



# Passport

## Baby Food in Turkey

Euromonitor International

September 2021

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Some content and data have been  
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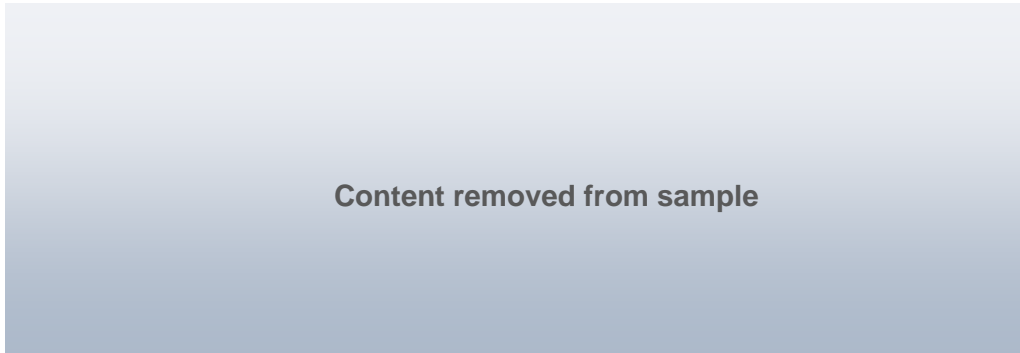
# LIST OF CONTENTS AND TABLES

Baby Food in Turkey - Category Analysis .....	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
Growing demand on baby food as parents want the best products for their children, despite increasing price sensitivity .....	1
Price sensitivity characterises this category and generates discounting activities among industry players.....	1
Decline in expensive categories, such as prepared baby food as parents spend more time at home, while cheaper products that boost immunity gain momentum.....	2
PROSPECTS AND OPPORTUNITIES.....	2
Retail shift offers opportunity for product development and A strengthening of brand loyalty...2	
Discounters becomes A more relevant channel and appeals to lower socioeconomic groups, particularly as new brands become available .....	2
Better price management in the case of future increases in the exchange rate bode well for category sales.....	2
CATEGORY DATA.....	3
Table 1 Sales of Baby Food by Category: Volume 2016-2021.....	3
Table 2 Sales of Baby Food by Category: Value 2016-2021 .....	3
Table 3 Sales of Baby Food by Category: % Volume Growth 2016-2021 .....	4
Table 4 Sales of Baby Food by Category: % Value Growth 2016-2021 .....	5
Table 5 NBO Company Shares of Baby Food: % Value 2017-2021 .....	5
Table 6 LBN Brand Shares of Baby Food: % Value 2018-2021.....	6
Table 7 Distribution of Baby Food by Format: % Value 2016-2021.....	7
Table 8 Forecast Sales of Baby Food by Category: Volume 2021-2026.....	7
Table 9 Forecast Sales of Baby Food by Category: Value 2021-2026.....	8
Table 10 Forecast Sales of Baby Food by Category: % Volume Growth 2021-2026 .....	9
Table 11 Forecast Sales of Baby Food by Category: % Value Growth 2021-2026 .....	9
Dairy Products and Alternatives in Turkey - Industry Overview.....	11
EXECUTIVE SUMMARY .....	11
Dairy products and alternatives in 2021: The big picture .....	11
Key trends in 2021 .....	11
Competitive landscape .....	11
Channel developments .....	11
What next for dairy products and alternatives?.....	12
MARKET DATA.....	12
Table 12 Sales of Dairy Products and Alternatives by Category: Value 2016-2021 .....	12
Table 13 Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021 .....	12
Table 14 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021 .....	12
Table 15 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021 .....	13
Table 16 Penetration of Private Label by Category: % Value 2016-2021 .....	13

Table 17	Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021 .....	14
Table 18	Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026.....	14
Table 19	Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026 .....	14
DISCLAIMER .....		15
SOURCES.....		15
Summary 1	Research Sources.....	15

