



Retail in Hungary

March 2025

Table of Contents

EXECUTIVE SUMMARY

Retail in 2024: The big picture

Special retail tax continues to take a toll on large multinational chains

Sustainability concerns remain influential as new deposit return scheme is launched

What next for retail?

OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2024

Seasonality

Black Friday

Christmas

Back-to-school

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2019-2024

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2019-2024

Table 3 - Sales in Retail Offline by Channel: Value 2019-2024

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2019-2024

Table 5 - Retail Offline Outlets by Channel: Units 2019-2024

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2019-2024

Table 7 - Sales in Retail E-Commerce by Product: Value 2019-2024

Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2019-2024

Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 11 - Sales in Grocery Retailers by Channel: Value 2019-2024

Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2019-2024

Table 13 - Grocery Retailers Outlets by Channel: Units 2019-2024

Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2019-2024

Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2019-2024

Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2019-2024

Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 21 - Retail GBO Company Shares: % Value 2020-2024

Table 22 - Retail GBN Brand Shares: % Value 2021-2024

Table 23 - Retail Offline GBO Company Shares: % Value 2020-2024

Table 24 - Retail Offline GBN Brand Shares: % Value 2021-2024

Table 25 - Retail Offline LBN Brand Shares: Outlets 2021-2024

Table 26 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 28 - Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 29 - Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2024-2029

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2024-2029

Table 36 - Forecast Sales in Retail Offline by Channel: Value 2024-2029

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2024-2029

Table 38 - Forecast Retail Offline Outlets by Channel: Units 2024-2029

Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2024-2029

Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2024-2029

Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2024-2029

Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2024-2029

Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2024-2029

Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2024-2029

Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2024-2029

Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2024-2029

Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2024-2029

Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Convenience stores face growing threat from other modern grocery retailers
- Orlen acquires several service stations from MOL
- Forecourt retailers chains continue to expand their foodservice offerings

PROSPECTS AND OPPORTUNITIES

- Competition from other formats will limit growth potential of convenience stores
- Numbers of 24-hour forecourt retailers expected to decline further
- More attractive franchise incentives could shake up competitive landscape

CHANNEL DATA

Table 54 - Convenience Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 55 - Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 56 - Sales in Convenience Retailers by Channel: Value 2019-2024

Table 57 - Sales in Convenience Retailers by Channel: % Value Growth 2019-2024

Table 58 - Convenience Retailers GBO Company Shares: % Value 2020-2024

Table 59 - Convenience Retailers GBN Brand Shares: % Value 2021-2024

Table 60 - Convenience Retailers LBN Brand Shares: Outlets 2021-2024

Table 61 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 62 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 63 - Forecast Sales in Convenience Retailers by Channel: Value 2024-2029

Table 64 - Forecast Sales in Convenience Retailers by Channel: % Value Growth 2024-2029

Supermarkets in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value sales and outlet numbers contract as threat from discounters intensifies
Supermarkets chains invest in more technologically advanced store infrastructure
Spar still the dominant player in value terms

PROSPECTS AND OPPORTUNITIES

Supermarkets set to remain an integral part of Hungary's grocery retailing landscape
Efforts to resist threat from discounters will centre on pricing and assortment variety
Chains likely to focus more on boosting same-store sales than opening new outlets

CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2019-2024
Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024
Table 67 - Supermarkets GBO Company Shares: % Value 2020-2024
Table 68 - Supermarkets GBN Brand Shares: % Value 2021-2024
Table 69 - Supermarkets LBN Brand Shares: Outlets 2021-2024
Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029
Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Hypermarkets in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hypermarkets continue to lose ground to discounters
Local company Indotek acquires large stake in Auchan's Hungarian operations
Leading chains reduce selling space allocated to non-grocery items

PROSPECTS AND OPPORTUNITIES

Plaza Stop Act limits scope for further growth in outlet numbers
Special retail tax will continue to disproportionately affect hypermarkets
Acquisitions may be the only viable path for potential new entrants

CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2019-2024
Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024
Table 74 - Hypermarkets GBO Company Shares: % Value 2020-2024
Table 75 - Hypermarkets GBN Brand Shares: % Value 2021-2024
Table 76 - Hypermarkets LBN Brand Shares: Outlets 2021-2024
Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029
Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Discounters in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Discounters is the most dynamic performer within grocery retailers
Appearance of Lidl private label products on Avokado platform sparks controversy
Anticipated entry of Russian chain Mere fails to materialise

