



## TÜRKİYE ODALAR VE BORSALAR BİRLİĞİ



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Konu : Macaristan Sunumları

### TÜM ODA VE BORSALARA (Genel Sekreterlik)

İlgi : Macaristan Ankara Büyükelçiliği'nin 5.01.2024 tarihli e-postası.

İlgide kayıtlı e-posta ile iletilen, Macaristan ekonomisi ve yatırım teşvikleri ile ilgili sunumlar ekte iletilmektedir.

Bilgilerinizi ve konunun ilgili üyelerinize duyurulmasını rica ederim.

Saygılarımla,

*e-imza*

Ali Emre YURDAKUL  
Genel Sekreter Yardımcısı

EK:

- 1- Macaristan Sunumu 1 Türkçe (9 sayfa)
- 2- Macaristan Sunumu 2 İngilizce (24 sayfa)



Evrakı Doğrulamak İçin : <https://belgedogrula.tobb.org.tr/belgedogrulama.aspx?eD=BSP5TU3AB0>

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DIŐİŐLERİ VE DIŐ TİCARET BAKANLIĐI

Macaristan  
BüyükelçiliĐi

Ankara

# Macaristan Yatırım Teővikleri



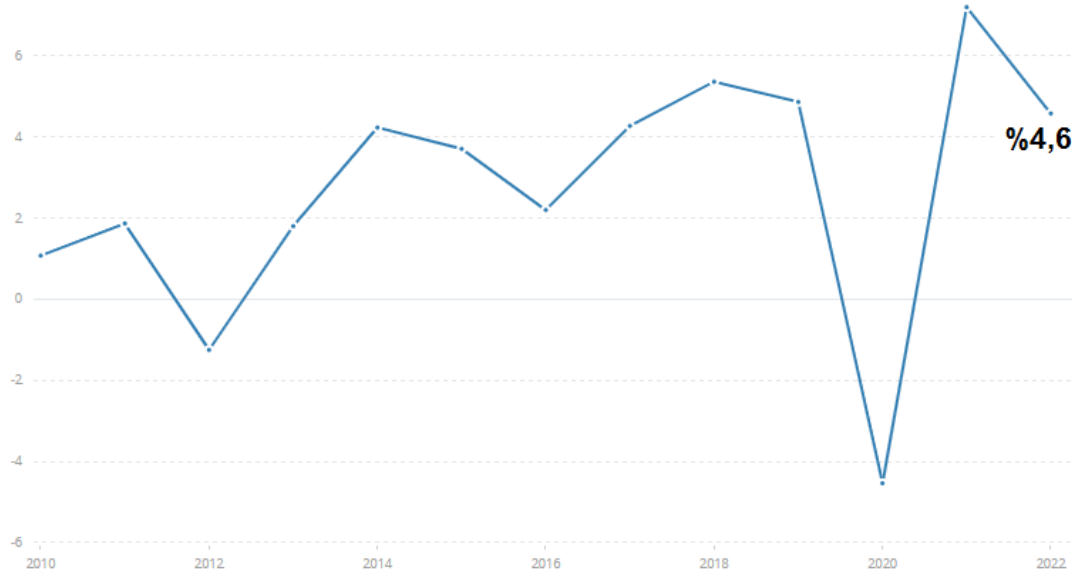


## DIŐIŐLERİ VE DIŐ TİCARET BAKANLIĐI

### Macaristan - İstikrara Dönüş

Malumunuz 2021 yılı ekonomiyi ve ticareti zorlayan bir sene olarak geçti; ihracat kapsamında Covid 19 ile ilgili gelişmeler ve kur dalgalanmaları genellikle tüm sektörleri ve başlıca küresel hayatı etkiledi, ama mevcut verilere dayanarak Macaristan ihracatının 2021'de 2020 yılı rakamlarını geçtiğini ve pandeminin etkilerini ülkemizin 2021'de atlatıp ekonominin eski seyrine döndüğünü söylemek mümkün. Hatta Macaristan hız kaybetmeden 2022 senesinde de %4.6 ile büyümeye devam etti. 2023 senesini ise dünyadaki negatif trendlere rağmen Macaristan %1,1 GDP artışıyla kapattı. 2024 için yaklaşık %4 artış öngörülmektedir.

### Macaristan - GSYİH büyümesi (yıllık %)





## DIŐİŐLERİ VE DIŐ TİCARET BAKANLIĐI

### Macaristan hakkında birkaç olgu:

Ülkenin nüfusu yaklaşık 9,6 milyon. 2004 yılında AB'ye giren Macaristan günümüze dek kendi para birimi olan Macar Forinti'ni kullanmaya devam ediyor.

2022 yılında kaydedilen verilere göre ülkenin gayrisafi yurt içi hasılası 177 milyar dolar civarında olup kişi başı milli gelir yaklaşık 20.100 USD. Gayri safi milli hasıla 2021 senesinde % 7.1 artıp 2022 senesinde ise %4,6 artış göstermişti. İşsizlik oranı ise %3,6 idi ve 2024 senesinde yaklaşık aynı seviyede kalması öngörülüyor.

Yurtdışından gelen yatırımların rakamı 13 milyar Avro'yu aştı ve öylece 2023'te rekor kırdık. Yatırımlar arasında dünyanın en büyük elektrik araba üreticisi olan BYD de yer almaktadır.

NEXT adlı Macaristan ihracat programı kapsamında ülke ihracat yönlerinin çeşitliliğini arttırmak istiyor ve bu bağlamda Türkiye-Macaristan arasındaki ikili ticaretinin engel ve zorluklarında günden güne azaldığını görebiliriz.



**Nüfus**

**9.599.744**  
**(2023, HSO)**

**Yüzölçümü**

**93.025 km<sup>2</sup>**

**Başkent (nüfus)**

**Budapeşte(1.671.004)**  
**(2023, HSO)**

**Siyasi sistem**

**Parlamber**  
**Cumhuriyet**

**Para birimi**

**Forint (HUF)**

**Saat dilimi**

**GMT + 1 saat**



**Uluslararası kuruluşlara üyelik: AB, BM, OECD, DTÖ, NATO, IMF, EC,**  
**Türk Devletleri Teşkilatı gözlemci üyesi**



## DIŐİŐLERİ VE DIŐİ TİCARET BAKANLIĐI

### Peki Neden Macaristan?

Macaristan'da saėlam bir iő ortamı, rekabetçi yatırım sistemi ve kaliteli iő gücü bulunmaktadır.

Ülke olarak yıllık ihracatı 160 milyar Avro üzerinde. 2023 verilerine göre ülkede yabancı doğrudan yatırım sermayesi (FDI) 13 milyar dolar idi.

Yabancı yatırımcı şirketleri arasında Mercedes, Audi, Suzuki, BMW ve bunların yanında Nestle, Unilever, Bosch, Google, IBM, Vodafone, BYD ve CATL gibi dünyaca bilinen çok uluslu şirketleri görebilirsiniz.



