

# Dairy Products and Alternatives in Turkey

August 2025

**Table of Contents** 

# Dairy Products and Alternatives in Turkey

#### **EXECUTIVE SUMMARY**

Dairy products and alternatives in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

#### MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2020-2025
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2020-2025
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2021-2025
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2022-2025
- Table 5 Penetration of Private Label by Category: % Value 2020-2025
- Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2020-2025
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2025-2030
- Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2025-2030

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Baby Food in Turkey

## **KEY DATA FINDINGS**

## 2025 DEVELOPMENTS

Baby food sales see steady growth as competition heats up

Nutricia Aptamil and Bebelac control milk formula sales as Ülker thrives in other baby food

Retail e-commerce remains the leading channel

#### PROSPECTS AND OPPORTUNITIES

Bright outlook for baby food with further investment expected

Health and wellness concerns expected to drive growth and new product development

Busy, working parents driving demand for prepared baby food

## **CATEGORY DATA**

- Table 9 Sales of Baby Food by Category: Volume 2020-2025
- Table 10 Sales of Baby Food by Category: Value 2020-2025
- Table 11 Sales of Baby Food by Category: % Volume Growth 2020-2025
- Table 12 Sales of Baby Food by Category: % Value Growth 2020-2025
- Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2020-2025
- Table 14 NBO Company Shares of Baby Food: % Value 2021-2025
- Table 15 LBN Brand Shares of Baby Food: % Value 2022-2025
- Table 16 Distribution of Baby Food by Format: % Value 2020-2025
- Table 17 Forecast Sales of Baby Food by Category: Volume 2025-2030
- Table 18 Forecast Sales of Baby Food by Category: Value 2025-2030
- Table 19 Forecast Sales of Baby Food by Category: % Volume Growth 2025-2030
- Table 20 Forecast Sales of Baby Food by Category: % Value Growth 2025-2030

# Butter and Spreads in Turkey

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Butter and spreads sees stable growth but continues to face challenges

Affordability, availability, naturalness and brand loyalty remain key factors

Small local grocers lead but discounters see strong gains thanks to low pricing

#### PROSPECTS AND OPPORTUNITIES

Butter set to drive growth in the retail channel

Search for healthier options expected to inform new product development

Plant-based products set to become more commonplace

## **CATEGORY DATA**

- Table 21 Sales of Butter and Spreads by Category: Volume 2020-2025
- Table 22 Sales of Butter and Spreads by Category: Value 2020-2025
- Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2020-2025
- Table 24 Sales of Butter and Spreads by Category: % Value Growth 2020-2025
- Table 25 NBO Company Shares of Butter and Spreads: % Value 2021-2025
- Table 26 LBN Brand Shares of Butter and Spreads: % Value 2022-2025
- Table 27 Distribution of Butter and Spreads by Format: % Value 2020-2025
- Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2025-2030
- Table 29 Forecast Sales of Butter and Spreads by Category: Value 2025-2030
- Table 30 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2025-2030
- Table 31 Forecast Sales of Butter and Spreads by Category: % Value Growth 2025-2030

## Cheese in Turkey

## **KEY DATA FINDINGS**

## 2025 DEVELOPMENTS

Cheese sales soaring with varieties to meet every need and budget

Private label players a key role in cheese thanks to its competitive prices

Supermarkets and discounters dominate distribution amid rising online sales

#### PROSPECTS AND OPPORTUNITIES

Enduring popularity of cheese set to fuel steady growth

New product development and demand expected to focus on healthier options

Innovation set to focus on health and convenience

## **CATEGORY DATA**

- Table 32 Sales of Cheese by Category: Volume 2020-2025
- Table 33 Sales of Cheese by Category: Value 2020-2025
- Table 34 Sales of Cheese by Category: % Volume Growth 2020-2025
- Table 35 Sales of Cheese by Category: % Value Growth 2020-2025
- Table 36 Sales of Spreadable Cheese by Type: % Value 2020-2025
- Table 37 Sales of Soft Cheese by Type: % Value 2020-2025
- Table 38 Sales of Hard Cheese by Type: % Value 2020-2025
- Table 39 NBO Company Shares of Cheese: % Value 2021-2025
- Table 40 LBN Brand Shares of Cheese: % Value 2022-2025
- Table 41 Distribution of Cheese by Format: % Value 2020-2025
- Table 42 Forecast Sales of Cheese by Category: Volume 2025-2030
- Table 43 Forecast Sales of Cheese by Category: Value 2025-2030
- Table 44 Forecast Sales of Cheese by Category: % Volume Growth 2025-2030
- Table 45 Forecast Sales of Cheese by Category: % Value Growth 2025-2030

