



Other Hot Drinks in Hungary

December 2025

Table of Contents

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 1 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
- Table 2 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
- Table 3 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025
- Table 4 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025
- Table 5 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025
- Table 6 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025
- Table 7 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030
- Table 8 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030
- Table 9 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030
- Table 10 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.

- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/other-hot-drinks-in-hungary/report.