



**Euromonitor
International**

Soft Drinks in Turkey

November 2024

Table of Contents

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: Volume Channel2019-2024
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by: % Volume Growth Channel2019-2024
- 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 Turkey

DISCLAIMER

SOURCES

Bottled Water in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Retail volume sales enjoy modest growth
- Carbonated and flavoured bottled benefit from demand for natural drinks
- Boycotts impact the bottled water category

PROSPECTS AND OPPORTUNITIES

- Bottled water to be driven by carbonated and flavoured bottled water
- Multinational companies to face challenges competing with local companies
- Discounters and e-commerce to see value share grow

CATEGORY DATA

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

Carbonates in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Carbonates see recovery in consumption after drop caused by earthquake in previous year
- Tonic water, mixers, and other bitters posts dynamic performance
- Private label gains share amid price inflation

PROSPECTS AND OPPORTUNITIES

- Reduced sugar alternatives to lift volume sales
- International brands should regain their strength with the end of boycotts
- Promotional campaigns and innovations to fuel category growth

CATEGORY DATA

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Concentrates report decline in off-trade volume sales
Competitive landscape is led by private label and small local brands
Positive performance in the on-trade channel

PROSPECTS AND OPPORTUNITIES

Concentrates face bleak outlook as appeal weakens
Average unit prices likely to rise further
Discounter channel remains pivotal to 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 Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Juice category sales driven by healthier choices
Growing demand for value is also paramount
Coca-Cola İçecek AS loses value share amid price competition and boycotts

PROSPECTS AND OPPORTUNITIES

Juice set for higher growth with new health-focused products
Average unit prices set to climb further
Discounters and e-commerce retailers set to expand share of sales

CATEGORY DATA

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

RTD Coffee in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Urban consumers fuel strong performance of RTD coffee
Wider product variety stimulates sales
Nestlé Gıda Sanayii AS secures its leading position

PROSPECTS AND OPPORTUNITIES

RTD coffee faces broadly positive outlook
Competition to heat up in RTD coffee
Supermarkets will remain the leading channel

CATEGORY DATA

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

RTD Tea in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTD tea growth slows due to weak demand and boycotts
Healthier perception of RTD tea resonates with families

Price hikes weigh on purchasing decisions

PROSPECTS AND OPPORTUNITIES

Moderate growth as consumers favour RTD tea over alternatives

On-trade sales are expected to demonstrate a good performance

Discounters channel to boost its share

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Energy drinks resonate with Turkey's young population

Reduced sugar energy drinks grow from low base

Red Bull preserves its leading position

PROSPECTS AND OPPORTUNITIES

Rising demand for energy drinks among young people drives growth

Competition is predicted to intensify

Retail e-commerce set to boost share

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports drinks post robust performance
Unit prices continue on upward trajectory
Supermarkets and e-commerce channel gain share

PROSPECTS AND OPPORTUNITIES

Sports drinks to be boosted by more active lifestyles and marketing efforts
On-trade sales of sports drinks set to outpace retail growth
Competition is set to intensify with new launches

CATEGORY DATA

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