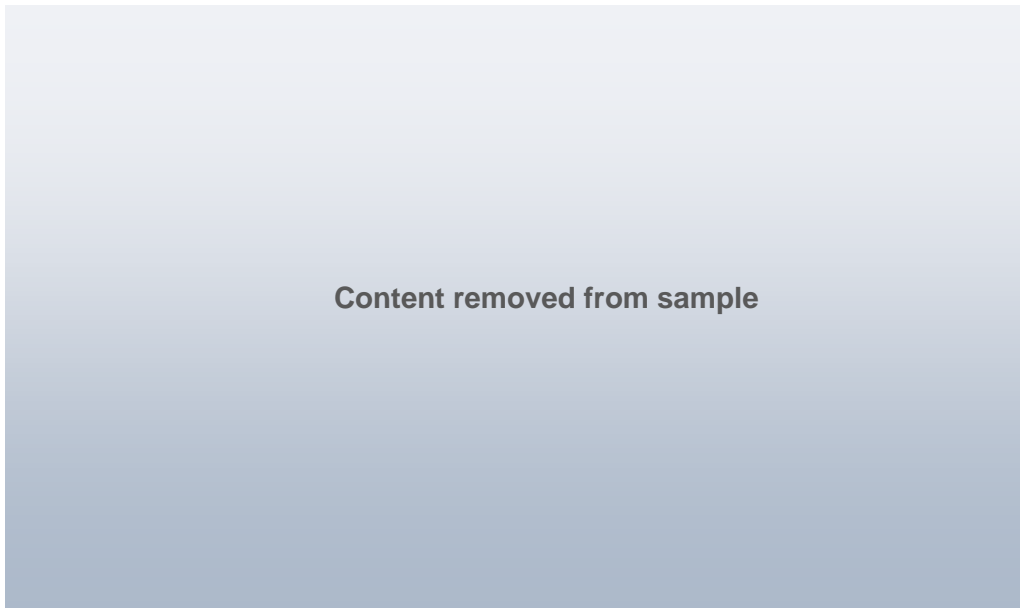
# BABY FOOD IN TURKEY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

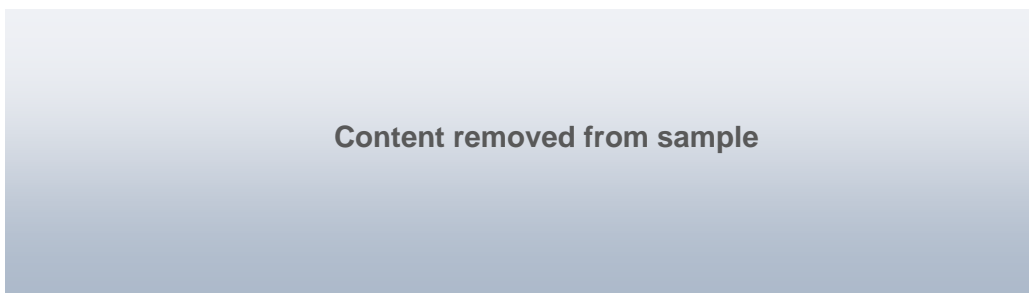


## 2021 DEVELOPMENTS

Growing demand for baby food as parents want the best products for their children, despite increasing price sensitivity



Price sensitivity characterises this category and generates discounting activities among industry players



Decline in expensive categories, such as prepared baby food as parents spend more time at home, while cheaper products that boost immunity gain momentum

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## PROSPECTS AND OPPORTUNITIES

Retail shift offers opportunity for product development and A strengthening of brand loyalty

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Discounters becomes A more relevant channel and appeals to lower socioeconomic groups, particularly as new brands become available

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Better price management in the case of future increases in the exchange rate bode well for category sales