**Őiőecam Macaristan'a 330 milyon dolar üzerinde yatırım yapmaya karar verdi.**





## DIŐIŐLERİ VE DIŐ TİCARET BAKANLIĐI

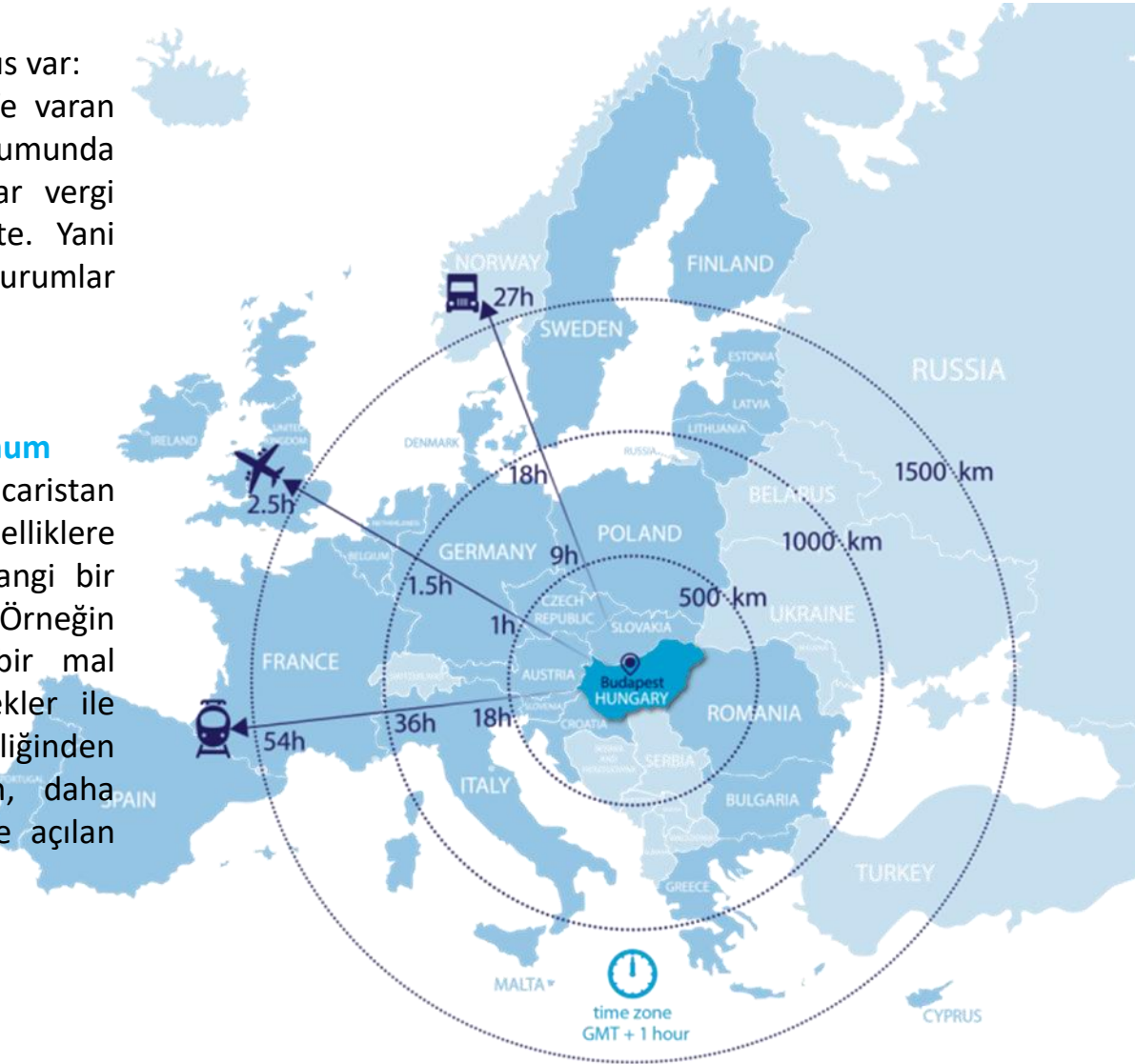
## Vergi Avantajları

Bu noktada altını çizmek gereken bir husus var:

**Kurumlar vergisi %9.** Bu miktarın %80'e varan kısmı da yine yatırımcı olmanız durumunda düşebilmekte ve bahsettiğimiz kurumlar vergi rakamı %1,8 oranına kadar inebilmekte. Yani uygun bir yatırım yapmanız durumunda kurumlar vergisi **%1,8'e kadar düşebiliyor.**

## Avrupa'ya geçiő saėlayan mükemmel konum

AB'ye ihracat yapan bir firma için Macaristan merkezi bir konum olabilecek tüm özelliklere sahip, 24 saat içinde Avrupa'nın herhangi bir yerine mal teslimi yapmanız mümkün. Örneğın Türkiye'de fiyat avantajıyla üretilen bir mal nakliye, vergi, ek hizmetler ve ödenekler ile AB'ye varana kadar rekabetçiliğinden kaybedebilir. Bu bağlamda Avrupa'nın, daha doğrusu Schengen bölgesinin Türkiye'ye açılan en yakın kapısı Macaristan'dır.







## DIŐIŐLERİ VE DIŐ TİCARET BAKANLIĐI

### İkili ilişkiler

2013 yılında Macaristan ve Türkiye stratejik, 2023 yılında ise Geliştirilmiş Stratejik İşbirliği Anlaşması'na imza atıldı ve günümüze kadar sayısız koordinasyon ve eylem ile ekonomilerimiz ve piyasalarımız arasındaki bariyerler azami seviyeye indirildi. Ticari odaklı bir dış politika takip eden Macar hükümeti, Türkiye'yi Dođu'ya Açılım politikasının merkez ülkelerinden biri olarak görüyor ve böylece Türk yatırımcılar için oldukça avantajlı ve hızlı imkanlar sağlıyor.





## DIŞİŞLERİ VE DIŞ TİCARET BAKANLIĞI

### Macaristan'da Yatırım

Macaristan'da şirket kurulum maliyetleri 8.000 Avrodan başlamakta ve gerekli belgelerin mevcut olması durumunda 7 gün içinde şirket kurulabilmektedir. İstihdam ile ilgili kanun ve bürokratik işlemler gayet esnek olmakla birlikte, asgari ücret de 15.000 TL civarındadır.

Çalışanın net maaşına ilaveten, işveren tarafından ödenecek sosyal primlerin oranı %15'tir. 2020 yaz döneminde yürürlüğe giren bu uygulama işverenler için de daha rekabetçi bir ortam yaratmaktadır.



#### HIPA investment results (2022)



**92**

Number  
of projects



**€ 6,493 M**

Investment  
volume

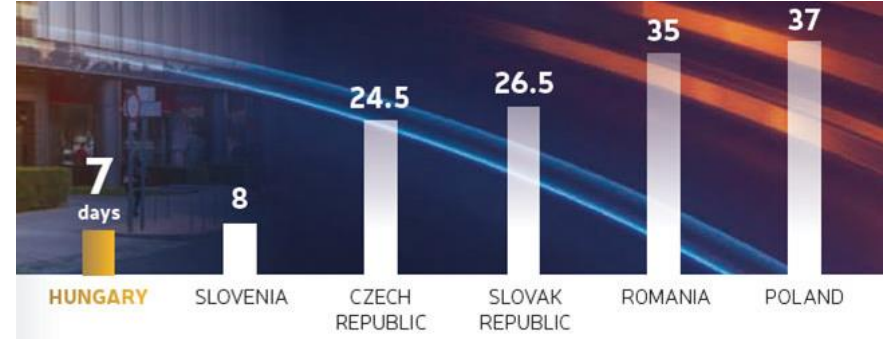


**15,083**

Number of new  
jobs created



#### ŞİRKET KURMAK İÇİN GÜN SAYISI



Orta Avrupa'nın önde gelen yatırımlarına ev sahipliği yapan Macaristan 2023 yılında toplam 13 milyar Avroluk değerde başarılı yatırım projesine imza attı ve projeler sayesinde 15.000 üzerinde yeni işyeri açıldı.

Macaristan'da en büyük yatırım yapan ülkelerin başında Kore, İsviçre, Fransa, Almanya ve Çin bulunuyor. 2022 yılında Macaristan'a gelen yatırımların %48'i Doğudan, %42'si Batıdan, %10'u ise Macar yatırımcılarından oluşmaktadır.

Türkiye'den son senelerde Macaristan'a gelen yatırımlar 2 milyar Avroyu geçmiş durumda.



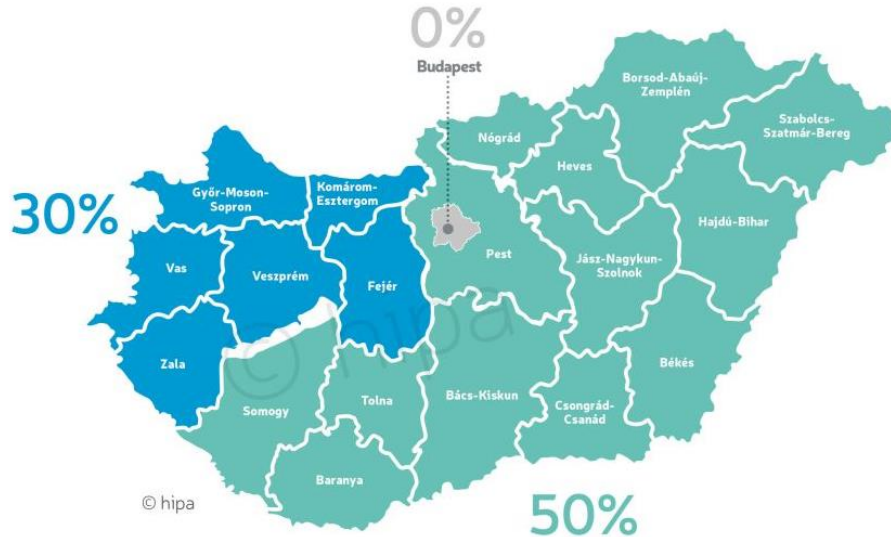


## DIŐİŐLERİ VE DIŐ TİCARET BAKANLIĐI

### HIPA - Hungarian Investment Promotion Agency



Macaristan Yatırım Teővik Ajansı olan HIPA yatırımlar konusunda sorumlu olan tek Macar Kurumu olarak hizmet verir ve böylece söz konusu tüm danışmanlıklar tek yerden verilmektedir. One Stop Shop hizmeti dahilinde başvurular alındıktan sonra birtakım hizmetler sağlanır örneĐin; lokasyon seçim danışmanlıĐı, devlet desteklerinin koordinasyonu ve yerli tedarikçiler danışmanlıĐı gibi.



