



Staple Foods in Turkey

November 2025

Table of Contents

Staple Foods in Turkey

EXECUTIVE SUMMARY

Price sensitivity shapes overall category performance

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Healthy performance despite high costs of living

Consumers shift towards local products for sustainable reasons

WHAT'S NEXT?

Positive outlook for frozen and smaller formats

Changing diets reflect rising demand for plant-based and vegan options

Growth potential for artisanal products

COMPETITIVE LANDSCAPE

BİM Birlesik Magazacilik takes the lead in highly fragmented category

Unifo Gıda San Ve Tic AS gains traction with Tada brand

CHANNELS

Consumers conduct more frequent shopping trips

Retail e-commerce gains traction

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Turkey

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable consumption despite rising inflationary pressures

INDUSTRY PERFORMANCE

Shrinkflation is adopted to ensure products remain affordable

Consumers rely on flat bread in packaged formats promising longer shelf life

WHAT'S NEXT?

Economic pressures will continue to shape consumer demand
Healthier lines set to evolve in the upcoming years
Sustainable attributes and practices will continue to evolve

COMPETITIVE LANDSCAPE

UNMAS AS leads with Uno packaged bread
Simsek Biskuvi ve Gida Sanayi gains traction with affordable premium lines

CHANNELS

Discounters draw in shoppers by staying responsive to economic needs

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Turkey](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable options and health appeal drives volume growth

INDUSTRY PERFORMANCE

Private label development propels category growth
Granola and muesli witness growth as consumers adopt healthier diets

WHAT'S NEXT?

Specialist offerings will address changing dietary preferences
Players will respond to healthier everyday diets
Product development to focus on nutritional and flavour combinations

COMPETITIVE LANDSCAPE

Multinational Nestlé leads in breakfast cereals
FFT Gida San ve Tic enjoys dynamism with its healthy and natural cereals

CHANNELS

Expansion and modernisation supports the supermarket channel
Convenience and digital literacy drive retail e-commerce sales

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025
Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Turkey

KEY DATA FINDINGS

2025 DEVELOPMENTS

Private label is key driver of volume sales

INDUSTRY PERFORMANCE

Frozen processed vegetables enjoy steady volume growth

Frozen processed potatoes gain appeal

WHAT'S NEXT?

Strong growth potential for frozen processed foods

Deeper corporate commitment to sustainability

Convenience and ease of use will drive e-commerce sales

COMPETITIVE LANDSCAPE

Hard discount retailer BIM leads the category

Konya Seker San ve Tic AS stands out by appealing to demands for natural products

CHANNELS

Modern retailers hold a strong position

Retail e-commerce achieves mainstream adoption among younger and urban consumers

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in Turkey

KEY DATA FINDINGS

2025 DEVELOPMENTS

Players entice price sensitive consumers with affordable products

INDUSTRY PERFORMANCE

Shrinkflation strategies are embraced by brands and private label amid persistently high inflation

Shelf-stable poultry gains appeal out of convenience and affordability

WHAT'S NEXT?

Price promotions and discount offers to remain vital strategies

Industry-wide commitment to environmental responsibility

Players will innovate by catering to specific health needs

COMPETITIVE LANDSCAPE

Established player Pinar Et leads this fragmented landscape

Unifo Gida supports growth of shelf-stable processed poultry

CHANNELS

Supermarkets capture significant share with diverse offerings and competitive pricing

Retail e-commerce sales increase at dynamic pace

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Turkey](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bright performance for rice, pasta and noodles

INDUSTRY PERFORMANCE

Price stability and innovation drives strong volume growth

Chilled pasta appeals as modern lifestyles evolve

WHAT'S NEXT?

Rapid growth in pasta boosted by domestic production

Players will cater to evolving preferences for low-carb and higher protein pasta and noodles

Efforts to put sustainability higher on the corporate agenda will continue

COMPETITIVE LANDSCAPE

BİM Birlesik Magazacilik leads with popular private label and “everyday low prices” strategy
Nissin Yildiz Gida develops the instant noodles category

CHANNELS

Discounters emerge as leading distribution channel
Strong preference for online shopping among urban households

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025
Table 69 - NBO Company Shares of Rice: % Value 2021-2025
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025
Table 76 - Distribution of Rice by Format: % Value 2020-2025
Table 77 - Distribution of Pasta by Format: % Value 2020-2025
Table 78 - Distribution of Noodles by Format: % Value 2020-2025
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/staple-foods-in-turkey/report.