



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)



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DIŐIŐLERİ 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 %)





DIŐIŐLERİ 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 Forintini 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 artış 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

Yüzölçümü

Başkent (nüfus)

Siyasi sistem

Para birimi

Saat dilimi

**9.599.744
(2023, HSO)**

93.025 km²

**Budapeşte(1.671.004)
(2023, HSO)**

**Parlamentar
Cumhuriyet**

Forint (HUF)

GMT + 1 saat



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



DIŐİŐLERİ VE DIŐ 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

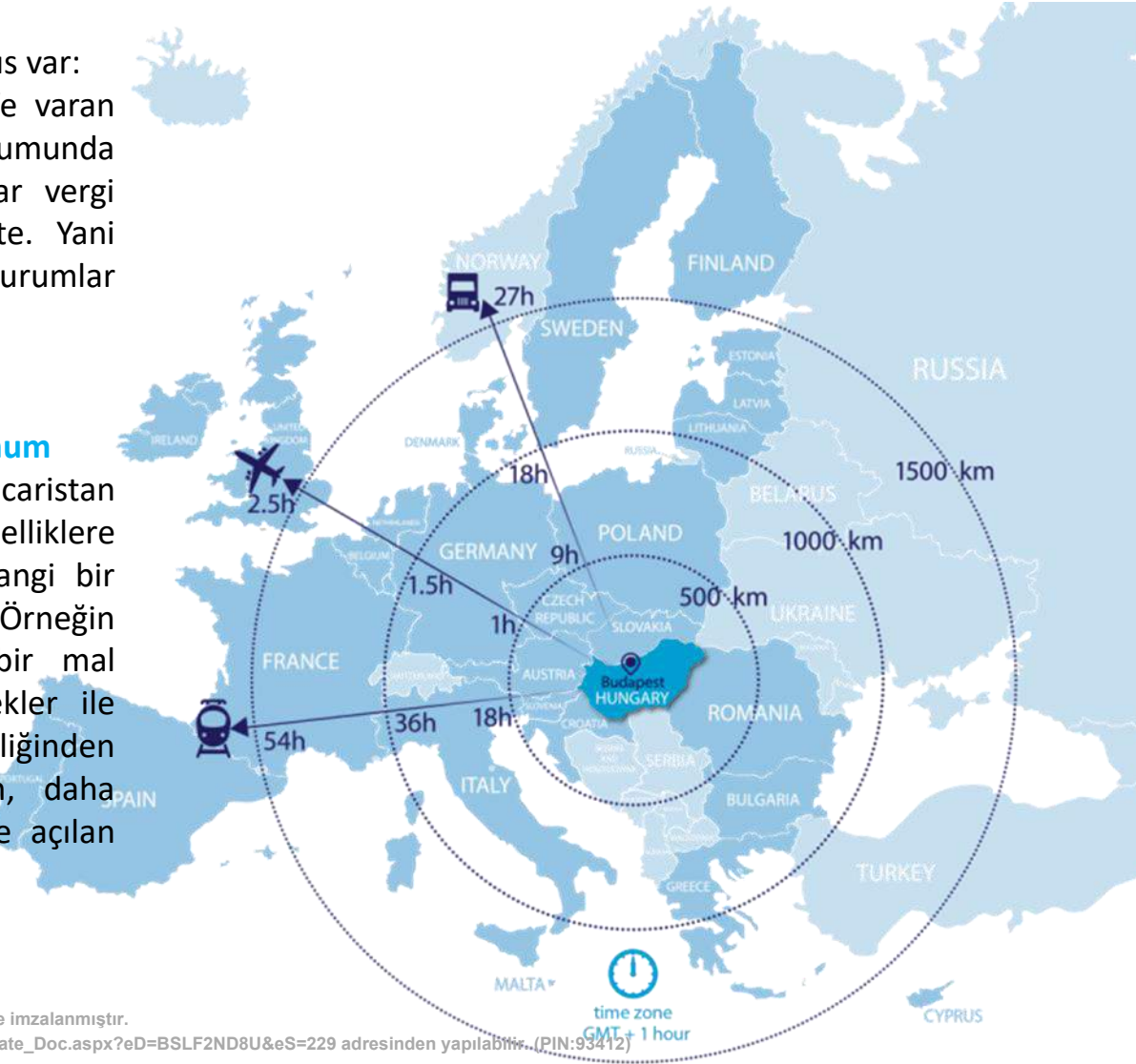
Vergi Avantajları

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.



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.

