

Alcoholic Drinks in Turkey

June 2024

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EXECUTIVE SUMMARY

Alcoholic drinks saw a modest growth in 2023 Average unit prices continue to be stimulated by increased production costs and taxes Efes Pilsen and Türk Tuborg preserve their dominant positions Supermarkets expands its position as a retail channel On-trade vs off-trade split Alcoholic drinks is expected to register a positive total volume growth over the forecast period

MARKET BACKGROUND

Legislation Legal purchasing age and legal drinking age Drink driving Advertising Smoking ban Opening hours On-trade establishments Summary 1 - Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

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Contraband/parallel trade Duty free Cross-border/private imports

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DISCLAIMER

SOURCES

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2023 DEVELOPMENTS

Beer sees positive volume growth and new product launches, despite challenging economic climate Average unit prices see significant hikes in 2023 On-trade volume sales see a slowdown

PROSPECTS AND OPPORTUNITIES

Positive volume growth expected for beer over the forecast period Dark beer set to maintain its positive trajectory Supermarkets set to see a rising share in beer sales

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2023 DEVELOPMENTS

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PROSPECTS AND OPPORTUNITIES

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2023 DEVELOPMENTS

Shift in channels and cocktail trends play important roles in off-trade growth A challenging economy and lower grape yields lead to skyrocketing unit prices Irish whiskey boosts its dynamic off-trade volume growth even further

PROSPECTS AND OPPORTUNITIES

Spirits set to see ongoing positive growth, with a balance between on-trade and off-trade channels Premiumisation trends expected to emerge more strongly in spirits Supermarkets set to see further growth in distribution share

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KEY DATA FINDINGS

2023 DEVELOPMENTS

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PROSPECTS AND OPPORTUNITIES

2024 will continue to present some challenges to wine, before the category starts to recover Positive factors set to emerge from 2025, for both on-trade and off-trade channels Still white wine is set to maintain its popularity over the forecast period

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