



Passport

Yoghurt and Sour Milk Products in Turkey

Euromonitor International

September 2021

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YOGHURT AND SOUR MILK PRODUCTS IN TURKEY - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Ongoing home seclusion in 2021 due to the continued presence of COVID-19 in the country

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2021 DEVELOPMENTS

Growth in retail volume sales for yoghurt and sour milk drinks as consumers remain at home and foodservice enjoys some rebound

Retail volume sales of yoghurt and sour milk products are set to grow in 2021. These are

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Demand for healthier products boosts sales of smaller brands, sour milk drinks and kefir

Consumers have increased their yoghurt consumption as home-made meals can easily be accompanied by yoghurt. Most people buy reputable well-known brands from the closest

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Drinking yoghurt benefits from affordability, larger pack sizes and the gradual reopening of foodservice in 2021

Drinking yoghurt is set to see positive growth in retail volume terms in 2021 following consistently strong growth over the review period. Growth has largely been driven by improving

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PROSPECTS AND OPPORTUNITIES

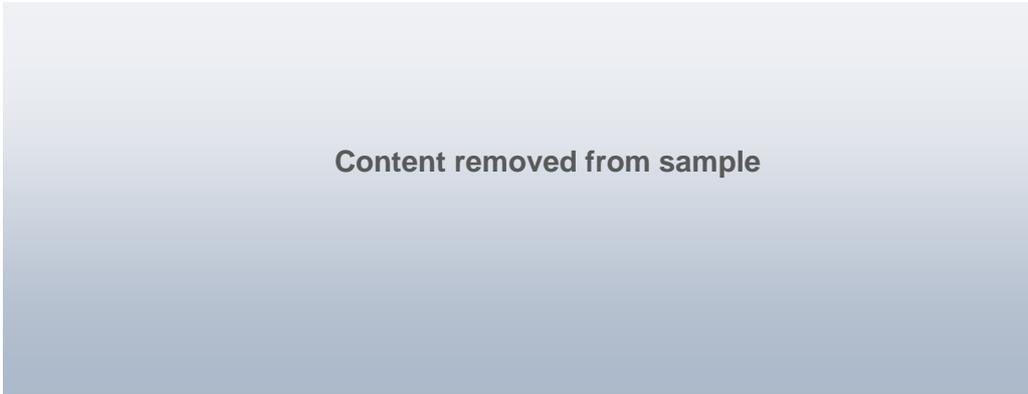
Normal habits resume after the pandemic recedes, with price becoming even more important to cash-strapped consumers

Once the pandemic recedes, consumers are expected to revert to their daily routines while

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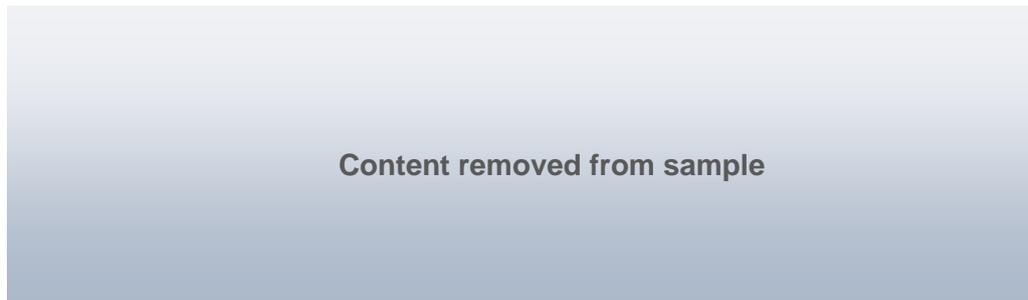
Organic products can benefit from rising health awareness

Organic yoghurt is set to see acceleration in demand over the forecast period, underpinned by a variety of factors. Strong underlying health and wellness trends will be the main driver. These



Strong forecast period performance of sour milk drinks thanks to their health benefits and new flavour profiles

Consumption of sour milk products has boomed since the pandemic as it is believed to boost



