

# **NATIONALISM ON THE SHELF**

## **Food Branding in Hungary's Tesco and Aldi**

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Submitted to Central European University - Private University  
Department of Undergraduate Studies

*In partial fulfillment of the requirements for the degree Bachelor of Arts in Culture, Politics  
and Society*

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Vienna, Austria  
2024

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## ABSTRACT

Food embodies culture, tradition, and identity, often forming the basis of collective identity. Member states of the EU have expressed concerns about the loss of cultural traditions due to globalization, leading to the establishment of Geographical Indicators to protect culinary heritage. This protectionism often promotes national sentiment, with food reinforcing collective identity and distinguishing nationals from outsiders. Hungary's nationalistic shift under Prime Minister Viktor Orbán exemplifies the link between nationalist politics and food, evident in laws boosting Hungarian domestic food production and initiatives like "Hungarikum." This study employs ethnographic research to examine food branding in foreign owned Aldi and Tesco stores in Hungary, focusing on national branding strategies for everyday fresh food not typically associated with a region or culture. Situated in research within food studies, and the concept of terroir, I will highlight the unique prevalence of Hungarian nationalist branding. I will examine the main actors that make up Hungarian national food branding, arguing that although these grocery stores are not intentionally participating in nationalist politics, their branding efforts serve to advance Hungary's nationalist agenda.

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# INTRODUCTION

Food is more than a material substance; it embodies culture, tradition and identity. Food is not only a “compulsion and a source of pleasure” (Garai-Fodor, Popovics and, Csiszárík-Kocsir 2022, 1), we are what we eat. Or as Fischler (1988) says, “we *become* what we eat”<sup>1</sup> (279), based on the fact that we incorporate food into our bodies and thus our selves and identities. Food is different from clothing or fancy brand-name bags, material objects that always lie outside ourselves and never enter our bodies. This unique quality of food makes it a fundamental “basis of collective identity” (Fischer 1988, 280).

In light of this complicated status, member states of the European Union have long professed concern over culturally specific traditions being lost because of shared EU food regulations and an increasingly globalized economy. In response to these anxieties, the EU has created a system of Geographical Indicators with the aim of protecting the culinary heritage of individual nations and consequently their identities.

This cultural protectionism can easily be turned into a method of encouraging national sentiment. Nationalism is often intertwined with food, as food becomes a symbol of pride and belonging, reinforcing collective identity by drawing distinctions between those of a nation and those outside of it. These qualities, in addition to food’s unique visceral qualities, make food a particularly useful tool for nationalist agendas.

Hungary’s recent Illiberal and nationalistic turn serves to illustrate the connection between nationalist politics and food. The Prime Minister of Hungary, Viktor Orbán (2010 to present) has continuously spewed national rhetoric during his tenure, and his government, which he describes as an ‘illiberal democracy’, has passed numerous laws meant to

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<sup>1</sup> Italics added

encourage or force greater production and consumption of Hungarian food explicitly as part of his nationalist project. This convergence of nationalistic ideology and food is reflected in the creation of “Hungarikum” (Hungary’s own internal Geographic Indicator) and other semi-official trademark designations. Furthermore, in grocery stores around Hungary there has been a notable rise in nationalist iconography on everyday food products.

Hungary’s food branding is a complex system made up of multiple independent actors that, when examined individually, are not intentionally participating in a nationalist politics. However, given the nationalist context of modern Hungary, these branding efforts serve to advance that same politics. Using ethnographic research I will be examining the everyday food branding of “fresh food” such as dairy and produce within multinational grocery stores Aldi and Tesco, specifically looking at what sort of branding they are using to communicate to customers. I will begin by stating my methodology and situating my research within food studies with the concept of terroir. In Chapter 2 I will illustrate the ubiquity of Hungarian nationalist branding and argue that Hungarian national branding is unique compared to neighboring country Austria. In Chapter 3 I bring in the remaining three stakeholders, namely Hungarian consumers and their purchasing preferences, Orbán’s government and the anti-foreign policies they enact, and the response of Tesco and Aldi. And finally I will bring in a wider context of globalization and how it negatively impacts Hungary’s economy providing a defense for nationalist food politics.

# METHODOLOGY

The bulk of the material for this thesis was obtained through ethnographic research conducted between November 2023 and May 2024. In order to understand the use of Hungarian nationalist imagery in food branding, I investigated a number of large grocery stores in Budapest and Vienna, looking at both Aldi and Tesco. I chose Aldi and Tesco because of their prevalence across Hungary, operating over 150 stores and 206 stores respectively. Additionally, both companies are based in other countries: Aldi is German and Tesco is British, making their production of Hungarian nationalist iconography intriguing. The two companies are also different in market orientation. Aldi is known for its relative affordability, achieved through limited staffing, the use of off-brand products, and its tendency to use locally sourced fresh produce to minimize transportation expenses. Tesco is a hypermarket known for carrying a wide price range to attract customers from all socio-economic demographics and for being a one-stop-shop providing groceries as well as household goods, clothing, and electronics.

I also used each store's online websites given the popularity of online shopping during and after the Covid-19 pandemic, during which time many people began to purchase their groceries through online portals. This method also allowed me to access information on products in other regions that I otherwise would not have had access to, such as England, Czechia, Poland and Slovakia.

