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GAIN Report #HU0014

## Hungary

### Exporter Guide

### 2000

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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. However, complicated import rules (such as product registration) and high import duties can make it difficult to compete with locally produced products.

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**Summary:** After a period of decline, Hungary's production and consumption of processed foods are now on the rise. The economic situation continues to improve as the Hungarian government prepares for EU accession sometime in the next decade. The Hungarian food distribution system has changed drastically in the past five years. There has been a great infusion of foreign capital into the retail food sector, resulting in the recent opening of several state-of-the-art hypermarkets, which 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. However, complicated import rules (such as product registration) and high import duties can make it difficult to compete with locally produced products.

## I. MARKET OVERVIEW

### *Overall Business Climate*

Hungary is a middle income country with a well developed and export-oriented food processing industry. Hungary's GDP growth was 4.5 percent for 1999. After 4.6 percent GDP growth in 1997, and 5.2 percent in 1998, this should finally bring Hungary back to its 1989 real GDP level. The government projects 4-5 percent GDP growth for 2000. 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 1999 (10%) and the 12-month inflation rate to August 2000 was 9.3 percent. With about \$23 billion in Foreign Direct Investment (FDI) since 1989, Hungary has been the leading destination for FDI in Central and Eastern Europe (including the former Soviet Union). Of this, over \$7 billion has come from US companies. The largest U.S. investors include Ameritech, GE, General Motors, U.S. West, Coca-Cola, Ford, IBM, Pepsico, McDonalds, Pioneer Brand-Seed, and Monsanto. The large American corporate presence is reflected in the local chapter of the American Chamber of Commerce, which has over 400 members. Products at least partially produced by foreign-owned companies account almost 75 percent of Hungary's exports.

The agri-food sector has a slowly declining but fundamental role in the national economy and in the trade balance. Agricultural trade accounted for \$2.4 billion in exports and \$1.2 billion in imports in 1998. Exports of bulk products to Russia are declining due to economic difficulties there but sales to OECD countries are increasing. More than half of Hungary's agri-food exports went to the countries of the EU. 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 \$46 million in 1999. Hungarian sales to the United States were \$19.7 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 26.5 kg currently but consumption of cheaper meat cuts and low priced frankfurters and Vienna sausages has increased. Similarly, demand for poultry has increased in recent years and currently exceeds pork. Turkey and frozen and oven-ready poultry products have seen the most growth.

Demand for fish and seafood is low in (landlocked) Hungary and stands at 2.7kg per capita annually. Demand for frozen fish, particularly breaded products and more expensive restaurant cuts, is on the rise.

Although total consumption of milk and milk products declined in recent years, sales of yogurt and innovative convenience products have reversed this trend and consumption now stands at 158 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, and soya 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.) is growing.

Currently, food purchases account for about 30 percent of the personal 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 petfood.

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

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

<b>Advantages</b>	<b>Challenges</b>
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	Bureaucratic import administration (mandatory product registration)
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 has 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 environmentally friendly reusable glass bottles have been replaced by plastic containers.

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*

All food products, excluding fresh products, must be registered and approved by the Hungarian food testing institute - OETI (see references at the last chapter of the report). Testing must be completed before the product is allowed on the market. Registration costs approximately HUF

120,000 per product (about \$558.00). If the product is in accord with Hungarian food regulations, it then receives a number (so called “OETI number”), under which it can be marketed for a three-year time period. After this period has expired, the product must be retested and issued a new number. The OETI number is always indicated on the product label.

### *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)*

The Hungarian WTO tariff schedule is available at [http://www.fas.usda.gov/scripts/wtopdf/wtopdf\\_frm.idc](http://www.fas.usda.gov/scripts/wtopdf/wtopdf_frm.idc). Hungary’s tariff system is based on the international HS system and 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 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).

### *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*

Between 1988 and 1996, turnover in the food retail sector declined (this corresponded with the drop in food consumption). However, the value of retail food sales was \$6.0 billion in 1998 and grew to \$6.42 billion in 1999 ( a 7 percent increase).

Concentration in the grocery trade has increased over the last few years. By 1997, 52 percent of the turnover was attributable to just six percent of companies and international retail chains controlled 43 percent of the market in 1997. The number of shops is also decreasing (from 25,000 in 1995 to 23,600 in 1998), and the average size and the number of new hypermarkets is also on the rise.

Size of Shops	Turnover 1998	
	Total (HUF bn)	%
Total	1,290	100
Over 1,000 sqm	330	25.6
401-1,000 sqm	350	27.1
201-400 sqm	170	13.2
101-200 sqm	210	16.3
40-100 sqm	140	10.9
Under 40 sqm	70	5.4

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 and Alfa. Supermarket chains such as Csemege-Julius Meinl, Billa, Spar, Kaisers 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, Jee)

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 1997, about 7.4 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. Near 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.