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Foodservice sales rise sharply buoyed by burgeoning café culture Lactalis Group remains a key player in drinking milk products Discounters drive sales growth thanks to affordable pricing

#### PROSPECTS AND OPPORTUNITIES

Strong growth predicted for drinking milk products despite shift in dietary behaviours Healthier options could help expand the market for drinking milk products

Packaging set to come under the microscope

## **CATEGORY DATA**

- Table 46 Sales of Drinking Milk Products by Category: Volume 2020-2025
- Table 47 Sales of Drinking Milk Products by Category: Value 2020-2025
- Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2020-2025
- Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2020-2025
- Table 50 NBO Company Shares of Drinking Milk Products: % Value 2021-2025
- Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2022-2025
- Table 52 Distribution of Drinking Milk Products by Format: % Value 2020-2025
- Table 53 Forecast Sales of Drinking Milk Products by Category: Volume 2025-2030
- Table 54 Forecast Sales of Drinking Milk Products by Category: Value 2025-2030
- Table 55 Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2025-2030
- Table 56 Forecast Sales of Drinking Milk Products by Category: % Value Growth 2025-2030

## Yoghurt and Sour Milk Products in Turkey

#### **KEY DATA FINDINGS**

## 2025 DEVELOPMENTS

Yoghurt and sour milk products benefiting from healthy image
Sütas remains the leading brand manufacturer while SEK sees standout performance
Discounters increase their dominance thanks to strong value positioning

## PROSPECTS AND OPPORTUNITIES

Sales set to benefit from increasing focus on healthy living
Health and wellness set to inform demand and drive new product development
Innovation set to play a key role in driving competition

## **CATEGORY DATA**

- Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2020-2025
- Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2020-2025
- Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2020-2025
- Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2020-2025
- Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2020-2025
- Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2021-2025
- Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2022-2025
- Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2020-2025
- Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2025-2030
- Table 66 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2025-2030
- Table 67 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2025-2030
- Table 68 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2025-2030

#### Other Dairy in Turkey

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Healthy eating trend has a positive influence on demand for other dairy

Turkish players lead other dairy with strong presence in labneh

Discounters benefit from strong value proposition with broad private label offering

## PROSPECTS AND OPPORTUNITIES

Bright outlook for other dairy thanks to its healthy image

Chilled snacks and labneh set to remain key growth drivers

Competition set to intensify with private label looking to win further share

#### **CATEGORY DATA**

Table 69 - Sales of Other Dairy by Category: Volume 2020-2025

Table 70 - Sales of Other Dairy by Category: Value 2020-2025

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2020-2025

Table 72 - Sales of Other Dairy by Category: % Value Growth 2020-2025

Table 73 - Sales of Cream by Type: % Value 2020-2025

Table 74 - NBO Company Shares of Other Dairy: % Value 2021-2025

Table 75 - LBN Brand Shares of Other Dairy: % Value 2022-2025

Table 76 - Distribution of Other Dairy by Format: % Value 2020-2025

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2025-2030

Table 78 - Forecast Sales of Other Dairy by Category: Value 2025-2030

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2025-2030

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2025-2030

## Plant-Based Dairy in Turkey

# KEY DATA FINDINGS

# 2025 DEVELOPMENTS

Plant-based dairy thriving with plant-based cheese being a focus of innovation

Alpro continues to benefit from first-mover advantage despite increasing competition

Supermarkets remain key to sales but e-commerce is playing a growing role

#### PROSPECTS AND OPPORTUNITIES

Increasing competition should benefit sales of plant-based dairy

Innovation and new product development will be key to growth

Ethical concerns should play a key role in driving sales growth

## **CATEGORY DATA**

Table 81 - Sales of Plant-Based Dairy by Category: Value 2020-2025

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2020-2025

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2022-2025

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2021-2025

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2022-2025

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2020-2025

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2025-2030

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2025-2030

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-inturkey/report.