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## CATEGORY DATA

Table 1 Sales of Baby Food by Category: Volume 2016-2021

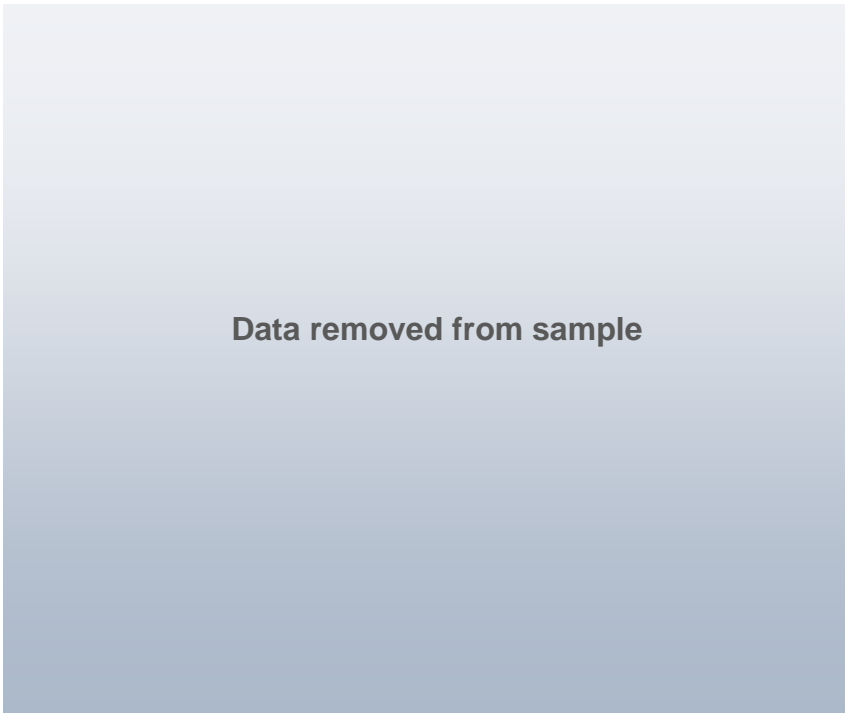
	2016	2017	2018	2019	2020	2021
Baby Food (Not calculable)	<b>Data removed from sample</b>					
Milk Formula (Not calculable)						
- Standard Milk Formula (Not calculable)						
- Follow-on Milk Formula (Not calculable)						
- Growing-Up Milk Formula (Not calculable)						
- Special Baby Milk Formula (Not calculable)						
Prepared Baby Food ('000 tonnes)						
Dried Baby Food ('000 tonnes)						
Other Baby Food ('000 tonnes)						
-- Liquid Standard Milk Formula (million litres)						
-- Powder Standard Milk Formula ('000 tonnes)						
-- Liquid Follow-on Milk Formula (million litres)						
-- Powder Follow-on Milk Formula ('000 tonnes)						
-- Liquid Growing-Up Milk Formula (million litres)						
-- Powder Growing-Up Milk Formula ('000 tonnes)						
-- Liquid Special Baby Milk Formula (million litres)						
-- Powder Special Baby Milk Formula ('000 tonnes)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Baby Food by Category: Value 2016-2021

TRY million	2016	2017	2018	2019	2020	2021
Baby Food	<b>Data removed from sample</b>					
Milk Formula						
- Standard Milk Formula						
- Follow-on Milk Formula						

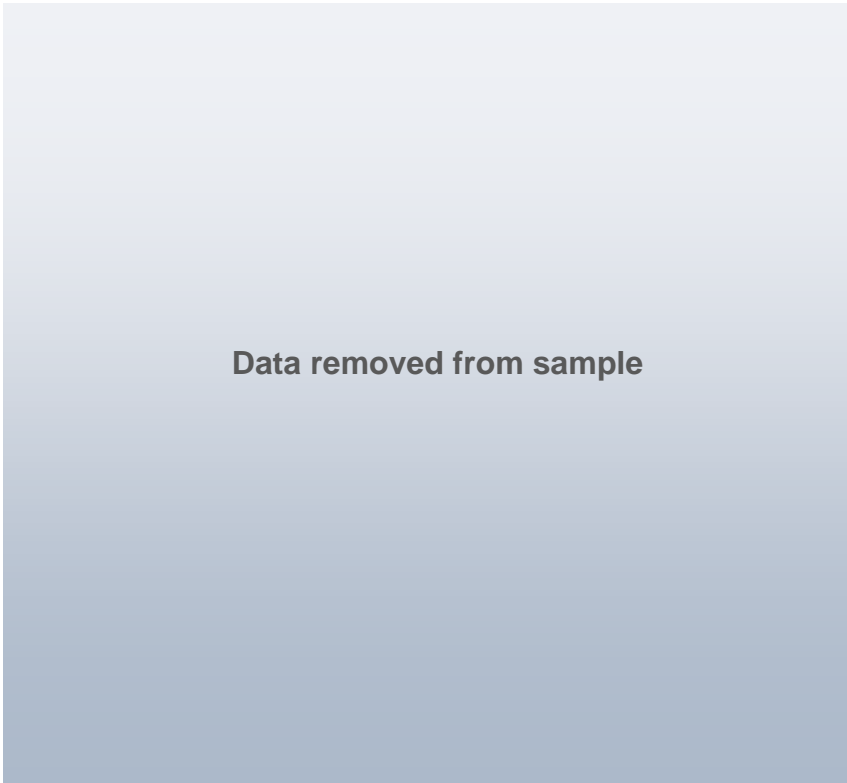
- Growing-Up Milk Formula
- Special Baby Milk Formula
- Prepared Baby Food
- Dried Baby Food
- Other Baby Food
- Liquid Standard Milk Formula
- Powder Standard Milk Formula
- Liquid Follow-on Milk Formula
- Powder Follow-on Milk Formula
- Liquid Growing-Up Milk Formula
- Powder Growing-Up Milk Formula
- Liquid Special Baby Milk Formula
- Powder Special Baby Milk Formula