CATEGORY DATA

Table 1 Sales of Yoghurt and Sour Milk Products by Category: Volume 2016-2021

	2016	2017	2018	2019	2020	2021
- Yoghurt (Not calculable)	Data removed from sample					
-- Plain Yoghurt ('000 tonnes)						
-- Flavoured Yoghurt ('000 tonnes)						
-- Drinking Yoghurt (million litres)						
- Sour Milk Products (million litres)						
Yoghurt and Sour Milk Products (Not calculable)	-	-	-	-	-	-

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Yoghurt and Sour Milk Products by Category: Value 2016-2021

TRY million	2016	2017	2018	2019	2020	2021
- Yoghurt	Data removed from sample					
-- Plain Yoghurt						
-- Flavoured Yoghurt						
-- Drinking Yoghurt						
- Sour Milk Products						
Yoghurt and Sour Milk Products						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2016-2021

	2020/21	2016-21 CAGR	2016/21 Total
- Yoghurt (Not calculable)	Data removed from sample		
-- Plain Yoghurt (% volume growth)			
-- Flavoured Yoghurt (% volume growth)			
-- Drinking Yoghurt (% volume growth)			
- Sour Milk Products (% volume growth)			
Yoghurt and Sour Milk Products (Not calculable)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Yoghurt	Data removed from sample		
-- Plain Yoghurt			
-- Flavoured Yoghurt			
-- Drinking Yoghurt			
- Sour Milk Products			
Yoghurt and Sour Milk Products			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Flavoured Yoghurt by Flavour: Rankings 2016-2021

ranking	2016	2017	2018	2019	2020	2021
Strawberry	Data removed from sample					
Apricot						
Peach						
Pineapple						
Blueberry						

Almond
 Apple
 Vanilla
 Walnut
 Oat

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						

Total	Data removed from sample					
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

Table 9 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
- Yoghurt (Not calculable)	-	-	-	-	-	-
-- Plain Yoghurt ('000 tonnes)	Data removed from sample					
-- Flavoured Yoghurt ('000 tonnes)	Data removed from sample					
-- Drinking Yoghurt (million litres)	Data removed from sample					
- Sour Milk Products (million litres)	Data removed from sample					
Yoghurt and Sour Milk Products (Not calculable)	-	-	-	-	-	-

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2021-2026

TRY million	2021	2022	2023	2024	2025	2026
- Yoghurt	Data removed from sample					
-- Plain Yoghurt	Data removed from sample					
-- Flavoured Yoghurt	Data removed from sample					
-- Drinking Yoghurt	Data removed from sample					
- Sour Milk Products	Data removed from sample					
Yoghurt and Sour Milk Products	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2021-2026

	2021/22	2021-26 CAGR	2021/26 Total
- Yoghurt (Not calculable)	Data removed from sample		
-- Plain Yoghurt (% volume growth)	Data removed from sample		
-- Flavoured Yoghurt (% volume growth)	Data removed from sample		
-- Drinking Yoghurt (% volume growth)	Data removed from sample		
- Sour Milk Products (% volume growth)	Data removed from sample		
Yoghurt and Sour Milk Products (Not calculable)	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2021-2026

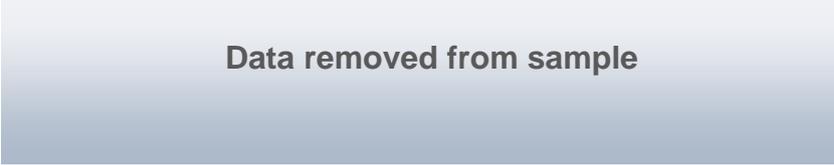
% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

- Yoghurt
- Plain Yoghurt
- Flavoured Yoghurt
- Drinking Yoghurt
- Sour Milk Products
- Yoghurt and Sour Milk Products



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DAIRY PRODUCTS AND ALTERNATIVES IN TURKEY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Dairy products and alternatives in 2021: The big picture

The main trend in 2021 continues to be limitations in the foodservice channel as operators

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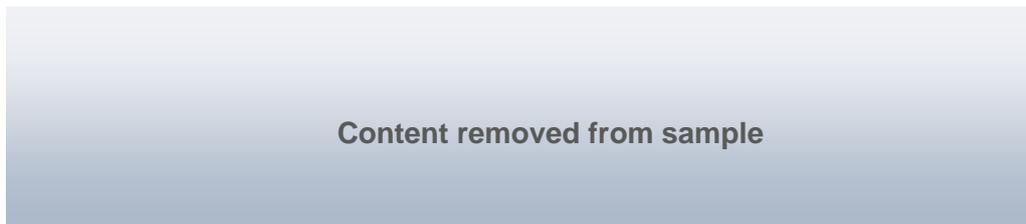
Key trends in 2021