Temelde Macaristan'da Türkiye'deki yatırım bölgelerine benzer şekilde 3 farklı yatırım bölgesi mevcut. Bunu aynı zamanda DoĐudan Batıya azalan bir destek olarak düşünebilirsiniz. DoĐuda ve Güneybatıda verilebilen maksimum %50 lik hibe, Kuzeybatı sınırındaki ilçelerde %30'a düşüyor ve başkent Budapeőte'de teşvik verilmemektedir. Genel olarak baktıĐımızda destek, bölgenin gelişmişlik düzeyine göre azalmaktadır.

Macar Yatırım Ajansı'nın sağladıĐı 3 farklı destek söz konusu olabilir:

- Bölgesel Destek (bunlar daha çok vergi indirimi veya muafiyeti olmak üzere, nakit desteĐi de olabilir)
- EĐitim DesteĐi (yeni elemanlara mahsus)
- Ar-Ge DesteĐi (nakit ve vergi teşvikleri)



DIŐIŐLERİ VE DIŐ TİCARET BAKANLIĐI

Projelerinize ya da yatırım konularınıza göre daha detaylı bilgileri bizlerden alabilirsiniz: [Trade.ANK@mfa.gov.hu](mailto:Trade.ANK@mfa.gov.hu)

Genel yatırım bilgileri için HIPA'nın web sitesini (<https://hipa.hu/>) ziyaret edebilirsiniz.

**İlginiz için teşekkür ederiz!**



# HUNGARY

*SMART. AMBITIOUS. COMPETITIVE*

Invest in Hungary

2023





Area  
**93,024 km<sup>2</sup>**



Population  
**9,730,772**  
(2021, HCSO)



Time zone  
**GMT +1 hour**



Currency  
**Forint  
(HUF)**



Capital (population)  
**Budapest**  
**1,723,836**  
(2021, HCSO)

**HUNGARY**



**Other major cities**  
Debrecen (201,112)  
Szeged (160,258)  
Miskolc (152,901)  
Pécs (141,843)  
Győr (133,946)



Membership in  
international  
organisations  
**EU, UN, OECD,  
WTO, NATO, IMF, EC**  
EU member since 2004



Risk of natural  
disaster  
**Very low**



Climate  
**Temperate**



Form of government  
**Parliamentary republic**

(Source: \*HCSO = Hungarian Central Statistical Office)



# Invest in Hungary





## Hungary offers excellent logistic opportunities in a central location



EU and Schengen memberships mean the free movement of goods



## Road & rail network

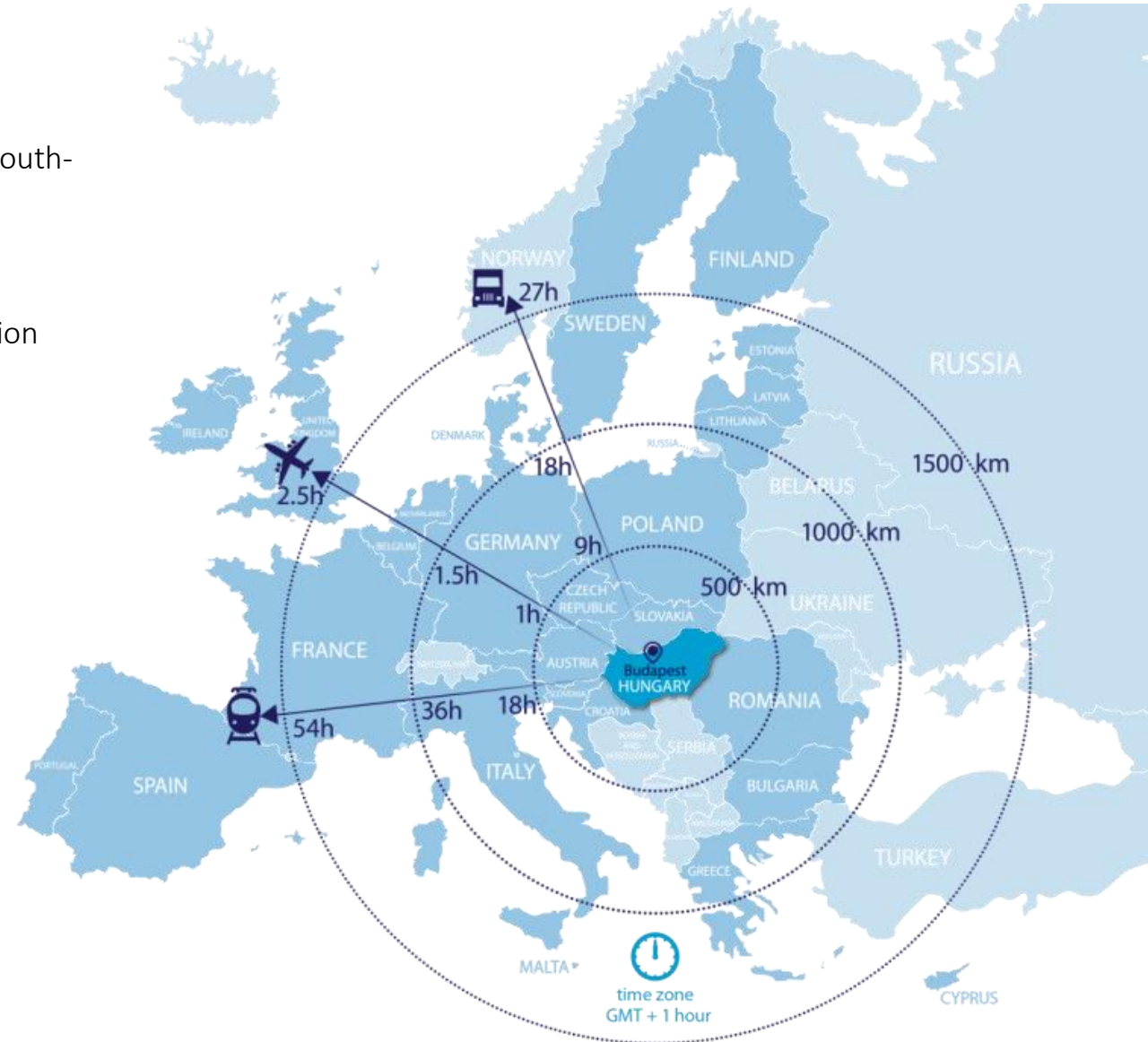
**6<sup>th</sup>** by railway line density in Europe

**50+** scheduled container trains weekly to European ports of the North Sea, the Adriatic and the Mediterranean



144 direct destinations by 34 airlines from Budapest airport

**Inland waterway** in Hungary is part of the Rhine – Danube corridor



# Climate goals

Gelen Tarih Sayı: 17.01.2024 - 99



## Hungary will become carbon neutral by 2050

### Climate goals until 2030



**90%** of the Hungarian electricity production will be carbon-neutral



**21%** renewable energy share in gross final energy consumption



**40%\*** decrease in the emission of greenhouse gases compared to 1990 levels

\*The EU is working on the revision of its climate, energy and transport-related legislation under the so-called 'Fit for 55 package'. According to these plans the EU will be committed to **cut emissions by at least 55% by 2030**. This will probably also raise Hungary's 2030 climate ambitions.

### Climate goals until 2050

**! Hungary will become carbon neutral by 2050.**



**Hungary is dedicated to reach ambitious climate goals.**

Since 2020 carbon neutrality in Hungary is a legal obligation:  
„Hungary will reach full climate neutrality by 2050, the remaining domestic emissions and removals of greenhouse gases will be in balance by 2050.” - *Act XLIV of 2020 on climate protection*

# Economy of Hungary

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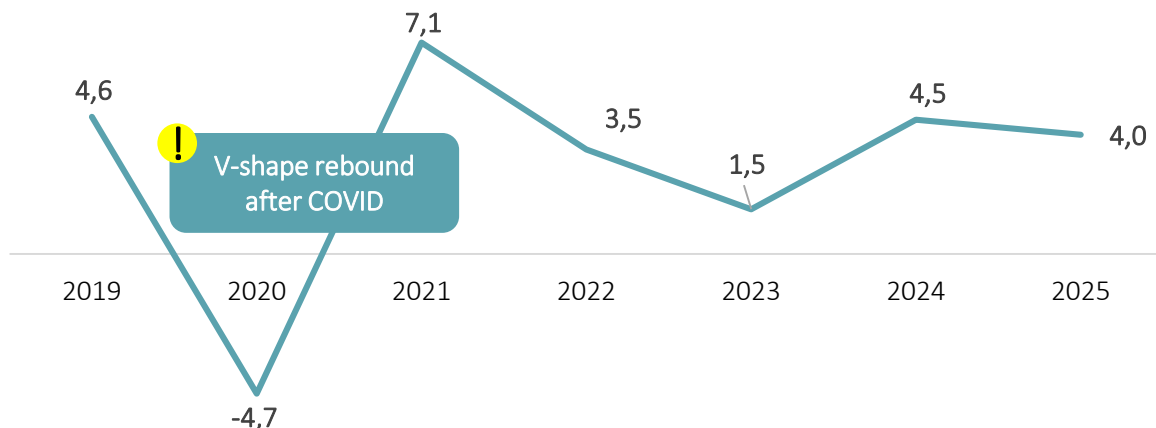


