of every hundred households have a microwave oven. In cities this figure is much higher and increasing rapidly.

Advantages and challenges faced by U.S. food exporters in Hungary

Advantages	**Challenges**
After a period of decline there is room to increase consumption	Domestic food processing is very competitive
Western consumption patterns are emerging	Strong European competition
There is growth potential in the development of retail sector, especially in suburban and rural areas	Slow increase of real incomes
There are unexplored commodity areas	
Consumers still find imported products novel and interesting and associate imports with high quality goods	Food safety issues (Hormone beef, GMO)
Domestic industry needs certain ingredients	Many traders are inexperienced in doing business with overseas companies
Purchases by tourists and transit shoppers are large and growing	High transport costs
High number of experienced, multinational retailers	Relatively small delivery volumes
Innovative products and packaging are appreciated	Hungarian consumers are unfamiliar with the value of many U.S. products
Importers are open to new products and technologies and have been willing to participate in U.S. sponsored events (e.g. the Cochran Fellowship Program and visits to trade U.S. food shows)	Importers have difficult time accessing reasonable local finance terms

II. EXPORTER BUSINESS TIPS

Local Business Customs
The food and beverage wholesale trade is more concentrated than the retail sector. Eleven 'purchasing partnerships', run by retailers, handle about 70 percent of total turnover. These purchasing companies are able to influence the price of domestic and imported foods and charge different fees to domestic and foreign suppliers. Fees include a "listing fee" to introduce a new product into the retailer's inventory, slotting fees to keep a product on the store shelf, and "marketing and shop network development contributions." Care must be taken to guard against excessive fees.

Retailers, including the multinational chains, mainly import through domestic foreign trading companies and wholesalers. U.S. traders interested in selling in Hungary should offer their products to the 'purchasing partnerships' that serve the big retailers, to the nation-wide network importer/distributors, or to "independent" importers. U.S. companies may even consider establishing their own import company to handle the distribution of their product.

The Hungarian wholesale market is also very price sensitive and Hungarian importers will expect American traders to bring samples and quote prices in the early stages of negotiation.

General consumer tastes and preferences
Consumption patterns appear to be dependent on income rather than price. Major factors in upper income purchasing decisions are quality, packaging, and brand recognition. To date, foreign suppliers seem to have been better able to capture this market segment than domestic suppliers. Because of income stratification, demand for cheap foodstuffs and expensive luxury items have increased while sales of medium priced products has declined.

New products are appearing in many categories and packaging designs are revised frequently. One negative aspect of this trend is that some popular and affordable products have disappeared and plastic containers have replaced the environmentally friendlier reusable glass bottles.

In the Hungarian food market, brands have secondary importance. Consumers do not make a distinction between brand name, company name and product name. Brand recognition and brand loyalty have a different meaning for the average Hungarian customer than they do in more mature western markets. Sellers cannot rely on brand power for sales and price premiums to the same extent as in other European countries. Many consumers mistrust new products, names and packages, especially if their appearance comes with a price increase. There is also a small movement against branded, well-advertised, "foreign" products. Conversely, Hungarian customers buy some branded products primarily for prestige (e.g., high-end U.S. bourbon or whisky).

Food standards and regulations

Until the middle of 2002, all food products, excluding fresh products, had to be registered and approved by the Hungarian food-testing institute - OETI. The process was slow and costly but the testing had to be completed before the product is allowed on the market.

In July 2002 GOH terminated the import products registration system. This means an opportunity for Hungarian traders to respond faster to good price or seasonal purchase offers.

The required export administration, quality responsibilities of the Hungarian importer and the foreign vendor etc. are outlined in the 43/2002. Order of the Minister of Agriculture, Minister of Health and the Minister of Economy.

The only group of commodities where the mandated registration has been prolonged is the nutrition supplements for sports, slimming diets and other “functional foods”.

Labeling

Labeling must be in Hungarian. In instances where retail packages are imported with labels written in English, the government requires that Hungarian-language label stickers be added. Labels should include the following information:

Name of product
Ingredients
Shelf life
Name and address of importer or distributor
OETI number

Tariffs and tariff rate quotas (TRQs)

Hungary’s tariff system is based on the international HS system. The tariff schedule has the following structure: the first column (I.) is the so-called ‘GSP’ column for tariffs on imports from developing countries, the second column (II.) contains WTO/MFN tariffs, and the third column (III.) contains the preferential tariffs. These latter are based on free trade agreements with the EU, EFTA, CEFTA (Poland, Czech Republic, Slovakia, Slovenia, Romania, Bulgaria, Estonia), Turkey, and Israel. Products from the United States enter Hungary at the MFN rate, or in some instances, at a lower applied rate.