Government measures put in place to curb the spread of the virus has meant most

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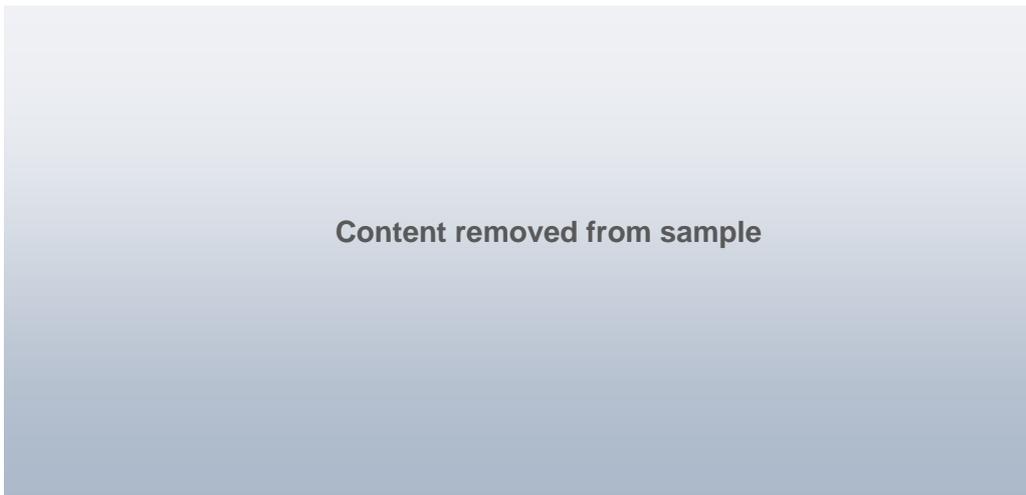
Competitive landscape

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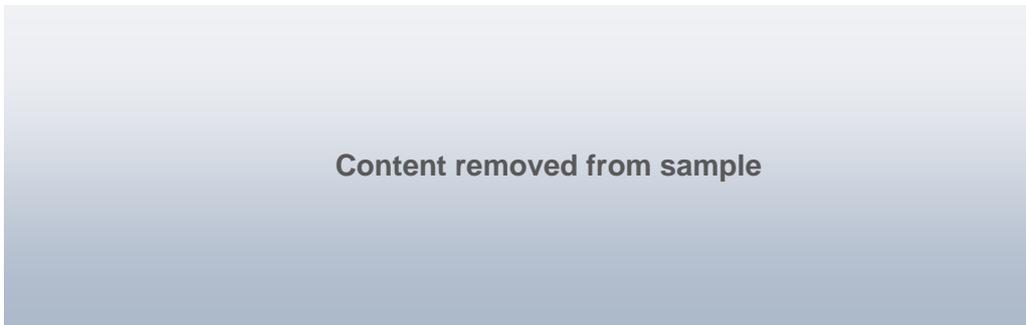
Channel developments

Modern retail channels such as chained supermarkets have become more aware of consumer



What next for dairy products and alternatives?

The pandemic is expected to begin to abate, particularly as vaccines are now being rolled out.



MARKET DATA

Table 13 Sales of Dairy Products and Alternatives by Category: Value 2016-2021

TRY million

	2016	2017	2018	2019	2020	2021
Dairy Dairy Products and Alternatives Baby Food	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021