## Stable economy with a very competitive tax system



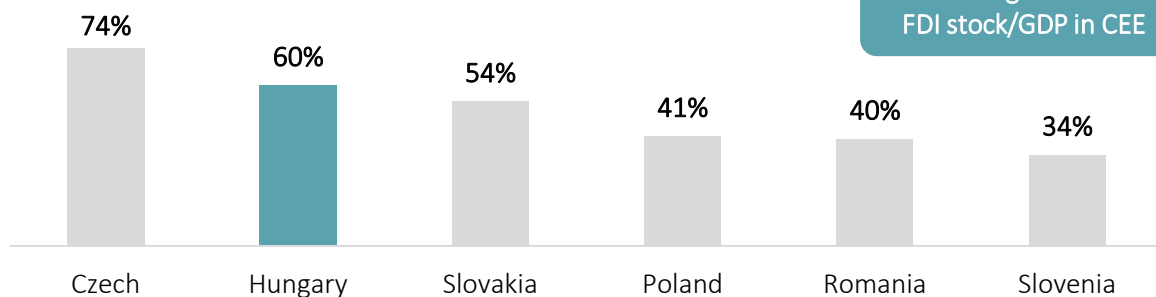
### Good GDP growth outlook

GDP growth (%) prognosis by the Hungarian National Bank, Dec. 2022



### Open economy with trade focused foreign policy

Inward FDI stock in 2021 (% of GDP)



#### OPEN ECONOMY

Export/GDP ratio close to **100%**  
Investment and trade development are key to drive sustainable growth



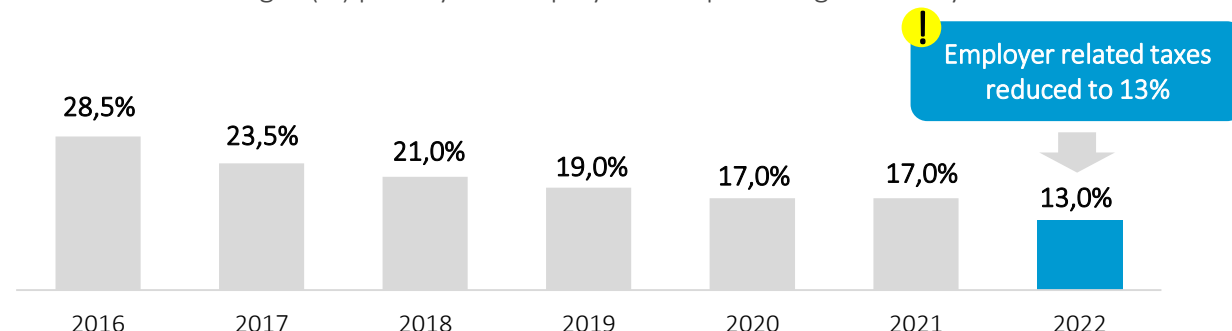
#### TRADE FOCUSED FOREIGN POLICY

**Partnership with investors** is a national priority  
The Ministry of Foreign Affairs and Trade & HIPA support investors in Hungary



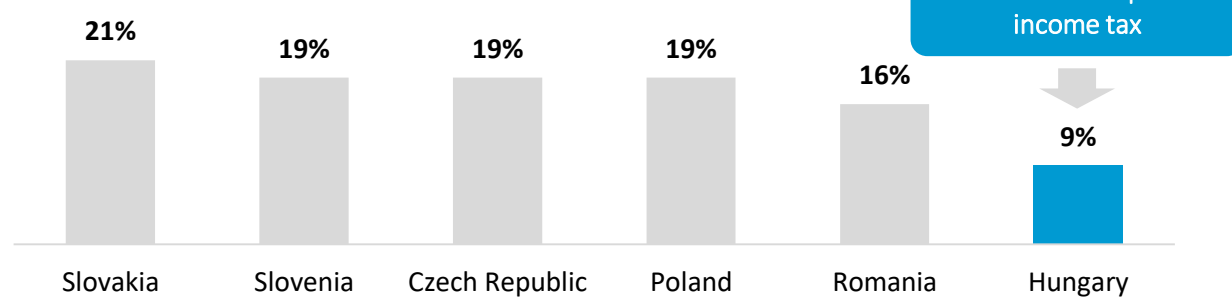
### Reducing tax burden on labour

Social charges (%) paid by the employer on top of the gross salary



### Lowest corporate income tax rate in the EU

Corporate income tax rates, 2022



#### TAX EXEMPTIONS

Tax exemptions for **families with children**  
All **under 25 years** and **mothers under 30** are exempt from personal income tax



#### LOW TAX ON PROFIT

Only **1,2% tax per GDP** on profit, which is the **lowest in the EU** based on OECD research in 2021



# Economy

Gelen Tarih Sayı: 17.01.2024 - 99



## Extremely business friendly economic environment

### Open economy with trade focused foreign policy

#### OPEN ECONOMY

Export/GDP ratio close to 100%  
Investment and trade development are  
key to drive sustainable growth

#### TRADE FOCUSED FOREIGN POLICY

„One-stop-shop” support of companies: tailor made  
consultancy focusing on business needs  
Partnership with investors is a national priority

### Newcomers 2022



### Reinvestment - 2022



### Investment results



#### HIPA investment results (2022)



**92**  
Number  
of projects



**€ 6,493 M**  
Investment  
volume



**15,083**  
Number of new  
jobs created

### Top investment Location Site Selection Magazine 2022



#### Best to invest overall

1. Lithuania
2. Hungary
3. Poland



#### Best to invest TOP metros

1. Poland
2. Czech Republic
6. Hungary



#### Best to invest per capita

1. Lithuania
2. Estonia
3. Hungary

HIPA wins Best Strategic  
Investment Partner Europe 2022 award



# Education

Hungary’s education system has a special focus on business and engineering, resulting in a market-ready workforce.

## Tertiary Education



**293,566**  
Total number of university students (2021-22)

**57,244**  
Fresh graduates (2021)

| Number of students in university education  |                 |
|---------------------------------------------|-----------------|
| Field of study                              | No. of students |
| Business and Administration                 | 54 388          |
| Engineering, manufacturing and construction | 37 718          |
| Social Sciences and Law                     | 46 369          |
| Teacher training and education              | 32 402          |
| Health and welfare                          | 34 524          |
| Mathematics, computing and natural sciences | 32 905          |
| Services                                    | 15 453          |
| Arts & Humanities                           | 23 599          |
| Other                                       | 16 208          |

## Vocational education

Vocational education in Hungary aims at training specialists for the professions necessary for the development of the Hungarian economy.

**129,046**  
Students in vocational education



## Dual education



Dual training programmes are available both in vocational and tertiary education.

Companies engaged in dual education provide a mixture of apprentice workshops and practice-centred internships.



**2,000 +**  
Students engaged in dual education at tertiary level



**50,000 +**  
Students participating in dual vocational training



**584**  
Science performance points (PISA)

**!** High science performance (PISA) scores, with results closely behind Germany

# Research and development

Increasing R&D expenditure as companies chose Hungary for their R&D activities, partnerships with universities is base for further growth



## 76,138

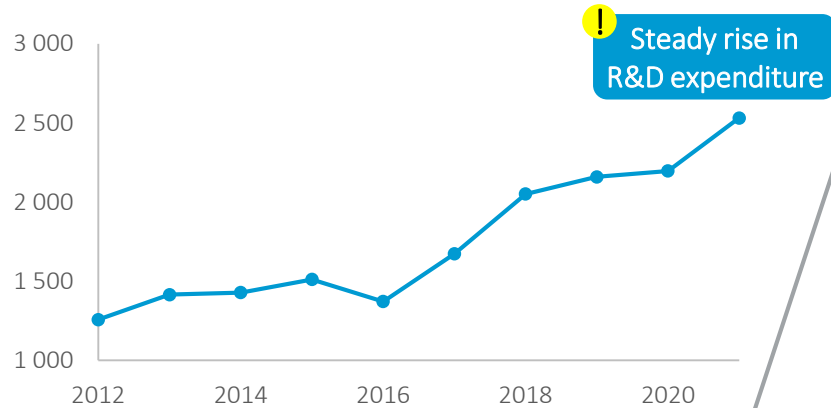
R&D personnel in Hungary



## € 2.5 B

Spent on R&D in Hungary in 2021

Gross domestic expenditure on R&D (€ million)