For each grocery store I examined the range of everyday consumer goods, mostly focusing on fruits and vegetables, dairy, and meat since these tend to be “fresh”, are essential to the Hungarian diet, and had the most visible national branding. I took notes of the presence or absence of any national iconography. The primary goal was to construct a comprehensive database detailing the origins/agricultural source and also the branding strategies associated with each product. This created an understanding of the relationship between product



sourcing and branding, while also providing an account of the frequency and variety of used national symbols.

I also conducted an interview with a key stakeholder of Tesco's, Éva (who preferred to only be referred to with her first name). She has worked at Tesco Hungary for over 10 years in various positions, most notably as the head of Tesco Hungary's grocery food buying. I have also had multiple informal interviews with customers of Tesco and Aldi from a range of ages. These interviews granted me insights into the multifaceted realm of food processing, focusing on the distribution and marketing of the products and their relationship to national symbols. These interviews also aided in understanding what individual actors within the food system think about food marketing and national symbols.

## CHAPTER 1: TERROIR AND HUNGARIKUM

In place-based food literature, the concept of terroir is very prominent. *Terroir* is a French word literally translated as “soil”, but in the context of food it is used to describe a certain quality, specifically the “relationship that exists between the land and those who have farmed that land over generations” (Graham 2006). The concept has its origin in the winemaking world to emphasize qualities seen as distinctive, individual, or unique, where one could literally taste the wine’s specific origins: land, soil, seed variety, etc.. While the word retains this meaning in a winemaking context, many food products are said to have terroir in that they have a value imparted onto them by their production by traditional methods in their place of origin by people whose culture the food originates from.

The European Union's Geographical Indicator (GI) initiatives stem from this idea of terroir. According to the European Commission’s website, geographical indicators “guarantee [...] authenticity, quality and distinctiveness linked to origin”, and something can be granted a GI if “they have a specific link to the place where they are made” (“Geographical Indications and Quality Schemes Explained” n.d.). This system also places an emphasis on “protecting producers ('GI users') from competitors trying to exploit their reputation and know-how developed to produce genuine high-quality products.” After Germany, Hungary has the greatest number of geographical indicators of member states in the European Union (World Intellectual Property Indicators 2019).

A specific illustration of this concept of terroir is the creation of the trademark 'Hungarikum', which is a legal designation encompassing various items, foods, and cultural elements acknowledged by the “Committee for Hungarikums” to embody the highest values of the country and exemplify the identity of Hungary. The Committee for Hungarikums was established in 2012 by *Act XXX on Hungarian national values and Hungarikums*. According

to the Hungarikum website, the chairman is the active agriculture minister and members are delegated by the Hungarian Parliament and other Hungarian Ministries. Furthermore, Orbán's administration has provided diverse economic incentives to designate items as Hungarikum and facilitate their status within domestic and international markets. This includes measures like exempting producers of *pálinka*, a Hungarikum designated fruit based spirit alcohol, from excise tax obligations (Harcza 2014). Additionally, the government has allocated funding for festivals and facilities aimed at manufacturing “Hungarian” products, such as ‘erős pista’, a type of chili paste. Erős pista was declared a Hungarikum in 2012 and is featured in many places from tourist agencies to Orbán’s facebook<sup>2</sup> as being both a staple good in Hungarian houses and an international export.

Orbán’s administration's continual investment in creating Hungarikum brand narratives illustrates the connection between food and nationalism. Hungarikums are a form of specialty items that are supposed to represent traditional aspects of the nation. I will be building upon the extensive research around countries who claim food “specialty” and the process of label designation and the complications that occur with claims of identity and regionality. However, unlike those investigations, I will be examining everyday, commonplace fresh food products like milk, that are typically not associated with a specific place, culture, or tradition.

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<sup>2</sup> Orbán Viktor, “3. Erős Pista. Erős Magyarország // Strong Steve. Strong Hungary,” Facebook, December 3, 2019, <https://www.facebook.com/orbanviktor/photos/a.10151703698051093/10157619409496093/?type=3>

## CHAPTER 2: REPRESENTING HUNGARIANNESS ON FRESH FOODS

Walk into any grocery store in Hungary and you'll find markers of Hungarian origin to be ubiquitous. I observed these nationalist branding within the stores and also through advertisements on grocery stores websites, Facebook pages, billboards, YouTube ads and weekly promotional sales pamphlets. The degree of officialness varies considerably, from unofficial markings such as flag colors to Hungarian dairy companies' brands that feature national symbols. Products that feature Hungarian colors will often present them in the form of a sticker in the shape of a flag or heart, or by placing an actual flag by the price on the packaging. Some of these national markers further emphasize their national connection by taking inspiration from traditional Hungarian embroidery patterns<sup>3</sup>, and including the words *Hazai Termék* ("domestic product")<sup>4</sup>

There are also a number of semi-formal organizations that create and officiate "Hungary" origin designations, a limited list includes Kiváló Magyar Élelmiszer (Excellent Hungarian Food), Hazai Termék (Domestic or Homemade Product), Ételed az életed (Your food is your life) and most notably Magyar Termék (Nébih 2019).