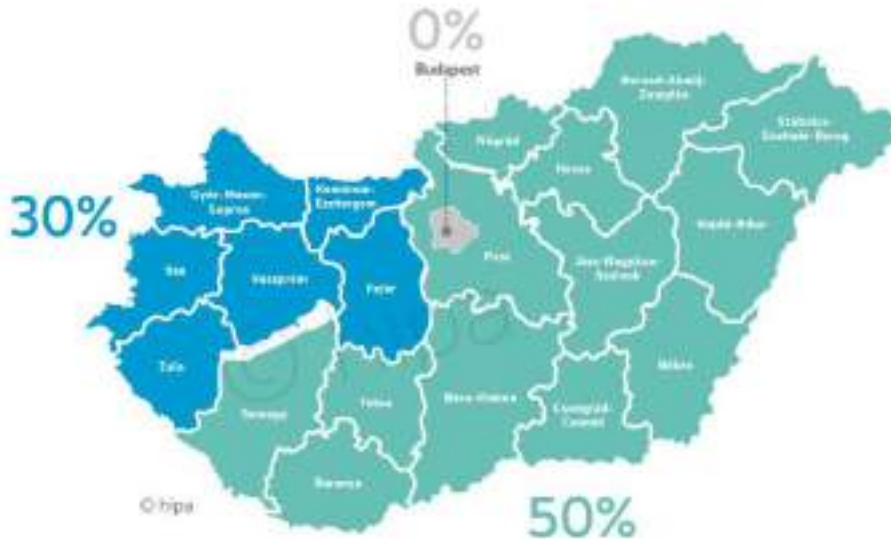


DIŐİŐLERİ VE DIŐ TİCARET BAKANLIĐI

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 baktığımızda destek, bölgenin gelişmişlik düzeyine göre azalmaktadır.

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

- Bölgesel Destek (bunlar daha çok vergi indirimi veya muafiyeti olmak üzere, nakit desteĐi de olabilir)
- Eğitim 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

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 km²



Population

9,730,772

(2021, HCSO)



Time zone

GMT +1 hour



Currency

Forint

(HUF)



Capital (population)

Budapest

1,723,836

(2021, HCSO)

HUNGARY



Membership in

international

organisations

EU, UN, OECD,

WTO, NATO, IMF, EC

EU member since 2004



Other major cities

Debrecen (201,112)

Szeged (160,258)

Miskolc (152,901)

Pécs (141,843)

Győr (133,946)



Risk of natural
disaster

Very low



Climate

Temperate



Form of government

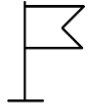
Parliamentary republic

[Source: *HCSO = Hungarian Central Statistical Office]

Invest in Hungary



Hungary offers excellent logistic opportunities in a central location



EU & Schengen

Central location as the center of gravity for distribution to Central & South-Eastern Europe

EU and Schengen memberships mean the free movement of goods

3TEN-T as Hungary is at the crossroads of 3 core European transportation corridors: Mediterranean, Orient/East – Med, Rhine – Danube