PROSPECTS AND OPPORTUNITIES

Discounters will continue to outperform all other grocery retailers channels
Expansion of non-grocery assortments set to remain a key strategy

Consolidation and regulatory barriers likely to deter new entrants

CHANNEL DATA

Table 79 - Discounters: Value Sales, Outlets and Selling Space 2019-2024

Table 80 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 81 - Discounters GBO Company Shares: % Value 2020-2024

Table 82 - Discounters GBN Brand Shares: % Value 2021-2024

Table 83 - Discounters LBN Brand Shares: Outlets 2021-2024

Table 84 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 85 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Small Local Grocers in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Outlet numbers continue to decline amidst mounting cost and competitive pressures

All Norbi Update outlets close as franchise owner goes into liquidation

Falling revenues from tobacco sales prompt strategic changes

PROSPECTS AND OPPORTUNITIES

Outlet numbers set to shrink further but current value growth should remain steady

Diversification efforts likely to focus on foodservice and more niche packaged foods

Competitive landscape expected to remain highly fragmented

CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2019-2024

Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 88 - Small Local Grocers GBO Company Shares: % Value 2020-2024

Table 89 - Small Local Grocers GBN Brand Shares: % Value 2021-2024

Table 90 - Small Local Grocers LBN Brand Shares: Outlets 2021-2024

Table 91 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 92 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

General Merchandise Stores in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Variety stores continue to perform strongly

Department stores remains a non-existent channel in Hungary

Ecofamily further consolidates its already dominant position in value terms

PROSPECTS AND OPPORTUNITIES

Convenience and affordability of variety stores will continue to win over shoppers

Department stores likely to remain absent from the Hungarian retail landscape

Chained operators expected to witness strong growth in online sales

CHANNEL DATA

Table 93 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2019-2024

Table 94 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 95 - Sales in General Merchandise Stores by Channel: Value 2019-2024

Table 96 - Sales in General Merchandise Stores by Channel: % Value Growth 2019-2024

Table 97 - General Merchandise Stores GBO Company Shares: % Value 2020-2024

Table 98 - General Merchandise Stores GBN Brand Shares: % Value 2021-2024

Table 99 - General Merchandise Stores LBN Brand Shares: Outlets 2021-2024

Table 100 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 101 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 102 - Forecast Sales in General Merchandise Stores by Channel: Value 2024-2029

Table 103 - Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2024-2029

Apparel and Footwear Specialists in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Trade picks up as inflation recedes but outlet numbers continue to fall

Primark opens its first store in Hungary

Growing demand for second-hand products restricts value growth potential

PROSPECTS AND OPPORTUNITIES

Polarisation likely to become more entrenched

Omnichannel strategies and sustainability initiatives will be key areas for investment

Focus on designer products could offer growth opportunities for independent stores

CHANNEL DATA

Table 104 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 105 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 106 - Apparel and Footwear Specialists GBO Company Shares: % Value 2020-2024

Table 107 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2021-2024

Table 108 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2021-2024

Table 109 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 110 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Appliances and Electronics Specialists in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Enduring budget-consciousness limits uptick in current value sales growth

eMAG closes most of its physical stores to focus on online sales

Threat from e-commerce intensifies with arrival of Temu

PROSPECTS AND OPPORTUNITIES

Outlet numbers will continue declining as sales migrate to online platforms

BNPL facilities set to become more widely available

More players expected to develop trade-in programmes

CHANNEL DATA

Table 111 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 112 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 113 - Appliances and Electronics Specialists GBO Company Shares: % Value 2020-2024

Table 114 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2021-2024

Table 115 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2021-2024

Table 116 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 117 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Home Products Specialists in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Current value sales remain in negative territory despite improved trading conditions
Pet shops and superstores is the best performing channel
IKEA expands its mobile click and collect service to 15 new locations

PROSPECTS AND OPPORTUNITIES

Increasing preference for online purchases will temper expansion in value terms
Declining trend in outlet numbers set to persist
Government housing subsidies expected to remain a key demand driver

