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Prepared By: Gellert Dr. Golya

Approved By: Emily Scott

Report Highlights:

Hungary is a resilient, export-driven economy with the second fastest economic growth in the EU in 2019. Growth in real wages has remained unbroken, resulting in increasing purchase power and demand for imported goods. This report summarizes general economic and business conditions in Hungary as they pertain to U.S. exports of food and agricultural products. Included is an overview of products sales prospects, market trends, and Hungary's relative position in the international market.

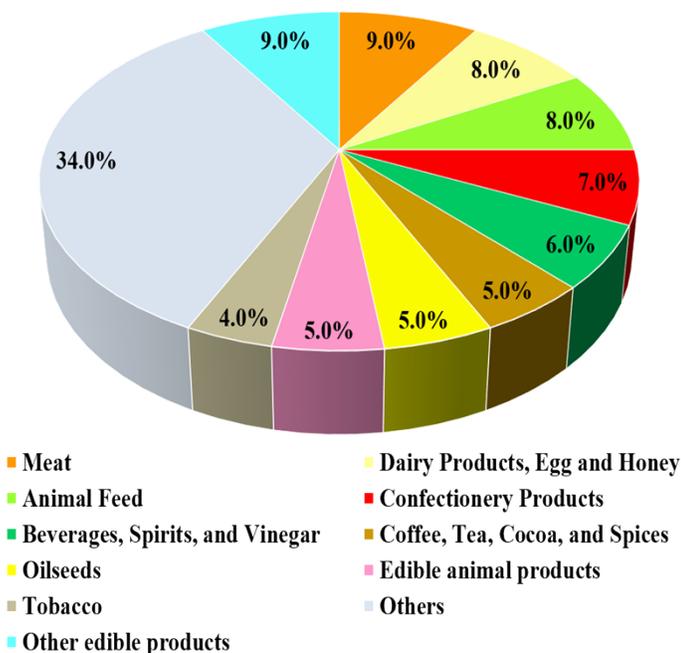
Market Fact Sheet: Hungary

Executive Summary

Hungary placed 47th among 141 countries in an annual socio-economic ranking compiled by the [World Economic Forum](#) (WEF). Within the EU, the country is 24th most competitive member state, maintaining its position reached last year. Hungarian economic growth is the second biggest in Europe, reaching 4.6 percent in 2019. Growth in real wages has remained unbroken resulting in increasing purchase power. Hungary's foreign trade structure is stable, however, more than 90 percent of agricultural imports come from EU member states. Non-EU trading partners include neighboring countries, Switzerland, Turkey, China, Japan, the United States, and Russia.

Imports of Consumer-Oriented Products

Share of Main Commodity Groups of Agricultural Imports in Hungary, 2018



Food Processing Industry

The country's food production potential is 120 percent of current needs. More than 5,400 food businesses are operating in Hungary. Approximately 96 percent of them are micro, small, or medium-sized enterprises. However, more than 70 percent of the total production value comes from large companies that are integral parts of the EU's food industry.

Food Retail Industry

Although Hungary's food retail sector continues to grow, the number of retail shops has fallen by 13.8 percent, to 38,987 since 2012, while their size and turnover increased. Multinational chains have the advantage of more efficient logistics, supplies, and sources in the sector, which struggles with a heavy labor shortage. Discount stores account for

27.3 percent of all turnover, hypermarkets, for 24.3 percent, retail chains for 35.2 percent, and the market share of independent grocery stores is 13 percent.

