



**Euromonitor
International**

Hot Drinks in Hungary

December 2025

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

High prices, global supply instability and shifting consumer behaviour define performance in 2025

INDUSTRY PERFORMANCE

High prices constrain demand while premium beans and pods demonstrate resilience

Fresh ground coffee pods lead category growth due to premium convenience and expanding machine penetration

WHAT'S NEXT?

Market stabilisation and fresh coffee growth expected as inflation eases and premium home-brewing culture strengthens

Digital innovation, upgraded private label and technology-driven convenience accelerate competitive intensity

Sustainability, wellness and RTD innovation become structural growth engines

COMPETITIVE LANDSCAPE

Tchibo Budapest Kft retains leadership through strong omnichannel presence and ongoing brand renewal

Segafredo Zanetti Magyarország Kft emerges as the fastest-growing player as premium beans gain traction

CHANNELS

Hypermarkets and large grocery formats remain central, but discounters and e-commerce gain momentum

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[Tea in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price fatigue, fragile tea culture and wellness-led niches shape performance in a soft market

INDUSTRY PERFORMANCE

Weak tea culture and price sensitivity keep the category on a downward path despite easing inflation

Fruit and herbal teas remain the core engine of value as wellness positioning sustains interest

WHAT'S NEXT?

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

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[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
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