



# 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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### SOURCES

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[Coffee in Hungary](#)

### 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

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