



HUNGARIAN-POLISH

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"Both are valiant, both are brave,
Blessings on them both we crave."



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HOW DID POLAND BECOME HUNGARY'S THIRD-LARGEST IMPORT PARTNER?



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Thirty-five years ago, following the fall of communism, the leaders of Poland, Hungary and what was then Czechoslovakia declared in Visegrád that their countries intended to return together to the mainstream of European economic as well as political life.¹ Their foremost task at the time was to lay the foundations of a market economy. On 6 October 2026, it will be thirty-five years since Hungary and Poland signed the Treaty on Friendly Relations and Good-Neighbourly Cooperation in Kraków. The two countries agreed to strengthen direct ties between businesses, make it easier for goods to cross borders and improve transport links. At the same time, the Visegrád countries also agreed to establish a free trade area, paving the way for the Central European Free Trade Agreement, CEFTA, signed the following year.²

The Visegrád countries have since become an integral part of the European Union's economy. Access to the common market through EU integration also boosted trade among them. Czechia, Slovakia and Poland are now among Hungary's most important trading partners. Freedom has thus strengthened both Hungarian–Polish relations and Visegrád cooperation through trade within the region.

The anniversary offers the Hungarian–Polish Institute of Freedom an opportunity to examine how Poland's role in Hungary's imports has grown since then, and how Polish products have become part of everyday life in Hungary. Alongside trade statistics, particular attention is given to Polish brands that Hungarian consumers encounter on supermarket shelves, in pharmacies or when furnishing their homes.

¹ Polish Sejm, 'Interparliamentary cooperation of the Visegrád Group countries', updated: 30 April 2021, accessed: 12 August 2026, https://oide.sejm.gov.pl/oide/en/index.php?Itemid=754&id=14731&option=com_content&view=article.

² Hungarian Act LXXVI of 1995 promulgating the Hungarian–Polish Treaty on Friendly Relations and Good-Neighbourly Cooperation, Section 1 and Articles 7–8 of the treaty, accessed: 5 September 2026, <https://mkogy.jogtar.hu/jogszabaly?docid=99500076.TV>; Hungarian Act XIII of 1995 promulgating the Central European Free Trade Agreement, Section 1 and preamble, accessed: 15 August 2026, <https://njt.jog.gov.hu/jogszabaly/1995-13-00-00>.



Anyone looking around central Warsaw today would struggle to recognise the Poland that older generations remember from the years of chronic shortages. The imposing Palace of Culture and Science still stands beside the central railway station, but it no longer dominates the skyline alone amid the glass towers that have risen around it. A new metropolitan centre has grown up around the old building, evoking Toronto or Frankfurt far more than the Warsaw of just a few decades ago. Hungarian consumers may be less aware of how much the range of Polish products has changed over those same decades, yet this transformation has been just as substantial.³

At the 'Polish markets' of the late 1980s and early 1990s, casual traders sold jeans, sweets and a variety of household goods, often more cheaply than shops. Polish traders came to be associated with resourcefulness and an ability to adapt quickly. This memory remains vivid among Hungarians over forty, even though economic relations between the two countries have changed fundamentally over the intervening decades. Large quantities of consumer goods and industrial components now arrive from Poland, while Polish companies operate retail networks across Hungary. Most Hungarian shoppers may not realise that brands with English-sounding names such as Reserved, House, Cropp and Sinsay all belong to a Polish company: the LPP group. The name of the popular footwear chain CCC also conceals a Polish slogan: 'Cena Czyni Cuda', meaning 'Price works wonders'.⁴

An older image of Poland persists among some members of the older generations. From the late 1970s to the late 1980s, shortages were part of everyday life. Hungarian visitors arriving from Kádár's 'happiest barrack' carried away a lasting memory of empty shop shelves. The transition from communism opened a new era for Polish businesses. Companies founded in

³ Warsaw Tourism Office, 'Warsaw is soaring! The capital's tallest buildings and their incredible stories from the Middle Ages to the present day'. Go To Warsaw, accessed: 5 September 2026, <https://go2warsaw.pl/en/warsaw-is-soaring-the-capitals-tallest-buildings-and-their-incredible-stories-from-the-middle-ages-to-the-present-day/>.

⁴ LPP, 'About us', accessed: 23 September 2026, <https://www.lpp.com/en/about-us/>; MODIVO PLATFORM, 'Historia MODIVO', accessed: 23 September 2026, <https://modivoplatform.com/historia-modivo>.



the 1990s typically first established themselves in the large domestic market; in the 2000s, increasing numbers expanded into neighbouring countries. EU accession in 2004 also helped them do so. Freer trade, foreign investment in production and improving transport links gradually made goods from Poland a regular part of the supply to Hungarian shops and factories.

Polish goods are now a visible part of the range offered by Hungarian food and furniture retailers, and suppliers based in Poland play an increasing role in supplying Hungarian factories. Poland has thus become one of Hungary's most important import partners. Business events bringing companies together also reflect these growing trade ties: the Polish–Hungarian Chamber of Commerce announced a Polish–Hungarian Business Mixer in Gdańsk for 29 September 2026 and a Polish–Hungarian Energy Forum at Hungexpo in Budapest for 6 October.⁵ Such events show that expanding trade in goods is accompanied by active business and professional relationships. The following sections examine the factors behind this advance, its constraints and the opportunities for further growth.

⁵ Polish–Hungarian Chamber of Commerce, 'Upcoming events': Polish-Hungarian Business Mixer in Gdańsk, 29 September 2026; Polish-Hungarian Energy Forum 2026, 6 October 2026; accessed: 14 September 2026, <https://www.plhucc.com/hu>.