Road & rail network

1st in length of motorways in CEE

6th by railway line density in Europe

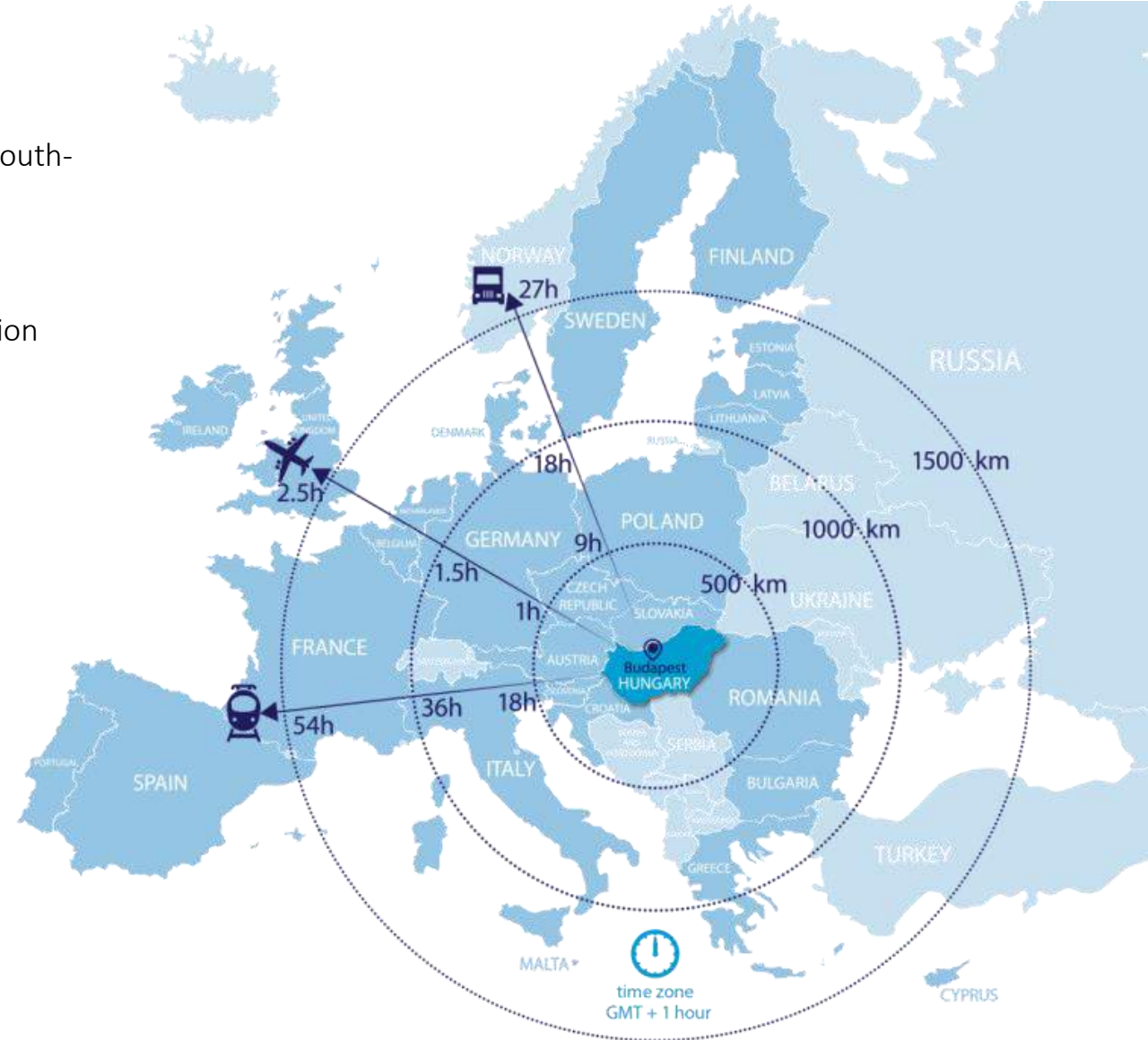
50+ scheduled container trains weekly to European ports of the North Sea, the Adriatic and the Mediterranean



Airports & waterways

144 direct destinations by 34 airlines from Budapest airport

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



Climate goals

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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*

