



Soft Drinks in Hungary

December 2025

[Table of Contents](#)

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 Ásványvíz Kft stands out as the most dynamic performer

Private label remains essential for budget-conscious households

CHANNELS

Hypermarkets remain the leading channel, though share continues to erode

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

Discounters gain ground as shoppers seek value-driven propositions

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Hungary

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water returns to growth as prices stabilise and DRS disruption eases

INDUSTRY PERFORMANCE

Bottled water benefits from easing inflation and health-led demand

Functional bottled water leads growth as consumers seek more than simple hydration

WHAT'S NEXT?

Steady growth outlook supported by health trends and expanding flavoured and functional segments

Functional water innovation intensifies as brands compete on benefits rather than flavour alone

Flavoured water and healthier positioning will benefit from wellness and sustainability trends

COMPETITIVE LANDSCAPE

Private label retains the largest share but faces renewed competition from strong brands

Functional water specialists and brand extensions drive the strongest growth

CHANNELS

Hypermarkets lead but discounters and supermarkets gain ground in bottled water distribution

E-commerce grows rapidly from a small base, supported by digital grocery adoption

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Hungary

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

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability and familiarity keep concentrates relevant

INDUSTRY PERFORMANCE

Concentrates maintain growth as value proposition holds firm

Liquid concentrates remain the growth engine

WHAT'S NEXT?

Steady, value-led growth expected over the forecast period

Innovation in flavours, formats and healthier recipes

Local champions to remain at the heart of category development

COMPETITIVE LANDSCAPE

Pölöskei and Bolero set the tone in liquid and powder segments

New powder entrants intensify competition and expand choice

CHANNELS

Modern grocery remains the core route to market

Discounters surge while e-commerce builds from a low base

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak demand persists as affordability pressures push consumers away from juice

INDUSTRY PERFORMANCE

Consumers cut back on juice volumes and shift to cheaper alternatives

Juice drinks prove more resilient as value-focused and versatile segment

WHAT'S NEXT?

Gradual recovery expected, led by premium one hundred percent juice and functional blends

Functional and added-value innovation reshapes the competitive landscape

Health and wellness trends support premium tiers and convenient formats

COMPETITIVE LANDSCAPE

Sió-Eckes Kft retains leadership through strong brands and health-focused innovation

Maspex Olympos Kft and private label outperform the market amid ongoing decline

CHANNELS

Hypermarkets remain key but lose ground to discounters and convenience-orientated formats

E-commerce grows rapidly from a low base as digital grocery adoption increases

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Café-style indulgence, flavour innovation and youth demand fuel rapid expansion

INDUSTRY PERFORMANCE

Local country-specific insights: RTD coffee firmly on a growth path

Flavoured RTD coffee as the main growth engine

WHAT'S NEXT?

Country-specific outlook: strong growth potential as coffee culture deepens

Digital and product innovation: flavour, format and “lighter” options

Premiumisation and positioning: RTD coffee as an affordable indulgence

COMPETITIVE LANDSCAPE

Hell Energy Magyarország consolidates leadership with HELL Coffee

Branded RTD coffee gains ground over private label

CHANNELS

Modern grocery as the main platform, with discounters gaining ground

E-commerce as a fast-growing complementary channel

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Tea in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health-led reformulation and stronger value cues underpin RTD tea growth

INDUSTRY PERFORMANCE

RTD tea consolidates its recovery

Reduced-sugar RTD tea drives incremental growth and premiumisation

WHAT'S NEXT?

Steady growth underpinned by wellness and variety

Digital and product innovation: reformulation, flavour expansion and pack diversification

Reducing seasonality and embedding RTD tea in everyday routines

COMPETITIVE LANDSCAPE

Hell Energy Magyarország extends its lead with Xixo

Branded RTD teas gain ground as private label comes under pressure

CHANNELS

Modern grocery remains core, with discounters in the lead

E-commerce gains traction as a complementary growth engine

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

New youth sales ban slows but does not derail energy drinks growth

INDUSTRY PERFORMANCE

Growth moderates as regulation and high prices reshape consumer behaviour

Reduced sugar formats outpace the wider category

WHAT'S NEXT?

Energy drinks expected to maintain growth in a more regulated environment

Healthier positioning and functionality guide innovation

Legislative tightening and adjacent categories reshape the competitive context

COMPETITIVE LANDSCAPE

Hell Energy Magyarország Kft consolidates domestic leadership

Red Bull and multinational competitors drive premium and flavour-led growth

CHANNELS

Hypermarkets remain key but discounters continue to gain importance

Discounters and e-commerce emerge as the most dynamic routes to market

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks gain traction as active lifestyles and hydration awareness strengthen

INDUSTRY PERFORMANCE

Rising active lifestyles and health focus underpin category expansion

Reduced sugar sports drinks lead growth as consumers balance performance and sugar concerns

WHAT'S NEXT?

Further volume growth expected as sports drinks reach a wider mainstream audience

Innovation focuses on lighter formulations today, with scope for more advanced concepts later

Adjacent categories intensify competition as functional benefits spread across soft drinks

COMPETITIVE LANDSCAPE

Coca-Cola HBC Hungary Kft maintains clear leadership with Powerade
Coca-Cola HBC Hungary Kft also posts the strongest growth as competitors struggle for space

CHANNELS

Hypermarkets lead sales but discounters and online channels gain relevance
E-commerce becomes the most dynamic channel as shoppers embrace digital grocery

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025
Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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