

# Soft Drinks in Hungary

November 2024

Table of Contents

# Soft Drinks in Hungary

# EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture 2024 key trends Competitive landscape Retailing developments Foodservice vs retail split What next for soft drinks?

# MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024 Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024 Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024 Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024 Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024 Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024 Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024 Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024 Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024 Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024 Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024 Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024 Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024 Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024 Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024 Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024 Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024 Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024 Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024 Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024 Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024 Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024 Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024 Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024 Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024 Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024 Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029 Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029 Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029 Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029 Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029 Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029 Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029 Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029 Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029 Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

#### APPENDIX

Fountain sales in Hungary

### DISCLAIMER

SOURCES

#### Summary 1 - Research Sources

#### Bottled Water in Hungary

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Rising costs and upward pressure on prices dampen demand Flavoured bottled water offers added-value alternative to regular carbonates and bottled water New product development reflects growth potential of functional bottled water

#### PROSPECTS AND OPPORTUNITIES

Price stabilisation to foster an upturn in off-trade volume sales New launches and health-orientated demand to expand functional bottled water's offer and appeal Ongoing investment to spur flavoured bottled water's profile and growth potential

#### CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

#### Carbonates in Hungary

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

The demand for carbonates rebounds in 2024 but constraints remain New launches and the popularity of gin and tonic cocktails boost tonic water The leading players continue to invest in the category

#### PROSPECTS AND OPPORTUNITIES

Carbonates to continue to recover as economic pressures ease Innovation to stimulate interest in a saturated category "Easy-mixes" culture to push tonic water/mixers/other bitters but RTD alternatives present a threat

#### CATEGORY DATA

- Table 49 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024Table 50 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024Table 51 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024Table 52 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024Table 53 Off-trade Sales of Carbonates by Category: Volume 2019-2024Table 54 Off-trade Sales of Carbonates by Category: Value 2019-2024Table 55 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024Table 55 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024Table 56 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

- Table 59 NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 60 LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 61 NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 62 LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 63 Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 64 Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029
- Table 65 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029
- Table 66 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029
- Table 67 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029
- Table 68 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

# Concentrates in Hungary

# **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

New flavours add some dynamism to the category in a still tough economic and operating climate Marketing and promotion to win over consumers to liquid concentrates The sports and fitness trend may offer some respite for declining powder concentrates

# PROSPECTS AND OPPORTUNITIES

Promotions and healthier options to stimulate the demand for liquid concentrates Company activity is essential to gain a competitive advantage Local players to maintain their stronghold on the category

# CATEGORY DATA

**Concentrates Conversions** Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024 Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024 Table 71 - Off-trade Sales of Concentrates by Category: Value 2019-2024 Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024 Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024 Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024 Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024 Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024 Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024 Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024 Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024 Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029 Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029 Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029 Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

## Juice in Hungary

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Inflationary pressure and legislation and schemes impact prices and costs Private label struggles amid narrower price differentials with branded rivals Sió-Eckes leverages a well-known and popular portfolio to lead juice

# PROSPECTS AND OPPORTUNITIES

Juice to see premiumisation in the forecast period Enduring appeal of affordable, widely available and developing juice drinks Packaging developments to cater to growing consumption occasions

# CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

# RTD Coffee in Hungary

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Slower unit price growth, low per capita consumption, innovation and price promotions boost demand Premium image of RTD coffee and smaller price difference with private label spur a preference for brands Hell Energy Magyarország continues to invest to consolidate its leadership of RTD coffee

#### PROSPECTS AND OPPORTUNITIES

Bright outlook for a fast-developing category

Innovations covering products and packaging to pique the interest of existing and new consumers Premiumisation trend to add dynamism to RTD coffee

# CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2024Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029Table 105 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029Table 106 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

# RTD Tea in Hungary

#### **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Company investments and improving economic conditions spur a return to off-trade volume growth Private label's main competitive advantage weakens to hand the initiative to brands

Strong investments maintain Xixo's competitive advantages

## PROSPECTS AND OPPORTUNITIES

Economic stabilisation and new product development to boost RTD tea Well-supported brands to continue to exert strong pressure on private label Players aim to reduce the high seasonality of RTD tea consumption

### CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2024Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2024Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

# Energy Drinks in Hungary

### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Energy drinks recovers dynamism to return to off-trade volume growth Zord launch illustrates the dynamism of social media as a marketing tool Innovation remains a key competitive tool

#### PROSPECTS AND OPPORTUNITIES

Brand dynamism to undermine private label offer New bill threatens energy drinks consumption Healthier positioning to improve consumer perception of energy drinks

# CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2024Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Crowth 2024-2029Table 131 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Hungary

# **KEY DATA FINDINGS**

Growth is derived from a low sales base but also health and fitness trends Marketing focus on sports and fitness to push awareness and demand Narrowing of the price gap favours brands over private label

#### PROSPECTS AND OPPORTUNITIES

Health and fitness trend continues to offer penetration opportunities Innovation to push nutritional benefits of sports drinks Local players to look to new product and packaging developments to compete

# CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029Table 142 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029Table 144 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

# 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/soft-drinks-in-hungary/report.