

Alcoholic Drinks in Turkey

June 2023

Table of Contents

Alcoholic Drinks in Turkey

EXECUTIVE SUMMARY

Double-digit total volume growth for alcoholic drinks in 2022

Extraordinarily high growth registered in average unit prices across the board

Boom in new product development as players seek to grab the attention of consumers

Position of supermarkets improves as consumers seek value and convenience

Dynamic on-trade volume growth due to reopening of local hospitality industry

Less oppressive economic conditions set to spur growth in demand

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

- Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 4 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 11 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 12 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 13 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Turkey

KEY DATA FINDINGS

2022 DEVELOPMENTS

Double-digit growth for total volume sales of beer in 2022

Average unit prices soar across beer as inflation takes its toll

The launch of new beer brands stimulates demand and pushes sales growth

PROSPECTS AND OPPORTUNITIES

Sales growth to accelerate as demand continues to increase

Demand set to continue shifting towards higher-quality beer

The share of supermarkets in the retail distribution of beer set to increase

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022

Table 20 - Sales of Beer by Category: Total Value 2017-2022

Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 - Sales of Beer by Craft vs Standard 2017-2022

Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Turkey

KEY DATA FINDINGS

2022 DEVELOPMENTS

Negative off-trade volume growth for cider/perry as price rises supress demand Lack of innovation and paucity of new product launches a sign of stagnation On-trade volume sales increase as consumers return to bars, pubs and restaurants

PROSPECTS AND OPPORTUNITIES

Potential for off-trade volume growth in cider/perry likely to remain very low

The average unit price of cider/perry to continue rising as inflation bites

Supermarkets expected to become increasingly dominant in cider/perry distribution

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

- Table 36 Sales of Cider/Perry: Total Value 2017-2022
- Table 37 Sales of Cider/Perry: % Total Volume Growth 2017-2022
- Table 38 Sales of Cider/Perry: % Total Value Growth 2017-2022
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
- Table 40 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
- Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 42 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 43 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 44 NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 45 LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
- Table 46 Forecast Sales of Cider/Perry: Total Volume 2022-2027
- Table 47 Forecast Sales of Cider/Perry: Total Value 2022-2027
- Table 48 Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
- Table 49 Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Spirits in Turkey

KEY DATA FINDINGS

2022 DEVELOPMENTS

Off-trade sales of spirits decline as demand for aniseed-flavoured spirit raki falls lrish whiskey the most dynamic spirits category in 2022

Double-digit on-trade volume growth a sign of strong recovery in the hospitality sector

PROSPECTS AND OPPORTUNITIES

Off-trade volume sales to increase as demand shifts towards premium products

Beer expected to remain the major rival to spirits

Supermarkets set to increase in importance in the retail distribution of spirits

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

CATEGORY DATA

- Table 50 Sales of Spirits by Category: Total Volume 2017-2022
- Table 51 Sales of Spirits by Category: Total Value 2017-2022
- Table 52 Sales of Spirits by Category: % Total Volume Growth 2017-2022
- Table 53 Sales of Spirits by Category: % Total Value Growth 2017-2022
- Table 54 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
- Table 55 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
- Table 56 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 57 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 58 Sales of Dark Rum by Price Platform: % Total Volume 2017-2022
- Table 59 Sales of White Rum by Price Platform: % Total Volume 2017-2022
- Table 60 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
- Table 61 Sales of English Gin by Price Platform: % Total Volume 2017-2022
- Table 62 Sales of Vodka by Price Platform: % Total Volume 2017-2022
- Table 63 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
- Table 64 GBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 65 NBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 66 LBN Brand Shares of Spirits: % Total Volume 2019-2022
- Table 67 Forecast Sales of Spirits by Category: Total Volume 2022-2027
- Table 68 Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 69 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 70 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Turkey

KEY DATA FINDINGS

2022 DEVELOPMENTS

Total volume sales increase due to a very robust on-trade performance Interruptions to the supply of glass packaging affect wine brands during 2022 Wine made from local grape varietals is subject to higher demand

PROSPECTS AND OPPORTUNITIES

Growth set to accelerate as demand rises in both the on-trade and the off-trade Mid-priced wine brands set to remain the main driver of sales growth The share of the supermarkets channel is expected to increase

CATEGORY DATA

Table 71 - Sales of Wine by Category: Total Volume 2017-2022

Table 72 - Sales of Wine by Category: Total Value 2017-2022

Table 73 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 74 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 75 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 76 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 77 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 78 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022

Table 79 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022

Table 80 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022

Table 81 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022

Table 82 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022

Table 83 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 84 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 85 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022

Table 86 - GBO Company Shares of Champagne: % Total Volume 2018-2022

Table 87 - NBO Company Shares of Champagne: % Total Volume 2018-2022

Table 88 - LBN Brand Shares of Champagne: % Total Volume 2019-2022

Table 89 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 90 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 91 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022

Table 92 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 93 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 94 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022

Table 95 - GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 96 - NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 97 - LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022

Table 98 - Forecast Sales of Wine by Category: Total Volume 2022-2027

Table 99 - Forecast Sales of Wine by Category: Total Value 2022-2027

Table 100 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027

Table 101 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

About Furomonitor 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/alcoholic-drinks-in-turkey/report.