### 2.1 Organizations of Domestic Product Certification (Magyar Termék)

The majority of European countries seem to have some sort of organization that designate the origin's of the country's products, emphasizing domestically produced

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<sup>3</sup> *Kalocsa*, traditional Hungarian embroidery has a Hungarikum designation

<sup>4</sup> All translations of Hungarian are provided by fluent Hungarian speakers unless otherwise indicated.

products. However, the way in which these designations are understood by the designating organization and the consumers can differ drastically. In Hungary the main organization that designates Hungarian produced products is *Magyar Termék* (Hungary Product), a trademarked non-profit organization that labels products according to their level of production within Hungary. There are five different designations, each indicating varying degrees of Hungarian value input: *Magyar Termék* meaning that 100% of the product is Hungarian, from the raw ingredients to the processing to the branding; *Hazai Termék* (Domestic Product) indicating that more than 50% of the ingredients are from Hungary and all of the processing took place within Hungary; *Hazai Feldolgozású Termék* (Domestically processed product) which is a product that is processed within Hungary but mostly contains foreign ingredients; *Magyar Szolgáltatás* (Hungarian service) which indicates that “more than 75% Hungarian value-added service”; and *Kiváló Termék* (Excellent product) designating that it’s quality stands out from the other domestic products available.



Figure 1: Magyar Termék logos. Screenshot by Author of Magyar Termék website.

On the Magyar Termék website page justifying their existence as an organization, they mention three missions: reliability, conscious design, and supporting the domestic economy. For reliability they emphasize that the consumer will get a reliable product without

being misled. They also certify the products “origin”, however, notably these labels do not give specific information about the origins of the product unless they are Hungarian.

Although the different labels cover different degrees of “Hungarian-ness”, in this context, meaning the extent to which Hungary was involved in the product, there’s hardly any visual difference between the main three labels *Magyar Termék* (Hungarian product), *Hazai Termék* (Domestic Product), and *Hazai Feldolgozású Termék* (Domestically processed product). Furthermore, “Foreign” remains a mystery, undefined– it’s not important where products outside of Hungary are from, it’s about whether the products are domestic. Essentially this labeling is a form of a buy national campaign.

*Magyar Termék* is a prime example of a “buy-national campaign” where (typically) governments encourage their citizens to buy nationally as a form of supporting the domestic economy. *Magyar Termék* literally encourages their consumers to “Buy Domestic!” (*Vedd a hazait!*). It does not matter where the product is coming from, the emphasis is on whether it is Hungarian or not, as well as to what extent it is Hungarian. Hungarian buy-local efforts are based on the premise that buying foreign products is a betrayal of the nation. According to Éva, a Tesco executive in charge of National Food Buying, Hungarians believe that multinational institutions are “evil” because they are not Hungarian.

The majority of products in Hungarian grocery stores do not have origins in Hungary (Nemzeti Élelmiszerlánc-biztonsági Hivatal 2021). However, it’s rare to see explicit national branding of non-Hungarian origins products. Even the most visible expressions of non-Hungarian nation branding are subtle, for instance in the case of products sourced from Austria, small Austrian flag ribbons are placed around the product. For products typically associated with Italy, such as pasta and various forms of tomatoes, the brand *Cucina Nobile* (Noble Cuisine) uses blue packaging. Blue has long been the color culturally associated with Italy rather than the color of the national flag (also red white and green), as a surviving tribute

to the official color of the Italian monarchy. Other aspects of the *Cucina Nobile*'s branding was much more subtly Italian: the logo features a nondescript country villa with a red flat roof surrounded by Mediterranean cypress trees. And even then, many of these Italian branded products are not made in Italy or only partially so, and therefore lack origin labels. Although some *Cucina Nobile* labels do specify the country of origin with main ingredients labeled as "EU and non-EU" or have a "Made in Italy" label, the label is never written in Hungarian making it unreadable to the average Hungarian consumer. The red designation is also placed within a red tomato, further obfuscating the Italian origin marker. Furthermore, the products have mandatory EU regulation ingredient lists only in Slovakian and Hungarian languages, meaning the products themselves are not sold within Italy.



Figure 2: *Various Cucina Nobile products from Aldi Hungary. Photo taken by Author.*

Magyar Termék is representative of the Hungarian food designations trends. And a brief comparison with the national branding of non-Hungarian countries furthers the point that Hungarian national branding is not about origin but rather promoting Hungary.

## 2.2 Product Packaging: Dairy and Fruits/Vegetables

There are differences in material qualities of food which require different packaging for branding of the products which in turn, creates different affordances for origin branding. Even within the larger category of branding, dairy products have brand labeling that both indicates a specific origin and connects the company brand with a specific origin. Whereas, for fruits and vegetables the variance in packaging typically lends itself to only origin branding. Regardless, the differences between brand labeling and origin labeling combine in complicated ways. In Hungarian food products sometimes the difference is negligible.

The first grocery category this paper will be analyzing is dairy, with a focus on milk branding, because of the prominence of Hungarian branded products in this section of the grocery stores I studied. I will outline Aldi and TESCO dairy suppliers and analyze the individual brands with a focus on the milk cartons. Both supermarkets rely on a variety of milk suppliers, with Aldi drawing from two suppliers, Alföldi Tej and Milfina, an Austrian company. Tesco Hungary also purchases milk from Alföldi Tej, as well as from five other suppliers so exploring the Alföldi Tej product line will be illustrative.

