



Passport

Yoghurt and Sour Milk Products in Turkey

Euromonitor International

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Some content and data have been
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LIST OF CONTENTS AND TABLES

Yoghurt and Sour Milk Products in Turkey - Category Analysis	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
Growth in retail volume sales for yoghurt and sour milk drinks as consumers remain at home and foodservice enjoys some rebound	1
Demand for healthier products boosts sales of smaller brands, sour milk drinks and kefir	1
Drinking yoghurt benefits from affordability, larger pack sizes and the gradual reopening of foodservice in 2021	2
PROSPECTS AND OPPORTUNITIES.....	2
Normal habits resume after the pandemic recedes, with price becoming even more important to cash-strapped consumers.....	2
Organic products can benefit from rising health awareness	3
Strong forecast period performance of sour milk drinks thanks to their health benefits and new flavour profiles	3
CATEGORY DATA.....	3
Table 1 Sales of Yoghurt and Sour Milk Products by Category: Volume 2016-2021	3
Table 2 Sales of Yoghurt and Sour Milk Products by Category: Value 2016-2021	4
Table 3 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2016-2021	4
Table 4 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2016-2021	4
Table 5 Sales of Flavoured Yoghurt by Flavour: Rankings 2016-2021	4
Table 6 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2017-2021	5
Table 7 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2018-2021	5
Table 8 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2016-2021	6
Table 9 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2021-2026.....	7
Table 10 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2021-2026.....	7
Table 11 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2021-2026	7
Table 12 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2021-2026	8
Dairy Products and Alternatives in Turkey - Industry Overview.....	9
EXECUTIVE SUMMARY	9
Dairy products and alternatives in 2021: The big picture	9
Key trends in 2021	9
Competitive landscape	9
Channel developments	10
What next for dairy products and alternatives?.....	10
MARKET DATA.....	10

Table 13	Sales of Dairy Products and Alternatives by Category: Value 2016-2021	10
Table 14	Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021	11
Table 15	NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021	11
Table 16	LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021	12
Table 17	Penetration of Private Label by Category: % Value 2016-2021	13
Table 18	Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021	13
Table 19	Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026	14
Table 20	Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026	14
DISCLAIMER		14
SOURCES		15
Summary 1	Research Sources	15

YOGHURT AND SOUR MILK PRODUCTS IN TURKEY - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Ongoing home seclusion in 2021 due to the continued presence of COVID-19 in the country

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2021 DEVELOPMENTS

Growth in retail volume sales for yoghurt and sour milk drinks as consumers remain at home and foodservice enjoys some rebound

Retail volume sales of yoghurt and sour milk products are set to grow in 2021. These are

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Demand for healthier products boosts sales of smaller brands, sour milk drinks and kefir

Consumers have increased their yoghurt consumption as home-made meals can easily be accompanied by yoghurt. Most people buy reputable well-known brands from the closest

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Drinking yoghurt benefits from affordability, larger pack sizes and the gradual reopening of foodservice in 2021

Drinking yoghurt is set to see positive growth in retail volume terms in 2021 following consistently strong growth over the review period. Growth has largely been driven by improving

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PROSPECTS AND OPPORTUNITIES

Normal habits resume after the pandemic recedes, with price becoming even more important to cash-strapped consumers

Once the pandemic recedes, consumers are expected to revert to their daily routines while

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Organic products can benefit from rising health awareness

Organic yoghurt is set to see acceleration in demand over the forecast period, underpinned by a variety of factors. Strong underlying health and wellness trends will be the main driver. These

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Strong forecast period performance of sour milk drinks thanks to their health benefits and new flavour profiles

Consumption of sour milk products has boomed since the pandemic as it is believed to boost

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CATEGORY DATA

Table 1 Sales of Yoghurt and Sour Milk Products by Category: Volume 2016-2021

	2016	2017	2018	2019	2020	2021
- Yoghurt (Not calculable)	Data removed from sample					
-- Plain Yoghurt ('000 tonnes)						
-- Flavoured Yoghurt ('000 tonnes)						
-- Drinking Yoghurt (million litres)						
- Sour Milk Products (million litres)						
Yoghurt and Sour Milk Products (Not calculable)	-	-	-	-	-	-