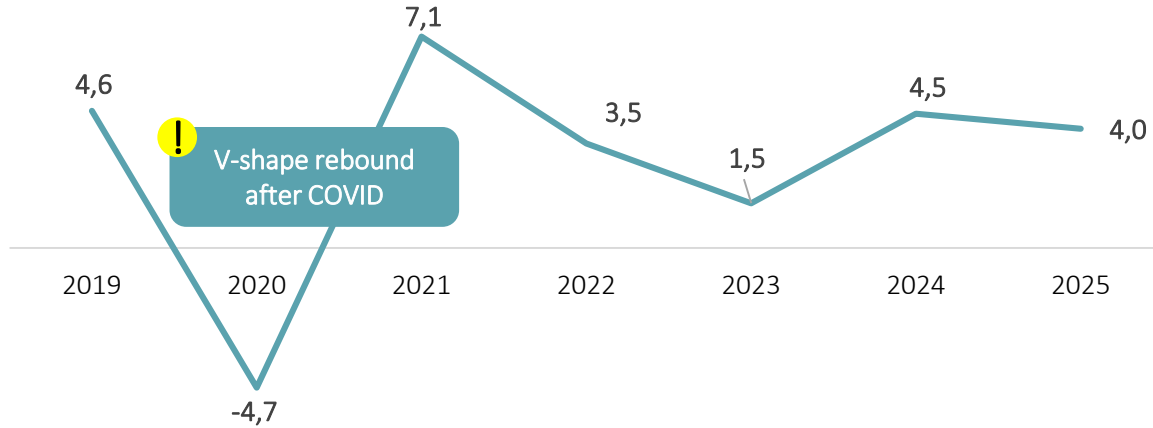
Economy of Hungary

Stable economy with a very competitive tax system



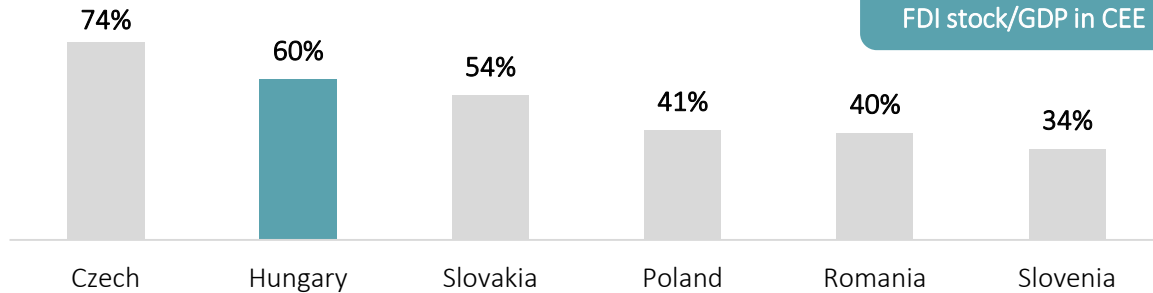
Good GDP growth outlook

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

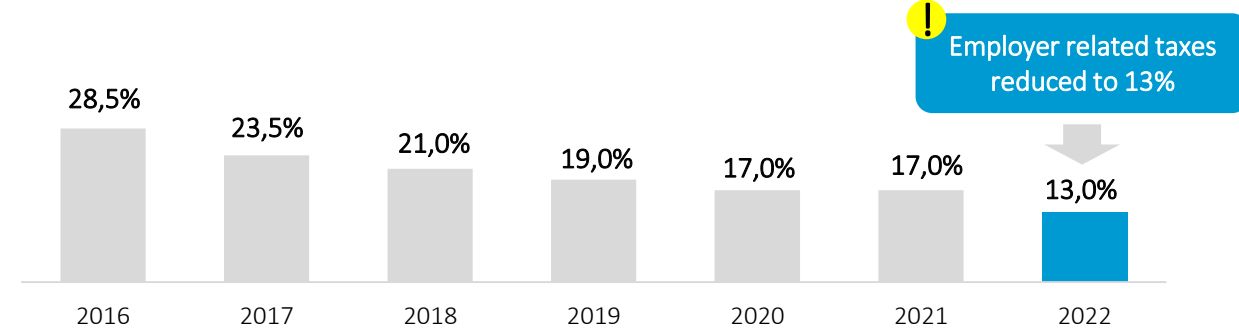
The Ministry of Foreign Affairs and Trade &

HIPA support investors in Hungary



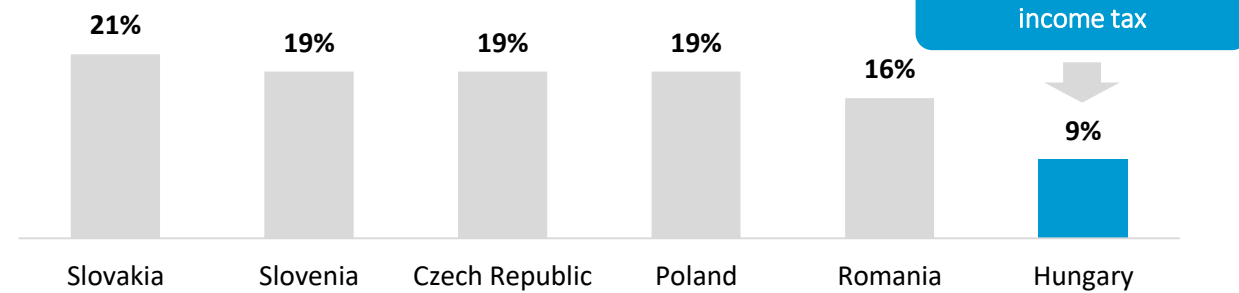
Reducing tax burden on labour

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

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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)