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Baby Food by Category: % Volume Growth 2016-2021

	2020/21	2016-21 CAGR	2016/21 Total
Baby Food (Not calculable)			
Milk Formula (Not calculable)			
- Standard Milk Formula (Not calculable)			
- Follow-on Milk Formula (Not calculable)			
- Growing-Up Milk Formula (Not calculable)			
- Special Baby Milk Formula (Not calculable)			
Prepared Baby Food (% volume growth)			
Dried Baby Food (% volume growth)			
Other Baby Food (% volume growth)			
-- Liquid Standard Milk Formula (% volume growth)			
-- Powder Standard Milk Formula (% volume growth)			
-- Liquid Follow-on Milk Formula (% volume growth)			
-- Powder Follow-on Milk Formula (% volume growth)			
-- Liquid Growing-Up Milk Formula (% volume growth)			
-- Powder Growing-Up Milk Formula (% volume growth)			
-- Liquid Special Baby Milk Formula (% volume growth)			
-- Powder Special Baby Milk Formula (% volume growth)			



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Baby Food by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby Food	<b>Data removed from sample</b>		
Milk Formula			
- Standard Milk Formula			
- Follow-on Milk Formula			
- Growing-Up Milk Formula			
- Special Baby Milk Formula			
Prepared Baby Food			
Dried Baby Food			
Other Baby Food			
-- Liquid Standard Milk Formula			
-- Powder Standard Milk Formula			
-- Liquid Follow-on Milk Formula			
-- Powder Follow-on Milk Formula			
-- Liquid Growing-Up Milk Formula			
-- Powder Growing-Up Milk Formula			
-- Liquid Special Baby Milk Formula			
-- Powder Special Baby Milk Formula			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 NBO Company Shares of Baby Food: % Value 2017-2021**

% retail value rsp	2017	2018	2019	2020	2021
Company	<b>Data removed from sample</b>				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Baby Food: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7** Distribution of Baby Food by Format: % Value 2016-2021

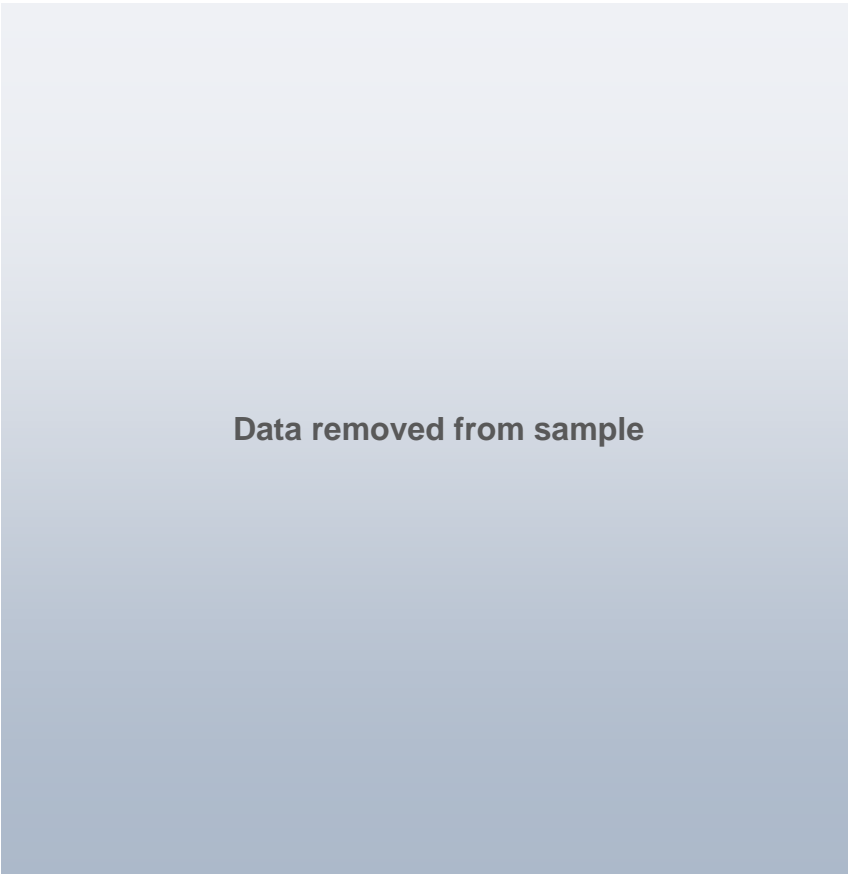
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8** Forecast Sales of Baby Food by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
Baby Food (Not calculable)	<b>Data removed from sample</b>					
Milk Formula (Not calculable)						
- Standard Milk Formula (Not calculable)						
- Follow-on Milk Formula (Not calculable)						
- Growing-Up Milk						