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

Table 2 Sales of Yoghurt and Sour Milk Products by Category: Value 2016-2021

TRY million

	2016	2017	2018	2019	2020	2021
- Yoghurt	Data removed from sample					
-- Plain Yoghurt						
-- Flavoured Yoghurt						
-- Drinking Yoghurt						
- Sour Milk Products						
Yoghurt and Sour Milk Products						

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

Table 3 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2016-2021

	2020/21	2016-21 CAGR	2016/21 Total
- Yoghurt (Not calculable)	Data removed from sample		
-- Plain Yoghurt (% volume growth)			
-- Flavoured Yoghurt (% volume growth)			
-- Drinking Yoghurt (% volume growth)			
- Sour Milk Products (% volume growth)			
Yoghurt and Sour Milk Products (Not calculable)			

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

Table 4 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Yoghurt	Data removed from sample		
-- Plain Yoghurt			
-- Flavoured Yoghurt			
-- Drinking Yoghurt			
- Sour Milk Products			
Yoghurt and Sour Milk Products			

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

Table 5 Sales of Flavoured Yoghurt by Flavour: Rankings 2016-2021

ranking

	2016	2017	2018	2019	2020	2021
Strawberry	Data removed from sample					
Apricot						
Peach						
Pineapple						
Blueberry						

Almond
Apple
Vanilla
Walnut
Oat

Data removed from sample

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

Table 6 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

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

Table 7 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

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

Table 8 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- 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

Data removed from sample

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

Table 9 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
- Yoghurt (Not calculable)	-	-	-	-	-	-
-- Plain Yoghurt ('000 tonnes)	Data removed from sample					
-- Flavoured Yoghurt ('000 tonnes)						
-- Drinking Yoghurt (million litres)						
- Sour Milk Products (million litres)						
Yoghurt and Sour Milk Products (Not calculable)	-	-	-	-	-	-

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

Table 10 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2021-2026

TRY million

	2021	2022	2023	2024	2025	2026
- Yoghurt	Data removed from sample					
-- Plain Yoghurt						
-- Flavoured Yoghurt						
-- Drinking Yoghurt						
- Sour Milk Products						
Yoghurt and Sour Milk Products						

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

Table 11 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2021-2026

	2021/22	2021-26 CAGR	2021/26 Total
- Yoghurt (Not calculable)	Data removed from sample		
-- Plain Yoghurt (% volume growth)			
-- Flavoured Yoghurt (% volume growth)			
-- Drinking Yoghurt (% volume growth)			
- Sour Milk Products (% volume growth)			
Yoghurt and Sour Milk Products (Not calculable)			

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

Table 12 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2021-2026

% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

- Yoghurt
 -- Plain Yoghurt
 -- Flavoured Yoghurt
 -- Drinking Yoghurt
 - Sour Milk Products
 Yoghurt and Sour Milk Products

Data removed from sample

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

DAIRY PRODUCTS AND ALTERNATIVES IN TURKEY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Dairy products and alternatives in 2021: The big picture

The main trend in 2021 continues to be limitations in the foodservice channel as operators

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Key trends in 2021

Government measures put in place to curb the spread of the virus has meant most

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Competitive landscape

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Channel developments

Modern retail channels such as chained supermarkets have become more aware of consumer

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What next for dairy products and alternatives?

The pandemic is expected to begin to abate, particularly as vaccines are now being rolled out.

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MARKET DATA

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

TRY million

	2016	2017	2018	2019	2020	2021
Dairy Dairy Products and Alternatives Baby Food	Data removed from sample					

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

Table 14 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

Dairy

Dairy Products and Alternatives

Data removed from sample

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

Table 15 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021

% retail value rsp

Company

2017

2018

2019

2020

2021

BIM

Data removed from sample

Data removed from sample

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

Table 16 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021

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

Data removed from sample

Data removed from sample

store checks, trade interviews, trade sources

Table 17 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baby Food	Data removed from sample					
Dairy						
Dairy Products and Alternatives						

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

Table 18 Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- 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