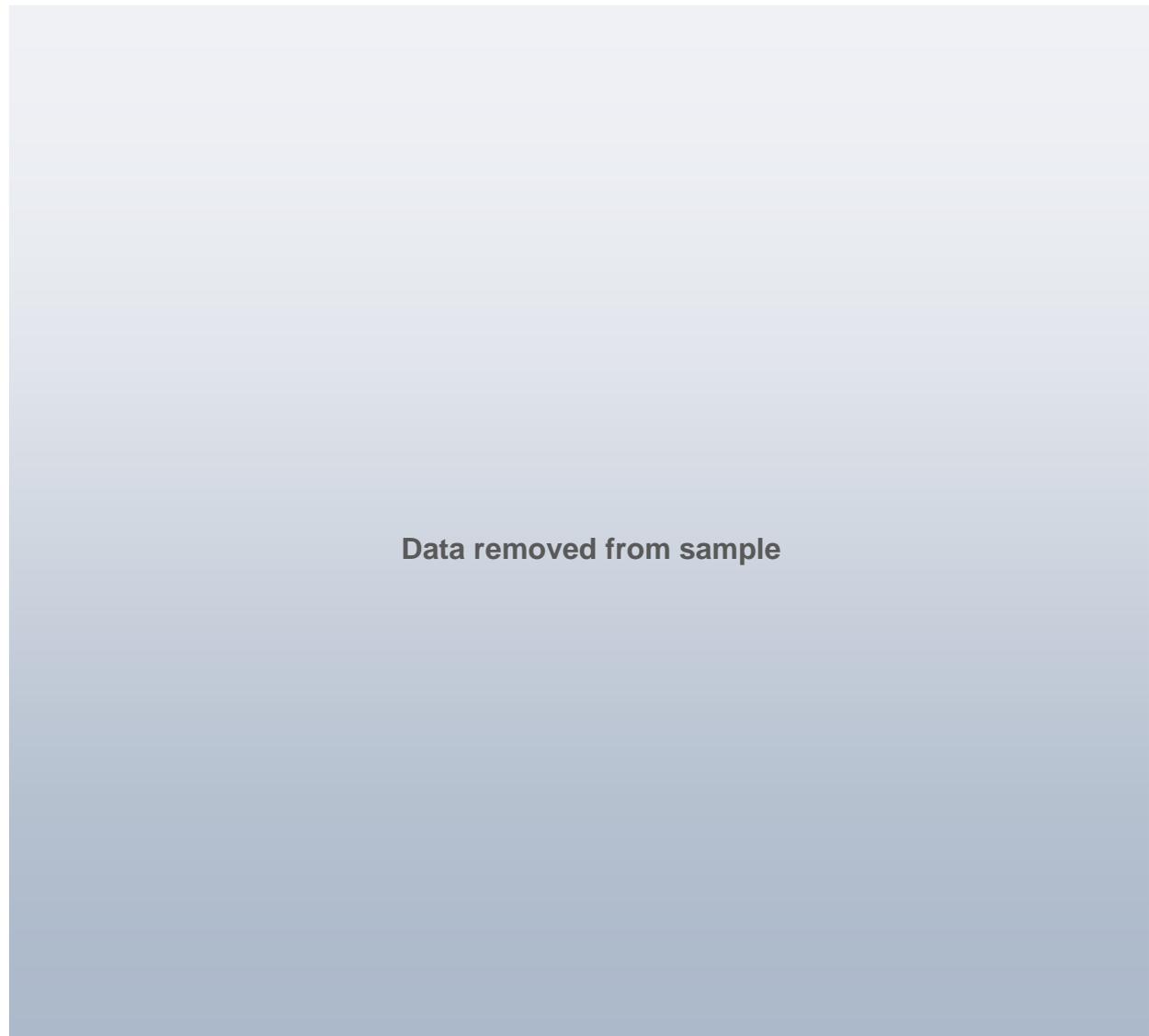
% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby Food	Data removed from sample		
Dairy			
Dairy Products and Alternatives			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
BIM	Data removed from sample				