Quick Facts CY 2018

Imports of Consumer-Oriented Products: USD 3.76 billion

List of Top 10 Growth Products in Host Country

- | | |
|----------------------------|---------------------------------|
| 1) Processed meat products | 6) Acidified milk products |
| 2) Beer | 7) Distilled beverages (gin) |
| 3) Cheese | 8) Ice cream |
| 4) Soft drinks | 9) Pet food |
| 5) Mineral water | 10) Gluten-free bakery products |

Food Industry by Channels (USD million)

Food Industry Output	10,711.9
Food Exports	4,025.5
Food Imports	3,261
Food Inventory	680.3 kg/capita
Domestic Food Retail	17,082.4
Food Service	4,261.6

Food Industry Gross Sales

Domestic Food Market: USD 6,528.8 million

Top 10 Host Country Retailers

- | | |
|----------|-----------------|
| 1) TESCO | 6) Reál |
| 2) COOP | 7) Auchan |
| 3) Spar | 8) Penny Market |
| 4) Lidl | 9) Aldi |
| 5) CBA | 10) DM |

GDP/Population

Population (million): 9.77

GDP (USD billion): 157,8 (2018)

GDP per capita (USD): 16,151 (2018)

Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
<ul style="list-style-type: none"> - Fiscal loosening and cuts in VATs intensify the market. - Increasing household consumption and retail trade are driven by wage increases and strong wage outflow. 	<ul style="list-style-type: none"> - Unbalanced purchasing power in the country. - Less direct contacts with Hungarian importers as multinational chains are purchasing to serve EU-wide markets.
Opportunities	Threats
<ul style="list-style-type: none"> - Increasing demand and growth potential in food retail businesses. - Benefits from the country's geographical position. 	<ul style="list-style-type: none"> - Strong competition from EU producers with geographic, tariff, regulatory and admin. advantages.

Data and Information Sources: GTA; CSO; The World Bank, Nielsen; Trade Magazine, GfK, GKI,

Contact: [USDA Foreign Agricultural Service, Budapest](#)

I. MARKET OVERVIEW

Population and Key Demographic Trends (changes in consumption of middle class)

Hungary has a population of 9.77 million (2019) though it has been declining for decades. The population density is 105.1 capita/km². Hungary's birth rate has also fallen significantly, and it is one of the lowest rates in Europe at 9.2 births/1,000 inhabitants (2018). Under the best scenario, the population will stabilize at around 9 million people, but a more realistic number is closer to 7.75 million by 2070. According to a study of the Hungarian [Central Statistical Office \(CSO\)](#), Hungary's population could fall to 6 million by that year. The national fertility rate was 1.49 children/woman in 2018, below the EU average of 1.59, and falling far short of the rate of replacement level. The Government of Hungary (GOH) is trying to solve the demographics shortfall with an extensive and unprecedented family-support scheme, with the "[Family Protection Action Plan](#)."

Despite the negative demographic trend, Hungary's economy is driven by growth in household consumption and strong domestic demand. However, the European Commission (EC) projects that private consumption growth will slow from 4.9 percent in 2019 to 3.8 percent in 2020 and to 3.4 percent in 2021.

Size of Economy, Purchasing Power, and Consumer Behavior

GDP per capita was USD 16,151 in 2018. According to the [International Monetary Fund \(IMF\)](#), Hungarian economic growth is likely to be the second largest in Europe after Malta, reaching 4.6 percent in 2019. The European Commission (EC) also raised its projection to 4.6 percent, and acknowledged in the autumn [European Economic Forecast](#) that Hungary had managed to withstand the global slowdown. The IMF expects GDP growth to be 3.3 percent in 2020 and 2.9 percent in 2021. The EC left its forecast for the next two years unchanged at 2.8 percent because the eurozone economy has stalled and Hungary's main trading partners are expected to slow further. The IMF projected the average annual inflation to increase to 3.4 percent in 2019 and expects the same figure in 2020. In 2021, inflation is forecast to reach 3.3 percent.