The development of electronic trading has increased recently in Hungary and the use of the Internet is beginning to appear in retailing. According to a survey by an Internet consulting company, sales by virtual shops are a mere \$50-100 / month on the average. Only the most well known, bigger sites may generate \$1,300-2,600 in monthly receipts. The survey estimates the 1999 turnover of electronic shopping at \$300,000 but their forecast for 2002 is as high as \$7-8 million.

#### *b. Hotel-Restaurant-Food Service*

Sales to catering firms were \$1.9 billion in 1999, 14 percent higher than in the previous year. However, the biggest growth rate within the HRI sector is in fast-food and 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, confectionary, petfood, 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 a domestically-owned majority interest. 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). Overcapacity in turn increased the pressure to export. In 1998, 22 percent of food industry output was exported but the export orientation may be much higher for individual sub-sectors such as canning, meat, poultry, dairy industry. Products at least partially produced by foreign-owned companies account for almost two thirds of Hungary's exports.

The food processing industry purchases most of its raw materials from domestic sources, but imports of out season or not available 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
15. Misc. Grocery Items (Snacks, Peanut Butter etc.)

V. KEY CONTACTS AND FURTHER INFORMATION

Ministry of Agriculture and Regional Development

H-1055 Budapest

Kossuth Lajos ter 11.

Web Address: [Http://www.fvm.hu](http://www.fvm.hu)

International Affairs

Mr. Ferenc Sulyok, Head of Department

Tel: 361 301-4661

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Veterinary and Food Hygiene

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Ministry of Economy

General Information: [www.gm.hu](http://www.gm.hu)

Licensing Office

H-1024 Budapest

Margit krt. 85.

Mr. Gyorgy Gilyan, General Director

Tel: 361 356-5566

Preferential Tariff Quotas

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*Hungary*

<b>TABLE A: KEY TRADE &amp; DEMOGRAPHIC INFORMATION</b>	<b>YEA R</b>	<b>VALUE</b>
Agricultural Imports From All Countries (\$Mil)/U.S. Market Share(%)	1999	1,022 / 5%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share(%)	1999	434 / 3%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share(%)	1998	28 / 1%
Total Population (Millions)*/Annual Growth Rate (%)*	1999	10 / -.4%
Urban Population (Millions)*/Annual Growth Rate (%)*	1999	6.4 / -.2%
Number of Major Metropolitan Areas	1999	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	1999	\$4,670
Unemployment Rate (%)**	1999	9.6%
Per Capita Food Expenditures (U.S. Dollars)	1998	\$474
Percent of Female Population Employed**	1998	44%
Exchange Rate (US\$1 = HUF)***	9/00	297

\* denotes information collected from [www.cia.gov](http://www.cia.gov)

\*\*denotes information collected from [www.worldbook.org](http://www.worldbook.org)

