

Alcoholic Drinks in Turkey

Market Direction | 2024-06-27 | 64 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Alcoholic drinks registered fairly modest single-digit volume growth in Turkey in 2023, with off-trade sales stronger than on-trade sales due to a notable transition between these channels. However, value growth continues to hit robust double-digit figures due to the significant price hikes seen in the recent review period.

Euromonitor International's Alcoholic Drinks in Turkey report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Table of Contents:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

List Of Contents And Tables

ALCOHOLIC DRINKS IN TURKEY

EXECUTIVE SUMMARY

Alcoholic drinks saw a modest growth in 2023

Average unit prices continue to be stimulated by increased production costs and taxes

Efes Pilsen and Turk Tuborg preserve their dominant positions

Supermarkets expands its position as a retail channel

On-trade vs off-trade split

Alcoholic drinks is expected to register a positive total volume growth over the forecast period

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

Summary 2 Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 15 □Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 □Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 Research Sources

BEER IN TURKEY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Beer sees positive volume growth and new product launches, despite challenging economic climate

Average unit prices see significant hikes in 2023

On-trade volume sales see a slowdown

PROSPECTS AND OPPORTUNITIES

Positive volume growth expected for beer over the forecast period

Dark beer set to maintain its positive trajectory

Supermarkets set to see a rising share in beer sales

CATEGORY BACKGROUND

Lager price band methodology

Summary 5 Lager by Price Band 2023

Table 84 Number of Breweries 2018-2023

CATEGORY DATA

Table 85 Sales of Beer by Category: Total Volume 2018-2023

Table 86 Sales of Beer by Category: Total Value 2018-2023

Table 87 Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 88 Sales of Beer by Category: % Total Value Growth 2018-2023

Table 89 Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 90 Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 91 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 92 Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 93 □Sales of Beer by Craft vs Standard 2018-2023

Table 94 □GBO Company Shares of Beer: % Total Volume 2019-2023

Table 95 □NBO Company Shares of Beer: % Total Volume 2019-2023

Table 96 □LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 97 □Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 98 □Forecast Sales of Beer by Category: Total Value 2023-2028

Table 99 □Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 100 □Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

WINE IN TURKEY

KEY DATA FINDINGS

2023 DEVELOPMENTS

2023 proves to be a challenging year for wine, although still white wine sees healthy volume growth

The share of still grape wines in the economy segment continues to grow

Wine sales fall into a negative figure decline in on-trade terms in 2023

PROSPECTS AND OPPORTUNITIES

2024 will continue to present some challenges to wine, before the category starts to recover

Positive factors set to emerge from 2025, for both on-trade and off-trade channels

Still white wine is set to maintain its popularity over the forecast period

CATEGORY DATA

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 17 Sales of Wine by Category: Total Volume 2018-2023
Table 18 Sales of Wine by Category: Total Value 2018-2023
Table 19 Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 20 Sales of Wine by Category: % Total Value Growth 2018-2023
Table 21 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 22 Sales of Wine by Off-trade vs On-trade: Value 2018-2023
Table 23 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 24 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 25 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
Table 26 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2018-2023
Table 27 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
Table 28 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
Table 29 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 30 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
Table 31 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
Table 32 □GBO Company Shares of Champagne: % Total Volume 2019-2023
Table 33 □NBO Company Shares of Champagne: % Total Volume 2019-2023
Table 34 □LBN Brand Shares of Champagne: % Total Volume 2020-2023
Table 35 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 36 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
Table 37 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
Table 38 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 39 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
Table 40 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
Table 41 □GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 42 □NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
Table 43 □LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
Table 44 □Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 45 □Forecast Sales of Wine by Category: Total Value 2023-2028
Table 46 □Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 47 □Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

SPIRITS IN TURKEY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift in channels and cocktail trends play important roles in off-trade growth
 A challenging economy and lower grape yields lead to skyrocketing unit prices
 Irish whiskey boosts its dynamic off-trade volume growth even further

PROSPECTS AND OPPORTUNITIES

Spirits set to see ongoing positive growth, with a balance between on-trade and off-trade channels
 Premiumisation trends expected to emerge more strongly in spirits
 Supermarkets set to see further growth in distribution share

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 Benchmark Brands 2023

CATEGORY DATA

Table 48 Sales of Spirits by Category: Total Volume 2018-2023
Table 49 Sales of Spirits by Category: Total Value 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 50 Sales of Spirits by Category: % Total Volume Growth 2018-2023
Table 51 Sales of Spirits by Category: % Total Value Growth 2018-2023
Table 52 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
Table 53 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
Table 54 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 55 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
Table 56 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023
Table 57 □Sales of White Rum by Price Platform: % Total Volume 2018-2023
Table 58 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023
Table 59 □Sales of English Gin by Price Platform: % Total Volume 2018-2023
Table 60 □Sales of Vodka by Price Platform: % Total Volume 2018-2023
Table 61 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023
Table 62 □GBO Company Shares of Spirits: % Total Volume 2019-2023
Table 63 □NBO Company Shares of Spirits: % Total Volume 2019-2023
Table 64 □LBN Brand Shares of Spirits: % Total Volume 2020-2023
Table 65 □Forecast Sales of Spirits by Category: Total Volume 2023-2028
Table 66 □Forecast Sales of Spirits by Category: Total Value 2023-2028
Table 67 □Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
Table 68 □Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

CIDER/PERRY IN TURKEY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic difficulties lead to the decline of less-popular cider/perry volume sales

Cider/perry lacking in recognition or innovation

Cider/perry also saw increased unit prices, further adding to its downfall

PROSPECTS AND OPPORTUNITIES

Cider/perry volumes set to recover over the forecast period, with on-trade recovering the soonest

Stronger product awareness needed to boost sales

Supermarkets to preserve its dominant position in cider/perry

CATEGORY DATA

Table 69 Sales of Cider/Perry: Total Volume 2018-2023
Table 70 Sales of Cider/Perry: Total Value 2018-2023
Table 71 Sales of Cider/Perry: % Total Volume Growth 2018-2023
Table 72 Sales of Cider/Perry: % Total Value Growth 2018-2023
Table 73 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
Table 74 Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
Table 75 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 76 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
Table 77 GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 78 □NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 79 □LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
Table 80 □Forecast Sales of Cider/Perry: Total Volume 2023-2028
Table 81 □Forecast Sales of Cider/Perry: Total Value 2023-2028
Table 82 □Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
Table 83 □Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Alcoholic Drinks in Turkey

Market Direction | 2024-06-27 | 64 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-06
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com