Favorable labor market conditions and growing wages are supporting households' propensity to spend more, despite the increasing uncertainty on external markets. Growth in wages has remained unbroken for six years. The positive trend continued by double-digits in the first half of 2019, supported not only by the dynamic increase of the minimum and guaranteed minimum wages, but also by the dire labor shortage, hurting all sectors. Kopint-Tárki Institute for Economic Research raised its outlook for gross nominal wage growth to 10.5 percent, leading to real wage growth of 6.8 percent in 2019 and 4.8 percent in 2020. In parallel, unemployment rate is expected to drop to 3.4 percent this year, and edge down to historically low level of 3.2 percent in 2020. The distribution of wages and purchasing power is very unbalanced in the country, however, and shows significant disparities. Richest settlements are concentrated around the capital, in the Central-Transdanubian Region, and close to the Austrian border. Per capita purchasing power of residents in Budapest is 125 percent (EUR 9,230/year) of the Hungarian average, while that of the population of Northeast Hungary (Szabolcs-Szatmar-Bereg County) is only 78 percent (EUR 5,816), according to a study by market researcher GfK. Hungary's average per capita purchasing power (EUR 7,416) is 50.31 percent of the EU average.

Food consumption expenditure reflects these differences among the county's regions. Hungarians spend one-sixth of their total disposable income, nearly USD 1,100 per capita, on food annually, but inhabitants of the central region (Pest County) spend 15 percent more. At the same time, people living in the northeast part of the country devote 15 percent less money to food than the national average. Among Hungarian consumers, price awareness, good value for money and generally low prices are still key factors when it comes to shopping, the global measurement company, Nielsen said. Retail landscape is undergoing a shift, which transforms consumers' behavior as well. It reflects in spending habits and

categories they are looking for. This process benefited the most from the financial surplus at households as 42 out of 100 Hungarian consumers say they are spending more on groceries than they did five years ago.

Overall Business Climate

Hungary maintains an open economy and its high-quality infrastructure and central location are features that make it an attractive destination for investments and exports. Hungary’s strategic location in Europe, easy access to both EU and non-EU markets within and outside the [Schengen area](#), highly skilled and educated work-force, and sound infrastructure have led global companies to locate manufacturing and service facilities there (see [Hungary’s Country Commercial Guide](#)). Improvements in technological readiness and financial markets provide positive business incentives. Fiscal loosening and cuts in VATs, corporate income taxes and social security contributions intensify the market and trade and help profitability. Although more than 90 percent of agricultural imports are from EU member states, there are still room for U.S. exports, especially for value-added products.

Recent Trends

Most consumers adjust their eating habits and diet for health reasons, as their health consciousness is increasing. Therefore, growth was observed in consumption of hypoallergenic, and organic food products, but price sensitivity is still among the most influencing factors affecting purchase decisions. Especially gluten-free products gained increasing share from the market and accounted for four percent (USD 265 million) of the total value-added of domestic retail trade between July 2018 and June 2019, according to Nielsen’s retail index. The percentage of people suffering from various allergies or food intolerances in Hungary is above the EU average. Seven percent of the domestic population is gluten sensitive. In this context, it is not surprising that health-related fears are prevalent (27 percent) among Hungarian respondents, citing health issues as primary or secondary concerns. This is also one of the reasons for the three times faster growth in sales of sugar-free soft drinks than that of sodas with sugar content.

Local and regional media published articles detailing Hungarian consumers’ worries and perceived discrepancies in the quality of identically-branded food products sold in Western Europe and Hungary. Concerns about ingredients and lower quality have strong influence on buyers’ confidence in import products. This so called ”dual standard” issue was common in the Central and Eastern European countries. Therefore, the Ministry of Agriculture has announced the launch of new checks to detect whether identically branded products sold in Hungary are of different quality than those sold in other countries.

Advantages and Challenges for U.S. Suppliers in the Hungarian Market

Advantages	Challenges
<ul style="list-style-type: none"> - The country's economic growth continued to exceed expectations, registering one of the highest rates in Europe. - International credit-rating agencies put Hungary into investment grade. - Fiscal loosening, cuts in VATs, corporate income taxes and social security contributions intensify the market and help profitability. 	<ul style="list-style-type: none"> - Short-term prospects are clouded by wavering global growth, trade tensions, and Brexit. - Labor market is tight; labor shortage is increasingly pressing in all sectors. - The distribution of wages and purchasing power is very unbalanced and below the EU average.