I. Poland's growing share of Hungary's imports

Poland's increasing importance in Hungary's imports

Over recent decades, Poland has moved steadily up the ranking of Hungary's import partners. The statistics record goods arriving from Poland, some of which may have been manufactured in another country. According to the Hungarian Central Statistical Office (KSH), Hungary purchased goods worth HUF 392.5 billion from Poland in 2004, the year of EU accession. Just over twenty years later, in 2025, imports had reached HUF 3,450.9 billion. Their value in forints therefore increased 8.8-fold in nominal terms. Hungarian consumer prices rose by approximately 160 per cent in total between 2004 and 2025. Adjusting for this increase, imports in 2025 were worth approximately HUF 1,329 billion in terms of the forint's 2004 purchasing power, or 3.4 times their initial value.⁶

Over the same period, Poland's share of Hungary's total imports rose from 3.2 to 6.2 per cent, almost doubling. Poland consequently moved from eighth to third place among Hungary's import partners.⁷ In 2025, only Germany and China ranked ahead of Poland.

A comparison with imports from another large member state, France, illustrates this shift. In 2004, Hungary purchased more goods by value from France than from Poland: HUF 561.5 billion compared with HUF 392.5 billion. France accounted for 4.6 per cent of Hungarian imports and Poland for 3.2 per cent. By 2025, the balance had reversed completely: imports from Poland were almost twice those from France. Companies based in Poland had

⁶ Hungarian Central Statistical Office, 'Consumer price index by main groups of consumption, pensioner consumer price index and core inflation', STADAT, accessed: 21 August 2026, https://www.ksh.hu/stadat_files/ara/hu/ara0002.html. Author's calculations based on the published annual price indices. The figure adjusted for consumer prices illustrates the purchasing power of the forint, not the change in the volume of imported goods.

⁷ Hungarian Central Statistical Office, 'External trade in goods in HUF, by country', STADAT, accessed: 21 August 2026, https://www.ksh.hu/stadat_files/kkr/hu/kkr0007.html. Author's calculations based on the published import data. Values are at current prices; shares refer to Hungary's total goods imports. KSH recalculated the figures from 2022 onwards using the 2025 methodology.



significantly increased their importance in supplying the Hungarian market, including relative to established Western European suppliers.

Table 1. The value and share of goods imports from Poland and France in Hungary's imports

Country	2004 HUF billion	2025 HUF billion	Share of imports 2004 → 2025	Rank 2004 → 2025
Poland	392.5	3,450.9	3.2% → 6.2%	8th → 3rd
France	561.5	1,849.2	4.6% → 3.3%	7th → 10th

Source: KSH STADAT 17.1.1.7; author's calculations.

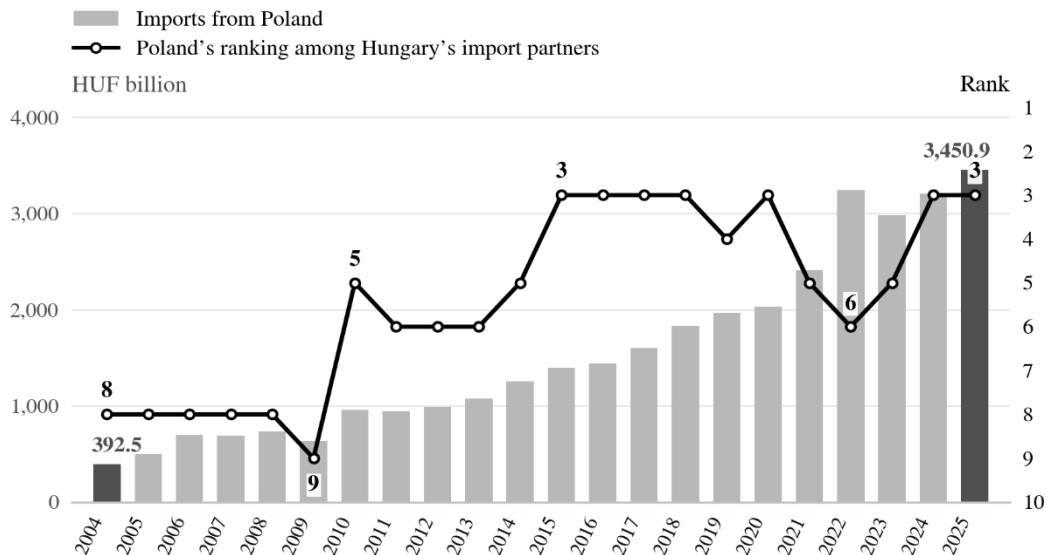
From eighth to third place

Poland ranked eighth among Hungary's import partners from 2004 to 2008, before slipping to ninth in 2009. The first major advance came in 2010, when it climbed to fifth place, overtaking France, Italy and the Netherlands that year. In 2015, it reached third place, which it held until 2020 apart from a temporary setback. Poland fell back in the ranking for a time in the years following the pandemic, but regained third place by 2024. The surge in energy prices may also have contributed to its lower ranking, particularly in 2022: higher prices for energy imported from other countries increased those partners' shares of Hungary's imports. This did not mean that the nominal value of imports from Poland had fallen; it rose in both 2021 and 2022.⁸

⁸ Hungarian Central Statistical Office, 'External trade in goods in HUF, by country', STADAT, accessed: 2 September 2026, https://www.ksh.hu/stadat_files/kkr/hu/kkr0007.html; *Hungary, Quarters I–III 2022 – Energy Price Shock and Economic Growth*, 2022, <https://www.ksh.hu/s/kiadvanyok/magyarorszag-2022-iii-nev/index.html>.



Figure 1. The nominal value of imports from Poland and Poland's ranking among Hungary's import partners, 2004–2025



Source: KSH STADAT 17.1.1.7; author's calculations.

What does Hungary buy from Poland?

According to United Nations data, Hungary purchased goods worth USD 9.78 billion from Poland in 2025. The leading product groups include food, pharmaceuticals, machinery and vehicle parts.