BIM

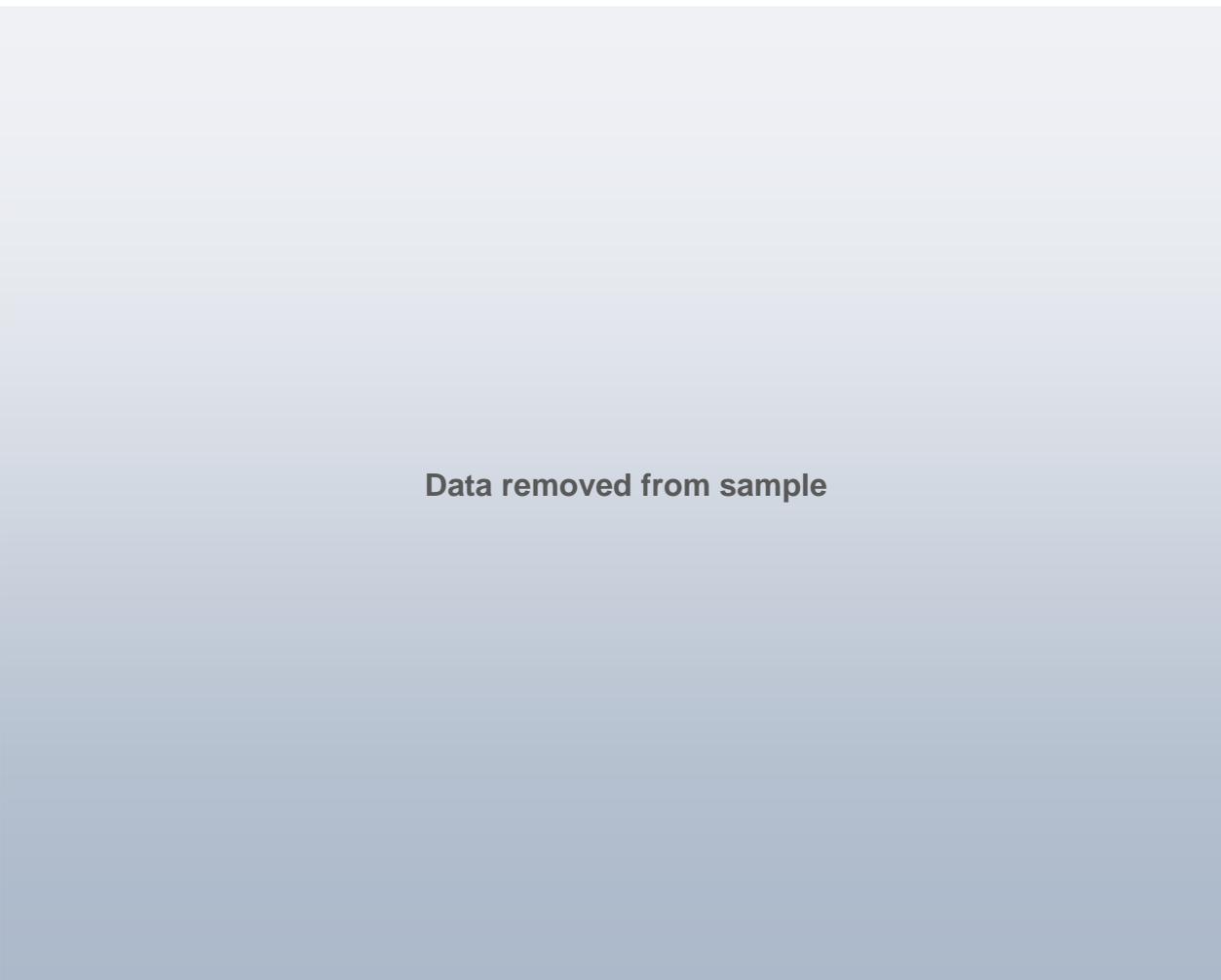


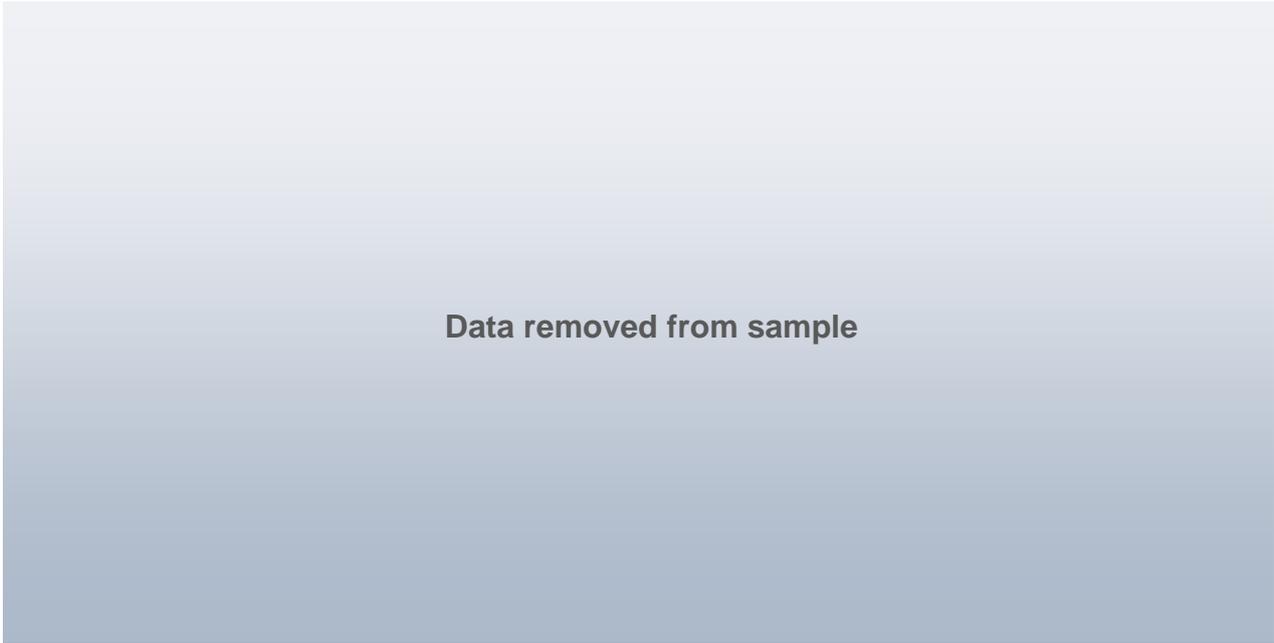


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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store checks, trade interviews, trade sources

Table 17 Penetration of Private Label by Category: % Value 2016-2021

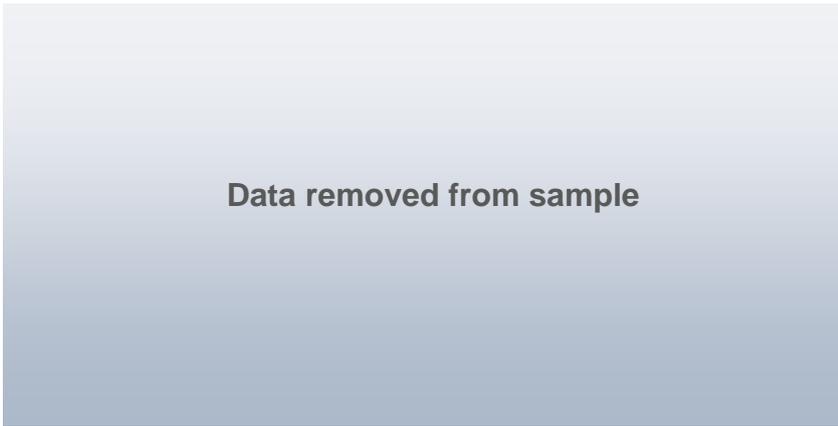
% retail value rsp	2016	2017	2018	2019	2020	2021
Baby Food	Data removed from sample					
Dairy						
Dairy Products and Alternatives						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						

- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



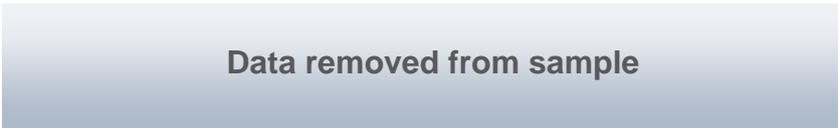
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026

TRY million

2021 2022 2023 2024 2025 2026

- Dairy Products and Alternatives
- Baby Food
- Dairy



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026

% constant value growth

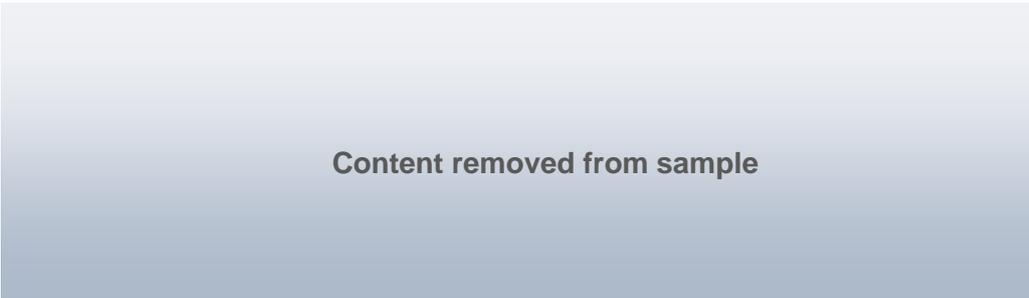
2021/2022 2021-26 CAGR 2021/26 Total

- Dairy
- Dairy Products and Alternatives
- Baby Food



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER



SOURCES

Sources used during research include the following:

