

# Carbonates in Hungary

December 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Carbonates return to growth as inflation slows and promotional intensity fuels demand

### INDUSTRY PERFORMANCE

Carbonates return to positive growth as price pressures ease

Non-cola carbonates emerge as the fastest-growing category, supported by flavour innovation and mixers

### WHAT'S NEXT?

Steady growth expected as stabilising prices, innovation and reduced-sugar varieties support demand

Digital innovation and tech-enabled marketing underpin future category development

Sustainability and regulation shape long-term operational priorities

### COMPETITIVE LANDSCAPE

Coca-Cola HBC Magyarország retains clear leadership supported by brand strength and continuous innovation

Coca-Cola HBC Magyarország was also the most dynamic performer through innovation and consumer activation

### CHANNELS

Hypermarkets remain the leading channel but slowly lose share to discounters

E-commerce becomes the fastest-growing channel as digital grocery adoption expands

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## Soft Drinks in Hungary - Industry Overview

### EXECUTIVE SUMMARY

2025 sees the soft drinks market recover as inflation eases and innovation regains momentum

### KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Healthier formulations, innovation cycles, and small but dynamic categories propel growth in 2025

Value remains central as shoppers remain price conscious despite improving sentiment

## WHAT'S NEXT?

Stable growth ahead as innovation, lifestyle shifts, and improved purchasing power support the forecast outlook

Brand owners intensify activity through product diversification and marketing investment

Niche categories emerge as innovation engines for the future

## COMPETITIVE LANDSCAPE

Coca-Cola HBC Hungary Kft maintains leadership through portfolio breadth, investment and strong execution

Szentkirályi-Kékkúti Asványvíz Kft stands out as the most dynamic performer

Private label remains essential for budget-conscious households

## CHANNELS

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E-commerce accelerates from a low base, driven by convenience and improved digital infrastructure

Discounters gain ground as shoppers seek value-driven propositions

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