Alföldi Tej has four brands, *Magyar Tej*<sup>5</sup> (literally ‘Hungarian milk’), RiSKA, Mesés and Pure Milk. Although the majority of milk in Hungary is color coordinated based on its fat

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<sup>5</sup> The brand Magyar Tej has a variety of products which substitute ‘tej’ for that item, some examples include Magyar Tejfol (Hungarian sour cream), Magyar Vaj (Hungarian butter), Magyar Rögös túró (Hungarian ‘cottage cheese’) which is also an EU/UK designated *hagyományos különleges termék* (Traditional Speciality Guaranteed) which differs from geographical indicators in that it does not link a geographical place to the



percentage for ease of identification<sup>6</sup>, Magyar Tej bucks this trend in favor of aggressive Hungarian branding. Regardless of the fat percentage it is covered in polka dotted hearts in red and green on white, mimicking the Hungarian flag. RiSKA and Mesés are both marketed towards children with RiSKÁs mascot featuring a cartoon cow with Hungarian colored spots and Mesés with cartoon monsters. Mesés does not feature Hungarian national branding but does have a heart label *Magyar Gazdák Teje* (Hungarian Farmer’s Milk). This *Magyar Gazdák Teje* heart label is seen on all Alföldi Tej dairy products (besides the “Pure Milk” brand). Even the content produced outside of the supermarket has a strong orientation towards Hungary: the Alföldi Tej Hungarian language website has a list of farmers that range from individuals' names to larger dairy farms, while the Magyar Tej YouTube channel has mini-documentary videos following dairy farmers branded with the same symbol.

TESCO Hungary has five dairy suppliers, Kuntej, Naszálytej (with its sub-brand Jásztej), Mizo, Alföldi Tej and TESCO’s own brand. Kuntej, named after the region in Hungary, was established in 1976, although now it is owned by the largest dairy production company in the world, the French owned Lactalis Group. The Kuntej logo mimics *kalocsa*, a type of traditional Hungarian embroidery and national symbol. Mizo is a Hungarian owned company that is supported by the Government of Hungary with the co-financing of the European Union. Their branding is remarkably un-Hungarian for being officially connected to the government—most of their dairy products feature a minimalistic cow print in the corresponding fat percentage colors. Naszálytej’s brand Jásztej features a traditional Hungarian drinking horn called the *koncovka*. Lastly, Tesco’s own-brand is minimalistically

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product but rather requires a ‘traditional’ raw material, production or processing (“Traditional Specialities Guaranteed” n.d.). TSG’s are part of the EU instituted “special” designation world to protect cultural traditions that would be otherwise hurt by EU regulations and EU markets.

<sup>6</sup> 1.5% is blue, 2.8% is red, 3.5 % is black and lactose free will be a mix of purple and the fat percentage (“ALDI Introduces a New, Unified Milk Brand: MILFINA Has Become MILSANT” 2022)

Hungarian, it indicates its Hungarian origins with a sterile Hungarian flag perhaps reflecting Tesco's ambivalence in participating in national branding.

In comparison to dairy, loose fruits and vegetables were notable for their lack of consistent pattern regarding displayed origins. Unlike packaged items, such as dairy and meat, there's a larger range for the types of packaging fresh produce comes in. For instance, apples can be bought loose, bagged in plastic, and placed on cardboard but wrapped in plastic. Products that are loose by definition do not have packaging, and therefore these products present difficulties in creating the same sort of nationalist branding that can be found on milk or packaged produce. This explains the necessity for a larger variety in methods to market origins. The main source of information about loose produce is a small black and white label beneath the product which states the price (the largest font size), the name (second largest font size), and then finally the origins ("Származási hely"), amount, price per kilogram and product identification. However, Aldi found ways to more dramatically convey the Hungarian origins of their products, with the the most notable being Hungarian paper flags placed right next to the product label. Products from elsewhere do not get their own flag depicting their origin. The emphasis is solely on Hungarian product origins. As cost is the number one decision factor for consumers when shopping for food, placing an indication of Hungary in the form of the flag close to the price is most likely

meant to nudge consumers to buy Hungarian made products.



Figure 3: Picture of paprika from Spain with no national branding on the product.

*Picture by author*

Carrots are a useful example to show the differentiation in marketing and packaging. Aldi typically sells four different carrots; sárgarépa XXL, bio sárgarépa, sárgarépa (loose), sárgarépa (packaged). All originate from Hungary except the bio ones which are from Austria. However their packaging is markedly different. The packaged carrots feature a large Hungarian flag whereas the loose are only indicated via the paper flag next to the price. Similarly TESCO sells three types of green apples all with different marketing and packaging: the cheapest is sold loose and I was unable to find a region of origin; the second one comes in a two kilograms bag and although it's from Hungary, does not have any Hungarian branding; and lastly the most expensive comes in a plastic wrapped pack of four apples with a Hungarian flag sticker and Tesco branding. No fruits or vegetables had an

official *Magyar Termék* label, although many were labeled with the words ‘*Magyar termék*’ without having the trademarked logos, meaning it is just a description "Hungarian product", not the authorized designation as such by the Magyar Termék organization. Instead these fruits and vegetables had more primitive labeling and graphic design, like small red, white and green stickers or tags stuck to the product. The absence of packaging and the simplicity of the designs quickly got the point across about Hungarian origins. Given that most companies pay to have their products labeled with Magyar Termék’s label I assumed the lack of affordances for loose produce was the reason.



Figure 4: *Carrots and other loose produce with Hungarian flags*

## 2.3 Regionalism and Nationalism

In many ways the inconsistency in branding of loose produce products looked similar to the loose product branding of Austria's Aldi, where it seems mainly to highlight the regionality of a product and not necessarily pushing for a nationalist identity.