Advantages	Challenges
<ul style="list-style-type: none"> - Increasing household consumption and retail trade are driven by wage increases, strong wage outflow, improved consumer confidence, and historically low unemployment rate. - There are increasing demand and growth potential in food retail businesses, especially in suburban and rural areas. - The number of experienced multinational retailers are relatively high. - Hungary’s actively maintained Central and Eastern European relations are helpful in expanding regional market opportunities. - There can be benefits from the country’s geographical position. - EU membership facilitates the entry of U.S. products through other countries’ distributors. - Western consumption patterns are still emerging. 	<ul style="list-style-type: none"> - Settlements with the highest spending power are concentrated around the capital, where market competition is stronger. - Domestic food sector is competitive and politically supported. - Consumer confidence is growing in Hungarian products. - Domestically produced food products account for 60 percent of total consumption. - Competition is strong from EU producers with geographic, tariff, regulatory and administrative advantages. - More than 90 percent of food and agricultural imports are from EU member states. - Multinational retail chains are purchasing to serve EU-wide markets. There are less direct contacts with Hungarian importers. - High transport costs can be challenging for U.S. products - Hungarian consumers are unfamiliar with the value of U.S. products.

II. EXPORTER BUSINESS TIPS

Market Research, Local Business Customs, and Trends

Based on Nielsen’s research, the amount Europeans paid for everyday groceries increased by 3.4 percent in the second quarter of 2019, after three previous quarters of muted growth. Despite the recorded slow down (because of Brexit and the impact of international trade disputes in Europe), the positive trend is expected to continue. After Turkey, Hungary showed the second highest year-on-year growth in takings (7.7 percent), and the domestic food market continued to expand by 8.1 percent in value.

Online trade is also expanding. Although the number of regular customers did not change much in the past year, average spending has increased to USD 102/month and purchases have become more frequent (3.4 times/month), GfK said. According to Nielsen’s survey, 93 percent of Hungarians with internet connections have made a purchase online. The top categories are fashion and travel, but restaurant deliveries are on the rise as well. The report also revealed that only seven percent of digital consumers purchased packaged groceries and five percent bought fresh groceries online. Least popular categories were wine and alcoholic beverages, flowers and gift sets. Regarding online shopping, almost half of the Hungarian consumers find free delivery and money-back guarantee appealing. Still, brands and brand loyalty are less determining in their online purchase decision.

A representative survey conducted by the insurance company Generali in 2018 found that one-third of Hungarian shoppers regularly make impulse purchases, buying products they do not need or had not planned on buying. When making a standard purchase, around 50 percent of Hungarians focus on the ”price to value ratio,” 25 percent look for discounted items, and 17 percent always buy the cheapest product.

General Consumer Tastes and Trends

Brand is an important factor in pre-purchase consumers' decisions, based on a Nielsen survey. Demand for high-quality and premium goods has increased. The majority of Hungarians prefer domestic brands to global ones because of (allegedly) better price/value ratio. Hungarian consumers are open to innovative products and more influenced by social media than the European average. While one-fifth of European buyers are paying attention to product-related social media content, one-third of Hungarians are receptive to such information. In addition, 74 percent of Hungarian buyers are definitely interested in promotions. A third of them are willing to switch from a shop to another one because of good campaigns, or special product sales and promotions.

Consumers' health consciousness has been increasing, and buyers are looking for and willing to pay more for healthy products, or food and drinks that do not contain undesirable ingredients (e.g. high level of sugar, salt, carbohydrates, or fat content; preservatives and additives). There are market opportunities for food retailers and processors to satisfy the increasing demand for healthy products as the majority of buyers deliberately adjust their diet for health reasons. In parallel, their preference is often influenced by sensitivities to ingredients.

Following these trends, GOH is planning to expand the Public Health Product Tax (which was popularly nicknamed "Chips Tax") to products containing sweeteners from January 1, 2020. The tax on such products will be half of the tax levied on other foods considered unhealthy. The exemption for fruit juices will be limited to products with at least 75 percent fruit content, up from the present 25 percent. Breakfast products presented as high in fibre will be taxed if their fibre content is less than eight percent. Chips with fat content over 20 percent will be taxed even if they have little salt. Energy drinks containing caffeine or other stimulants will be taxed at USD 0.34/liter. Revenues from this tax are estimated to reach USD 358.3 million in 2020.