CHANNEL DATA

- Table 118 - Home Products Specialists: Value Sales, Outlets and Selling Space 2019-2024
- Table 119 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 120 - Sales in Home Products Specialists by Channel: Value 2019-2024
- Table 121 - Sales in Home Products Specialists by Channel: % Value Growth 2019-2024
- Table 122 - Home Products Specialists GBO Company Shares: % Value 2020-2024
- Table 123 - Home Products Specialists GBN Brand Shares: % Value 2021-2024
- Table 124 - Home Products Specialists LBN Brand Shares: Outlets 2021-2024
- Table 125 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 126 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 127 - Forecast Sales in Home Products Specialists by Channel: Value 2024-2029
- Table 128 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2024-2029

Health and Beauty Specialists in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Outlet numbers continue to shrink as trading conditions remain challenging
Adoption of premiumisation strategies increasingly visible in beauty specialists
Rossmann's Isana private label products now sold in Spar outlets

PROSPECTS AND OPPORTUNITIES

Rising health- and image-consciousness will continue to boost trade
Pharmacies set to remain the largest and most dynamic channel in value terms
Vending sales unlikely to pose significant threat to health and beauty specialists

CHANNEL DATA

- Table 129 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2019-2024
- Table 130 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 131 - Sales in Health and Beauty Specialists by Channel: Value 2019-2024
- Table 132 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2019-2024
- Table 133 - Health and Beauty Specialists GBO Company Shares: % Value 2020-2024
- Table 134 - Health and Beauty Specialists GBN Brand Shares: % Value 2021-2024
- Table 135 - Health and Beauty Specialists LBN Brand Shares: Outlets 2021-2024
- Table 136 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 137 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 138 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2024-2029
- Table 139 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2024-2029

Vending in Hungary

KEY DATA FINDINGS

2024 DEVELOPMENTS

Current value growth slows as inflation stabilises but trade remains buoyant
New deposit return scheme drives up unit prices in soft drinks vending
Franchise model supports swift expansion of Vendobox concept

PROSPECTS AND OPPORTUNITIES

Vending will continue to benefit from busy lifestyles and innovation in product mixes
Coca-Cola expected to retain overall lead in value sales terms
Hot drinks vending likely to see further improvements in coffee quality standards

CHANNEL DATA

Table 140 - Vending by Product: Value 2019-2024
Table 141 - Vending by Product: % Value Growth 2019-2024
Table 142 - Vending GBO Company Shares: % Value 2020-2024
Table 143 - Vending GBN Brand Shares: % Value 2021-2024
Table 144 - Vending Forecasts by Product: Value 2024-2029
Table 145 - Vending Forecasts by Product: % Value Growth 2024-2029

[Direct Selling in Hungary](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Direct selling continues to lose ground to e-commerce
Agent-operated stores help Avon to maintain its leading position
Lux rebranded as Richter following sale of local subsidiary

PROSPECTS AND OPPORTUNITIES

Threat from e-commerce will continue to limit growth potential
Rising levels of distrust among consumers pose a further challenge
Competitive landscape likely to become more consolidated

CHANNEL DATA

Table 146 - Direct Selling by Product: Value 2019-2024
Table 147 - Direct Selling by Product: % Value Growth 2019-2024
Table 148 - Direct Selling GBO Company Shares: % Value 2020-2024
Table 149 - Direct Selling GBN Brand Shares: % Value 2021-2024
Table 150 - Direct Selling Forecasts by Product: Value 2024-2029
Table 151 - Direct Selling Forecasts by Product: % Value Growth 2024-2029

[Retail E-Commerce in Hungary](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local players face growing threat from Asian giants
Two online marketplaces make their debut in 2024
New delivery regulation imposes additional cost and administrative burden

PROSPECTS AND OPPORTUNITIES

Outlook remains bright but smaller players will struggle to gain ground
Growing availability of BNPL services will continue to boost e-commerce sales
More grocery retailers expected to partner with third-party delivery specialists

CHANNEL DATA

Table 152 - Retail E-Commerce by Channel: Value 2019-2024

Table 153 - Retail E-Commerce by Channel: % Value Growth 2019-2024

Table 154 - Retail E-Commerce by Product: Value 2019-2024

Table 155 - Retail E-Commerce by Product: % Value Growth 2019-2024

Table 156 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 157 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 158 - Forecast Retail E-Commerce by Channel: Value 2024-2029

Table 159 - Forecast Retail E-Commerce by Channel: % Value Growth 2024-2029

Table 160 - Forecast Retail E-Commerce by Product: Value 2024-2029

Table 161 - Forecast Retail E-Commerce by Product: % Value Growth 2024-2029

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/retail-in-hungary/report.