Hungary's national branding patterns can be contrasted with those of its neighbor, Austria. While Austria has some national branding, it seems to be more preoccupied with regionality and origins over a nationalist identity discourse. A couple years ago (2021-22) the only products that had the Austria flag were produce labeled as "organic" or "bio", usually also marked with the specific region in which they were produced. Generally the Austrian markings come in variations of the Austrian flag, either a small stylized Austrian flag on the center of the product, Austrian flag color ribbons, or a small white heart on the Austrian flag. In some ways Hungary's national branding on loose produce resembles Austria's, which would suggest that regionalism also exists within Hungary.<sup>7</sup> However, Austria does not have similar levels of national branding and label designations with their other products as Hungary. For instance, even though Austria is known for its milk production, both domestically and internationally, its milk products do not feature more national branding than a small Austrian flag in the corner of the milk carton. Similarly if one compares the announcements of Milfina<sup>8</sup>, an Aldi owned milk supplier based in Austria, one can see the differences in tone. Milfina in Austria has Austrian symbols, there's a flag banner that wraps around the milk carton, and Aldi "places great emphasis on regional quality" and as part of a

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<sup>7</sup> And it's possible that Austria is following Hungary as of late June. I was surprised to notice that Aldi in Austria had added the same paper flags next to the price as Hungary. And similarly they do not advertise other country's origin products. It's unclear to me whether this is a shift in suppliers, and Aldi has moved to buy produce from more local suppliers, or if it is in fact taking inspiration from the ubiquity of Hungary's national branding within their stores in Hungary.

<sup>8</sup> Milfina is known as Milsani in Hungary

sustainability initiative places an “emphasis on regional agriculture”(“MILFINA – Fresh Dairy Products | HOFER Own Brand” n.d.). Milfina branding in Hungary is similar aesthetically with a flag banner; it also holds the Magyar Termék and Tejszív logo designations. However the Aldi website only mentions continued availability of Hungarian domestic products without any mention of regionality or sustainability (“ALDI Introduces a New, Unified Milk Brand: MILFINA Has Become MILSANI” 2022).

In contrast to Austrian regional labeling, Hungarian product indications subtly draw regionalism into the service of nationalism. A prime example is how the map of Hungary, also in Hungarian colors, is featured prominently across many pamphlets. One such unofficial (not trademarked) designation is *Hazait, Szeretettel* (“From home, with love”) which is an Aldi logo applied seemingly indiscriminately. It features the map of Hungary contained in a red white and green heart. Interestingly, the hearts' borders are sketchy and vaguely defined, as opposed to the usual graphic design style of crisp and clear lines in food marketing. The vaguely portrayed borders seem to address the sensitivities of many Hungarian nationalists, for whom the current national boundaries represent a great trauma. In 1920, the Treaty of Trianon defined Hungary's borders post World War 1, where it had to cede two-thirds of the territory that had previously constituted the Kingdom of Hungary. Molnar (2021) outlines the resurgence of the use of the “Greater Hungary” map starting in 2006 through banal objects such as car bumper stickers which spread to door posts, tshirts, cakes and even tattoos. The use of the pre-Trianon border map is considered the most prominent current nationalist symbol used by Hungarian nationalists today. In 2010, the newly elected FIDESZ government declared the day the treaty was signed an official national holiday. Since then, the Hungary government has encouraged Greater Hungary rhetoric, from creating dual citizenship to “reunite the Hungarian nation within the existing borders and by peaceful

means”<sup>9</sup> (“A Piece of Hungary for Hungarians Abroad with Dual Citizenship” 2022) to recently (and controversially) wearing a “Greater Hungary” football scarf (BBC News 2022). With this context, one might say that placing the current post-Trianon Hungary in a vaguely-defined heart is a symbolic nod towards a pre-Trianon “Greater Hungary”.

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<sup>9</sup> Quote translated by Hungary Today of Árpád János Potápi the Secretary of State for National Policy





Figure 5: Hungarian meat with Hungarian map in a heart at Aldi. Photo by author.



## CHAPTER 3: SENTIMENT, REGULATION, AND RESPONSES

### 3.1 Hungarian Sentiments about Domestic Food

There are many consumer surveys which show that Hungarians prefer to buy Hungarian products, which would suggest that nationalist branding is somewhat consumer driven. Wolanin-Jarosz (2013) using CETSCALE, a metric used to study how what they call “ethnocentric” consumers” are, found that the Hungarian average “ethnocentricity” was substantially high at 71,9 percent regardless of their economic standpoint or education level. Ethnocentric consumers were defined by taking into consideration “patriotic and moral” rationals in addition to “economic rational favours” (Wolanin-Jarosz 2013, 14) where there was a distinct emphasis on not buying foreign goods in favor of domestic ones. They state that “Ethnocentric behaviour usually takes place when consumers perceive such features like the country of the product origin and in their decision making process actively look for information, which allows them to differentiate the domestic products from the imported ones” (Wolanin-Jarosz 2013, 13). In a national representative survey the motivational factors for grocery purchases found that respondents considered “identifiable origin, healthiness and support for local producers and product manufacturers” as the most important motivating factors (T. Nagy-Pető, D. 2021 in Garai-Fodor and Popovics 2022, 190). In a consumer survey in Kecskemet,<sup>10</sup> conducted by Orban (2021), only 2.4% of the respondents did not consider it important to buy Hungarian products, 19.5% did not pay attention to where the product was Hungarian or foreign whereas 78% percent of the people surveyed indicated that they “consciously buy”(161) Hungarian products. However there is a discrepancy between what Hungarian consumers say, and what they do. As Éva the Tesco manager told me, if you ask Hungarian consumers if they prefer to buy from local suppliers “they will say yes. But if

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<sup>10</sup> Kecskemét is the eight largest city in Hungary and lies just outside Budapest.

they [are] standing in front of the shelves they (will) choose what is the cheaper”. This is exemplified, she said, in UHT milk where Hungarian people, “...say we really need a Hungarian [UHT milk] product but if the Slovakia UHT product is cheaper they buy the Slovakian one”.