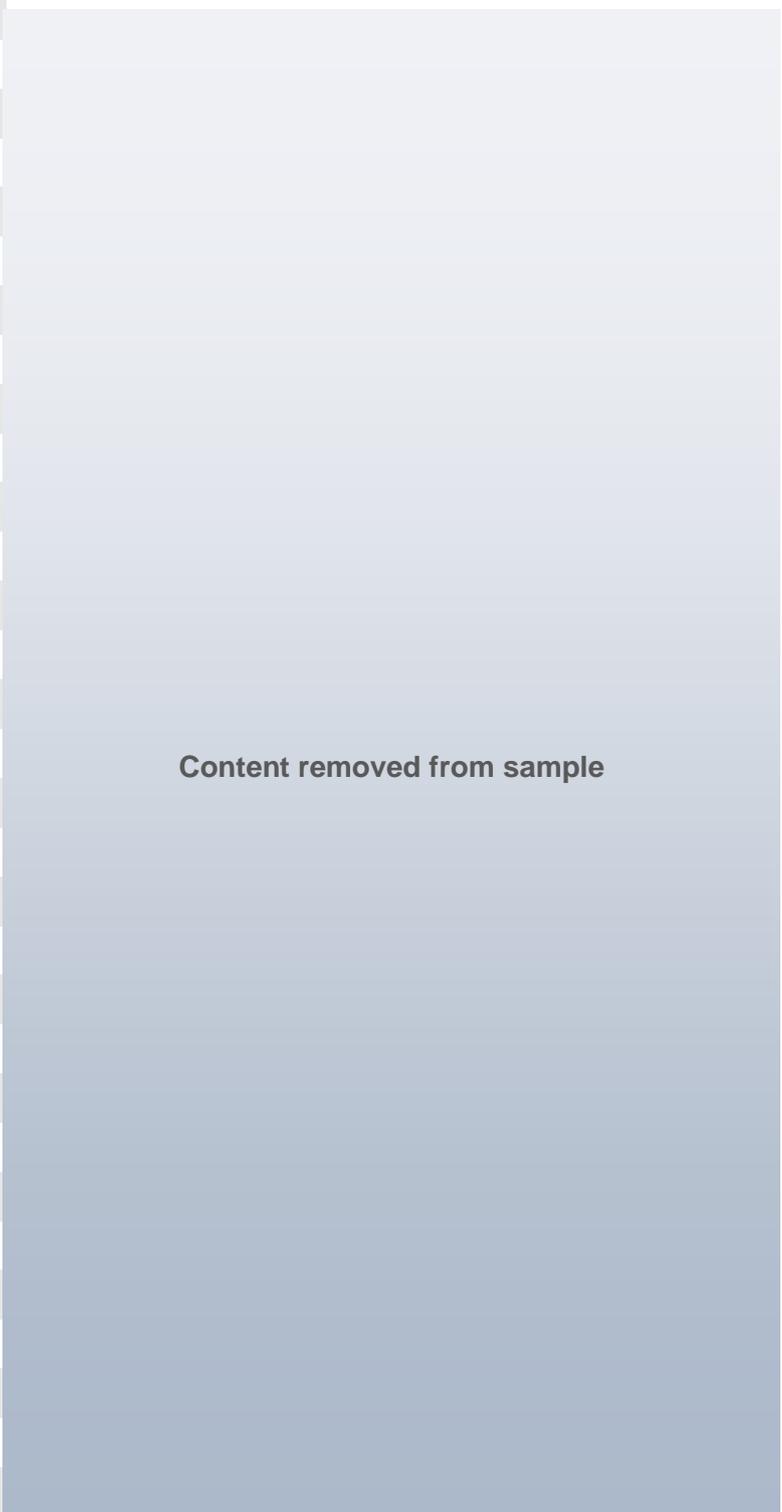
Summary 1 Research Sources

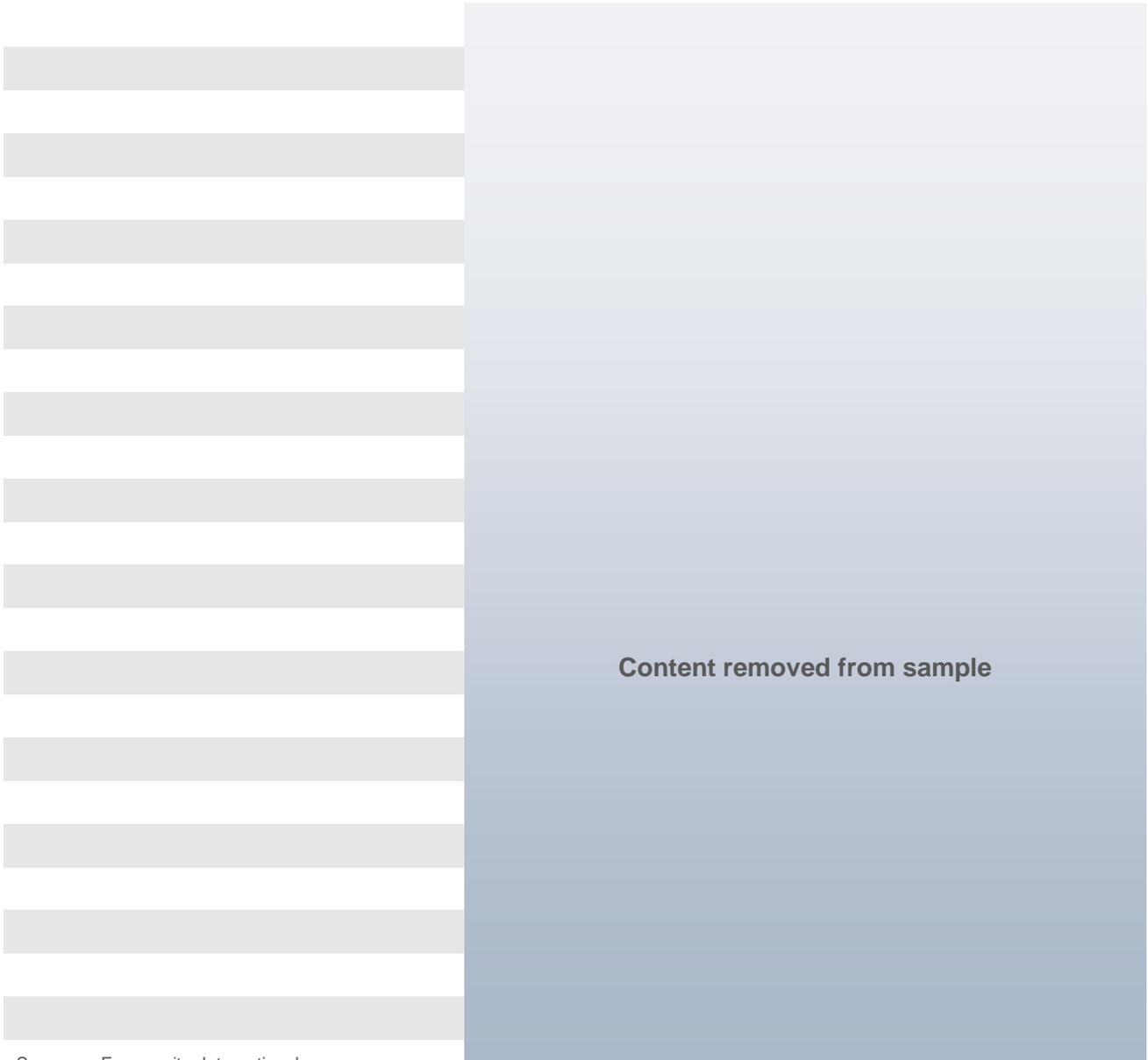
Official Sources

Official Sources

Trade Associations

Trade Associations





Source: Euromonitor International