



Alcoholic Drinks in Hungary

June 2024

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2023
2023 key trends
Competitive landscape
Retailing developments
On-trade vs off-trade split
What next for alcoholic drinks?

MARKET BACKGROUND

Legislation
Legal purchasing age and legal drinking age
Drink driving
Advertising
Smoking ban
Opening hours
On-trade establishments
Summary 1 - Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade
Duty free
Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023
Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023
Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023
Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023
Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023
Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023
Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023
Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023
Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023
Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023
Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023
Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028
Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028
Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028
Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 - Research Sources

Beer in Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic hangover – drop in purchasing power reflected in declining beer sales

Focus on core brands

Craft breweries – struggling but adapting with innovative solutions to woo customers

PROSPECTS AND OPPORTUNITIES

Unit prices keep growing amidst ongoing inflationary pressures

Mindful drinking: consumer acceptance of non-alcoholic beers keeps increasing

Expanding the tap: increased space dedicated to craft beer revolution

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 - Lager by Price Band 2023

Table 17 - Number of Breweries 2018-2023

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2018-2023

Table 19 - Sales of Beer by Category: Total Value 2018-2023

Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 21 - Sales of Beer by Category: % Total Value Growth 2018-2023

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 26 - Sales of Beer by Craft vs Standard 2018-2023

Table 27 - GBO Company Shares of Beer: % Total Volume 2019-2023

Table 28 - NBO Company Shares of Beer: % Total Volume 2019-2023

Table 29 - LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 30 - Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 31 - Forecast Sales of Beer by Category: Total Value 2023-2028

Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 33 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

Cider/Perry in Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cider remains a niche segment with strong seasonal peak

Flavouring drives innovation that grabs attention

Market consolidation after COVID-19 pandemic

PROSPECTS AND OPPORTUNITIES

Cider to remain a niche segment

Category premiumisation with move towards craft production, while non-alcoholic variants could tap into new consumer segments

Room for new brands – but space can be limited

CATEGORY DATA

Table 34 - Sales of Cider/Perry: Total Volume 2018-2023

Table 35 - Sales of Cider/Perry: Total Value 2018-2023
Table 36 - Sales of Cider/Perry: % Total Volume Growth 2018-2023
Table 37 - Sales of Cider/Perry: % Total Value Growth 2018-2023
Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
Table 42 - GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 43 - NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 44 - LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
Table 45 - Forecast Sales of Cider/Perry: Total Volume 2023-2028
Table 46 - Forecast Sales of Cider/Perry: Total Value 2023-2028
Table 47 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
Table 48 - Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Brands launched in 2021 are quickly phased out
Breezer benefits from Coca-Cola's marketing expertise
Private labels of leading discounters grabbing share

PROSPECTS AND OPPORTUNITIES

Crowded market driven by mixes and exotic flavours
Small sizes making a big impact, with convenience of immediate consumption supporting demand
Potential for non-alcoholic RTDs

CATEGORY DATA

Table 49 - Sales of RTDs by Category: Total Volume 2018-2023
Table 50 - Sales of RTDs by Category: Total Value 2018-2023
Table 51 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
Table 52 - Sales of RTDs by Category: % Total Value Growth 2018-2023
Table 53 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
Table 54 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
Table 55 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 56 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
Table 57 - GBO Company Shares of RTDs: % Total Volume 2019-2023
Table 58 - NBO Company Shares of RTDs: % Total Volume 2019-2023
Table 59 - LBN Brand Shares of RTDs: % Total Volume 2020-2023
Table 60 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
Table 61 - Forecast Sales of RTDs by Category: Total Value 2023-2028
Table 62 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
Table 63 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premiumisation persists
High prices move customers towards grey market
Miskolci Likorgyár Zrt is in liquidation

PROSPECTS AND OPPORTUNITIES

Improving economic sentiment and more disposable income will be key to growth
Diverse market dynamics: fragmentation and assortment drive category engagement.
Mindful drinkers welcome shift in drinking culture

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology
Summary 5 - Benchmark Brands 2023

CATEGORY DATA

Table 64 - Sales of Spirits by Category: Total Volume 2018-2023
Table 65 - Sales of Spirits by Category: Total Value 2018-2023
Table 66 - Sales of Spirits by Category: % Total Volume Growth 2018-2023
Table 67 - Sales of Spirits by Category: % Total Value Growth 2018-2023
Table 68 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
Table 69 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
Table 70 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 71 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
Table 72 - Sales of Dark Rum by Price Platform: % Total Volume 2018-2023
Table 73 - Sales of White Rum by Price Platform: % Total Volume 2018-2023
Table 74 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023
Table 75 - Sales of English Gin by Price Platform: % Total Volume 2018-2023
Table 76 - Sales of Vodka by Price Platform: % Total Volume 2018-2023
Table 77 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023
Table 78 - GBO Company Shares of Spirits: % Total Volume 2019-2023
Table 79 - NBO Company Shares of Spirits: % Total Volume 2019-2023
Table 80 - LBN Brand Shares of Spirits: % Total Volume 2020-2023
Table 81 - Forecast Sales of Spirits by Category: Total Volume 2023-2028
Table 82 - Forecast Sales of Spirits by Category: Total Value 2023-2028
Table 83 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
Table 84 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Wine in Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sparkling wine fizzing back
Wholesaler insolvency sends shockwaves through wineries, sparking financial woes
High hopes to reignite passion for fine wine consumption

PROSPECTS AND OPPORTUNITIES

Financial bottlenecks: limited disposable incomes and inflation restrict upgrading trends
Quality over quantity, with smaller domestic wineries to gain recognition
Interest in non-alcoholic wine will continue to grow

CATEGORY DATA

Table 85 - Sales of Wine by Category: Total Volume 2018-2023
Table 86 - Sales of Wine by Category: Total Value 2018-2023
Table 87 - Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 88 - Sales of Wine by Category: % Total Value Growth 2018-2023
Table 89 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 90 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023

Table 91 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 92 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 93 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 94 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
Table 95 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 96 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 97 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 98 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 99 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 100 - GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 101 - NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 102 - LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 103 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 104 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 105 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 106 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 107 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 108 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 109 - GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 110 - NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 111 - LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 112 - Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 113 - Forecast Sales of Wine by Category: Total Value 2023-2028
Table 114 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 115 - Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

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/alcoholic-drinks-in-hungary/report.