TESCO sells both their name brand UHT 2.8% milk and a Slovakian origin UHT 2.8% milk. Even though both are the cheapest on the market, Tesco’s Hungarian brand costs significantly more at 339 HUF/L compared to the Slovakian origin cost of 298 HUF/L. A study looking at food consumption behaviors across Europe found that price is among the “main determinants of purchasing decisions”. In some ways, the national branding is consumer driven, since Hungarian consumers say they want Hungarian domestic products, but ultimately the most important factor for Hungarians in purchasing behavior in food products is cost. Éva told me, “it is very important to buy Hungarian products but at the end of the day the Hungarian products are more expensive.... I think it’s a few people who really buy Hungarian products and do what they want and think.” This split between local and cheap manifests across the world.

Imported goods are often cheaper than local ones in any market, but there are specific regulatory factors that contribute to the higher prices of Hungarian products and generate this choice between domestic and affordable. According to consumers many would like to purchase Hungarian products but can not afford them, creating a disconnect between grocery stores' reasons for national branding and what is sold.

### **3.2 State Policies for Multinational Food Retailers**

Orban’s government has instituted multiple laws and regulatory rules for the food market that mainly target multinational grocery stores. Orban’s government has ordered price caps, tax increases, and time consuming mandatory price-monetary systems. Furthermore

Nebih, a government authority publishes studies comparing foreign and domestic companies by the percentage of Hungarian domestic products.

In December of 2021 when Central and Eastern Europe had intense inflation hitting food prices, Orban's government pushed a bill through, forcing supermarkets with sales revenues above 100 billion forints (€250 million) to give away all their food to state-owned charities 48 hours before their "best before" date. Between December 2021 and November 2022 Orban's government ordered price caps on nine different food staples: sugar, wheat flour, sunflower oil, chicken breast, 2.8% cow's milk, and pork thigh which eventually got expanded to include eggs and potatoes and chicken back (Nieuwsbericht 2023). As Éva explained, it means that "we had to set the retail prices a year before and it wasn't possible to increase these prices. Although the suppliers increased their cost continuously" (2024) meaning the supermarkets had to swallow the cost. Part of the legislation also required the companies to keep the stock, meaning it wasn't possible to stop buying the product or not put it on their shelves. For Tesco and all other large grocery stores, all of which are foreign, it was a huge amount of money lost. A news article written in 2022 talking about 2021 says, "it doesn't help that the giant retailers don't evoke public sympathy, especially if the retailers are making big profits off of sky-high prices... the country's five major foreign-owned brands boosted their turnovers". However in 2023, reflecting on 2022 Éva said, "No one in this country made a profit...only Lidl made a profit...It's a huge [price] cap and that [was] just only one [regulation]".

During this time a policy was also passed that increased tax rates from 2.7% to 4.1% that targeted big retailers ("Hungary Imposes Mandatory Price Cuts on Basic Food Items" 2023). The firms subjected to the rules were all foreign owned, German Aldi and Lidl, French Auchan, Irish Penny Market, Austrian Spar and UK's Tesco. No Hungarian firms (Real, CBA and Coop) were impacted since the domestic grocery retailers, despite reaching the 100-

billion-forint (euros 2,604,440) threshold, operate underneath a franchise system, sidestepping the new policies. The law also prevents supermarket chains from similarly restructuring. A representative of one of the impacted foreign retailers declared, "It is simply impossible to operate profitably in a sustainable manner under such circumstances imposed by the Hungarian government", a sentiment shared by others in the industry. (Savage 2022)

Furthermore, the third policy the Hungarian government issued, Éva explained, was a price monitoring system, requiring all the foreign retailers (Aldi, Lidl, Auchan, Penny, Spar, Tesco) to upload the daily prices of "close to 80 categories" of food some of which include dairy, meat, and bakery products. The website, *Árfigyelő* (Price watcher) allows consumers to compare products from all of the brands and choose the cheapest product. Its intention is to force the foreign companies to continuously compete with each other, lowering prices for consumers—and it seems to work this way. Éva told me, "We check these price monitoring systems all the time, 'Oh, Penny dropped their prices, let's follow them', it's a nightmare". Éva also complained that the supplier uses the legislation against Tesco and other companies because they know the exact prices and know that "we have to keep the products on our shelves," adding, "it's hard. ... I don't really know what I did before these legislation[s]".

Orbán's government imposed these legislation and restrictions with the stated aim of reducing the high inflation rates caused by the war on Ukraine and its effects on supply chains and energy. However, the European Union wrote that not only has it failed to address the inflation, the tax on the retail sector "disproportionately burdens larger companies that do not have their headquarters in Hungary" (European Commission 2023). In essence this legislation puts multinational grocery stores in a difficult position.