\*\*\*denotes information collected from <http://quote.yahoo.com>

Table B

Hungary Imports of Agriculture, Fish & Forestry Products  
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S. Market Share		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
<b>BULK AGRICULTURAL TOTAL</b>	<b>236</b>	<b>250</b>	<b>220</b>	<b>15</b>	<b>23</b>	<b>21</b>	<b>6%</b>	<b>9%</b>	<b>9%</b>
Wheat	1	1	1	0	0	0	0%	0%	0%
Coarse Grains	7	3	3	1	1	1	2%	9%	10%
Rice	15	15	19	1	1	1	0.99%	2%	1%
Soybeans	1	3	1	0	1	0	0%	8%	0%
Other Oilseeds	18	29	15	2	4	5	11%	13%	30%
Cotton	36	29	21	1	2	0	0.65%	5%	0%
Tobacco	67	68	63	11	16	15	16%	23%	23%
Rubber & Allied Gums	7	9	11	1	1	1	1%	0.66%	0.35%
Raw Coffee	64	69	67	0	1	0	0%	0.00%	0%
Cocoa Beans	0	5	0	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	5	6	3	1	0	1	0.18%	0%	0.18%
Raw Beet & Cane Sugar	1	1	1	0	0	1	0%	0%	1%
Pulses	3	2	3	1	1	1	10%	15%	21%
Peanuts	6	7	7	1	1	1	17%	13%	7%
Other Bulk Commodities	6	4	6	9	0	0	140%	0%	0%
<b>INTERMEDIATE AGRICULTURAL TOTAL</b>	<b>479</b>	<b>510</b>	<b>368</b>	<b>27</b>	<b>30</b>	<b>14</b>	<b>6%</b>	<b>6%</b>	<b>4%</b>
Wheat Flour	1	1	1	0	0	0	0%	0%	0%
Soybean Meal	174	165	131	11	10	3	7%	6%	2%
Soybean Oil	1	1	1	0	1	1	0%	0.08%	0.09%
Vegetable Oils (Excl. Soybean Oil)	91	113	45	6	7	1	7%	6%	0.98%
Feeds & Fodders (Excl. Pet Foods)	15	22	21	1	1	1	0.14%	0.24%	3%
Live Animals	13	16	15	2	2	2	18%	15%	12%
Hides & Skins	29	17	2	1	1	1	0.11%	0.39%	3%
Animal Fats	3	2	1	1	1	1	0.82%	0.14%	13%
Planting Seeds	21	26	25	2	2	2	9%	9%	7%
Sugars, Sweeteners, & Beverage Bases	3	4	5	1	1	1	5%	9%	3%
Essential Oils	35	37	34	1	1	1	0.77%	1%	1%
Other Intermediate Products	94	106	87	5	7	6	5%	6%	7%
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	<b>434</b>	<b>471</b>	<b>434</b>	<b>10</b>	<b>12</b>	<b>11</b>	<b>2%</b>	<b>3%</b>	<b>3%</b>
Snack Foods (Excl. Nuts)	57	59	61	1	1	1	0.15%	0.11%	0.05%
Breakfast Cereals & Pancake Mix	4	5	5	1	1	1	0.14%	0.79%	7%
Red Meats, Fresh/Chilled/Frozen	59	52	17	1	2	1	2%	3%	0.14%
Red Meats, Prepared/Preserved	1	1	1	1	0	0	5%	0%	0%
Poultry Meat	2	6	1	1	1	1	13%	3%	11%
Dairy Products (Excl. Cheese)	22	24	23	1	0	0	0.99%	0%	0%
Cheese	16	16	15	0	0	0	0%	0%	0%
Eggs & Products	5	8	3	1	1	1	9%	15%	33%
Fresh Fruit	46	46	43	1	1	1	0.01%	0.04%	0.02%
Fresh Vegetables	9	13	12	1	1	1	0.94%	0.15%	0.34%
Processed Fruit & Vegetables	48	43	44	2	3	3	5%	7%	7%

	21	22	19	1	1	1	2%	0.78%	1%
cont.	1997	1998	1999	1997	1998	1999	1997	1998	1999
Fruit & Vegetable Juices	21	22	19	1	1	1	2%	0.78%	1%
Nursery Products & Cut Flowers	18	23	23	1	1	1	0.41%	0.14%	0.39%
Pet Foods (Dog & Cat Food)	10	13	15	1	1	1	7%	7%	4%
Other Consumer-Oriented Products	97	115	128	2	3	4	2%	2%	3%
<b>FOREST PRODUCTS (EXCL. PULP &amp; PAPER)</b>	<b>189</b>	<b>221</b>	<b>243</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>
Logs & Chips	15	19	22	1	1	1	0.14%	0.20%	0.15%
Hardwood Lumber	7	9	8	1	1	1	15%	14%	5%
Softwood and Treated Lumber	81	83	92	1	1	1	0.03%	0.14%	0.02%
Panel Products (Incl. Plywood)	46	63	71	3	2	2	6%	2%	2%
Other Value-Added Wood Products	39	47	49	1	1	1	0.53%	2%	3%
<b>FISH &amp; SEAFOOD PRODUCTS</b>	<b>23</b>	<b>28</b>	<b>22</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2%</b>	<b>0.65%</b>	<b>0.86%</b>
Salmon	1	1	1	0	0	0	0%	0%	0%
Surimi	1	1	1	0	1	0	0%	0.49%	0%
Crustaceans	1	1	1	1	1	1	3%	2%	1%
Groundfish & Flatfish	10	12	8	1	1	1	4%	0.99%	2%
Molluscs	1	1	1	1	1	1	0.83%	0.33%	0.37%
Other Fishery Products	11	13	10	1	1	1	0.09%	0.30%	0.03%
<b>AGRICULTURAL PRODUCTS TOTAL</b>	<b>1,149</b>	<b>1,231</b>	<b>1,022</b>	<b>51</b>	<b>65</b>	<b>46</b>	<b>4%</b>	<b>5%</b>	<b>4%</b>
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	<b>1,361</b>	<b>1,481</b>	<b>1,286</b>	<b>56</b>	<b>69</b>	<b>49</b>	<b>4%</b>	<b>5%</b>	<b>4%</b>