Table 2. Composition of Hungary's goods imports from Poland in 2025

Product group	Value USD million	Share (%)
Agricultural and food products	1,730.6	17.7
Electrical machinery and equipment	1,594.1	16.3
Machinery and mechanical appliances	1,044.0	10.7
Pharmaceutical products	842.0	8.6
Vehicles and parts	657.9	6.7
Plastics and plastic articles	409.6	4.2
Furniture, lighting and prefabricated buildings	408.1	4.2
Other products	3,088.9	31.6
Total	9,775.2	100.0

Source: UN Comtrade; author's grouping and calculations.⁹

Machinery and equipment, together with vehicles and their parts, accounted for 33.7 per cent of imports from Poland. A more detailed breakdown shows USD 492.7 million in motor vehicle parts, USD 231.8 million in batteries and USD 65.0 million in insulated wires and cables. Polish goods therefore also contribute to manufacturing in Hungary and to supplying repair workshops. Electrical products also include appliances bearing brands familiar to households:

⁹ United Nations Statistics Division, *UN Comtrade*, Hungary's goods imports from Poland, 2025, accessed: 16 September 2026, <https://comtradeplus.un.org/>. Author's grouping and calculations based on the published data. The agricultural and food product group also includes beverages and tobacco.



imports of televisions, monitors and projectors totalled USD 210.6 million.¹⁰ Some LG and TCL televisions sold by Hungarian retailers, for example, are manufactured in Poland. (As we have increasingly come to expect in a global market, a brand name alone does not reveal where a product was made.)¹¹

Agricultural and food products accounted for USD 1.73 billion, or 17.7 per cent, of imports. Within this group, Hungary purchased USD 63.0 million worth of poultry meat and edible poultry offal, and USD 50.3 million worth of cheese and curd, from Poland.¹² Mlekovita's Favita soft cheese is one example. Other products are also made in Poland whose origin Hungarian shoppers might hardly suspect, such as Győri Édes Zabfalatok oat biscuits half-coated in milk chocolate and Milka Cookies Sensations biscuits with a milk chocolate filling.¹³

Home furnishings are another substantial item. Imports from Poland in the product group that includes furniture, lighting and prefabricated buildings amounted to USD 408.1 million. Within this group, the separate category of other furniture and furniture parts accounted for USD 167.3 million.¹⁴

¹⁰ United Nations Statistics Division, *UN Comtrade*, Hungary's goods imports from Poland, 2025, detailed product breakdown: motor vehicle parts, batteries, insulated wires and cables, televisions, monitors and projectors, accessed: 16 September 2026, <https://comtradeplus.un.org/>.

¹¹ Auchan, 'LG OLED55C51LA 4K AI Smart TV 2025', accessed: 5 September 2026, <https://auchan.hu/shop/lg-55-lg-oled-evo-oled55c51la-4k-ai-smart-tv-2025-webos-okos-tv-dolby-vision-hdr-gaming-tv-139-cm.p-967921>; MediaMarkt Hungary, 'TCL 43A400 Pro', in the Google TV product listing, <https://www.mediamarkt.hu/v/google-tv-43>.

¹² United Nations Statistics Division, *UN Comtrade*, Hungary's goods imports from Poland, 2025, poultry meat and edible poultry offal, and cheese and curd, accessed: 16 September 2026, <https://comtradeplus.un.org/>.

¹³ Tesco, 'Mlekovita Favita full-fat soft cheese 270 g', accessed: 15 September 2026, <https://bevasarlas.tesco.hu/shop/hu-HU/products/2004120658652>; Auchan, 'Győri Édes Zabfalatok chocolate biscuits 215 g', accessed: 23 September 2026, <https://auchan.hu/shop/gyori-edes-abfalatokcsokis-215-g.p-913782>; Milka Cookies Sensations biscuits with Alpine milk chocolate pieces and milk chocolate filling 156 g', accessed: 15 September 2026, <https://auchan.hu/shop/milka-cookies-sensations-keksz-alpesi-tejcsokolade-darabokkal-es-tejcsokolades-toltelekkel-156-g.p-929773>.

¹⁴ United Nations Statistics Division, *UN Comtrade*, Hungary's goods imports from Poland, 2025, home furnishings, and other furniture and furniture parts, accessed: 12 September 2026, <https://comtradeplus.un.org/>.



The growing importance of Visegrád partners

Poland's advance is part of a broader shift in Hungary's imports. The other two Visegrád partners, Czechia and Slovakia, have also significantly increased their shares. Between 2004 and 2025, Czechia's share rose from 2.8 to 5.1 per cent and Slovakia's from 2.0 to 5.7 per cent. Together, the three countries supplied 17 per cent of Hungary's goods imports in 2025, compared with 8.1 per cent in 2004. Meanwhile, Germany's share fell from 29.3 to 22.1 per cent and Austria's from 8.1 to 5.9 per cent. (Alongside the region's growing importance, China's share also increased, from 4.8 to 8.1 per cent.)

Table 3. Selected countries' shares of Hungary's goods imports

Country	2004 (%)	2025 (%)
Germany	29.3	22.1
China	4.8	8.1
Poland	3.2	6.2
Austria	8.1	5.9
Slovakia	2.0	5.7
Czechia	2.8	5.1
France	4.6	3.3

Source: KSH STADAT 17.1.1.7; author's compilation.

II. The factors behind Poland's economic development

Several mutually reinforcing factors have helped Polish goods gain ground in Hungary. Private businesses that emerged after the transition from communism could find customers and gain experience in the large domestic market, while foreign investors brought new production capacity and international business ties to Poland. The easing of trade barriers in the 1990s,



followed by EU membership, made it considerably easier for goods produced in Poland to find buyers in other countries, including Hungary.

The role of EU membership and investment

Poland's integration into the modern European market began in the 1990s. The Central European Free Trade Agreement, CEFTA, gradually eased trade in goods among the countries of the region. Polish and Hungarian businesses were therefore able to trade on more favourable terms even before EU accession. The market opening of that period was an important precursor to today's relationship.