In 2014, *Nemzeti Élelmiszerlánc-biztonsági Hivatal* (Nébih, The National Food Chain Safety Office), a government authority established in 2012 under the Ministry of Agriculture,

published a study conducted on the number of Hungarian products in grocery stores. Limiting the study to only agricultural and animal products actively produced in Hungary, Nébih found that around 70% is domestic and 30% is foreign in all grocery stores, with domestic chains generally supplying a higher percentage of domestic products. Although in the case of meat, the majority of the foreign owned companies had 100% domestic meat while there was no data for domestically owned grocery stores. In 2020 they repeated the study and found similar results where most international stores had 66.79% domestic products compared to domestic stores which had 79.26% (Nemzeti Élelmiszerlánc-biztonsági Hivatal 2021). As Éva explained, they looked at each top grocery store and compared “which retailer has more Hungarian products, which has less, how many percent within your range”, explicitly highlighting or calling out certain stores. It’s an influential study as many newspaper organizations referred to it throughout the ongoing years contributing to anti-foreign/multinationals and pro-domestic rhetoric within Hungarian consumers. Between the official studies some media companies have conducted mini-assessments such as Penzcentrum who called each distributor to see how many Hungarian products are on the shelves (Penzcentrum 2021) furthering the discourse.

### **3.3 Multinational Responses and Perspectives**

All three of these regulations and anti-foreign discourse puts Tesco and other multinational stores in a tough position. For instance, in 2023 Spar Hungary paid an additional 76 million euros tax to Hungary's budget, revealing that they are operating at a loss since the regulations (Woods 2024). Tesco and Aldi’s response to the results of these consumer surveys, regulations, and anti-foreign rhetoric is to make clear commitments to Hungarian domestic products.

Tesco has a hundred percent commitment to domestic meat in the fresh meat counter section. Hungary does not produce enough domestic animals to sustain its domestic consumption. For instance the majority of processed meat is imported and then processed in Hungary (“Magyar Termék Nonprofit Kft.” n.d). Éva explained that Tesco specifically invests in fresh chicken “with lots of money” because “we don’t have enough chicken here in Hungary, so many competitors have to buy [chicken’s] in Romania. But in Tesco we have a commitment to keep the Hungarian chicken”. Aldi also has a hundred percent commitment to Hungarian meat, in 2021 declaring, “from now on, the products of the company’s permanent fresh meat range only come to the stores from Hungarian sources” and also emphasizing that “all fresh meat is made from Hungarian ingredients” (“The Purchase of Fresh Meat Products Available in ALDI’s Permanent Offer Is Changing...” 2021). The commitments extend beyond fresh meat. Aldi also made commitments in the dairy sector and Tesco made commitments “in the segments that are extremely important for customers and for Hungarian agriculture” (Penzentrum 2021) such as milk, *turo*, sour cream, honey and wine<sup>11</sup>. This would suggest Tesco’s decisions regarding domestic products are purely about consumer based interests which is a large part of it. Éva understands part of these measures as to push back against “the government communication” which pushes the narrative that, “[all] the ... foreign multinational companies are ...evil” as well as stating that, “this commitment is mainly for the government because it’s important to show them that we keep the Hungarian products”. Tesco participates in national branding for a complex set of reasons, it is partly to comply with government legislation to avoid fines, partly to counter consumers' conceptions about foreign companies and partly because organizations like Magyar Termék make it easy. As the government produces anti-multinational rhetoric, citizens listen and profess to prefer

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<sup>11</sup> Éva noted that wine is “not 100% Hungarian but 95% Hungarian” (2023).

Hungarian products. As a response these foreign grocery stores both perform for the Hungarian consumer and for the government.

Tesco and Aldi also work in close cooperation with labeling organizations such as Magyar Termék. Hungarian manufacturers and suppliers pay organizations like Magyar Termék to use the labels on their products. However, it is not mandatory for the grocery store to advertise with these labels. Tesco, Éva explained, “prefers to use this label” and whenever Tesco sees that a product has the logo they place the logo next to the product on their promotional campaigns, such as weekly sales pamphlets, websites, and billboard ads. Éva repeatedly stressed the importance of “communicating” to the Hungarian public that Tesco has “all Hungarian brand[s] and products” and this is one way to illustrate that.

## CHAPTER 4: NATIONALISM AS A RESPONSE TO OPEN MARKETS

I argued above that the nationalist discourse promoted by the Orbán administration is the main reason that Hungarian consumers are against large multinational grocery stores. However, the globalization of the Hungarian food market has generated real problems that contribute to these anti-multinational sentiments.

First, the opening of the Hungarian market to the rest of Europe and beyond has not always brought high-quality products and has given Hungarian consumers good reasons to be distrustful. In 2017, a number of studies came forward comparing the same brand products sold in Western Europe to Eastern and Central Europe and showing that in all cases the product in Eastern Europe was generally inferior. Many of the accused companies claimed to be accounting for so-called ‘regional taste preferences’ which many central and eastern consumers rightfully took offense to when it means, “more sugar, lower percentage of fruit, lower percentage of meat; never vice-versa” (The Guardian 2017, Interview from Romania). There's a well-founded skepticism towards multinational grocery stores as not looking out for Hungarian consumers' health. A more complicated example is in 2022 there was a shortage of honey that companies met with Chinese imports. Typically Hungary has a large domestic honey production that covers all domestic demands, but weather and disease limited production. Although domestic production would have still covered Hungarian consumption, farmers had to make all their income off a smaller amount leading to higher prices. To keep prices affordable, companies imported Chinese honey. However, the Chinese honey was found to be completely fake and made up of sugar derivatives. Today, honey is one of the most important food products for Hungarians to be Hungarian that is not fresh. Although



neoliberalism and globalization has caused many negative effects, part of the possibility and continued existence of multinational corporations is globalization and neoliberalism.