R&D expenditure was

## 1.64%

of GDP in 2021



Hungary aims to reach

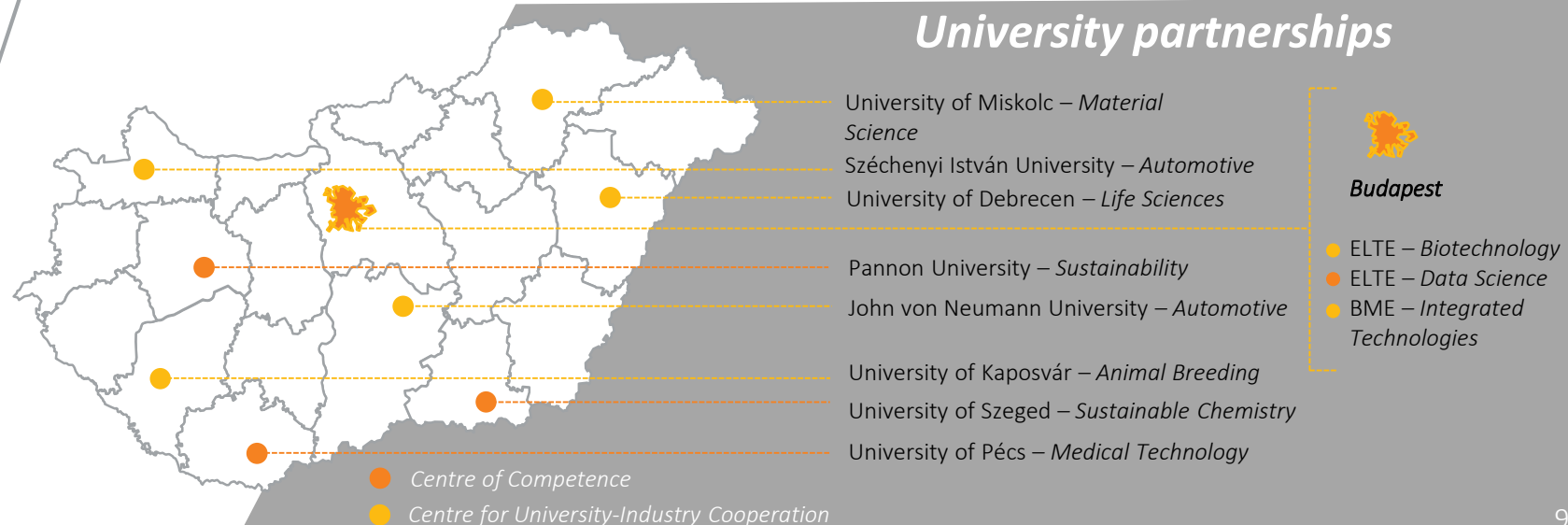
## 3%

by 2030

## Our partners in stepping into the future



## University partnerships





# Business climate

The Hungarian Government is continuously improving the business climate of Hungary

- The most competitive Corporate income tax in the EU with a 9% flat rate introduced
- Reduced taxes on employment to only 13%
- Improved practice-based dual education system built on industry needs
- Modified taxation and incentive system related to R&D activities to make Hungary the innovation hub of CEE
- Introduced unique economic development plan based on Industry 4.0 requirements



## Most recent new investment decisions



## Most recent reinvestment decisions



# Investment trends in Hungary

Recent key investments in the automotive, battery, food and service industries



Strengthening automotive ecosystem



**BOSCH**



Hungary to become battery producing superpower

**CATL**

**SAMSUNG**

**SAMSUNG SDI**

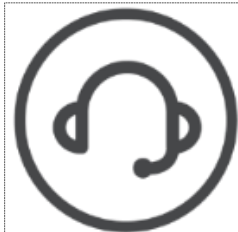


Increasing share of processed food in our exports



**Master Good**

*Coca-Cola*



Increasing share of high value-add service activities



**FrieslandCampina**



**DIEHL**

Aircabin

**BLACKROCK**



**CUSHMAN & WAKEFIELD**

# Industry trends in Hungary

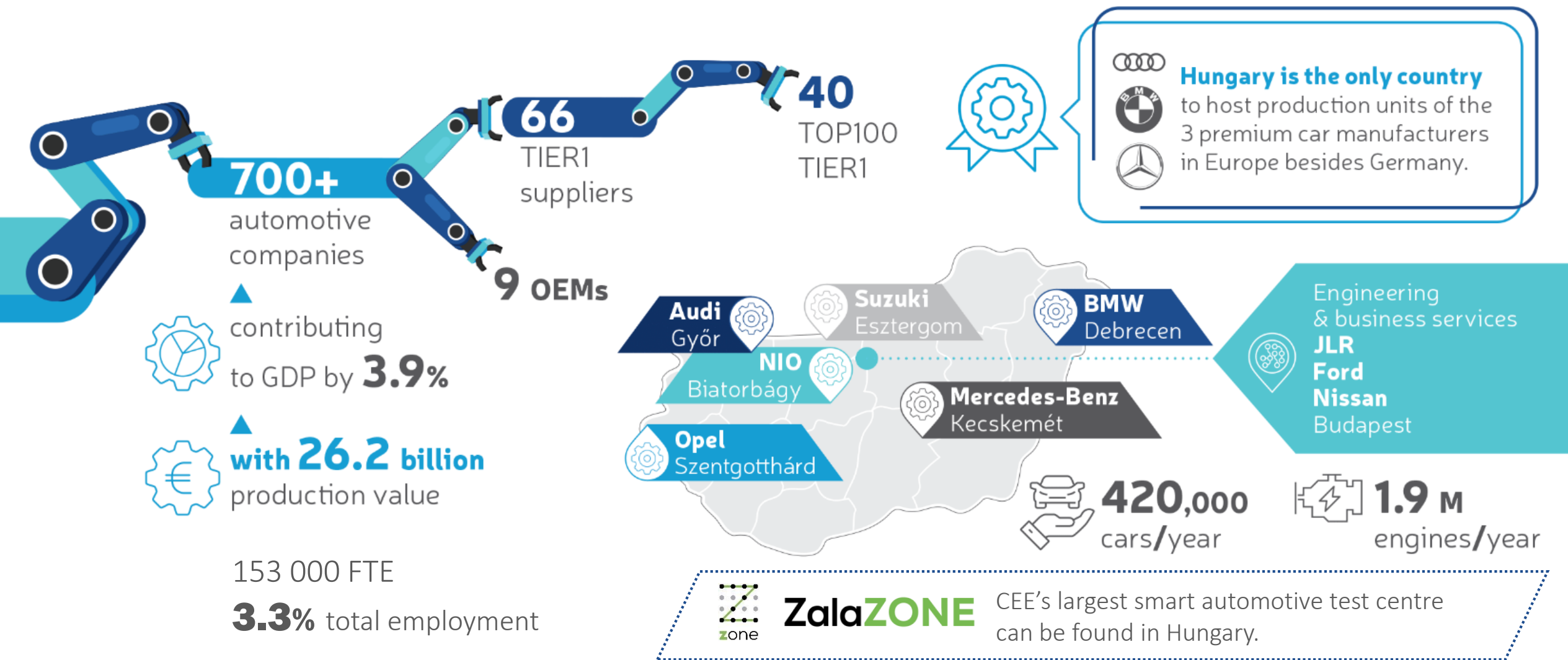






# Automotive Industry in Hungary

Hungary is the only country in Europe to host production units of the 3 German premium car manufacturers besides Germany







# Battery Industry in Hungary

The battery industry is developing rapidly in Hungary with a planned 250 GWh manufacturing capacity until 2030



