# Hot Drinks in Hungary

December 2025

Table of Contents

## Hot Drinks in Hungary

### EXECUTIVE SUMMARY

High prices, global supply disruption and weakening consumer confidence shape a challenging year for hot drinks

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Convenience-driven premiumisation in coffee pods continues despite pressures in the broader market

Fruit and herbal teas gain traction as wellness needs intensify and consumers seek functional comfort

Price sensitivity remains a defining force in consumer decision-making and shapes all hot drinks categories

### WHAT'S NEXT?

Modest value growth ahead as stabilising inflation, improved availability and renewed category engagement support recovery

Coffee culture remains the dominant long-term force as home-brewing, RTD formats and premium experiences drive modernisation

Functional innovation and health-aligned reformulation will accelerate across hot drinks, with fruit/herbal tea and cocoa leading diversification

### COMPETITIVE LANDSCAPE

Nestlé retains market leadership but faces pressure from structural declines in instant coffee and intensifying competition

Bedeco returns as the most dynamic company, capturing momentum through nostalgic branding and modern wellness positioning

### CHANNELS

Supermarkets and hypermarkets remain dominant, but discounters gain ground as affordability becomes critical

E-commerce accelerates as digital convenience, improved assortment and younger shopper engagement drive structural growth

### FOODSERVICE VS RETAIL SPLIT

Foodservice recovers as tourism, warmer weather and improving consumer sentiment lift on-trade activity

### MARKET DATA

Tea expected to record modest value growth as consumption broadens beyond winter remedies
Fruit and herbal teas to lead innovation as brands leverage functionality, flavour diversity and new formats
Private label expansion in wellness-led teas to shape competition and improve accessibility

COMPETITIVE LANDSCAPE

Pickwick maintains leadership through breadth of range, legacy trust and everyday accessibility
Private label outperforms as price sensitivity rises and retailer brands broaden their ranges

CHANNELS

Large-format grocery remains central while gradually ceding share to discounters and online
Discounters and e-commerce gain importance as value and convenience reshape purchasing habits

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

## Other Hot Drinks in Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inflation-fatigued households, stabilising prices and enduring family indulgence define performance

INDUSTRY PERFORMANCE

Retail value sales of other hot drinks increased in 2025, but demand remains highly vulnerable to economic shocks
Chocolate-based flavoured powder drinks remain the most resilient segment as plant-based alternatives stay niche

WHAT'S NEXT?

Slow but steady value growth expected as family indulgence and brand loyalty underpin category resilience
Brand-led innovation, digital engagement and portfolio premiumisation strengthen category competitiveness
Wellness and nostalgia converge as legacy brands adapt to lighter, health-conscious positioning

COMPETITIVE LANDSCAPE

Nestlé Hungária Kft consolidates category leadership with a two-tier portfolio spanning family staples and premium indulgence
Bedeco Kft emerges as the most dynamic player as a retro brand is reborn for the wellness era

CHANNELS

Hypermarkets and supermarkets retain leadership while discounters and e-commerce steadily gain influence
E-commerce becomes an increasingly important growth engine as families embrace digital convenience

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025