Hungary's agricultural sector is suffering from the effects of globalization. In the 1990s, under state communism, there were high levels of state subsidies and protections from import competition. However when communism collapsed Hungary rapidly transitioned to a market oriented economy which led to a "rapid collapse of traditional agricultural and food policy" (Fehér 2006, 461) causing a decline in domestic purchasing power and increased competition from imported products. Although the new economy allowed consumers access to a larger variety of high quality Western products at relatively affordable prices (Fehér 2006, 463), it also put pressure on domestic enterprises. When Hungary joined the EU in 2004, there was another shift as farmers were subject to more rules and regulations than previous Hungarian food acts (Fehér 2006, 466). In 1989 most Hungarian exports were shipped to other former Soviet Union countries which generally had lower quality and safety standards than the EU, thus they had to cover costly modernizations with EU entry. The EU food laws also aims to, "harmonize the existing national requirements (Fehér 2006 466) to ensure that food can move freely throughout the EU, arguably a central tenet of neoliberalism. EU laws have expanded some regulations, such as geographical indicators, but they generally strive for a de-personal free-market, for example, by promoting food origin labels that refer to "within the EU region".

Today, Hungarian domestic products are often more expensive than imported goods which makes the overall price of food much higher in Hungary. For instance, I purchased the same exact goods at a Hungarian Aldi and an Austrian Aldi and the Hungarian basket cost 1.23 euros more than the Austrian one. This discrepancy does not even take into account the large average income disparity between Austria and Hungary. In Hungary "The proportion spent on food is the highest among consumer expenditures" (Garai-Fodor, Popovics and,

Csiszárík-Kocsir 2022, 1) where in most other places the highest proportion of income is spent on housing. Hungarian goods are more expensive than imports in part due to production costs of Hungarian farms, which tend to be smaller and less efficient than non-Hungarian farms. It's also due to the neoliberal economy allowing more lucrative opportunities for suppliers to sell to other countries in Euros rather than to Hungary with its weak currency the Forint. For example, Hungarian dairy farmers often sell their milk to Italy for processing in Italian facilities (Éva 2024). Neo-liberal economies also create the context where countries can export their surplus at lower costs disrupting the local market. For instance, Spain produces more strawberries than the domestic market demands, so the surplus goes into Hungarian markets at a cheaper price, undercutting Hungarian strawberry farmers. Furthermore, when there are inevitable problems with domestic production, demand is easily filled in with international productions which creates a cycle where it's more expensive to produce on a smaller scale if there's no intervention, such as the case with honey. In looking at the disparity problems caused by neo-liberal economies, Navarro (2007) argues that poor countries need to shift from export-oriented economies to domestic-oriented growth. Hungary's strong state protectionist influences and a push to a more localized economy is a direct push away from a neo-liberal market-oriented economy. Nationalist food policy becomes a defensible position in the context of the damages that neoliberalism has wrought to Hungary's food economy. Whether the rest of Orbán's nationalist rhetoric and conservative politics is defensible is an entirely different question.

## CONCLUSION

An examination of Hungary's Tesco and Aldi's national branding of food products has illustrated how Hungarian consumer preferences and government policies have led these multinationals to participate in Hungary's nationalist politics. Food is a unique substance, "we *become* what we eat" (Fischler 1988, 279) as we incorporate food into our bodies and thus our selves and identities. Branding, as an extension of food products, becomes a powerful tool for nationalist rhetoric. In Hungary, Orban's conservative administration has pushed protectionist legislation to the forefront by seeking out the EU's Geographical Indicators in order to protect Hungarian food traditions. They have also created their own domestic protectionist office which highlights Hungarian traditions. Related to these larger projects, Hungary is notable for the prevalence of Hungarian branding on everyday food products. Shopping at a grocery store in Hungary you would be surprised to learn that regardless of the grocery stores national ownership 70% of the goods sold are foreign made (Nemzeti Élelmiszerlánc-biztonsági Hivatal 2021). Internationally made products do not receive the same attention to national iconography than Hungarian made products. Domestic products are pressed into the forefront with heavy-handed nationalist branding. The national origins of food products not from Hungary are foreshadowed by the abundance of Hungarian nationalist branding at the hands of Hungarian suppliers, organizations like Magyar Termék, and the foreign companies themselves. Even as Orban's government targets foreign companies with higher taxes, price caps, and regulations that force competition within each other, Aldi and Tesco participate in the national branding schemes. Their compliance is partly forced but they also seek to counter consumers' conceptions about foreign companies. The fact that organizations like Magyar Termék work with suppliers to designate products as domestic also makes it easy for foreign owned companies to incorporate it within their usual branding campaigns. A variety of discourse surrounding consumers places emphasis on

purchasing domestic products through “buy national” campaigns as well as anti-foreign and pro-nationalist rhetoric. Hungary’s food branding is a complex system made up of multiple independent actors that, when examined individually, are not intentionally participating in a national politics. However, given the nationalist context of modern Hungary, these branding efforts serve to advance that same politics.

Within the context of neoliberalism, nationalist food policy can be seen as a defensible stance. However, the question remains whether such policies will ultimately benefit the health and prosperity of Hungary and its citizens. On one hand, multinational grocery stores, despite not turning a profit, continue to operate in Hungary without plans to withdraw. Similarly, the EU appears hesitant to intervene and correct Orbán’s nationalistic policies that conflict with EU ideals. While the current situation seems stable, a significant question persists regarding how long multinational retailers will accept their losses and how long the Hungarian government can sustain subsidizing and “compensating for the losses of the unprofitable domestic dairy and meat industries” (“The Domestic Meat and Dairy Industry Is Losing Money, but It Receives a Lot of Support” 2023).

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