- Formula (Not calculable)
- Special Baby Milk Formula (Not calculable)
- Prepared Baby Food ('000 tonnes)
- Dried Baby Food ('000 tonnes)
- Other Baby Food ('000 tonnes)
- Liquid Standard Milk Formula (million litres)
- Powder Standard Milk Formula ('000 tonnes)
- Liquid Follow-on Milk Formula (million litres)
- Powder Follow-on Milk Formula ('000 tonnes)
- Liquid Growing-Up Milk Formula (million litres)
- Powder Growing-Up Milk Formula ('000 tonnes)
- Liquid Special Baby Milk Formula (million litres)
- Powder Special Baby Milk Formula ('000 tonnes)

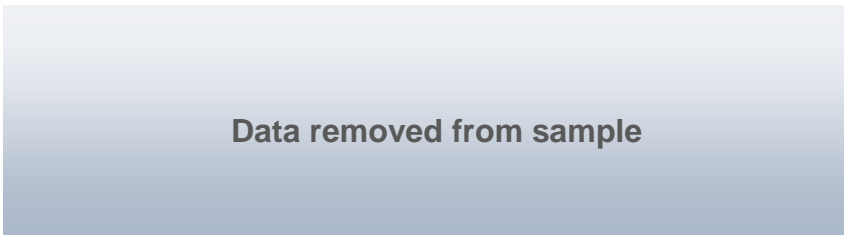


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 9 Forecast Sales of Baby Food by Category: Value 2021-2026**

TRY million	2021	2022	2023	2024	2025	2026
Baby Food	Data removed from sample					
Milk Formula						
- Standard Milk Formula						
- Follow-on Milk Formula						
- Growing-Up Milk Formula						
- Special Baby Milk Formula						
Prepared Baby Food						
Dried Baby Food						
Other Baby Food						
-- Liquid Standard Milk Formula						
-- Powder Standard Milk Formula						
-- Liquid Follow-on Milk Formula						
-- Powder Follow-on Milk Formula						
-- Liquid Growing-Up Milk Formula						

- Powder Growing-Up Milk Formula
- Liquid Special Baby Milk Formula
- Powder Special Baby Milk Formula



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Sales of Baby Food by Category: % Volume Growth 2021-2026**

	2021/22	2021-26 CAGR	2021/26 Total
Baby Food (Not calculable)	<b>Data removed from sample</b>		
Milk Formula (Not calculable)			
- Standard Milk Formula (Not calculable)			
- Follow-on Milk Formula (Not calculable)			
- Growing-Up Milk Formula (Not calculable)			
- Special Baby Milk Formula (Not calculable)			
Prepared Baby Food (% volume growth)			
Dried Baby Food (% volume growth)			
Other Baby Food (% volume growth)			
-- Liquid Standard Milk Formula (% volume growth)			
-- Powder Standard Milk Formula (% volume growth)			
-- Liquid Follow-on Milk Formula (% volume growth)			
-- Powder Follow-on Milk Formula (% volume growth)			
-- Liquid Growing-Up Milk Formula (% volume growth)			
-- Powder Growing-Up Milk Formula (% volume growth)			
-- Liquid Special Baby Milk Formula (% volume growth)			
-- Powder Special Baby Milk Formula (% volume growth)			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Sales of Baby Food by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baby Food	<b>Data removed from sample</b>		
Milk Formula			
- Standard Milk Formula			
- Follow-on Milk Formula			
- Growing-Up Milk Formula			
- Special Baby Milk Formula			
Prepared Baby Food			
Dried Baby Food			