Like other countries in the region preparing for accession, Poland received substantial support from the European Communities, and subsequently from the European Union established in 1993, even before becoming a member. Launched in 1989 to assist Poland and Hungary, the PHARE programme (Poland and Hungary: Assistance for Restructuring their Economies) increasingly focused on preparing countries for accession, strengthening public administration and supporting the investment needed to adopt Community rules. In the early 2000s, ISPA (Instrument for Structural Policies for Pre-Accession) provided funding for major transport and environmental projects, while SAPARD (Special Accession Programme for Agriculture and Rural Development) supported agriculture and rural development. According to the European Commission, EUR 411 million was allocated to Poland's PHARE programme alone in 2001. These years also saw the beginnings of the institutions and procedures needed to use the much larger funding allocations that would follow.¹⁵

With EU accession in 2004, the Visegrád countries became part of the single market. The removal of customs barriers and the introduction of common rules significantly eased conditions for Polish exports to Hungary.¹⁶ Membership also opened a new phase in

¹⁵ European Commission, *General Report on Pre-accession Assistance (PHARE–ISPA–SAPARD) in 2001*, COM(2003) 329 final, 2003, pp. 3–6, accessed: 4 September 2026, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52003DC0329>; 'PHARE', https://nuclear-safety-cooperation.ec.europa.eu/phare_en.

¹⁶ European Union, 'The single market', accessed: 4 September 2026, https://european-union.europa.eu/priorities-and-actions/actions-topic/single-market_en; Hungarian Act XIII of 1995



development funding. During the first, short programming period of 2004–2006, Poland had an EU structural funding allocation of EUR 12.8 billion. The EUR 67.3 billion awarded for 2007–2013 was the largest structural and cohesion allocation of any EU member state. To put its scale in perspective, Spain, the next-largest recipient, was entitled to EUR 35.2 billion, only just over half as much. Poland also ranked first in the following budget cycle, with EUR 77.5 billion allocated for 2014–2020. For 2021–2027, Poland could count on EUR 78.9 billion from the EU budget. These resources have thus been able to contribute to Poland's economic development over several successive budget cycles.¹⁷

Table 4. Poland's share of EU cohesion funding

Period	Total EU allocation (EUR billion)	Poland's allocation (EUR billion)	Poland's share
2007–2013	347.0	67.3	19.4%
2014–2020	351.0	77.5	22.1%
2021–2027	391.9	78.9	20.1%

Source: European Commission; author's calculations. The 2007–2013 and 2014–2020 rows follow the summary in Panorama 64; the 2021–2027 row shows the initial allocations before reallocations.

promulgating the Central European Free Trade Agreement, Section 1 and Articles 1–3 of the agreement, accessed: 4 September 2026, <https://njt.jog.gov.hu/jogszabaly/1995-13-00-00>.

¹⁷ European Commission, *Panorama*, issue 64, 2018, pp. 47 and 49, accessed: 4 September 2026, https://ec.europa.eu/regional_policy/sources/panorama/mag64/mag64_en.pdf; Cohesion Open Data, '2021–2027 EU cohesion policy + JTF budget initial allocations', accessed: 4 September 2026, <https://cohesiondata.ec.europa.eu/2021-2027-Finances/2021-2027-EU-cohesion-policy-JTF-budget-initial-al/v7xe-nn2c>. Shares calculated by the author. The allocations are EU funds awarded, not actual disbursements; the 2021–2027 figures show the initial distribution before reallocations.



The scale of Poland's share becomes particularly clear when set against the EU total: roughly one in every five euros earmarked for cohesion went to Poland. Transport investment featured prominently in the use of these funds. According to a 2020 publication by Poland's Centre for EU Transport Projects, CUPT, EUR 19.6 billion of the EUR 27.4 billion EU allocation for the 2014–2020 Infrastructure and Environment Programme was earmarked for transport, potentially also improving conditions for international freight movements.¹⁸ Better roads and railways, industrial sites equipped with utilities and improved training together create more favourable conditions for production in Poland. Domestic entrepreneurs and foreign investors can both benefit from this investment. For Hungarian manufacturers and retailers, its practical benefits may take the form of greater capacity and more predictable deliveries from Polish suppliers. EU funding, together with business investment in Poland and the development of distribution networks, has thus helped Hungary purchase increasing quantities of goods from Poland.

The role of foreign capital and management expertise

Foreign capital has played an important role in the transformation of Poland's economy since the 1990s. New investors brought technology and organisational expertise alongside the capital needed to modernise production. Plants in Poland were consequently able to join international production and distribution networks, opening up a customer base for locally manufactured goods far larger than the domestic market alone.¹⁹

Foreign investment in Poland plays a decisive role in the growth of Polish exports. The OECD estimates that foreign-owned companies accounted for 56 per cent of Polish exports in 2020. Their share of manufacturing exports was 65 per cent, and they generated 90 per cent of the

¹⁸ Centrum Unijnych Projektów Transportowych (CUPT), *Fundusze europejskie dla nowoczesnego transportu*, 2020, pp. 13 and 18, figures as at 31 August 2020, accessed: 4 September 2026, https://www.cupt.gov.pl/wp-content/uploads/2022/02/fundusze_europejskiedla_nowoczesnego_transportu_145.pdf.

¹⁹ OECD, *Strengthening FDI and SME Linkages in Poland*, Paris, OECD Publishing, 2025, Chapter 2, accessed: 4 September 2026, https://www.oecd.org/en/publications/strengthening-fdi-and-sme-linkages-in-poland_cb08eb93-en/full-report/enabling-conditions-for-fdi-and-sme-linkages_66833082.html.



automotive industry's exported value added.²⁰ The Polish plants of international companies work with local employees and suppliers, while their corporate groups' distribution networks also give them access to factories and retailers in other countries. Intra-group ties may also shape the routes taken by goods arriving in Hungary: a Polish plant might supply components to the same group's Hungarian factory, for example, or a Hungarian retailer might be supplied from a warehouse in Poland.²¹

Expertise acquired at an international company could also spread through employees changing jobs or starting their own businesses. Foreign investment and the development of Polish entrepreneurship thus became interconnected. On the Hungarian market, the results can appear under a Polish brand or in a product manufactured in Poland by an international company.²²

European integration, the common market, partly foreign-financed investment and companies' growth in a large domestic market, together with the interaction of these factors, explain how Poland became Hungary's third-largest import partner by 2025.