Top investment Location Site Selection Magazine 2022



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

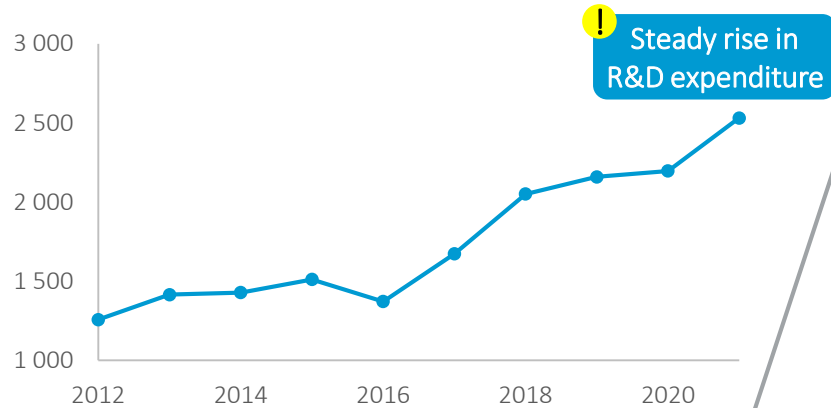
R&D personnel in Hungary



€ 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%

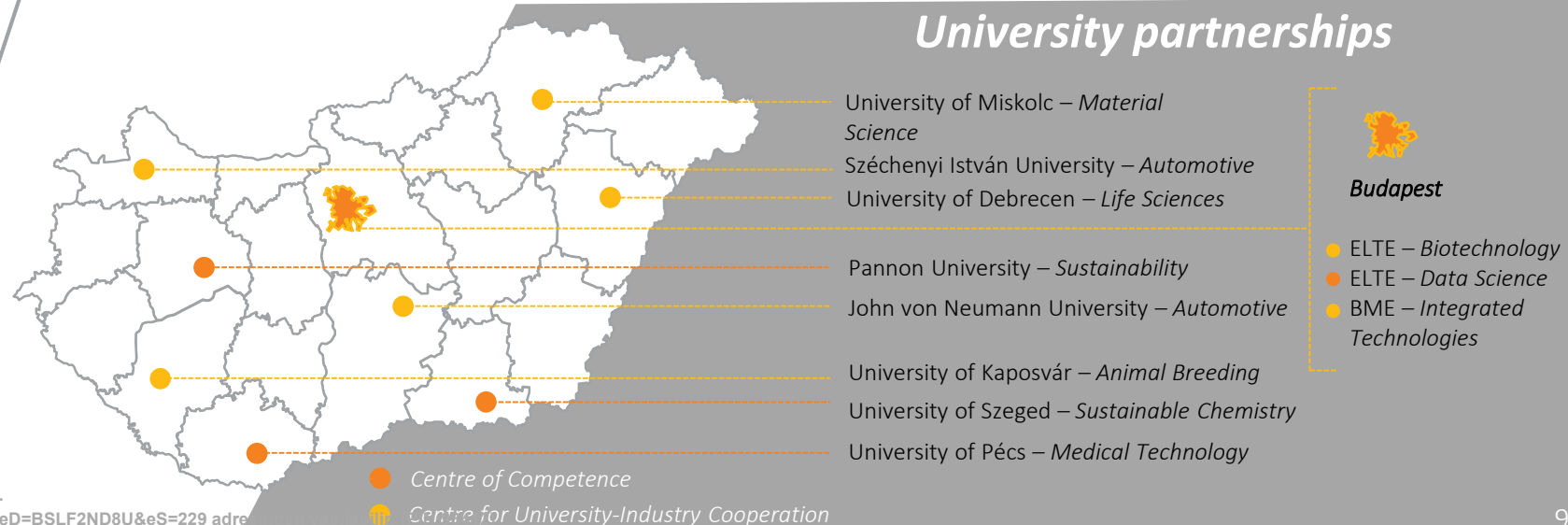
by 2030

Our partners in stepping into the future



Companies with existing R&D centres in Hungary

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

GS YUASA

SK battery hungary



Increasing share of processed food in our exports



Master Good

Coca-Cola



Increasing share of high value-add service activities



DIEHL

Aircabin

FrieslandCampina

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

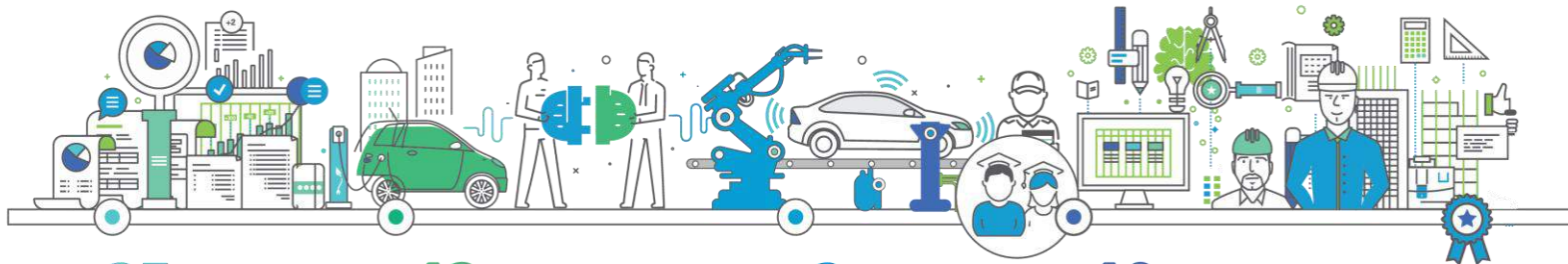


Our partners
in stepping into
the future



250 GWh battery cell
manufacturing capacity until 2030

Battery related studies propelling the industry



25

universities
in 42 locations

43,000/285,000

students in battery industry related
tertiary education

2,300

university students
in dual education

40,000/145,000

students in practice-based battery
industry related vocational education

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

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

High share in total production



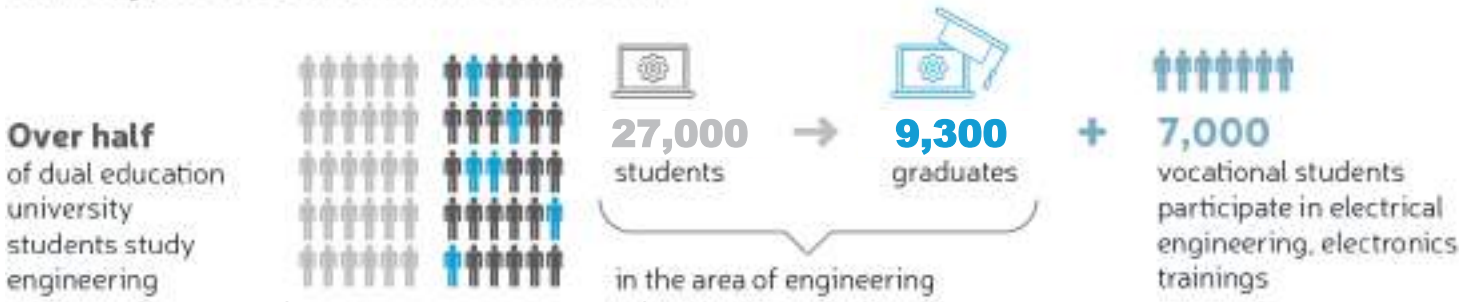
Export oriented



Our partners in stepping into the future



Talent pool & education in electronics



Did you know?



