



Euromonitor
International

Snacks in Turkey

July 2024

Table of Contents

EXECUTIVE SUMMARY

- Snacks in 2024: The big picture
- Key trends in 2024
- Competitive landscape
- Channel developments
- What next for snacks?

MARKET DATA

- Table 1 - Sales of Snacks by Category: Volume 2019-2024
- Table 2 - Sales of Snacks by Category: Value 2019-2024
- Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Snacks: % Value 2020-2024
- Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024
- Table 7 - Penetration of Private Label by Category: % Value 2019-2024
- Table 8 - Distribution of Snacks by Format: % Value 2019-2024
- Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029
- Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

Chocolate Confectionery in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Chocolate confectionery continues to record retail volume growth as consumers look for indulgence and treats
- Chocolate prices increase due to global cocoa shortages
- Healthier-positioned options are increasing on retailers' shelves

PROSPECTS AND OPPORTUNITIES

- Room remains for children-focused products to shine
- Chocolate is expected to become more of a luxury option
- Healthy indulgence a watchword

CATEGORY DATA

- Summary 2 - Other Chocolate Confectionery by Product Type: 2024
- Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024
- Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024
- Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024
- Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024
- Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024
- Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Gum continues to grow as players try to broaden consumption occasions

Functional variants take gum in Turkey in a new direction

Perfetti Van Melle completes the purchase of Mondelez International's gum business

PROSPECTS AND OPPORTUNITIES

Positive but modest retail volume growth for gum

Young population offers gum consumption opportunities

Innovation to focus on health and wellness and emotions

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024

Table 26 - Sales of Gum by Category: Value 2019-2024

Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024

Table 28 - Sales of Gum by Category: % Value Growth 2019-2024

Table 29 - Sales of Gum by Flavour: Rankings 2019-2024

Table 30 - NBO Company Shares of Gum: % Value 2020-2024

Table 31 - LBN Brand Shares of Gum: % Value 2021-2024

Table 32 - Distribution of Gum by Format: % Value 2019-2024

Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029

Table 34 - Forecast Sales of Gum by Category: Value 2024-2029

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Seasonal gifting continues to support retail volume growth

"Other" sugar confectionery contributes to strong retail volume growth

Indulgence takes precedence over health concerns in sugar confectionery

PROSPECTS AND OPPORTUNITIES

Healthier options may add new consumers

Packaging is set to be a focus of innovation

Opportunities for players to engage with a young population and tourists

CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024

Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Impulse and take-home ice cream continue to benefit from a variety of push factors
- Migros adds dynamism to the growing private label offer in ice cream
- New flavours and limited editions create dynamism

PROSPECTS AND OPPORTUNITIES

- Popularity of multi-pack format is expected to increase amid portion control trend
- Purchasing behaviour sees polarisation between premium and economy options
- Consumers are becoming more experimental with their ice cream flavour choices

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Healthy snacks trend influences developments in savoury snacks
- Ülker proves a strong branded rival to private label in savoury biscuits and pretzels
- Lay's caters to local tastes and demand while supply and import problems hurt Pringles

PROSPECTS AND OPPORTUNITIES

- Healthier choices to burgeon in savoury snacks
- Pre-teenage consumers and sports fans to represent key target audiences
- Private label is well placed to gain momentum as sophistication rises

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increase in home snacking boosts the demand for sweet biscuits
- Chains are obliged to offer products suitable for patients who require medical nutrition as of January 2024
- Important wheat supply project penetrates sweet biscuits

PROSPECTS AND OPPORTUNITIES

- Focus on health and wellness to gain momentum
- Bright outlook for free from gluten products
- Protein/energy bars is emerging as a promising category

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % 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/snacks-in-turkey/report.