

# Soft Drinks in Turkey

December 2025

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## Soft Drinks in Turkey

#### **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 Içecek faces challenges yet retains its leadership in 2025 Beypazari and local players lead volume growth in soft drinks in Turkey

#### **CHANNELS**

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Competitive pricing and health-focused positioning drive growth in carbonated bottled water

## WHAT'S NEXT?

Rising health awareness is expected to stimulate growth for bottled water

Bottled water sales are projected to benefit from ongoing investments in packaging and innovative designs

The health and wellness trend is expected to remain a key growth driver for bottled water

# COMPETITIVE LANDSCAPE

The shares of international brands fall, while local players drive growth

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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

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

#### COMPETITIVE LANDSCAPE

Coca-Cola lçecek 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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#### INDUSTRY PERFORMANCE

Concentrates volume decline is driven by health perceptions and price pressures

Powder concentrates sales are driven by flavour variety and affordability

## WHAT'S NEXT?

The performance of concentrates is set to be challenged by health concerns

Digital developments are expected to drive growth in liquid concentrates through retail e-commerce and marketing Health and wellness trends are set to drive sales of liquid concentrates through clean-label innovations

#### COMPETITIVE LANDSCAPE

The share of private label and smaller companies continues to rise

Private label drives sales while branded innovation creates interest in concentrates

#### **CHANNELS**

Discounters continues to improve its lead through expansion and private label lines

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# INDUSTRY PERFORMANCE

100% juice drives sales as nectars lose momentum in Turkey

Affordability, flavour innovation and seasonal demand fuel growth for juice drinks (up to 24% juice)

# WHAT'S NEXT?

Rising incomes and affordability are expected to drive sustained growth in juice sales

Sustainability and efficiency will shape the future of juice production in Turkey Health and functional benefits are expected to drive growth within juice

## COMPETITIVE LANDSCAPE

Domestic brands gain ground as Coca-Cola Içecek faces share pressure in juice

Dimes Gida San ve Ticaret strengthens its position through quality and innovation in juices

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#### 2025 DEVELOPMENTS

Convenience, flavour innovation, and health trends drive growth in RTD coffee

# INDUSTRY PERFORMANCE

RTD coffee gains momentum in Turkey amid rising demand for convenient café-style drinks Flavour innovation and health trends boost RTD coffee sales in Turkey

# WHAT'S NEXT?

Premium products and the expansion of coffee culture is set to drive growth in RTD coffee Digitalisation and technology are expected to drive innovation in RTD coffee Health and wellness is set to be key to product development in RTD coffee

# COMPETITIVE LANDSCAPE

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## RTD Tea in Turkey

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Health trends, new flavours, and expanding distribution drive growth for RTD tea

## INDUSTRY PERFORMANCE

A heathy image and refreshing taste drive sales of RTD tea in Turkey Reduced sugar RTDs drive growth as consumers reach for healthier options

#### WHAT'S NEXT?

Steady volume growth ahead as RTD tea in Turkey enters maturity

Packaging innovation is set to play an important role in RTD tea across the forecast period

Health and wellness will continue to be a central driver of RTD tea consumption

#### COMPETITIVE LANDSCAPE

Lipton retains its leading share through strong brand reputation and high visibility

Local and private label players accelerate growth through affordability and flavour innovation

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# Energy Drinks in Turkey

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#### 2025 DEVELOPMENTS

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#### INDUSTRY PERFORMANCE

Inflation and price increases negatively impact the performance of energy drinks Growth for regular energy drinks is driven by increased marketing and brand visibility

#### WHAT'S NEXT?

Volume growth for energy drinks is set to be driven by strong brand association and product innovation Energy drinks producers are expected to invest in technological innovations to support sales Reduced sugar and sugar-free options will continue to benefit from rising health consciousness

#### COMPETITIVE LANDSCAPE

Red Bull's continued leadership is driven by brand strength and product innovation Private label growth is driven by affordability and rising cost-consciousness

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# Sports Drinks in Turkey

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# 2025 DEVELOPMENTS

Fitness trends in Turkey fuel volume growth for sports drinks in 2025

# INDUSTRY PERFORMANCE

Growth for sports drinks is supported by fitness trends but limited by economic pressures Health trends drive interest in sports drinks, with rising opportunities in on-trade channels

## WHAT'S NEXT?

Steady growth for sports drinks expected as the health and fitness trends expand Manufacturers are expected to offer value-added products to drive sales Retail e-commerce is set to gain traction through offering convenience

#### COMPETITIVE LANDSCAPE

Coca-Cola Içecek AS maintains its leadership in sports drinks despite share pressures Emerging local brands gain traction in sports drinks in Turkey in 2025

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