Data removed from sample

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

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

TRY million

2021 2022 2023 2024 2025 2026

Dairy Products and
 Alternatives
 Baby Food
 Dairy

Data removed from sample

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

Table 20 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Dairy
 Dairy Products and Alternatives
 Baby Food

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

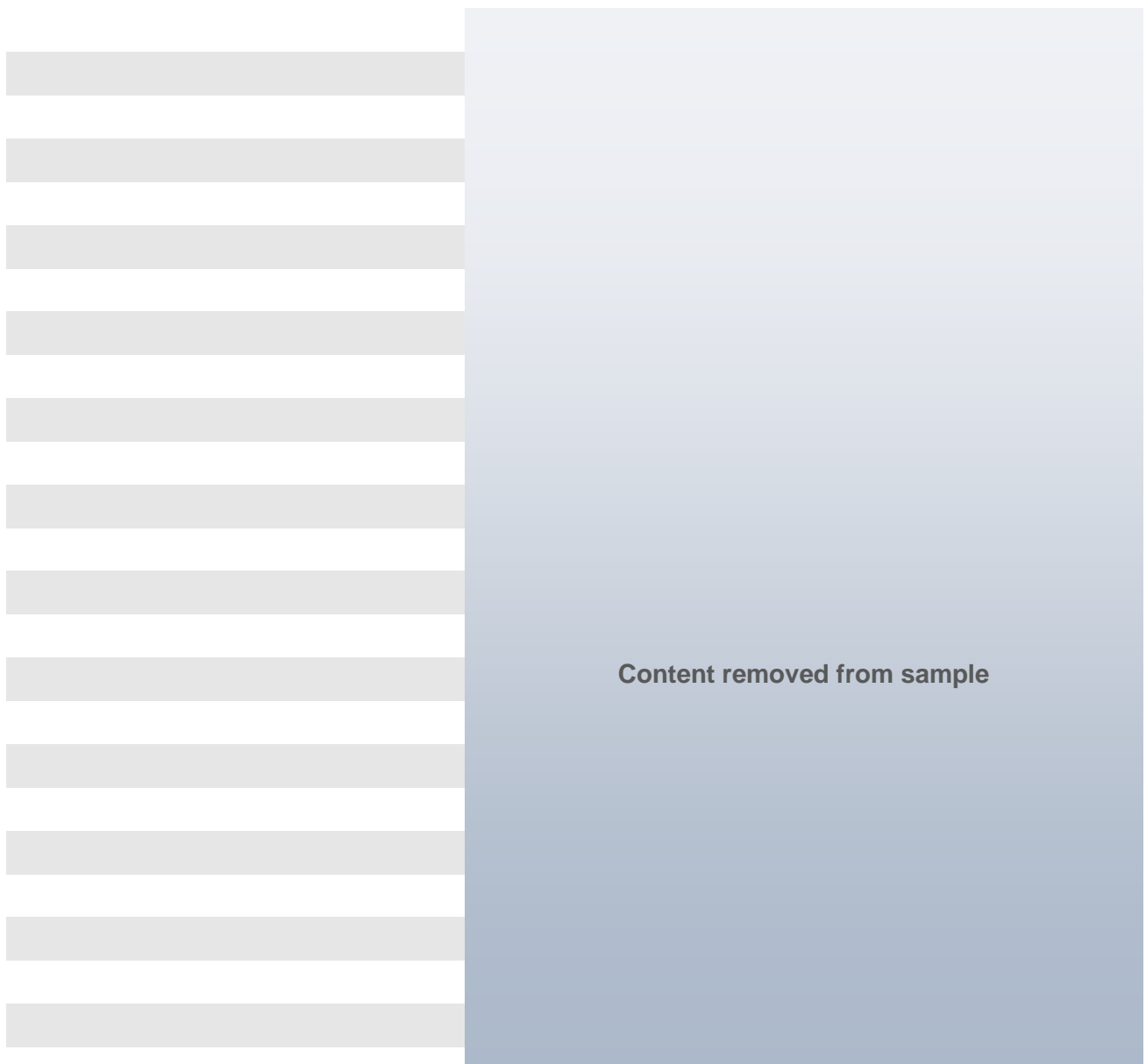
Official Sources

Trade Associations

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Trade Press

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Source: Euromonitor International