²⁰ OECD, *Strengthening FDI and SME Linkages in Poland*, Paris, OECD Publishing, 2025, Chapter 2, accessed: 4 September 2026, https://www.oecd.org/en/publications/strengthening-fdi-and-sme-linkages-in-poland_cb08eb93-en/full-report/enabling-conditions-for-fdi-and-sme-linkages_66833082.html.

²¹ OECD, *Strengthening FDI and SME Linkages in Poland*, Paris, OECD Publishing, 2025, Chapters 2–3, accessed: 27 September 2026, https://www.oecd.org/en/publications/strengthening-fdi-and-sme-linkages-in-poland_cb08eb93-en.html.

²² OECD, *Strengthening FDI and SME Linkages in Poland*, Paris, OECD Publishing, 2025, Chapter 3, accessed: 4 September 2026, https://www.oecd.org/en/publications/strengthening-fdi-and-sme-linkages-in-poland_cb08eb93-en/full-report/fdi-spillovers-at-play-for-polish-smes_f2ec4735.html.



Polish products in everyday life in Hungary

Behind the trade figures are brands familiar from supermarket shelves, our home furnishings or visits to the filling station. Poland's economic presence takes several forms: production in Poland, deliveries organised from there and Polish-owned retail networks.

Food and retailers' own brands

Kubu and La Festa, for example, are familiar names from food shops. Both belong to Poland's Maspex group. Kubu fruit purée, available in Hungary and easy to pack with a child's mid-morning snack, is made in Poland. The brand name itself offers a small linguistic example of adaptation to foreign markets: Kubuś, the name used in Poland, is a diminutive of Jakub, the equivalent of the Hungarian Jakab. In Hungary, it appears as Kubu, without the final letter that is unfamiliar to local consumers. Maspex also produces La Festa hot chocolate powder.²³ Poland's food industry is also behind some own-brand products sold by well-known retail chains. Auchan Kedvenc mozzarella in the 125-gram pack and Tesco's one-litre bottle of 20 per cent food vinegar, for instance, are both made in Poland.²⁴

Home furnishings and building products

When furnishing a home, Hungarian consumers may encounter products from Poland made by Black Red White, or BRW. Its Hungarian retailers offer living-room, bedroom and dining-

²³ Maspex Hungary, 'Our brands', accessed: 4 September 2026, <https://maspex.hu/markaink/>; Kifli.hu, 'Kubu 100% apple–banana–strawberry–carrot purée', <https://www.kifli.hu/25585-kubu-100-alma-banan-eper-sargarepa-puere>; Tesco, 'La Festa Hot Chocolatta Classico', <https://bevasarlas.tesco.hu/shop/hu-HU/products/2004005794696>.

²⁴ Auchan, 'Auchan Kedvenc mozzarella cheese 125 g', accessed: 4 September 2026, <https://auchan.hu/shop/auchan-kedvenc-mozzarella-sajt-125-g.p-571796>; Tesco, 'Food vinegar 20% 1 l', accessed: 20 September 2026, <https://bevasarlas.tesco.hu/shop/hu-HU/products/2004120601846>.



room furniture as well as furniture for children and teenagers. For nurseries, there are also VOX cots and changing chests to choose from.²⁵

Roof windows and loft ladders made by FAKRO, another Polish company, are also a common choice when Hungarian homes are refurbished. Founded in 1991, the company has had a Hungarian subsidiary since 2000. Its products are sold by local retailers, with technical advice and servicing available to customers and building contractors.²⁶ A broad network of retailers and professional contacts has therefore developed over the years to support sales in Hungary.

Many global brands manufacture some of their products in Poland. Certain models of Bosch washing machines sold in Hungary are made there too.²⁷ This illustrates the role of foreign-owned plants in Poland discussed above.

Motoring and Orlen

Hungarian motorists are most likely to recognise Orlen from its filling stations. The company entered the Hungarian market in December 2022 by taking over 79 stations; by the end of 2025, it had 139 stations in Hungary.²⁸ In addition to Orlen's filling-station network, ORLEN

²⁵ Comfort Line, 'Black Red White brand store', accessed: 4 September 2026, <https://comfortbutor.hu/black-red-white-markabolt/>; MiniMind, 'VOX Cute white nursery furniture set', accessed: 20 September 2026, <https://minimind.hu/termek/vox-cute-feher-babaszoba-szett/>.

²⁶ FAKRO Hungary, 'Company information', accessed: 4 September 2026, <https://www.fakro.hu/ceginformacio/>; 'Contact', <https://www.fakro.hu/kapcsolat/>.

²⁷ MediaMarkt Hungary, 'Bosch WAN2826BBY front-loading washing machine', in the Bosch washing machine product listing, accessed: 5 September 2026, <https://www.mediamarkt.hu/v/bosch-mosogep>.

²⁸ ORLEN, 'ORLEN expanding its retail presence in Europe', 1 December 2022, accessed: 5 September 2026, https://www.orlen.pl/en/about-the-company/media/press-releases/2022/december-2022/orlen_expanding_its_retail_presence_in_europe; *Annual Report 2025*, 'Consumers & Products', <https://raportroczny.orlen.pl/en/management-report/our-performance-in-2025/consumers-and-products/>.



OIL lubricants deserve a mention, as Hungarian distributors also sell them on the domestic market.²⁹

Medicines and personal care

Hungarian medicine cabinets also contain products whose names have been familiar for years. The Polish manufacturers of Novorin nasal drops include Warsaw-based Polfa and Medana in Sieradz, both members of the Polpharma group. Polpharma was founded in 1935 and privatised with Polish capital in 2000.³⁰ On bathroom shelves, Ziaja cosmetics offer another example of Poland's presence.³¹

Clothing stores and online marketplaces

Polish clothing and footwear retail brands are familiar to Hungarian shoppers too. Reserved, Cropp, House, Mohito and Sinsay all belong to the LPP group. The company started in 1991 and opened its first stores abroad in 2002, including in Hungary.³² CCC entered the Hungarian market in 2012 and, by the end of the following year, already operated 50 stores there, compared with 379 in Poland.³³ Its 2024 corporate report identifies the logistics centre in

²⁹ ORLEN OIL, 'Distribution', distributors in Hungary, accessed: 5 September 2026, <https://www.ornloil.pl/EN/Distribution/Pages/DistributionMap.aspx>; Mogul Hungária, ORLEN OIL products, <https://www.mogulhungaria.hu/hu/termekek/?firm=6>; *ORLEN Transport Catalogue*, Megalub, <https://www.megalub.hu/letoltesek/orlen%20kozlekedesi%20katalogus.pdf>; Allegro Hungary, ORLEN OIL listings, <https://allegro.hu/kategoria/motorolajok-asvanyi-253182?minosegi-eloiras=ACEA+E5&string=orlen+oil>.

