

Staple Foods in Turkey

November 2023

Table of Contents

Staple Foods in Turkey

EXECUTIVE SUMMARY

Staple foods in 2023: The big picture Key trends in 2023 Competitive landscape Channel developments What next for staple foods?

MARKET DATA

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

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price increases in baked goods are tempered to offer affordable levels Baked goods producers offer smaller sizes and weights to maintain affordability Foreign packaged pastries transfer from foodservice to retail

PROSPECTS AND OPPORTUNITIES

Avoiding waste and utilising old bread Appeal of artisanal products is rising Replacing out-of-home consumption to contribute to packaged bread sales

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023Table 14 - Sales of Baked Goods by Category: Value 2018-2023Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023Table 17 - Sales of Pastries by Type: % Value 2018-2023Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Breakfast Cereals in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Amid high inflation and added-value offerings breakfast cereals sees exponential retail current value growth Developing product variety enriches breakfast cereals Adopting a healthy diet with granola, fibre-rich and fruit-added products

PROSPECTS AND OPPORTUNITIES

Muesli and granola to leverage healthy living trend to post the fastest growth Product range is expected to keep diversifying through natural and healthy mixes Budget-friendly vs added-value offers

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023
Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023
Table 30 - LBN Brand Shares of Breakfast Cereals by Format: % Value 2018-2023
Table 31 - Distribution of Breakfast Cereals by Category: Volume 2018-2023
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028
Table 33 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

Processed Fruit and Vegetables in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Processed fruit and vegetables sees exponential retail current value despite stagnant retail volume sales Storage advantage and widening varieties boost frozen processed vegetables and potatoes Foodservice volume growth is limited despite rebound in tourism flows

PROSPECTS AND OPPORTUNITIES

Frozen processed vegetables and potatoes to develop with expanding product ranges and new competitors Dried fruit offers growth potential but low purchasing power is set to limit demand Strong economic pressure to drive a preference for home-made solutions

CATEGORY DATA

- Table 36 Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023
 Table 37 Sales of Processed Fruit and Vegetables by Category: Value 2018-2023
 Table 38 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023
 Table 39 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023
 Table 40 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023
 Table 41 NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023
 Table 42 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023
- Table 43 Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023
- Table 44 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028
- Table 45 Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

Processed Meat, Seafood and Alternatives To Meat in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players introduce smaller portions and pack sizes to widen the appeal of processed red meat Processed poultry benefits from red meat price increases Processed seafood product variety expands with new launches

PROSPECTS AND OPPORTUNITIES

Discounting and price promotions are expected to remain a key competitive tool Chilled processed red meat's variety to diminish while shelf stable gains momentum in meat and seafood Product offers are expected to adapt to meet price competition needs

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2018-2023Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Rice, Pasta and Noodles in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pasta benefits from low price points while domestic producers look to exports Noodles remains the most expensive option Rice continues to pique interest as a cheap, versatile and nutritious staple food

PROSPECTS AND OPPORTUNITIES

Pasta to develop and grow in the domestic and export markets Noodles to grow in familiarity and sophistication Rice players to continue to leverage basic but nutritious staple food positioning

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023
Table 69 - NBO Company Shares of Rice: % Value 2019-2023
Table 70 - LBN Brand Shares of Rice: % Value 2020-2023
Table 71 - NBO Company Shares of Pasta: % Value 2019-2023
Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023
Table 73 - NBO Company Shares of Noodles: % Value 2019-2023
Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023
Table 76 - Distribution of Rice by Format: % Value 2018-2023
Table 77 - Distribution of Pasta by Format: % Value 2018-2023
Table 78 - Distribution of Noodles by Format: % Value 2018-2023
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028
Table 81 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-turkey/report.