**Other Baby Food**

- Liquid Standard Milk Formula
- Powder Standard Milk Formula
- Liquid Follow-on Milk Formula
- Powder Follow-on Milk Formula
- Liquid Growing-Up Milk Formula
- Powder Growing-Up Milk Formula
- Liquid Special Baby Milk Formula
- Powder Special Baby Milk Formula

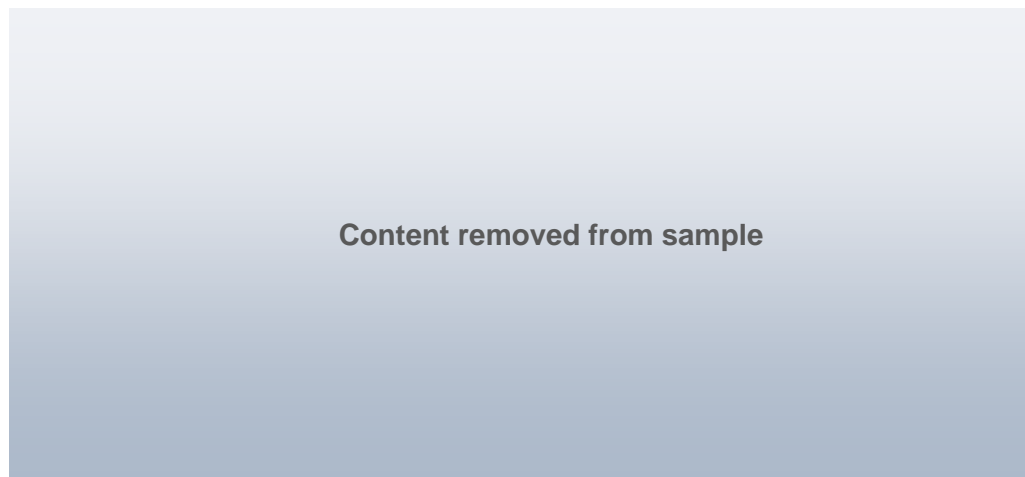
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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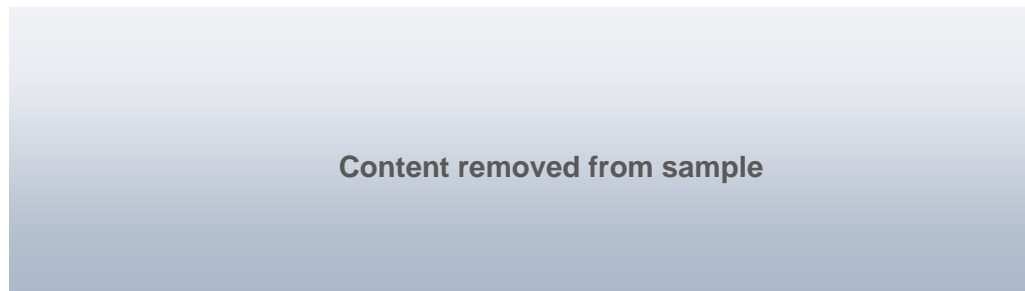
# DAIRY PRODUCTS AND ALTERNATIVES IN TURKEY - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

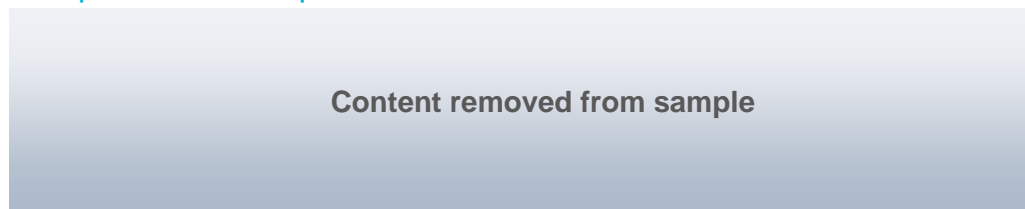
Dairy products and alternatives in 2021: The big picture