³⁰ Novorin Hungary, 'Novorin® nasal drops: patient information leaflet', accessed: 27 September 2026, <https://novorin.hu/novorin-orrsepp-betegtajekoztato/>; 'The manufacturer of Novorin', <https://novorin.hu/a-novorin-gyartoja/>.

³¹ Auchan, 'Ziaja goat's milk day cream 50 ml', accessed: 5 September 2026, <https://auchan.hu/shop/ziaja-kecsketejes-nappali-krem-50-ml.p-411911>.

³² LPP, 'LPP history', accessed: 5 September 2026, <https://www.lpp.com/en/about-us/lpp-history/>; *Annual Report 2017*, <https://www.lpp.com/wp-content/uploads/2018/02/LPP-report2017EN.pdf>.

³³ MODIVO PLATFORM, 'Historia MODIVO', accessed: 5 September 2026, <https://modivoplatform.com/historia-modivo>; CCC, *Consolidated Report 2017*, retail network figures



Polkowice, Poland, as the main distribution hub for CCC and HalfPrice stores.³⁴ Poland's presence therefore also extends to warehousing and onward distribution.

The Allegro online marketplace is available in Hungary as well, allowing Hungarian customers to order directly from numerous Polish sellers. Launched in Poland in 1999, the marketplace opened its Hungarian site on 1 October 2024.³⁵ The Hungarian-language interface also makes it easier to access goods offered by sellers in Poland; the ORLEN OIL lubricants mentioned above, for example, can be ordered through Allegro.

III. Challenges and opportunities

The next phase of expansion in Hungary will take place amid less favourable cost conditions and greater uncertainty over orders. Polish suppliers face the simultaneous tasks of modernising production, retaining Hungarian customers and improving delivery links. It is therefore worth examining the challenges alongside the possible responses.

Rising production costs and a shrinking labour supply

Some of the conditions that previously helped Poland's economy catch up are becoming less substantial. The earlier competitive advantage of relatively low wages for skilled workers is weakening. According to the IMF's November 2025 assessment, the złoty's real effective exchange rate appreciated by around 20 per cent in 2023–2024, which may weaken Polish exporters' price competitiveness.³⁶ The question is whether Polish suppliers can offset rising

for 2013–2017, <https://corporate.ccc.eu/en/results-center/pobierz-zalacznik/3-ccc-szd-2017-skonsolidowane-eng-pdf>.

³⁴ CCC Group, *Consolidated Directors' Report 2024*, p. 21, accessed: 5 September 2026, <https://corporate.ccc.eu/en/download/pobierz-zalacznik/consolidated-directors-report-of-the-ccc-group-for-the-fiscal-year-2024-2>.

³⁵ Allegro, 'Who we are', accessed: 5 September 2026, <https://about.allegro.eu/who-we-are/>; 'What we do', <https://about.allegro.eu/what-we-do/>; 'Welcome to Allegro', 1 October 2024, <https://allegro.hu/sugo/hirek/uedvoezluenk-az-allegron-hasznald-ki-az-uj-magyar-piacteruenk-elonyeit-3AkExngRBT2>.

³⁶ International Monetary Fund, 'Poland: Staff Concluding Statement of the 2025 Article IV Mission', 24 November 2025, accessed: 5 September 2026,



costs through productivity gains. Labour shortages in certain sectors and a shrinking working-age population also constrain the expansion of production.

Investment and financing difficulties for smaller suppliers

One obstacle to the development of Polish suppliers working with international companies is that smaller firms find it harder to obtain the funding needed for modernisation. According to a 2023 business survey cited in the OECD's 2025 report, 17 per cent of small and medium-sized enterprises faced financing constraints, compared with only 2.4 per cent of large companies. This can be a particular obstacle when rising labour costs call for greater mechanisation, new production lines or investment in IT.³⁷

From Hungary's perspective, what matters is the price at which a supplier can fulfil an order and how reliably it can do so. A component manufacturer or furniture factory may not be able to expand capacity while also maintaining the prices expected by its customers.

A pause in growth

The expansion of recent years stalled in the first seven months of 2026. According to KSH data for January–July 2026, the forint value of imports from Poland fell by 9.3 per cent compared with a year earlier, while the forint value of Hungary's total goods imports rose by 1.2 per cent. Poland's share in the first seven months was consequently lower, at 5.6 per cent, compared with 6.2 per cent in the same period of 2025.³⁸ Whether the full-year figures will show a meaningful change remains to be seen.