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



175,000 employees

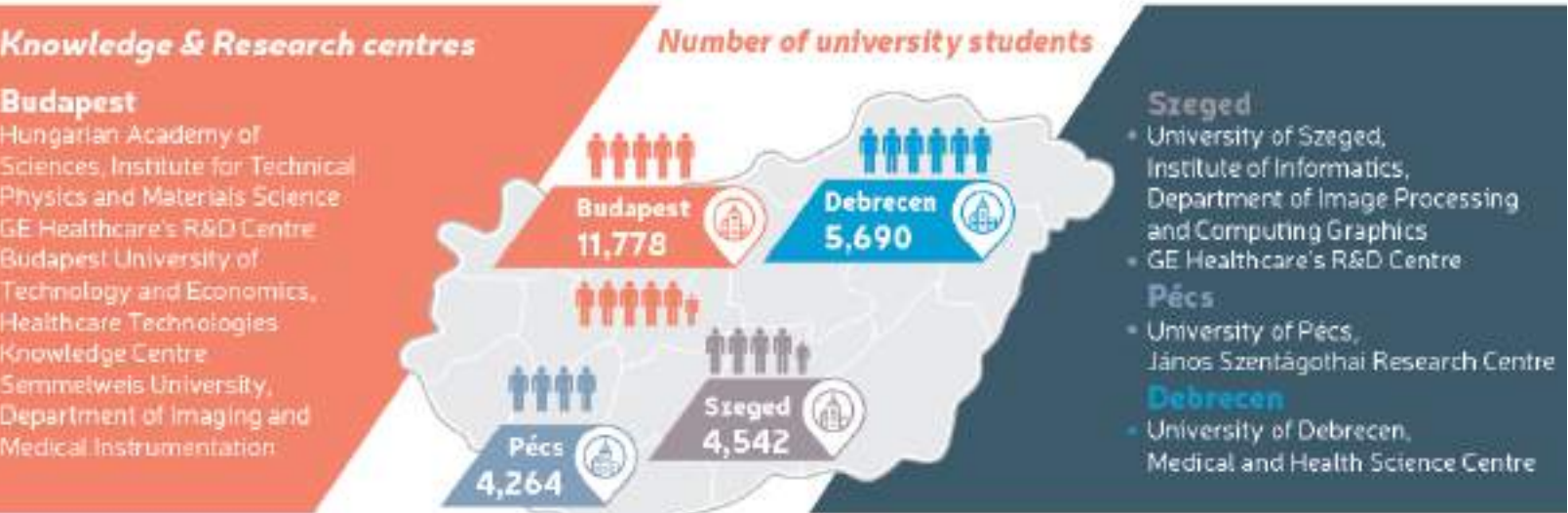


Medical Technology in Hungary



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



Nr.1 in the region

Medical technology & pharma industry together amount to over

~50,000
employees

9%

of the total manufacturing value added

Our partners in stepping into the future



over 85%
export ratio

Nr.1 in the region
Largest exporter of medicinal & pharma products in the region

70%
to EU countries

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



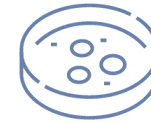
Biotechnology

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



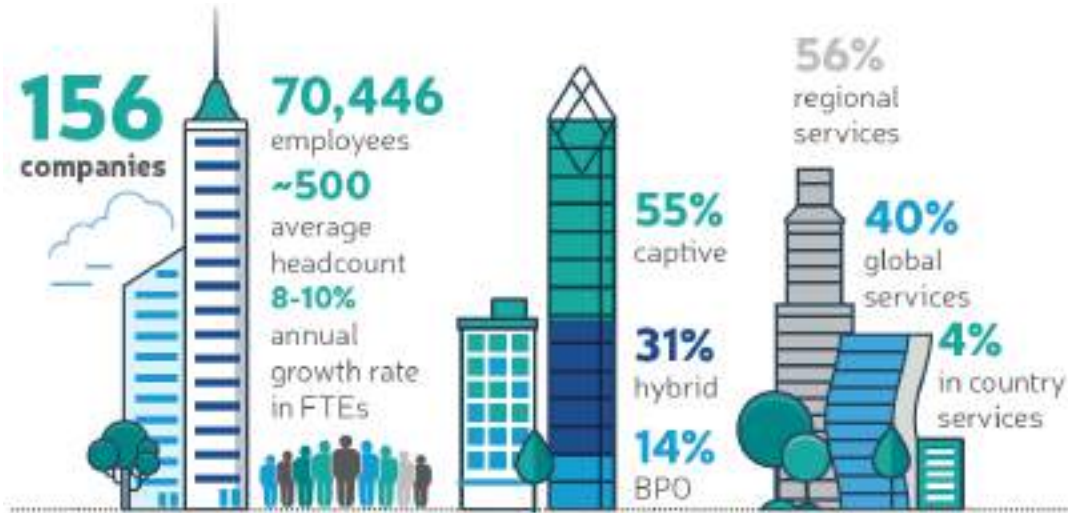
GEDEON RICHTER





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)