The genetically engineered (GE) content of food is also a sensitive issue; consumers are the target of intense, competing messages regarding the safety of GE products. Cultivation of genetically modified organisms is prohibited in the Hungarian constitution and the press often publishes negative articles about GE ingredients in food and feed. At the same time, the number of pro-biotech publications and messages are increasing as well. In this regard, consumer choices and attitudes are influenced by price sensitivity, the awareness of new technologies, and the availability of related information and substitute products.

III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

Customs Clearance

As an EU member, Hungary has adopted the EU's import and food safety regulations. Agricultural products are subject to the standard import sanitary and phytosanitary rules, quotas, duties, and other provisions. Hungary's national food legislation is harmonized with EU food laws. For more information on food legislation and food safety regulations, please see the [EU's Food Law General Principles](#), and the related documents.

Documents Generally Required by the Country's Authority for Imported Food

Applications for agricultural import licenses must be submitted to the [Department of Trade](#), Defense Industry, Export Control and Precious Metal Assay of the Government Office of the Capital City Budapest. These licenses impose rights and obligations on applicants with respect to trade. [Commission Regulation \(EC\) No. 1291/2000](#) lays down "common detailed rules for the application of the system of import and export licenses and advance fixing certificates for agricultural products." [Commission Regulation \(EC\) No. 1301/2006](#) contains the common rules for the administration of import tariff quotas for agricultural products managed by a system of import licenses. Imported products must meet member state requirements and must be accompanied by proper certification at the port of arrival. Certificates

must be in Hungarian. For more information please consult the [FAIRS report](#) on Hungary's import regulations and standards.

Labeling Requirements

[EC regulations on food labeling](#) and packaging must be applied directly in the EU member states. Additionally, harmonized national laws regulate the process of packaging, labeling, and waste management ([Government Decree No. 442/2012](#) /in Hungarian/; [Decree No. 36/2014](#) /in Hungarian/). For more information on labeling requirements, packaging and container regulations please consult Hungary's [FAIRS report](#).

Tariffs and FTAs

Regarding tariffs and trade agreements, Hungary applies EU-harmonized legislation. For detailed information, please consult the [EU website](#).

Trademarks and Patents

Trademarks and brand names are legally protected. Hungary is an active a member of the [World Intellectual Property Organization](#), and has a complete codification covering the protection of industrial property, copyright and authors' right ([Act No. XXXIII of 1995](#) on invention protection by patents, in Hungarian). Companies interested in the registration of trademarks or brand names must apply to the [Hungarian Intellectual Property Office](#), where information folders and application forms are available.

IV. MARKET SECTOR STRUCTURE AND TRENDS

1. Food Retail

According to CSO, consumer prices rose on average by 3.3 percent in January-October 2019, compared with the same period of the previous year. The price of alcoholic beverages and tobacco products increased by 8.4 percent, while food prices went up by 5.4 percent. GKI Economic Research Co. sees retail trade rising by an annual average of six percent in 2019 and four percent in 2020. Although, the number of shopping malls and hypermarkets has stagnated since 2010, the total number of retail shops has fallen, while their average size and turnover increased. In 2018, there were 121 shopping malls and 166 hypermarkets in the country, and the number of shops that sell food products fell by 2.4 percent, to 38,987.

Positive trends in consumption and spending on food as well as better financial situation of households provide better opportunities for U.S. exporters. A broad range of consumers are open to American foodstuffs. An increasing number of buyers are seeking quality products, special or gourmet specialties from the United States, helped in part by stories, traditions (such as barbecue) and positive feelings for America. For instance,

- Increasing **beer** consumption offers limited but improving export opportunities for U.S. products. Especially, craft beer has good market potential despite the high number and good availability of substitute products.
- **U.S. bourbon** whiskey is also popular among Hungarians who can afford more premium products. Whiskies account for about 13 percent of country's total spirit sales. The current level of U.S. whiskey exports to Hungary can be maintained, however, the EU's introduced and additional duties (25 percent tariffs) can negatively impact the trade. High VAT and excise tax on spirits also make the exports challenging.
- As western consumption patterns are emerging especially among the younger consumers, exports of **sugar confectionary and snack food** offer lucrative opportunities.