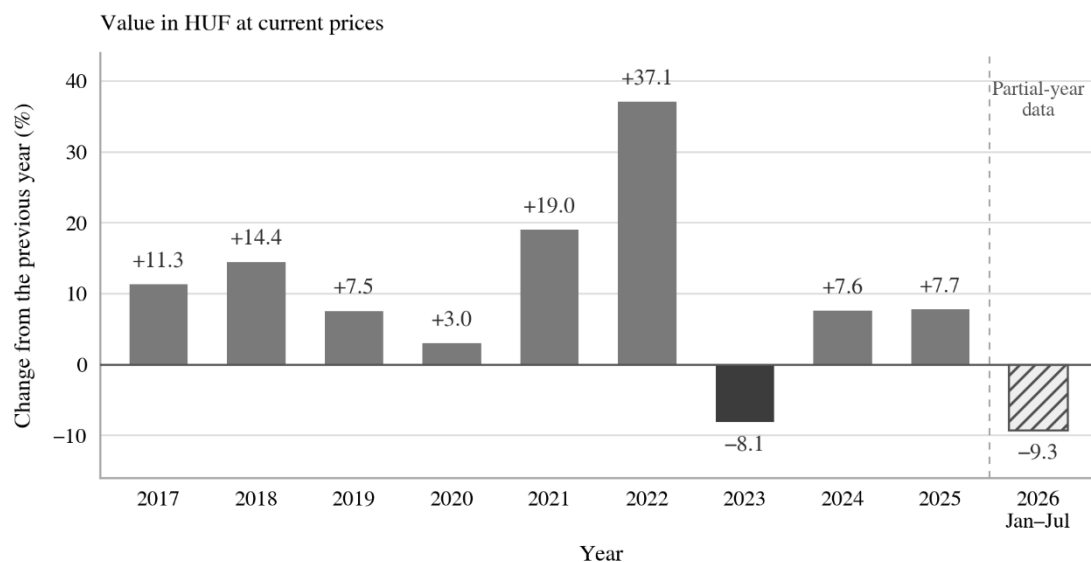
<https://www.imf.org/en/news/articles/2025/11/24/cs-poland-staff-concluding-statement-of-the-2025-article-iv-mission>.

³⁷ OECD, *Strengthening FDI and SME Linkages in Poland*, Paris, OECD Publishing, 2025, Chapter 2, accessed: 9 September 2026, https://www.oecd.org/en/publications/strengthening-fdi-and-sme-linkages-in-poland_cb08eb93-en/full-report/enabling-conditions-for-fdi-and-sme-linkages_66833082.html.

³⁸ Hungarian Central Statistical Office, 'External trade in goods in HUF, by country' and 'External trade in goods in EUR, by country', STADAT, January–July 2026, updated: 8 September 2026, accessed: 9 September 2026, https://www.ksh.hu/stadat_files/kkr/hu/kkr0047.html; https://www.ksh.hu/stadat_files/kkr/hu/kkr0048.html. Shares calculated by the author. A change in value is not the same as a change in the volume of imported goods.



Figure 2. Annual change in the forint value of imports from Poland



Source: KSH STADAT 17.1.1.7 and 17.2.1.8; author's calculations. Year-on-year change in the forint value at current prices. 2026: January–July compared with the same period of the previous year.

Further opportunities in the Hungarian market

North–south transport links

Further improvements in transport logistics are one condition for expanding imports into Hungary. Geographical proximity is useful only if goods can reliably reach the customer. On the Rzeszów–Košice–Miskolc route, completing the Polish S19 and Slovak R4 sections of Via Carpatia could improve road freight conditions and support further trade, particularly for goods arriving in Hungary from factories and warehouses in south-eastern Poland.³⁹

A 2026 update from the Polish road authority still indicated completion in 2027 for the 18.2-kilometre S19 section between Dukla and Barwinek, while already warning that the deadline

³⁹ Polish Ministry of Infrastructure, 'Polsko-słowackie porozumienie na rzecz budowy szlaku Via Carpatia', 10 February 2023, accessed: 12 September 2026, <https://www.gov.pl/web/infrastruktura/polsko-slowackie-porozumienie-na-rzecz-budowy-szlaku-via-carpatia>.



might be revised. Other sections south of Rzeszów may be completed in 2028, 2030 and 2031.⁴⁰ The planned R4 between the Polish border and Kapušany covers approximately 59 kilometres. A study discussed in the Slovak Ministry of Finance's 2024 investment appraisal recommended completing the key Lipníky–Kapušany section by 2032, while envisaging the remaining sections over a longer time horizon.⁴¹ Business plans therefore cannot currently assume that the entire continuous corridor will open soon, although it is already worth taking it into account in long-term strategy.

The need for coordination has long featured in intergovernmental discussions in the region. During Hungarian–Polish talks in January 2019, Poland's then infrastructure minister described Hungary as a strategic transport partner and called for the joint development of road and rail links.⁴² In February 2023, the Polish deputy minister responsible described an agreement between the Polish and Slovak road authorities as another step in cooperation towards completing Via Carpatia.⁴³ Both statements point to the same practical issue: the value of a completed road in one country can be limited by a missing section on the other side of the border. Aligning routes, financing and schedules therefore requires professional cooperation extending across several terms of government.

⁴⁰ GDDKiA, Rzeszów branch, 'Budowa S19 – stop dezinformacji', 2026, accessed: 12 September 2026, <https://www.gov.pl/web/gddkia-rzeszow/budowa-s19--stop-dezinformacji>.

⁴¹ Slovak Ministry of Finance, *Útvár hodnoty za peniaze, R4 štátna hranica PL/SK – Kapušany*, November 2024, pp. 3–4 and 10, accessed: 12 September 2026, https://mfsr.sk/files/sk/financie/hodnota-za-peniaze/hodnotenia-investicnych-projektov/doprava/hodnotenie-r4_uhp.pdf. The investment appraisal does not constitute a funding commitment.

⁴² Polish Ministry of Infrastructure, 'Współpraca z Węgrami w transporcie', 29 January 2019, accessed: 12 September 2026, <https://www.gov.pl/web/infrastruktura/wspolpraca-z-wegrami-w-transporcie>.

⁴³ Polish Ministry of Infrastructure, 'Polsko-słowackie porozumienie na rzecz budowy szlaku Via Carpatia', 10 February 2023, accessed: 15 September 2026, <https://www.gov.pl/web/infrastruktura/polsko-slowackie-porozumienie-na-rzecz-budowy-szlaku-via-carpatia>.



Railways and tunnels in the Carpathian region

Hungary continued to call for faster international rail links in 2026. On 19 May, during a visit to Poland, Minister of Transport and Investment Dávid Vitézy said in connection with planned talks on the Budapest–Warsaw link: 'We too would like to join this high-speed rail network in East-Central Europe.'⁴⁴

High-speed rail would primarily benefit passenger transport and business travel. For goods arriving from Poland, what can help is sufficient track capacity for freight trains, reliable cross-border connections and improved transshipment terminals. A new passenger line offers real benefits to freight only if the capacity it frees up on the existing network can actually be used for goods transport. The commercial benefits of rail investment therefore also need to be assessed against the needs of rail freight.