**Our partners  
in stepping into  
the future**

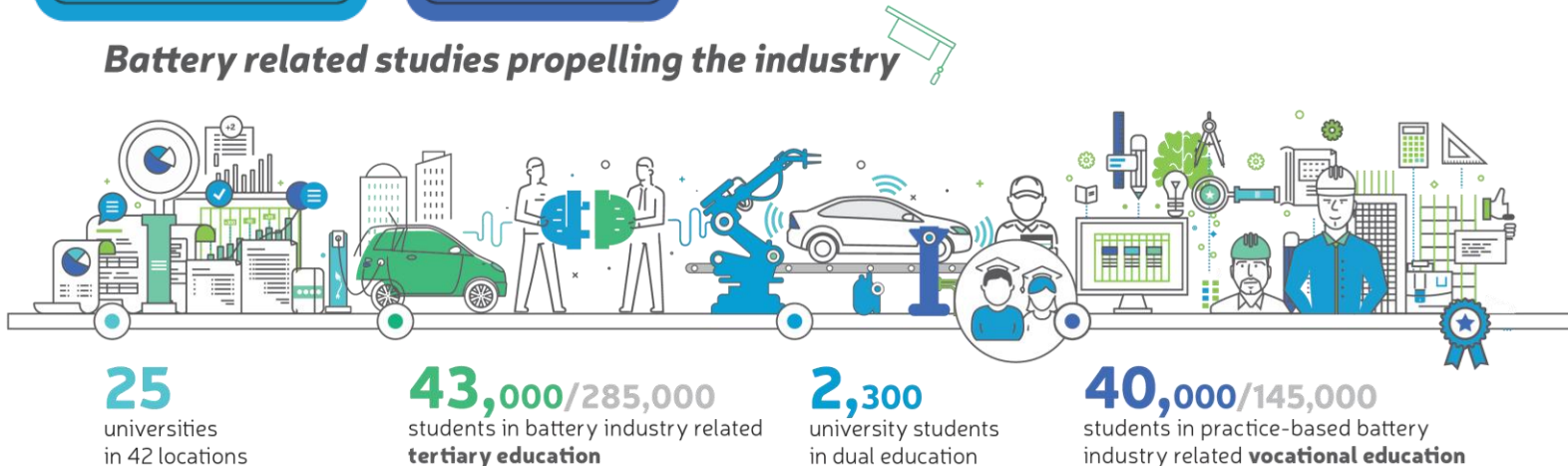


**€14.34 billion FDI**  
20,000 newly created  
jobs in the last 6 years

**38 projects**  
from South-Korea,  
Japan, China, USA

**250 GWh** battery cell  
manufacturing capacity until 2030

**Battery related studies propelling the industry**



**Did you  
know?**



**Hungary has implemented a flexible curriculum** for vocational education, allowing to incorporate business specific content in one academic year.

**+ Battery related**  
studies and curriculum

# Electronics Industry in Hungary

Gelen Tarih Sayı: 17.01.2024 - 99



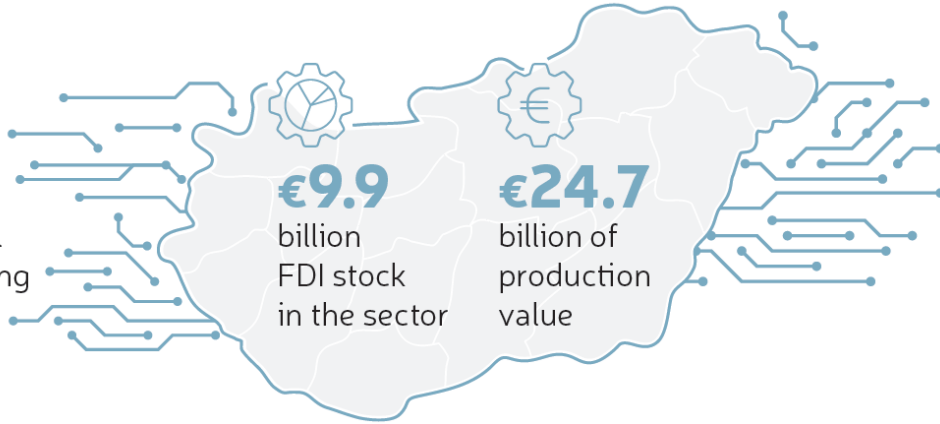
The most diversified and one of the largest manufacturing sectors in Hungary is the electronics sector

## High share in total production



**22.7%**

share in total manufacturing production



## Export oriented

**92.8**

export ratio in the sector

**30.2**

share in total exports



**5/8**

Out of the Top 8 global EMS manufacturers, 5 are settled in Hungary.



## Our partners in stepping into the future

ALPSALPINE

AVL

BOSCH

Continental

flex



JABIL

Lenovo



OBO BETTERMANN

Rosenberger

SAMSUNG ELECTRONICS

Schneider Electric

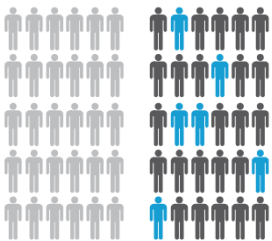
SIEMENS

SIEMENS energy

VIDEOTON

## Talent pool & education in electronics

Over half of dual education university students study engineering



**27,000** students



**9,300** graduates



**7,000**

vocational students participate in electrical engineering, electronics trainings

## Did you know?



Electronics is **one of the largest** economic sectors in Hungary



**175,000** employees



# Medical Technology in Hungary



Hungarian medical technology instruments are available globally, and Hungarian universities offer an outstanding base for R&D

**R&D concentrated around 4 major cities with medical universities**

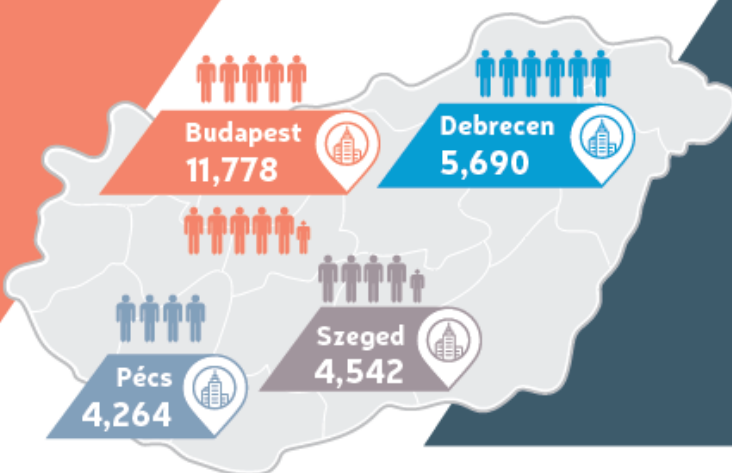


## Knowledge & Research centres

### Budapest

- Hungarian Academy of Sciences, Institute for Technical Physics and Materials Science
- GE Healthcare's R&D Centre
- Budapest University of Technology and Economics, Healthcare Technologies Knowledge Centre
- Semmelweis University, Department of Imaging and Medical Instrumentation

## Number of university students



### Szeged

- University of Szeged, Institute of Informatics, Department of Image Processing and Computing Graphics
- GE Healthcare's R&D Centre

### Pécs

- University of Pécs, János Szentágothai Research Centre

### Debrecen

- University of Debrecen, Medical and Health Science Centre

## Nr.1 in the region

Medical technology & pharma industry together amount to over

**9%**

of the total manufacturing value added



**~50,000**  
employees

**Our partners  
in stepping into  
the future**

**B|BRAUN**  
SHARING EXPERTISE



**Coloplast**



THINKING AHEAD  
**FEMTONICS**  
MICROSCOPY



**HOYA**



**MEDICENTUR**

Material. Design. Optics.



**Sanatmetal**  
Manufacturer of Orthopaedic and Traumatologic Products

**Specsavers**



**over 85%**  
export ratio

**70%**  
to EU countries

**Nr.1 in the region**

Largest exporter  
of medicinal & pharma  
products in the region

**6.4%**  
of total export

# Life Sciences in Hungary

Over €1 billion FDI invested in the past years, global pharma and biotech companies already chose Hungary for R&D or manufacturing



## Unique focus areas



### Pharma

original and generic drug production, APIs production, herbal industry



### Biotechnology

medicinal chemistry, preclinical studies, stem cell research



### Veterinary

CEVA-Phylaxia's largest biological R&D center in Budapest



### Clinical trial

**~300** clinical trials registered each year

**€5.8B**

FDI Stock

**8/TOP10**

global pharma and biotech companies have manufacturing / R&D activities

## Our partners in stepping into the future

 **BÉRES**



 **Goodwill**



 **PANNON PHARMA**



**GEDEON RICHTER**

**SANOFI** 



**SOLVO**  
BIOTECHNOLOGY

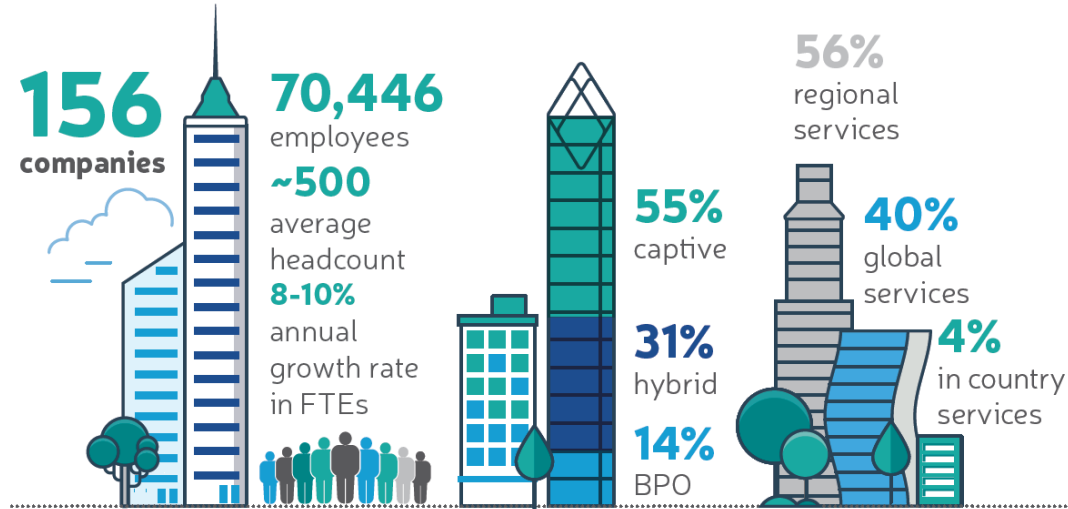


**xellia**  
PHARMACEUTICALS



# Business Service Centres in Hungary

Mature BSC sector with complex, high value-added activities based on highly skilled, multilingual workforce at a competitive cost