- **Pet food** market also shows good prospects. The number of pets and responsible pet keepers is growing. As wages and purchase power have notably increased in recent years, and the financial situation of the middle class improved, sales turnover significantly rose even in the premium and super premium segments. Currently, about 4.5 million dogs and cats are living in households, but only 40 percent of them are fed on pet food products. Therefore, further growth in sales is expected.

2. *Tourism*

Tourism is one of the largest sectors of Hungary's economy, contributing 10.7 percent to GDP. The number of foreign guests and the number of nights they spent in the country have increased by 58.1 percent since 2010. Nearly 16 million foreign tourists visit Hungary every year. The rise in hotel incomes exceeded the global average. Occupancy rates at four and five-star hotels are around 80 percent. The [Hungarian Tourism Agency](#) expected that the number of guest nights in commercial lodgings would reach 50 million and the tourism sector would account for 16 percent of the country's GDP by 2022.

3. *Catering*

Considering the positive tourism trends, foodservice operators, event marketing professionals, and regional tourism offices teamed up to create more open-air events, making various consumer foodservice types and cuisines popular to boost sales, as a report of Euromonitor established. Full-service restaurants, burger fast food, and food trucks lead this trend. Gastro-tourism and demand for fine dining drive sales in Budapest, but fine dining initiatives are emerging in the countryside as well.

- High quality **U.S. beef** has good prospects at full-service, white tablecloth restaurants, targeting both upper end Hungarian consumers and tourists.

4. *Food Processing*

Hungary is self-sufficient in basic foods. About 5,400 food businesses are operating in the country. Since farmers and processors typically produce mass products, the sector is under competitive pressures.

- Imports of **out-season or unavailable ingredients, additives, and packaging materials** as well as technologies can provide further export opportunities.

5. *Livestock Production*

- U.S. bull semen accounts for more than 80 percent of imported dairy **cattle genetics**. The volume of U.S. exports to Hungary has shown a growing trend since 2016, and the United States became the Hungary's most important supplier. Regarding the stabilized dairy market, and the increasing number of cattle inventories, there are real potentials for these products.

V. AGRICULTURAL AND FOOD IMPORTS (Prospects for U.S. exporters)

Product category	2018 Market size	2018 Imports	5-year avg. annual import growth	Key constraints over market development	Market attractiveness for USA
Leguminous vegetables (excl. soy, dried shelled) metric tons (MT)	36,000	20,821	7.1%	<ul style="list-style-type: none"> • Low consumption. 	<ul style="list-style-type: none"> • Health conscious consumers are open to increase the share of legumes in their diet.
Beer made from malt million liters	700	144.82	6.9%	<ul style="list-style-type: none"> • High number and good availability of substitute products. 	<ul style="list-style-type: none"> • Growth in beer consumption at the cost of distilled beverages.
Animal feed	USD 231.8 million	296,909 MT	19%	<ul style="list-style-type: none"> • Competition from EU producers with geographic, regulatory, and administrative advantages. 	<ul style="list-style-type: none"> • Strong market growth, good prospects even in the premium and super premium segments.
Distilled beverages million liters of pure alcohol	30	8.57	13.8%	<ul style="list-style-type: none"> • High VAT and excise tax on spirits. • High number and good availability of substitute products. 	<ul style="list-style-type: none"> • Significant retail turnover of distilled beverages. • High annual domestic alcohol consumption (distilled 3.0 l/capita, total 9.1 l/capita – 2017).
Baked snack foods MT	30,000	2,046	12.4%	<ul style="list-style-type: none"> • Public health product tax on snack foods. 	<ul style="list-style-type: none"> • Hungarian snack food consumption is less than the European average; there is room to grow.
Fish & Seafood MT	63,400	13,548	7.9%	<ul style="list-style-type: none"> • Low per capita fish consumption. 	<ul style="list-style-type: none"> • Government programs support the increase of fish consumption. • As of January 1, 2018, VAT rate on fish has been reduced to 5 percent
Sugar Confectionary MT	30,000	14,567	9.9%	<ul style="list-style-type: none"> • Growing number of consumers consider sugar unfavorable in diet and reduce the daily sugar intake. 	<ul style="list-style-type: none"> • Emerging western consumption patterns. • Demand and market opportunities for U.S. products.
Bovine semen doses	852,000 (total) 660,211 (dairy)	695,000	4%	<ul style="list-style-type: none"> • Competition from EU producers with geographic advantages. 	<ul style="list-style-type: none"> • The US is the most important supplier of Hungary.