Railway tunnels are already under construction in the Northern Carpathians. The Podłęże–Piekietko programme involves building 58 kilometres of new railway and upgrading the 75-kilometre line between Chabówka and Nowy Sącz. The tunnel between Męcina and Mordarka was designed to be 3.6 kilometres long; a further three-year construction contract for the Tymbark–Limanowa section was signed in March 2026.⁴⁵ The current investment improves the network in southern Poland, while international connections still need to be integrated into it separately.

⁴⁴ Zoltán Siposhegyi, 'Péter Magyar in Kraków: we would like to revive Visegrád cooperation', 19 May 2026, Euronews, accessed: 23 September 2026, <https://hu.euronews.com/2026/05/19/magyar-peter-krakkoban-szeretnenk-a-visegradi-egyuttmukodest-feleleszteni>.

⁴⁵ Polish Ministry of Infrastructure, 'Tunel kolejowy pod górami usprawni przejazd pomiędzy Limanową a Nowym Sączem', 2024, accessed: 23 September 2026, <https://www.gov.pl/web/infrastruktura/tunel-kolejowy-pod-gorami-usprawni-przejazd-pomiedzy-limanowa-a-nowym-saczem>; 'Kolejna umowa dla projektu Podłęże – Piekietko podpisana', 12 March 2026, <https://www.gov.pl/web/infrastruktura/kolejna-umowa-dla-projektu-podleze---piekielko-podpisana>.



Financing development

Regional investment funds can also strengthen the financing available for development. In 2024, the Hungarian Development Bank joined the Three Seas Initiative Innovation Fund, managed by the European Investment Fund, with a EUR 20 million commitment. The initiative, in which Bank Gospodarstwa Krajowego (BGK), Poland's state development bank,⁴⁶ participates, aims to mobilise EUR 1 billion in investment capital.⁴⁷ Such capital can finance technological and operational improvements at companies seeking to expand across the region.

On 24 September 2026, BGK also announced the creation of a new infrastructure financing vehicle with initial capital of EUR 360 million, to which it contributed EUR 50 million. This is a 'fund of funds': it invests in other investment funds, which in turn finance projects.⁴⁸ Investment in Polish logistics and energy infrastructure financed by such funds could also improve conditions for transporting goods to Hungary.

Local partners and language skills

For Hungarian businesses, the direct opportunity in this context lies in serving Polish companies entering Hungary. A local logistics company can provide warehousing and domestic delivery, an engineering firm can design a business site, and a service network can maintain imported machinery. These partners can make it easier for Polish suppliers to maintain direct contact with Hungarian customers. The local partner earns revenue from

⁴⁶ Bank Gospodarstwa Krajowego, 'About us', accessed: 23 September 2026, <https://www.en.bgk.pl/about-us/>.

⁴⁷ European Investment Fund, 'MFB Hungarian Development Bank joins EIF-led fund for central and eastern European businesses', 19 November 2024, accessed: 23 September 2026, <https://www.eif.org/press/all/mfb-hungarian-development-bank-joins-eif-led-fund-for-central-and-eastern-european-businesses>.

⁴⁸ Bank Gospodarstwa Krajowego, 'BGK co-founds regional infrastructure fund with €360 million in capital', accessed: 23 September 2026, <https://www.en.bgk.pl/news/details/bgk-co-founds-regional-infrastructure-fund-with-eur360-million-in-capital/>.



business in Hungary, while locally available services can also make Polish products more competitive.

Despite the widespread use of English, knowledge of Hungarian and Polish retains its business value. In a joint investment project, the details of contracts, technical requirements and questions of responsibility all need to be understood precisely. Perhaps even more important is creating an atmosphere of trust, ideally through informal exchanges without an interpreter. Conducting discussions in one party's native language can do much to build that trust. Several universities in Poland train Hungarian-language specialists, including Hungarian studies programmes in Warsaw and Kraków. Polish studies programmes are also available in Hungary. Making students and their parents more aware of the business value of language skills could help attract students to these courses. Expanding trade in goods from Poland and closer business ties substantially broaden employment opportunities for Polish speakers.⁴⁹

Growing imports make a closer connection between Polish-language education in Hungary, foreign trade and business services worthwhile. Work placements in Hungary, corporate scholarships and courses in the language of trade could help realise the economic value of these skills. A Hungarian employee who speaks Polish can act as a link between buyer and supplier, facilitate entry into the Hungarian market and bring new orders to local service providers.

⁴⁹ Voivodeship Labour Office in Łódź, 'Hungarystyka', accessed: 22 September 2026, <https://wuplodz.praca.gov.pl/-/24642581-hungarystyka>; ELTE Faculty of Humanities, 'Polish Language and Literature MA', accessed: 22 September 2026, <https://btk.elte.hu/mesterszakok/lengyel>.



Conclusion

Thanks to freedom of trade, Poland's economic presence in Hungary has become an established part of everyday supply over recent decades. Imports include both components destined for Hungarian factories and familiar clothing and household products used by Hungarian families. A brand or shop name does not always reveal that a product was made in Poland, yet the trading relationship is broader still than any list of well-known companies can show.

Poland's third-place ranking among Hungary's import partners in 2025 and its 6.2 per cent share of imports are the result of a long process of catching up. In the period ahead, Polish suppliers' prices, Hungarian orders and reliable delivery will be decisive. It will be worth watching whether growth resumes after the pause in the first seven months of 2026, how Poland's share of Hungarian imports develops and which product groups account for most of the change. In transport investment, progress will depend on actually completing the missing sections and improving freight conditions.

The world of the old Polish markets increasingly lives on only in the memories of older generations. Yet Polish goods have a far wider presence than under the previous regime, even if that presence often goes unnoticed: in a snack box, a new wardrobe, on a bathroom shelf or in a component delivered to a factory. The Visegrád aspiration expressed in 1991 has taken shape in the economy. Hungarian–Polish freedom is flourishing in foreign trade too.