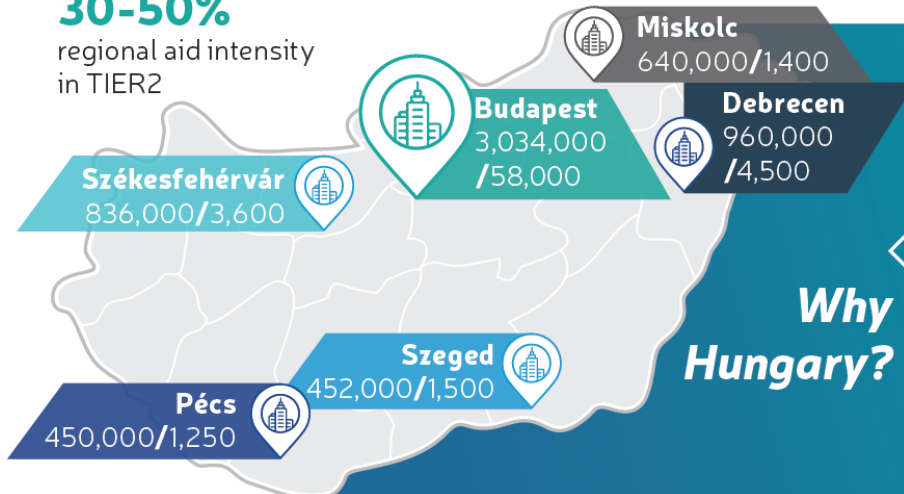
***Our partners  
in stepping into  
the future***



## Major BSC Locations (population – greater area / employees in BSCs)

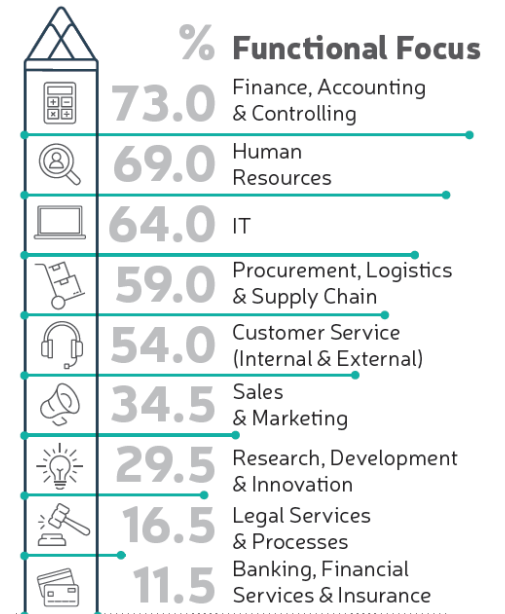
**30-50%**

regional aid intensity  
in TIER2



**Why  
Hungary?**

1. Highly skilled, multilingual workforce at a competitive cost
2. Mature BSC sector with complex and high value-add activities
3. High quality infrastructure and excellent quality of life
4. Emerging TIER2 cities with strong university background
5. Stable political and economic environment





# ICT in Hungary

Gelen Tarih Sayı: 17.01.2024 - 99



Excellent talent pool supports a flourishing ICT ecosystem. Start-up success stories include LogMeIn, Balabit, NNG, Prezi and Ustream

## Talent pool & education



**51,883**  
students in  
STEM programs  
(BSc level)

+



**16,684**  
students in  
STEM programs  
(MSc level or above)



**23**  
Universities  
with IT  
programmes

**24,434**

IT university  
students

**7,183**

IT university  
final-year  
students

+



**3,984**  
Vocational  
students  
in IT

**70,000**  
companies

**1,000+**  
start-ups

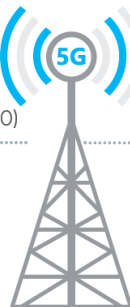
**252,000**  
employees

**168,000**  
ICT Services

**84,000**  
ICT related  
manufacturing

**+223%**  
growth of  
the R&D costs  
(between 2012-'20)

**8.1%**  
of the total  
R&D costs



**5G**  
network  
coverage

**Excellent**  
**mobile**  
broadband  
coverage

## Leading ICT functions

**Software**  
development

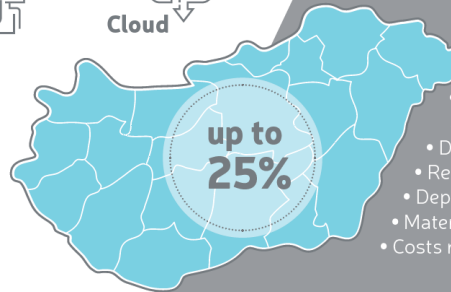
**Business**  
Intelligence

**Data**  
Science

**Cyber**  
Security

**AI**

**AR/VR**



**up to**  
**25%**

## State Aid for R&D activity



**Eligible costs**

- Personnel related costs of the researchers & developers participating in the project
- Depreciation of buildings
- Rental fee of buildings and other structures
- Depreciation of tangible assets & equipment
- Material costs (up to 25% of the total costs)
- Costs related to contract research

## ICT start-up success stories

**LogMeIn**

#softwareasaservice  
#cloudbased  
#remoteconnectivity  
#collaboration  
#ITmanagement  
#Customerengagement

**BALABIT**  
CONTEXTUAL SECURITY INTELLIGENCE

#ITsecurity  
#reducedrisk  
#privilegedaccounts  
#identity  
#accessmanagement

**NNG**

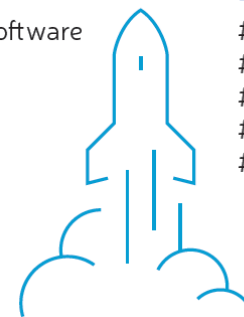
#navigationsoftware  
#automotive  
#enterprise  
#wireless  
#personal