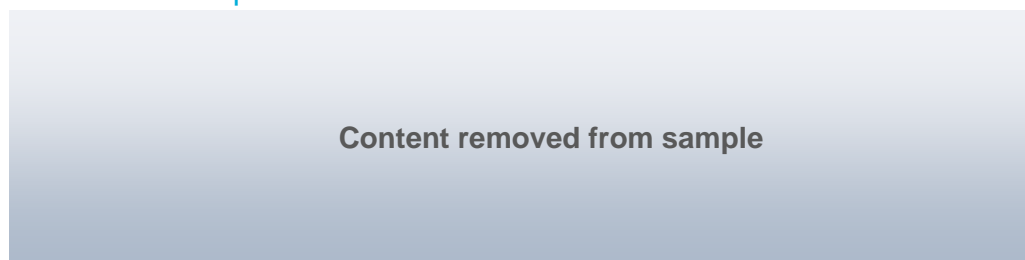
Key trends in 2021



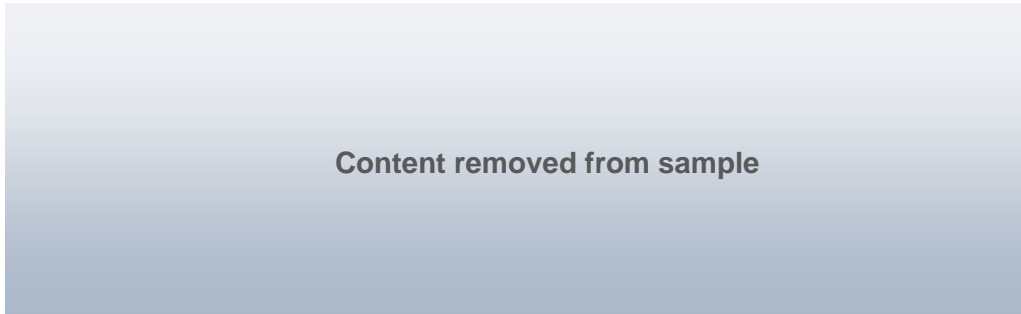
Competitive landscape



Channel developments



### What next for dairy products and alternatives?



### MARKET DATA

**Table 12** Sales of Dairy Products and Alternatives by Category: Value 2016-2021

TRY million	2016	2017	2018	2019	2020	2021
Baby Food	<b>Data removed from sample</b>					
Dairy						
Dairy Products and Alternatives						
Alternatives						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

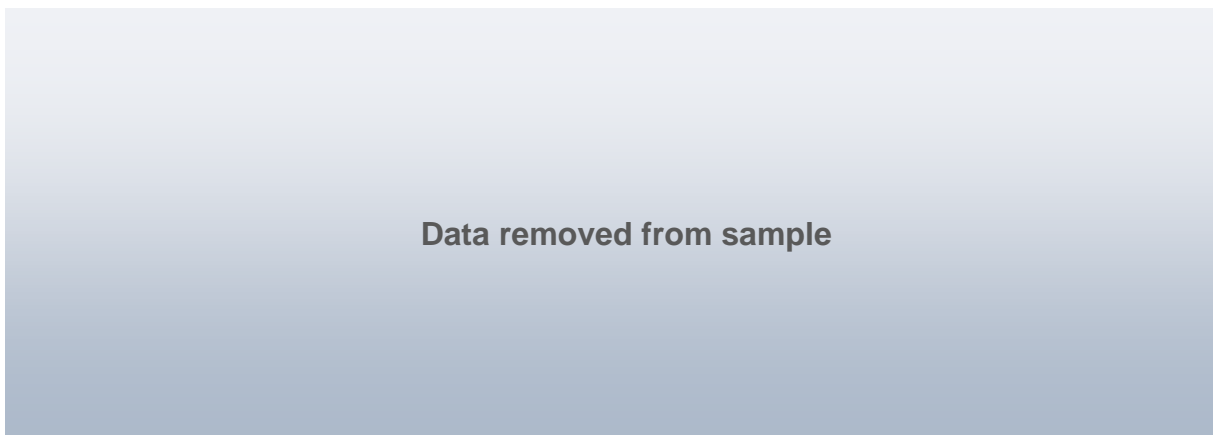
**Table 13** Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby Food	<b>Data removed from sample</b>		
Dairy Products and Alternatives			
Dairy			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14** NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

<b>Data removed from sample</b>					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16 Penetration of Private Label by Category: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

Baby Food	<b>Data removed from sample</b>					
Dairy						
Dairy Products and Alternatives						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources



**Table 17** Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18** Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026

TRY million	2021	2022	2023	2024	2025	2026
Dairy	<b>Data removed from sample</b>					
Baby Food						
Dairy Products and Alternatives						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 19** Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
	<b>Data removed from sample</b>		

Baby Food  
Dairy Products and Alternatives  
Dairy

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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## SOURCES

Sources used during research include the following:

Summary 1    Research Sources

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