In addition to tariffs, Hungary maintains tariff rate quotas (TRQs) on a wide range of agricultural products (over 150 separate tariff lines). In some instances, a TRQ will allow a product to enter Hungary at a lower tariff rate. However, TRQs are allocated both on a country specific basis and on a Most Favored Nation (MFN) basis and the administration of specific TRQs can be very complicated. It is recommended that U.S. exporters gather information about the availability of TRQs when evaluating business opportunities. The local FAS office maintains an up to date listing of TRQs and can assist this regard (see the FAS point of contact under Section V of this report).

From May, 2004 Hungary will be a member of the European Union, and will take over the EU’s outside tariff system.

On January 30, 2002, the United States and Hungary agreed to a ‘package’ of trade concessions in which Hungary agreed to reduce or suspend tariffs on some key U.S. agricultural and industrial exports, totaling $180 million annually. This agreement will end with Hungary’s EU membership and so will other bilateral preferential agreements such as GSP (which has been worth up to USD 300-400 million in recent years).

The number of potential export products from the United States to Hungary where EU membership brings a higher tariff is surprisingly limited. These products are beef, poultry meat, and barley, and rice, some beef preparations, margarine and apple juice concentrate. Hungary imports these commodities regularly, including in some years from the United States. With the exception of rice, Hungary is also often a net exporter of these commodities.

In the case of beef, the basic tariff in the EU will not be much higher than it is in the Hungarian tariff schedule, but the preferences under the “minimum access” GATT quota and the bilateral in quota preference will be lost. The “hormone beef” and BSE disputes affect beef trade as well.

Taxes
Value added taxes (VAT - also called the ‘general turnover tax’ in Hungary) are also charged. The VAT is essentially a tax on consumption and the normal rate is 25 percent, with a reduced rate of 12 percent applying to most food and agricultural products. In addition to the VAT, a consumption tax is levied on certain goods (coffee, some kinds of wine, jewelry etc.). Excise taxes are also levied on alcohol and tobacco products. Imports are subject to VAT, with the taxable base calculated as the sum of the customs value, plus customs duties, fees and consumption tax.

III. MARKET SECTOR STRUCTURE AND TRENDS

Market opportunities in:

a. Food retail sector

Food retail sales were $6.16 billion in 2001 and it grew to $9.1 billion in 2002 (a 10 percent increase at comparable prices).

Concentration in the grocery trade has increased over the last few years. By 2002, more than 52 percent of the turnover was attributable to the five biggest companies. Some of the famous retailer chains were forced to sell their shops and move out of Hungary such as Julius Meinl and Billa. The total number of food dominated shops decreased (from 36,912 in 2001 to 36,529 in 2002). The number of new hypermarkets is still growing although at a smaller rate than in the previous years. Shops in the small-medium segment (200-400 sq. meter) managed to increase their share in the total turnover first since the appearance of the multinational retailer chains. The number of small (under 200 sq. meter) shops dropped the most.

Type of Shop	2001	2002
	%	%
Hypermarket	17	19
Supermarket	14	14
Large Discount	16	15

C+C	5	4
Convenience Shops	35	36
Market and Street Kiosks	4	5
Other	9	7

Hypermarkets bigger than 10,000 square meters include Cora, Tesco and Auchan, while cash and carry shops (5,000-10,000 square meters) include Metro, Interfruct C+C and Alfa. Supermarket chains such as Spar, Kaisers, and CBA are well known in the capital area and in bigger cities. Their size is typically 1,000-3,500 square meters. Discount food stores (401-1,000 square meters) are the backbone of the everyday food shopping (Profi, Penny-Market, Plus, Real)

A traditional consumer cooperative chain, COOP, has still the most shops in the 200-400 and the 400-1,000 square meters size categories. But the 40-400 square meters size shops have been the biggest losers in the concentration process - their share of the total turnover has decreased from 22 percent to 13.4 percent during the last four years.

While the number of the small convenience shops is relatively stable, turnover is high. About one third of them close annually and are replaced by newly opened shops.

Changes to Hungary's import regime as a result of the 1995 WTO Uruguay Round Agreement have spurred consumer imports. One response to increased import competition has been an increase in the quality and selection of products provided by domestic food producers. Multinational food companies investing in privatized food manufactures have also helped to increase the quality and appearance of domestic products. In 2000, about 9.1 percent of the food and beverages retail sales were from imports. The biggest import items are tropical and out season fruit, roasted coffee, canned fruits and vegetable, fruit juice, beer and tobacco products.