**Prezi**

#webbased  
#presentaion  
#innovative  
#softwaresolutic  
#worldclass

**IBM**  
**Budapest Lab**  
**USTREAM**

#onlinevideo  
#streaming  
#livebroadcast  
#interactive  
#50millionusers



**Our partners**  
**in stepping into**  
**the future**



**cloudera**



**Diligent**

**<epam>**

**ERICSSON**

**formlabs**



**GoTo**



**IBM**

**Microsoft**



**NOKIA**

**ORACLE**



**SIEMENS**



DEUTSCHE TELEKOM IT SOLUTIONS

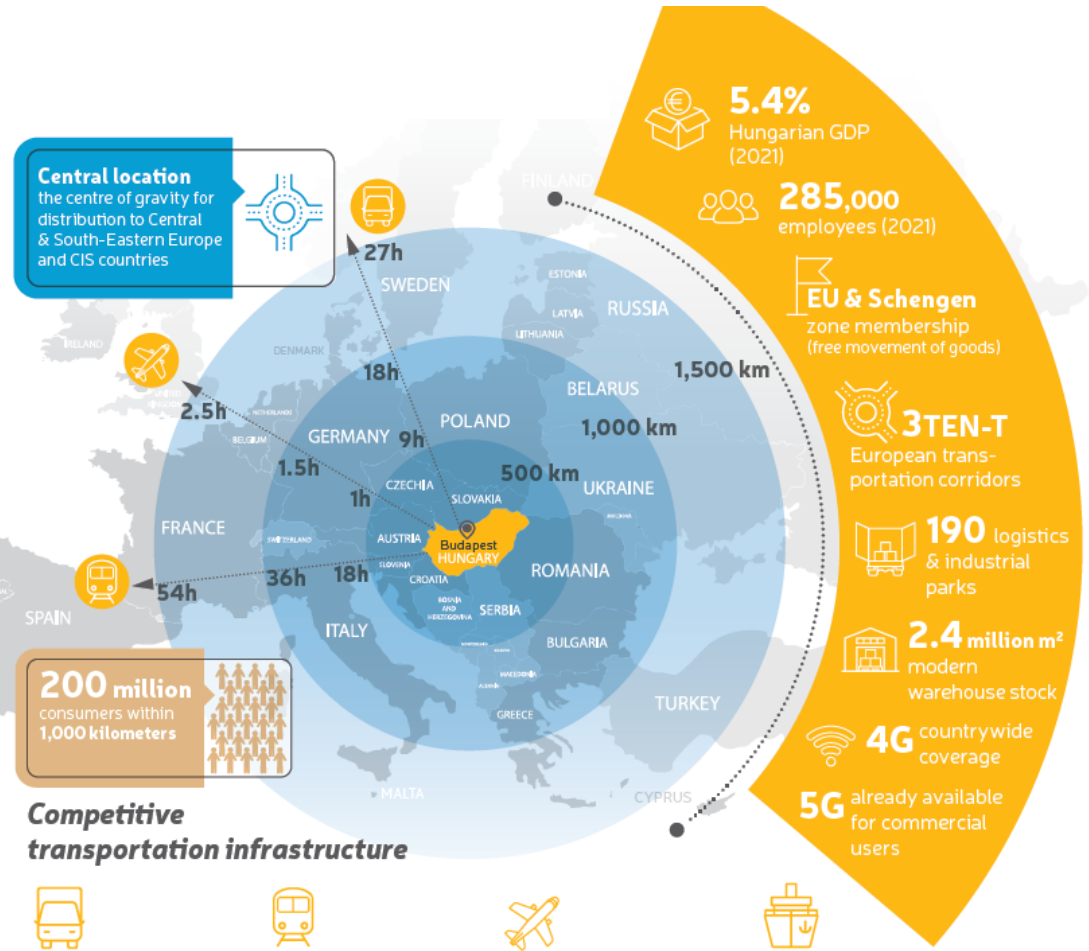
**TATA**  
CONSULTANCY  
SERVICES

# Logistics Industry in Hungary

Gelen Tarih Sayı: 17.01.2024 - 99



Hungary offers excellent logistics in a central location with a very competent and continuously developing infrastructure



**Competitive transportation infrastructure**

- Nr.1** in length of motorways in CEE (Source: EU transport in figures – Statistical pocketbook 2021)
- Hungary is ranked **Nr.6** by railway line density in Europe (Source: Eurostat)
- 114 direct destinations** by 34 airlines from Budapest Airport (Source: www.bud.hu)
- 50+** scheduled container trains weekly to European ports of the North Sea, the Adriatic and the Mediterranean

**Our partners in stepping into the future**  
**Top 10 distribution centres (Company / nr. of countries served)**

|     |      |        |               |      |                |     |          |        |                    |
|-----|------|--------|---------------|------|----------------|-----|----------|--------|--------------------|
| DAE | Ford | HUAWEI | HYUNDAI MOBIS | JYSK | KONICA MINOLTA | MSD | ORIFLAME | SANOFI | Schneider Electric |
| 23  | 15   | 50     | 14            | 7    | 15             | 14  | 12       | 17     | 21                 |

**Continuous investments in transportation infrastructure**

**TIR**  
**1,739 km**  
world class highway network  
**+360 km**  
under construction or planned  
**Highway density**  
once fully developed: 0,0226 km/km²  
**4th** in Europe  
Allocated budget: **€ 7.7 billion** until 2025

**BUD Cargo City:**  
new € 50 million investment  
**32,800 m² air cargo facility**  
handed over at BUD Airport in November 2019

New **direct flights** launched in the past three years to  
**NEW YORK** **CHENGDU**  
**Philadelpia** **SEOUL**  
**CHICAGO** **XI'IAN**  
**SHANGHAI** **GUANGZHOU**

**4 new container terminals** planned or under construction in the **countryside**

Continuous investments into **rail infrastructure**  
Allocated budget: **€ 5.4 billion (2016-2024)**

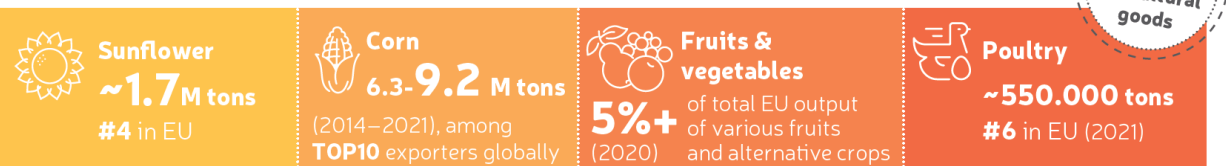
# Food Industry in Hungary

Gelen Tarih Sayı: 17.01.2024 - 99



## Continous reinvestments with focus on corn, sunflower and meat processing, soft drinks and pet food manufacturing

### Key agricultural outputs, industry overview and trends



€12.4 billion of production value

11.4% of total manufacturing production

~60 large companies & ~300 mid-sized companies

140,000+ employees

Automation of the production

International quality and safety standards

Halal, kosher, "free from", vegan and bio products

Advanced packaging

### Significant investment and reinvestment results (2014-2022 H1)



9/10 projects were genuine reinvestments of already settled companies

1/4 investments in meat processing and preserving activities



€6.95 billion total export value

€1.56 billion surplus in trade balance

### Main subsectors of the food and beverage industry

|                                    | Domestic / Export / Total revenue |
|------------------------------------|-----------------------------------|
| Meat processing and preserving     | 60% / 40% / €2,948M               |
| Beverages                          | 77% / 23% / €1,634M               |
| Pet food and prepared animal feed  | 52% / 48% / €1,514M               |
| Sweets, snacks, convenience food   | 42% / 58% / €1,199M               |
| Oils & fats (vegetable and animal) | 33% / 67% / €1,098M               |
| Milk processing and dairy products | 76% / 24% / €1,073M               |
| Fruits & vegetables processing     | 37% / 63% / €1,011M               |
| Grain mill products, starches      | 54% / 46% / €904M                 |
| Bakery and farinaceous products    | 82% / 18% / €838M                 |

### Export oriented subsectors



### Our partners in stepping into the future



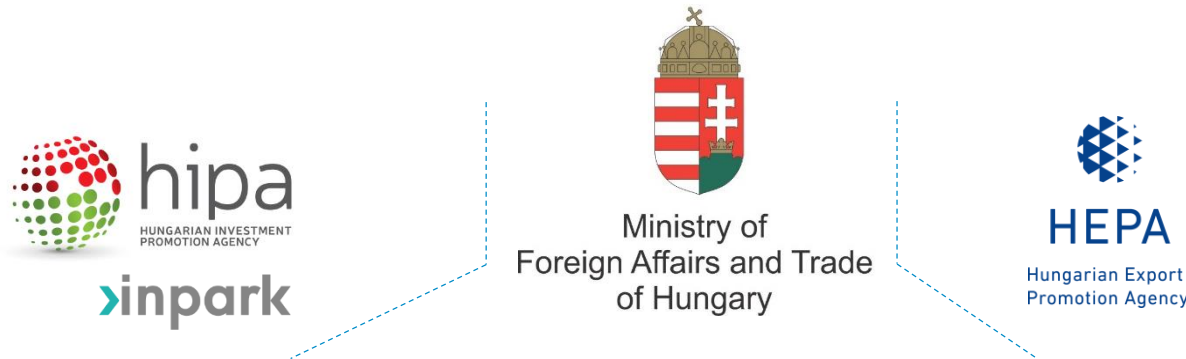


# HIPA Services



# HIPA services

As the only governmental investment promotion agency in Hungary, HIPA provides a wide range of services for investors free of charge.



! HIPA offers one-stop-shop management consultancy services, tailor-made information packages and incentives for companies interested in investing in Hungary.



## Location selection

- Tailor-made information packages
- Investment Site Database with more than 1,600 industrial sites
- Location search and evaluation
- Site visits and reference visits
- Meetings with local authorities, educational institutions, consultants



## State aid

- Tailor-made incentive offers and state aid information packages
- Assistance with the incentive application
- Management of the VIP cash subsidy procedure



## Supplier services

- Extensive database about local suppliers with certificates and references to the automotive sector
- B2B meetings between Integrators and Hungarian suppliers
- Tailor-made supplier development programs



## Gateway to the Government

- Policy advocacy: policy proposals based on company feedbacks
- Mediation between business and government to support economic development



Thank you for your attention!

Please contact us:

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Budapest, Honvéd street 20.  
Hungary  
Tel.: +36 1 872 6520  
E-mail: [investment@hipa.hu](mailto:investment@hipa.hu)  
[www.hipa.hu](http://www.hipa.hu)