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**Table C 1**  
**AGRICULTURAL, FISH & FORESTRY TOTAL**

Reporting Country: Hungary Top 15 Ranking	Import		
	1997	1998	1999
	1000\$	1000\$	1000\$
Germany	141,001	142,428	135,306
Brazil	151,222	149,236	133,296
Netherlands	80,180	102,537	95,415
Austria	88,127	88,138	73,334
Poland	38,018	55,756	69,950
Slovakia	66,538	59,902	60,281
France	62,593	67,637	58,461
Romania	34,091	45,614	55,807
Italy	60,740	58,055	52,796
United States	56,103	69,463	49,253
Uganda	31,527	35,368	32,867
Czech Republic	18,808	27,787	28,251
Russian Federation	34,392	37,314	27,672
Belgium	0	0	26,321
Turkey	17,768	17,721	21,543
Other	479,476	523,620	365,929
World	1,360,584	1,480,576	1,286,482

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**Table C 2**  
**BULK AGRICULTURAL TOTAL**

Reporting Country: Hungary Top 15 Ranking	Import		
	1997	1998	1999
	1000\$	1000\$	1000\$
Uganda	31,513	35,026	32,498
United States	14,976	23,218	20,772
Malawi	10,658	10,055	13,619
Turkey	9,868	9,474	11,749
Argentina	2,794	4,103	9,034
Brazil	7,039	10,732	8,937
Italy	11,755	9,981	8,314
Uzbekistan, Republic of	21,362	13,201	8,100
Indonesia	4,773	4,593	6,852
Guinea	4,284	8,292	5,951
Zimbabwe	12,346	5,492	5,448
Vietnam	4,161	1,807	5,447
Greece	6,111	5,906	4,933
Tanzania, United Republic of	6,067	8,650	4,898
Guatemala	274	675	3,531
Other	87,561	99,241	70,096
World	235,542	250,446	220,179

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**Table C 3**  
**INTERMEDIATE AGRICULTURAL TOTAL**

Reporting Country: Hungary Top 15 Ranking	Import		
	1997	1998	1999
	1000\$	1000\$	1000\$
Brazil	136,518	129,246	115,502
Netherlands	39,386	49,376	41,357
France	37,863	43,234	35,603
Germany	49,225	41,903	30,035
Austria	27,877	20,962	18,605
United States	26,799	30,290	13,705
Romania	16,996	20,261	13,366
Malaysia	15,928	14,215	12,978
Italy	12,476	12,941	11,666
Denmark	11,951	12,748	11,245
Belgium	0	0	10,463
Slovakia	4,898	5,372	6,679
Sweden	7,722	7,147	5,735
United Kingdom	3,229	4,059	4,155
Poland	1,472	2,397	4,096
Other	87,096	115,793	32,589
World	479,436	509,944	367,779

NA - Data not available (not reported)      Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**Table C 4**  
**CONSUMER-ORIENTED AGRICULTURAL TOTAL**

Reporting Country: Hungary Top 15 Ranking	Import		
	1997	1998	1999
	1000\$	1000\$	1000\$
Germany	56,484	60,361	60,420
Poland	30,804	41,348	54,047
Netherlands	35,987	47,067	49,020
Austria	37,731	37,768	32,126
Italy	28,817	24,916	23,189
Slovakia	7,869	11,860	17,810
France	16,231	16,071	16,539
Spain	17,489	17,309	14,964
Czech Republic	7,017	14,127	12,510
Belgium	0	0	11,912
Switzerland	6,593	7,148	11,171
United States	9,570	11,883	11,045
Greece	19,800	19,356	10,961
Brazil	7,496	9,052	8,582
Turkey	7,755	8,095	7,616
Other	144,347	144,199	92,134
World	433,990	470,560	434,046

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**Table C 5**  
**FISH & SEAFOOD PRODUCTS**

Reporting Country: Hungary Top 15 Ranking	Import		
	1997	1998	1999
	1000\$	1000\$	1000\$
Argentina	3,761	4,764	3,416
Thailand	2,527	4,194	2,760
Poland	3,977	4,907	2,730
Germany	2,980	3,801	2,039
Peru	1,287	947	1,266
Denmark	1,436	1,156	1,143
Norway	739	860	820
Russian Federation	239	961	778
China (Peoples Republic of)	533	565	711
Netherlands	917	743	644
Italy	369	400	500
Austria	539	569	498
Morocco	577	849	407
Spain	83	180	406
France	209	334	356
Other	2,925	3,055	3,102
World	23,098	28,285	21,576

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office