VI. KEY CONTACTS AND FURTHER INFORMATION

Ministry of Agriculture, Apáczai Csere János u. 9, Budapest 1052, Tel.: +36 1 795 2000

- **State Secretariat for Food Chain Control**, Dr. Lajos Bognár, Deputy State Secretary, CVO
Tel.: +36 1 795 3785; E-mail: lajos.bognar@am.gov.hu
- **Department of Food Chain Control**, Dr. Zoltán Gombos, Head of Department
Tel.: +36 1 795 3762; E-mail: zoltan.gombos@am.gov.hu
- **Department of International Relations**, Péter Király, Head of Department
Tel.: +36 1 795 1126; E-mail: peter.kiraly@am.gov.hu

National Food Chain Safety Office (in Hungarian);

- **Animal Health and Animal Welfare Directorate** (in Hungarian)
Keleti Károly utca 24, Budapest 1024, Hungary; Tel.: +36 1 336 9302; E-mail: aa@nebih.gov.hu
- **Directorate of Plant Protection, Soil Conservation, and Agri-environment** (in Hungarian)
Budaörsi út 141-145, Budapest 1118, Hungary; Tel.: +36 1 309 1000; E-mail: nti@nebih.gov.hu
- **Directorate of Wine Products and Alcoholic Beverages** (in Hungarian)
Budaörsi út 141-145, Budapest 1118, Hungary; Tel.: +36 1 346 0930; E-mail: bor@nebih.gov.hu

Department of Trade, Defense Industry, Export Control and Precious Metal Assay of the Government Office of the Capital City Budapest, Németvölgyi út 37-39, Budapest 1124, Hungary
Tel.: +36 1 4585-525, +36 1 4585-526; E-mail: keo@bfkh.gov.hu

Hungarian Intellectual Property Office, II. János Pál pápa tér 7, Budapest 1081, Hungary
Tel.: +36 1 312 4400; E-mail: hipo@hipo.gov.hu

National Public Health and Medical Officer Service, Albert Flórián út 2-6, Budapest 1097, Hungary;
Tel.: +36 1 476 1100; E-mail: tisztifoorvos@oth.antsz.hu

American Chamber of Commerce in Hungary, Szent István tér 11, Budapest 1051, Hungary,
Tel.: +36 1 266 9880; E-mail: info@amcham.hu

Federation of Responsible Food Manufacturers (in Hungarian), Bécsi út 126-128, Budapest 1034, Hungary;
Tel.: +36 1 889 6159; E-mail: fesz@elelmiszeripar.hu

Hungarian Meat Industry Federation, Lágymányosi utca 7, Budapest 1111, Hungary
Tel.: +36 30 401 7661; E-mail: meatfed@t-online.hu; meatfed@husszov.hu

Hungarian Franchise Association, Margit krt. 64/b, Budapest 1027, Hungary
Tel.: +36 1 391 7313; E-mail: titkarsag@franchise.hu

USDA Foreign Agricultural Service - Budapest, U.S. Embassy, Office of Agricultural Affairs
Szabadság tér 12, Budapest 1054, Hungary; Tel.: +36 1 475 4162, E-mail: agbudapest@fas.usda.gov

Attachments:

No Attachments