



Coffee in Turkey

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Shifting consumer habits drive robust growth for coffee in Turkey

INDUSTRY PERFORMANCE

Premiumisation drives growth while at-home coffee machines support sales

Fresh coffee beans drive growth as consumers increasingly seek high-quality experiences

WHAT'S NEXT?

Consumers are expected to embrace high-quality, café-style coffee experiences at home

Growth is set to be driven by digital and technological innovation

Interest in eco-friendly packaging and sustainably sourced coffee beans is set to rise

COMPETITIVE LANDSCAPE

Nestlé Gıda Sanayii maintains its leadership through brand reputation and innovation

BİM Birlesik Magazacilik AS registers strong growth with its affordable private label ranges

CHANNELS

Affordable pricing and easy accessibility made discounters the leading distribution channel

Retail e-commerce strengthens as the most dynamic channel for coffee in 2025

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Hot Drinks in Turkey - Industry Overview

EXECUTIVE SUMMARY

Premiumisation, innovation and health drive value growth in hot drinks in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Retail value sales rise amid premiumisation and currency-driven price growth

Product innovation sustains consumer engagement in hot drinks amid inflation

Health, wellness and sustainability shape hot drinks consumption in 2025

WHAT'S NEXT?

Steady growth is expected for hot drinks amid mature conditions

Innovation to set to drive growth in hot drinks through health and premiumisation trends

Digital adoption and consumer lifestyle changes impact distribution channels within hot drinks

COMPETITIVE LANDSCAPE

Cay Isletmeleri Genel Müdürlüğü retains its top position through leading tea brands
Ofcaysan AS and Dogus Cay record dynamic growth through tea innovations

CHANNELS

Supermarkets leads sales of hot drinks, while discounters and retail e-commerce drive growth
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