

Cooking Ingredients and Meals in Turkey

November 2023

Table of Contents

Cooking Ingredients and Meals in Turkey

EXECUTIVE SUMMARY

Cooking ingredients and meals in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for cooking ingredients and meals?

MARKET DATA

- Table 1 Sales of Cooking Ingredients and Meals by Category: Volume 2018-2023
- Table 2 Sales of Cooking Ingredients and Meals by Category: Value 2018-2023
- Table 3 Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2018-2023
- Table 4 Sales of Cooking Ingredients and Meals by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Cooking Ingredients and Meals: % Value 2019-2023
- Table 6 LBN Brand Shares of Cooking Ingredients and Meals: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2018-2023
- Table 8 Distribution of Cooking Ingredients and Meals by Format: % Value 2018-2023
- Table 9 Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2023-2028
- Table 10 Forecast Sales of Cooking Ingredients and Meals by Category: Value 2023-2028
- Table 11 Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rampant inflation translates into phenomenal value growth for edible oils in 2023

Turkey's domestic olive oil production hits record highs during 2023

Buoyant tourism flows drive growth in foodservice volume sales of edible oils

PROSPECTS AND OPPORTUNITIES

Maintaining affordable prices set to remain the primary aim for category players

Olive oil's healthy image set to prove crucial as consumption continues to increase

The government of Turkey to continue subsidising sunflower oil production

CATEGORY DATA

- Table 13 Sales of Edible Oils by Category: Volume 2018-2023
- Table 14 Sales of Edible Oils by Category: Value 2018-2023
- Table 15 Sales of Edible Oils by Category: % Volume Growth 2018-2023
- Table 16 Sales of Edible Oils by Category: % Value Growth 2018-2023
- Table 17 NBO Company Shares of Edible Oils: % Value 2019-2023
- Table 18 LBN Brand Shares of Edible Oils: % Value 2020-2023
- Table 19 Distribution of Edible Oils by Format: % Value 2018-2023
- Table 20 Forecast Sales of Edible Oils by Category: Volume 2023-2028
- Table 21 Forecast Sales of Edible Oils by Category: Value 2023-2028
- Table 22 Forecast Sales of Edible Oils by Category: % Volume Growth 2023-2028
- Table 23 Forecast Sales of Edible Oils by Category: % Value Growth 2023-2028

Meals and Soups in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive growth in ready meals flows from widening of product range in the category

A major shakeup in shelf stable soup as Knorr exits the category

Small packs come to the fore as falling purchasing power puts pressure on spending

PROSPECTS AND OPPORTUNITIES

Development of ready meals to continue focusing on new products and small packs Wider range of products and higher quality to support growth in chilled ready meals Frozen ready meals to continue benefiting from long shelf life and value for money

CATEGORY DATA

- Table 24 Sales of Meals and Soups by Category: Volume 2018-2023
- Table 25 Sales of Meals and Soups by Category: Value 2018-2023
- Table 26 Sales of Meals and Soups by Category: % Volume Growth 2018-2023
- Table 27 Sales of Meals and Soups by Category: % Value Growth 2018-2023
- Table 28 Sales of Chilled Ready Meals by Ethnicity: % Value 2018-2023
- Table 29 Sales of Frozen Ready Meals by Ethnicity: % Value 2018-2023
- Table 30 Sales of Soup by Leading Flavours: Rankings 2018-2023
- Table 31 NBO Company Shares of Meals and Soups: % Value 2019-2023
- Table 32 LBN Brand Shares of Meals and Soups: % Value 2020-2023
- Table 33 Distribution of Meals and Soups by Format: % Value 2018-2023
- Table 34 Forecast Sales of Meals and Soups by Category: Volume 2023-2028
- Table 35 Forecast Sales of Meals and Soups by Category: Value 2023-2028
- Table 36 Forecast Sales of Meals and Soups by Category: % Volume Growth 2023-2028
- Table 37 Forecast Sales of Meals and Soups by Category: % Value Growth 2023-2028

Sauces, Dips and Condiments in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Foodservice volume growth outpaces retail volume growth due to rising tourism flows

Private label benefits as discounters respond to economic woe by expanding product ranges

Price competition becomes increasingly intense as consumers prioritise value for money

PROSPECTS AND OPPORTUNITIES

Variety of table sauces set to expand as consumers become more sophisticated

Pressure on spending set to continue encouraging key players to reduce pack sizes

Competition from unbranded and unpackaged alternatives to put pressure on demand

CATEGORY DATA

- Table 38 Sales of Sauces, Dips and Condiments by Category: Volume 2018-2023
- Table 39 Sales of Sauces, Dips and Condiments by Category: Value 2018-2023
- Table 40 Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2018-2023
- Table 41 Sales of Sauces, Dips and Condiments by Category: % Value Growth 2018-2023
- Table 42 Sales of Other Sauces and Condiments by Type: Rankings 2018-2023
- Table 43 NBO Company Shares of Sauces, Dips and Condiments: % Value 2019-2023
- Table 44 LBN Brand Shares of Sauces, Dips and Condiments: % Value 2020-2023
- Table 45 Distribution of Sauces, Dips and Condiments by Format: % Value 2018-2023
- Table 46 Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2023-2028

Table 47 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2023-2028

Table 48 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2023-2028

Table 49 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2023-2028

Sweet Spreads in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Honey and nut and seed based spreads benefit from trend towards healthy eating

Jams and preserves benefits from its reputation as a budget-friendly option

Sales growth in chocolate spreads undermined by high prices and non-essential status

PROSPECTS AND OPPORTUNITIES

Further price rises ahead for chocolate spreads, with pressure on demand set to remain Nut and seed based spreads to benefit from weak demand for chocolate spreads The positions of trusted honey brands set to improve due to scepticism over quality

CATEGORY DATA

Table 50 - Sales of Sweet Spreads by Category: Volume 2018-2023

Table 51 - Sales of Sweet Spreads by Category: Value 2018-2023

Table 52 - Sales of Sweet Spreads by Category: % Volume Growth 2018-2023

Table 53 - Sales of Sweet Spreads by Category: % Value Growth 2018-2023

Table 54 - Sales of Jams and Preserves by Leading Flavours: Rankings 2018-2023

Table 55 - NBO Company Shares of Sweet Spreads: % Value 2019-2023

Table 56 - LBN Brand Shares of Sweet Spreads: % Value 2020-2023

Table 57 - Distribution of Sweet Spreads by Format: % Value 2018-2023

Table 58 - Forecast Sales of Sweet Spreads by Category: Volume 2023-2028

Table 59 - Forecast Sales of Sweet Spreads by Category: Value 2023-2028

Table 60 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2023-2028

Table 61 - Forecast Sales of Sweet Spreads by Category: % Value Growth 2023-2028

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/cooking-ingredients-and-meals-in-turkey/report.