Specialty shops, many of them at recently opened shopping malls, may provide good business opportunities for imported foodstuffs. Nearly thirty large shopping centers have been built in Budapest and other cities in Hungary in the last three years. Supermarkets (typically 2,000-3,500 square meters in size) are an important part of each new shopping mall.

Gift shops and sweets shops also sell a variety of foreign wine and spirits, fancy dry fruits and nuts, sweets. Gift baskets of food are also commonly for sale in bigger food stores, particularly around Christmas and Easter. Fancy food and spices shops, specialty beverages shops, pet shops etc. are also important distribution channels of imported commodities.

Most of the more than 900 gas stations in Hungary are also convenience stores. The size of these convenience shops varies from 200-1,300 square feet. According to a recent survey, 35-45 percent of shop sales are food and beverage items. Most of Hungary's ten major gas station companies run the shops themselves. Shell Hungary, however, has for years run its "Select" stores under a franchise partnership with CBA, a major domestic grocery chain.

There are about 150 companies in Hungary that sell their products over the Internet. According to a May 2002 GKI - Westel - Sun Hungary survey, Internet sales revenues were about $18 million in 2000. This is a 500 percent increase over 1999. The most common goods sold are books, music, electronics and gifts. There are several grocery companies in bigger cities running e-commerce web sites for home delivery of food and grocery items. The majority of non-food B2C companies use the Hungarian Postal Service to deliver their goods; food retailers use their contractors or have their own car fleet. In most cases, payment is collected upon delivery.

b. Hotel-Restaurant-Food Service

Catering sales were $2.08 billion in 2002, a 4.3 percent growth over the previous year. However, the biggest growth rate within the HRI sector is in fast food. Several well known companies have franchise networks in Hungary, including McDonalds, Pizza Hut, Kentucky Fried Chicken, Wendy's and Mr. Sandwich.

Foreign and "theme" restaurants offering ethnic food and beverages also appear to be growing faster than the restaurant sector in general. These restaurants use and sell imported ingredients and niche products, making them a good place to advertise new products and to educate consumers about new foods.

Upper-tier hotels can also be good partners for U.S. exporters. Not only as hosts for promotional events but also as buyers of premium ingredients and beverages. Most hotel shops sell American products and hotel and catering trade opportunities are under-utilized. Hotels and restaurants mainly buy imported products from local distributors but their managers and chefs are good sources of information about customer preferences and quality and price expectations.

c. The Food Processing sector

Hungary's food processing sector is the most modern in Eastern Europe, and its export revenues are vital to the country's trade balance. Western companies have invested in privatized companies active in distilling, sugar production, soft drinks, vegetable oil processing, products of confectionary, pet food, snacks, and tobacco. These processors have received a good deal of foreign investment, have integrated themselves into a Western-style market system, and are becoming more concentrated in their ownership structure. In other industries, privatization took place more slowly and investors have typically established small- to mid-sized joint ventures with domestic majority ownership. Examples of this model include investment in the milling, baking, pasta, and poultry industries.

Within most parts of the food-processing sector, the increase in the number of companies and new production facilities, in tandem with the decline of domestic consumption, initially led to excess production capacity (sometimes over 30 percent above demand). Over capacity in turn increased the pressure to export. In 2002, 19.8 percent of food industry output was exported but the export orientation is much higher for individual sub-sectors such as canning, meat, poultry, and dairy industry. Products at least partially produced by foreign-owned companies' account for almost two thirds of Hungary's exports.

The total food /beverages sector production is 120 % of domestic demand, indicating a strong <u>export orientation</u>. The following table indicates that the share of imports in the supply of processed food (<u>import penetration</u>) is relative low. Imports are significant for sweets, confectionary and dairy products (need for a wide variety products in these sectors), and fruits/vegetable (need for out season products).

Food Processing Industry Sub-Sector	Export Orientation	Import Penetration
Meat Industry	33.3 %	5.4 %
Dairy	15.3 %	6.2 %
Poultry Processing	42.9 %	0.9 %
Fruit and Vegetable Processing	52.0 %	12.4 %
Brewing	0.7 %	3.0 %
Soft Drinks	8.2 %	2.5 %
Tobacco Industry	Negligible	2.0 %
Sweets and Confectionary	17.2 %	22.8 %
Wine	62.0 %	2.7 %
Feed Milling	23 %	52.0 %
Flour Milling	13.5 %	1.5 %

For many sub-sectors, the consumer oriented product imports are not high, but raw material imports may be considerable. Soybean and fishmeal import (Feed milling), almonds and raisins import (Sweets and Confectionary), pork and tobacco all fall into this category.

