



**Euromonitor
International**

Hot Drinks in Turkey

December 2025

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EXECUTIVE SUMMARY

Premiumisation, innovation and health drive value growth in hot drinks in 2025

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INDUSTRY PERFORMANCE

Retail value sales rise amid premiumisation and currency-driven price growth

Product innovation sustains consumer engagement in hot drinks amid inflation

Health, wellness and sustainability shape hot drinks consumption in 2025

WHAT'S NEXT?

Steady growth is expected for hot drinks amid mature conditions

Innovation to set to drive growth in hot drinks through health and premiumisation trends

Digital adoption and consumer lifestyle changes impact distribution channels within hot drinks

COMPETITIVE LANDSCAPE

Cay Isletmeleri Genel Müdürlüğü retains its top position through leading tea brands

Ofcaysan AS and Dogus Cay record dynamic growth through tea innovations

CHANNELS

Supermarkets leads sales of hot drinks, while discounters and retail e-commerce drive growth

The on-trade channel drives growth for hot drinks, fuelled by social interactions and tourism demand

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Shifting consumer habits drive robust growth for coffee in Turkey

INDUSTRY PERFORMANCE

Premiumisation drives growth while at-home coffee machines support sales

Fresh coffee beans drive growth as consumers increasingly seek high-quality experiences

WHAT'S NEXT?

Consumers are expected to embrace high-quality, café-style coffee experiences at home

Growth is set to be driven by digital and technological innovation

Interest in eco-friendly packaging and sustainably sourced coffee beans is set to rise

COMPETITIVE LANDSCAPE

Nestlé Gıda Sanayii maintains its leadership through brand reputation and innovation

BİM Birleşik Magazacılık AS registers strong growth with its affordable private label ranges

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Retail volume and value sales continue to grow despite tea being a mature product

Black tea bags drive value growth through offering convenience in 2025

WHAT'S NEXT?

Steady growth is set to be driven by product diversification and convenience formats

Technological innovations in tea packaging are set to boost convenience and sustainability

Health and wellness trends are expected to drive innovation and growth in tea

COMPETITIVE LANDSCAPE

Cay Isletmeleri Genel Müdürlüğü leads as the country's most established tea producer

Dogus Cay and Ofcaysan AS drive growth through health-focused innovations and aggressive marketing

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[Other Hot Drinks in Turkey](#)

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2025 DEVELOPMENTS

Other hot drinks records growth driven by sahlep, while flavoured powder drinks decline

INDUSTRY PERFORMANCE

Price inflation and shifts in consumer preferences challenges volume growth of other hot drinks

Other plant-based hot drinks lead growth, driven by Sahlep's seasonal appeal and cultural significance

WHAT'S NEXT?

Moderate growth is set to be driven by other plant-based hot drinks and portfolio adaptation

Packaging developments are expected to support growth in other hot drinks

Health and wellness trends will continue to shape consumer preferences in other hot drinks

COMPETITIVE LANDSCAPE

Nestlé Gıda Sanayii AS maintains its leadership in other hot drinks despite challenges

Danone Tikvesli Gıda ve İçecek San. ve Tic. AS leads growth through sales of sahlep

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