



Euromonitor
International

Tea in Hungary

December 2025

Table of Contents

Tea in Hungary - Category analysis

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

CHANNELS

Large-format grocery remains central while gradually ceding share to discounters and online

Discounters and e-commerce gain importance as value and convenience reshape purchasing habits

CATEGORY DATA

Table 1 - Retail Sales of Tea by Category: Volume 2020-2025

Table 2 - Retail Sales of Tea by Category: Value 2020-2025

Table 3 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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Hot Drinks in Hungary - Industry Overview

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

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SOURCES

Summary 1 - Research Sources

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