The number of food processing firms was 8,160 in 2001 (slowly declining) but 90 percent of these processors employ less than 20 people. Bigger companies, employing more than 300, account for 67 percent of total sector output.

The food processing industry purchases most of its raw materials from domestic sources, but imports of out season or unavailable agricultural ingredients, non-food additives, and packaging materials and technologies, are vital.

Export sales opportunities for U.S. suppliers have occasionally occurred in recent years because of temporary shortages on the domestic market (meat) or the limited availability of a given commodity or quality grade in Hungary (fruit juice concentrate, rice, tobacco, peanuts, fish, raisins, tree nuts, dried fruit etc.)

IV. BEST HIGH-VALUE PRODUCT PROSPECTS

1. Raisins
2. Dried Fruit

3. Almonds
5. Peanuts
6. Rice
7. Meat (Pork and Beef)
8. Seafood
9. Distilled Liquors
10. Wine
11. Spices & Condiments
12. Pet Food
13. Fruit Juice Concentrates
14. Instant Food

Misc. Grocery Items (Snacks, Peanut Butter etc.)

V. KEY CONTACTS AND FURTHER INFORMATION

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Hungary

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	***YEAR***	***VALUE***
Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)	*2002*	*1,327 / 4%*
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)	*2002*	*701/ 2%*
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)	*2002*	*31 / 1%*
Total Population (Millions)/Annual Growth Rate (%)	*2002*	*10 / -3.5%*
Urban Population (Millions)/Annual Growth Rate (%)	*2001*	*6.4 / -.2%*
Number of Major Metropolitan Areas	*2002*	*1*
Size of the Middle Class (Millions)/Growth Rate (%)	*N/a*	*N/a*
Per Capita Gross Domestic Product (U.S. Dollars)	*2002*	*$7,421*
Unemployment Rate (%)	*2002*	*3.1%*

Per Capita Food Expenditures (incl. beverages/tobacco)(U.S. Dollars)	*2001*	*$582*
Percent of Female Population Employed	*2000*	*45.8%*
Exchange Rate (US$1 = HUF)	*9/2003*	*222*

Hungary Imports	Imports from the World			Imports from the U.S.			U.S. Market Share		
(In Millions of Dollars)	2000	2001	2002	2000	2001	2002	2000	2001	2002
CONSUMER-ORIENTED AGRIC.	504	560	701	11	14	15	2	3	2
Snack Foods (Excl. Nuts)	58	73	81	1	1	1	0	0	1
Breakfast Cereals & Pancake Mix	6	7	8	1	1	1	4	3	1
Red Meats, Fresh/Chilled/Frozen	43	55	71	1	1	0	0	0	0
Red Meats, Prepared/Preserved	2	3	5	0	1	0	0	3	0
Poultry Meat	6	12	9	0	1	0	0	2	0
Dairy Products (Excl. Cheese)	30	33	34	1	1	1	0	0	3
Cheese	22	26	28	0	0	0	0	0	0
Eggs & Products	5	11	13	1	1	1	20	7	1
Fresh Fruit	40	42	77	1	1	1	0	0	1
Fresh Vegetables	15	17	24	1	0	0	0	0	0
Processed Fruit & Vegetables	49	56	67	4	5	5	8	9	8
Fruit & Vegetable Juices	31	16	17	1	1	1	1	2	5
Tree Nuts	12	13	16	1	2	2	11	13	12
Wine & Beer	10	10	15	1	1	1	1	0	6
Nursery Products & Cut Flowers	25	27	34	1	1	1	0	0	1
Pet Foods (Dog & Cat Food)	16	16	16	1	1	1	1	2	1
Other Consumer-Oriented Products	135	143	185	4	5	7	3	4	4
FISH & SEAFOOD PRODUCTS	23	27	31	1	1	1	1	0	0
Salmon	1	1	1	1	0	0	1	0	0
Surimi	1	1	1	1	0	0	1	0	0
Crustaceans	1	1	1	0	0	0	0	0	0
Groundfish & Flatfish	8	10	11	1	1	1	1	1	1
Molluscs	1	1	1	1	1	0	0	0	0
Other Fishery Products	11	13	16	1	1	1	0	1	1

AGRIC. PRODS. TOTAL	1064	1152	1327	39	50	46	4	4	4
AGRIC., FISH & FOREST. TOTAL	1365	1468	1738	44	53	48	3	4	3

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office
Note: Many products U.S. products are transshipped from European suppliers and do not appear c official statistics.