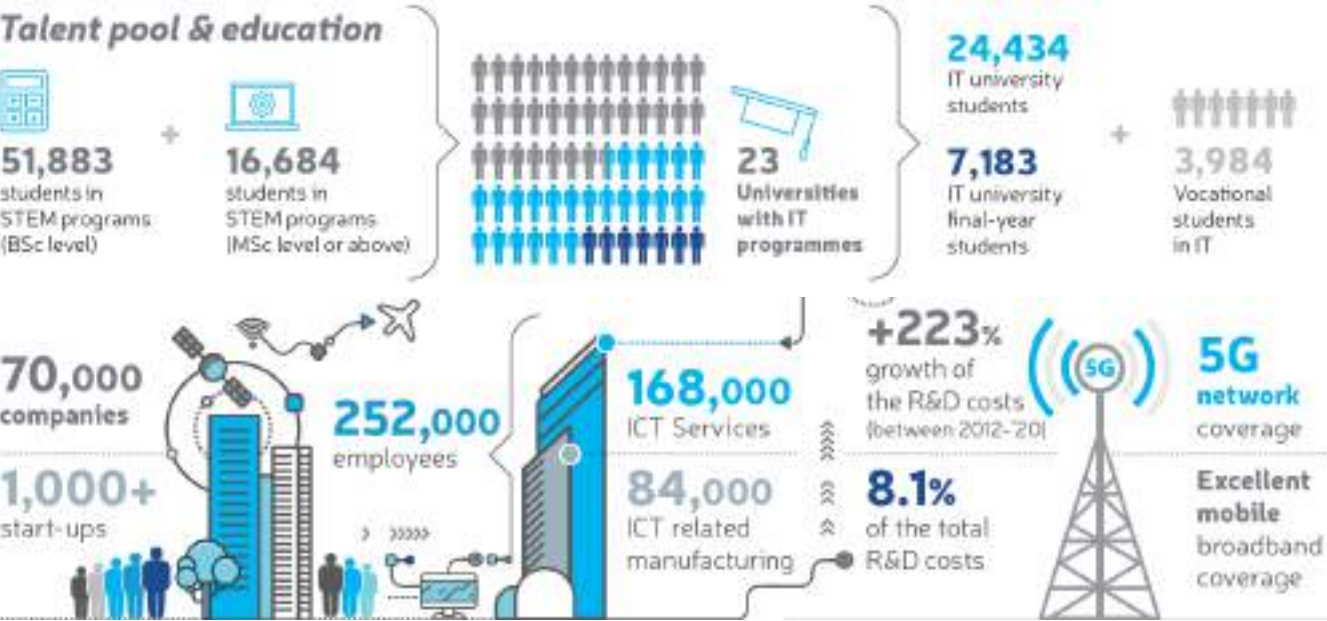


ICT in Hungary

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



Leading ICT functions



State Aid for R&D activity



ICT start-up success stories



#ITsecurity
#reducedrisk
#privilegedaccounts
#identity
#accessmanagement



#navigationsoftware
#automotive
#enterprise
#wireless
#personal



#webbased
#presentaion
#innovative
#softwaresolutic
#worldclass



#onlinevideo
#streaming
#livebroadcast
#interactive
#50millionusers



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

Our partners in stepping into the future

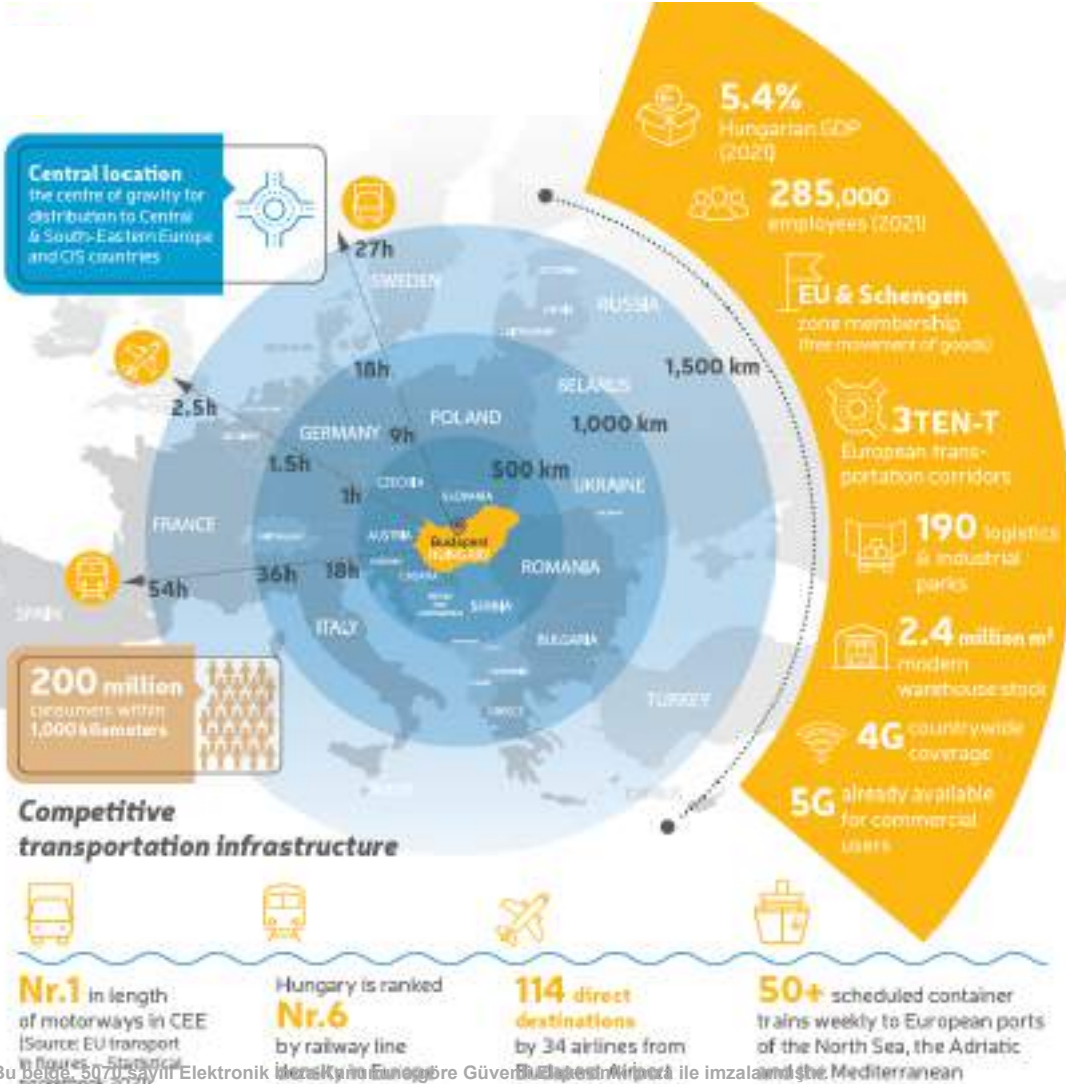


Logistics Industry in Hungary

Gelen Tarih Sayı: 17.01.2024 - 229



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



Our partners in stepping into the future

Top 10 distribution centres (Company / nr. of countries served)

RAE	DB Schenker	HUAWEI	MOBIS	JYSK	WALMART	MSD	ORIELAME	SANOFI	Schneider
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**
Philadelphia **SEOUL**
CHICAGO **XI'IAN**
SHANGHAI **PRINCETON**

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

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

Key agricultural outputs, industry overview and trends



Significant investment and reinvestment results (2014-2022 H1)



Main subsectors of the food and beverage industry

Export oriented subsectors

	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



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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