



Carbonates in Turkey

December 2025

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Carbonates in Turkey - Category analysis

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2025 DEVELOPMENTS

Health trends and local brands drive growth in carbonates during 2025

INDUSTRY PERFORMANCE

Health-driven reformulation supports ongoing growth for carbonates in Turkey

Reduced-sugar innovation and premium mixers fuel dynamic growth across carbonates

WHAT'S NEXT?

Economic recovery, innovation and easing boycotts are set to support growth in carbonates

Manufacturers are expected to invest further in automation, energy-efficient manufacturing

Health-led reformulation will drive future demand for reduced-sugar and naturally positioned carbonates

COMPETITIVE LANDSCAPE

Coca-Cola İçecek retains its leadership despite share losses linked to boycotts

Private label gains momentum as boycotts and localisation trends shift demand away from global brands

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Small local grocers remains the leading channel but continues to lose ground to modern retail

Discounters accelerates channel shift through rapid expansion, strong promotions and private label

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Soft Drinks in Turkey - Industry Overview

EXECUTIVE SUMMARY

Health, innovation and the rise of private label shapes the performance of soft drinks in Turkey

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Bottled water and RTD beverages drive off-trade volume growth for soft drinks in Turkey
Rising demand for healthier, functional options shapes soft drinks in 2025
Some consumers migrate away from multinational players, boosting the performance of local brands

WHAT'S NEXT?

Healthy, innovative and premium options are set to support growth over the forecast period
The rise of health-conscious lifestyles is set to shape product innovation in soft drinks
International brands should regain strength as boycotts start to decline

COMPETITIVE LANDSCAPE

Coca-Cola İçecek faces challenges yet retains its leadership in 2025
Beypazari and local players lead volume growth in soft drinks in Turkey

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Retail e-commerce emerges as the fastest-growing distribution channel in 2025
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