



Staple Foods in Hungary

November 2025

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Staple Foods in Hungary

EXECUTIVE SUMMARY

Price pressure and changing consumer habits influence staple foods in 2025

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INDUSTRY PERFORMANCE

Stagnant sales of staple foods amid macroeconomic pressures in 2025

Demographic shifts and health trends shape the consumption of staple foods

Convenience and sustainability impact the performance of staple foods in Hungary

WHAT'S NEXT?

Rising unit prices and changing consumer habits are set to drive value growth in staple foods

Health focused, functional products are expected to gain traction in Hungary

The integration of digital and physical channels is set to shape the future of staple foods

COMPETITIVE LANDSCAPE

Pick Szeged Zrt strengthens its lead through strong sales of processed meat and seafood

Nádudvari Élelmiszer Kft drives dynamism as private label quality rises in staple foods

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Discounters strengths its lead through a broad assortments and appealing price points

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Indulgence, convenience, and frozen formats drive sales of baked goods

INDUSTRY PERFORMANCE

Premium and indulgent baked goods outperform basic staples amid cost-of-living pressures

Convenience and brand trust fuel rising demand for dessert mixes in Hungary

WHAT'S NEXT

Sales of baked goods will be driven by premium, convenient and indulgent offerings
Health-focused options are set to gain momentum as consumers seek gluten-free, wholegrain, and free-from goods
Sustainability and regulatory trends are expected to shape the future of baked goods

COMPETITIVE LANDSCAPE

Ceres Sütöipari Zrt retains its lead while discounters expands its ranges
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Functional innovation and convenience drive steady growth in breakfast cereals

INDUSTRY PERFORMANCE

Health, convenience and functional benefits support steady growth in breakfast cereals
Demand for convenience drives the strong performance of RTE cereals in 2025

WHAT'S NEXT?

Breakfast cereal sales are expected to rise as functional innovation and convenience sustain consumer interest
Sustainability and digital access will shape the future of breakfast cereals in Hungary
Health and wellness are expected to drive innovation as functional cereals gain traction

COMPETITIVE LANDSCAPE

Nestlé Hungária Kft increases its lead while local players focus on innovation
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INDUSTRY PERFORMANCE

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Frozen fruits and vegetables lead growth amid convenience and health trends in Hungary

WHAT'S NEXT?

Frozen vegetables is set to drive steady growth as shelf-stable fruits face stagnation

Innovation is set to focus on low-sugar and minimally processed fruits and vegetables

Sustainability is expected to gain momentum as consumers demand eco-conscious options

COMPETITIVE LANDSCAPE

Lidl expands its lead through the strength of its private label ranges

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Processed meat, seafood and alternatives to meat record value growth despite volume challenges

INDUSTRY PERFORMANCE

Value sales rise while health concerns and flexitarian shifts challenge demand

Grilling culture, flavour innovation and discounters fuel growth in processed meat

WHAT'S NEXT?

Poultry and frozen seafood are set to drive modest growth as red meat faces continued volume pressures

Health and flexitarian trends are set to drive innovation across the forecast period

Sustainability and digital innovation will influence the future of processed meat, seafood and alternatives to meat

COMPETITIVE LANDSCAPE

Pick Szeged Zrt improves its leads amid regulation and innovation

Nádudvari Élelmiszer Kft drives growth through a strong performance in frozen processed poultry

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[Rice, Pasta and Noodles in Hungary](#)

KEY DATA FINDINGS

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Affordability and innovation drive growth in rice, pasta and noodles in Hungary

INDUSTRY PERFORMANCE

Instant noodle innovation and inflation-driven trading sustain growth in rice, pasta and noodles

Convenience, affordability and restaurant-inspired flavours drive growth for instant noodles

WHAT'S NEXT?

Modest growth is expected in rice, pasta and noodles driven by convenience and innovation

Health and wellness will increasingly shape rice, pasta and noodles across the forecast period

Regulatory and sustainability trends are expected to influence the forecast period

COMPETITIVE LANDSCAPE

Tesco-Globál Áruházak Zrt maintains its leading position despite losing share
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