

Consumer Foodservice in Turkey

March 2025

Table of Contents

Consumer Foodservice in Turkey

EXECUTIVE SUMMARY

Consumer foodservice in 2024: The big picture

2024 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

- Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2019-2024
- Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024
- Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024
- Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024
- Table 5 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024
- Table 6 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024
- Table 7 Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024
- Table 8 Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024
- Table 9 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024
- Table 10 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024
- Table 11 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024
- Table 12 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029
- Table 13 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Affordability and accessibility boost transaction growth

Bars and pubs continue to grow in popularity despite economic challenges

Takeaway orders increasingly popular

PROSPECTS AND OPPORTUNITIES

Chained cafés will continue to outperform independent cafés

Specialist coffee and tea shops catering to affluent urban consumers will prosper

Fresh bakery products and expanding takeaway options to boost sales

CATEGORY DATA

- Table 14 Cafés/Bars by Category: Units/Outlets 2019-2024
- Table 15 Sales in Cafés/Bars by Category: Number of Transactions 2019-2024
- Table 16 Sales in Cafés/Bars by Category: Foodservice Value 2019-2024
- Table 17 Cafés/Bars by Category: % Units/Outlets Growth 2019-2024
- Table 18 Sales in Cafés/Bars by Category: % Transaction Growth 2019-2024
- Table 19 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2019-2024
- Table 20 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2020-2024
- Table 21 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2021-2024
- Table 22 Forecast Cafés/Bars by Category: Units/Outlets 2024-2029
- Table 23 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2024-2029

- Table 24 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2024-2029
- Table 25 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2024-2029
- Table 26 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2024-2029
- Table 27 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2024-2029

Full-Service Restaurants in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Elevated inflation hits full-service restaurants particularly hard

Sustainability, traceability and vegan outlets are trending

Asian full-service restaurants grow in popularity among affluent consumers

PROSPECTS AND OPPORTUNITIES

Middle Eastern cuisine to remain the top choice

Increased tourism to support full-service restaurants

Operators may favour international over domestic investment

CATEGORY DATA

- Table 28 Full-Service Restaurants by Category: Units/Outlets 2019-2024
- Table 29 Sales in Full-Service Restaurants by Category: Number of Transactions 2019-2024
- Table 30 Sales in Full-Service Restaurants by Category: Foodservice Value 2019-2024
- Table 31 Full-Service Restaurants by Category: % Units/Outlets Growth 2019-2024
- Table 32 Sales in Full-Service Restaurants by Category: % Transaction Growth 2019-2024
- Table 33 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
- Table 34 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2024
- Table 35 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2024
- Table 36 Forecast Full-Service Restaurants by Category: Units/Outlets 2024-2029
- Table 37 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2024-2029
- Table 38 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2024-2029
- Table 39 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
- Table 40 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2024-2029
- Table 41 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Limited-Service Restaurants in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation weighs on demand

Pizza and chicken outlets perform relatively well

Cig Kofte outlets continue to expand aggressively

PROSPECTS AND OPPORTUNITIES

Yum! Brands' termination of KFC and Pizza Hut franchise agreement could destabilise market

Bakery Products Restaurants to be bolstered by borek

Chains will continue to leverage economies of scale

CATEGORY DATA

- Table 42 Limited-Service Restaurants by Category: Units/Outlets 2019-2024
- Table 43 Sales in Limited-Service Restaurants by Category: Number of Transactions 2019-2024
- Table 44 Sales in Limited-Service Restaurants by Category: Foodservice Value 2019-2024
- Table 45 Limited-Service Restaurants by Category: % Units/Outlets Growth 2019-2024

- Table 46 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2019-2024
- Table 47 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
- Table 48 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2024
- Table 49 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2024
- Table 50 Forecast Limited-Service Restaurants by Category: Units/Outlets 2024-2029
- Table 51 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2024-2029
- Table 52 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2024-2029
- Table 53 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
- Table 54 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2024-2029
- Table 55 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Self-Service Cafeterias in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Independent operators under pressure but remain dominant
With limited pricing power, operators focus on financial management
Online orders provide a lifeline

PROSPECTS AND OPPORTUNITIES

Competitive pressures will continue intensify

Takeaway and online orders will grow in importance

Increased meal card use in retail outlets poses a threat

CATEGORY DATA

- Table 56 Self-Service Cafeterias: Units/Outlets 2019-2024
- Table 57 Sales in Self-Service Cafeterias: Number of Transactions 2019-2024
- Table 58 Sales in Self-Service Cafeterias: Foodservice Value 2019-2024
- Table 59 Sales in Self-Service Cafeterias: % Units/Outlets Growth 2019-2024
- Table 60 Sales in Self-Service Cafeterias: % Transaction Growth 2019-2024
- Table 61 Sales in Self-Service Cafeterias: % Foodservice Value Growth 2019-2024
- Table 62 GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2024
- Table 63 GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2024
- Table 64 Forecast Self-Service Cafeterias: Units/Outlets 2024-2029
- Table 65 Forecast Sales in Self-Service Cafeterias: Number of Transactions 2024-2029
- Table 66 Forecast Sales in Self-Service Cafeterias: Foodservice Value 2024-2029
- Table 67 Forecast Self-Service Cafeterias: % Units/Outlets Growth 2024-2029
- Table 68 Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2024-2029
- Table 69 Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2024-2029

Street Stalls/Kiosks in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Elevated inflation has a smaller impact on street stalls/kiosks than other types of consumer foodservice Independent street stalls/kiosks remain dominant

Fast food and coffee-selling kiosks continue to expand in shopping malls

PROSPECTS AND OPPORTUNITIES

In an adverse economic environment, price and convenience will remain key points of attraction Independent street stalls/kiosks will continue to grow

Frozen yogurt and fruit/fruit juice will grow in popularity

CATEGORY DATA

- Table 70 Street Stalls/Kiosks: Units/Outlets 2019-2024
- Table 71 Sales in Street Stalls/Kiosks: Number of Transactions 2019-2024
- Table 72 Sales in Street Stalls/Kiosks: Foodservice Value 2019-2024
- Table 73 Street Stalls/Kiosks: % Units/Outlets Growth 2019-2024
- Table 74 Sales in Street Stalls/Kiosks: % Transaction Growth 2019-2024
- Table 75 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2019-2024
- Table 76 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2024
- Table 77 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2024
- Table 78 Forecast Street Stalls/Kiosks: Units/Outlets 2024-2029
- Table 79 Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2024-2029
- Table 80 Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2024-2029
- Table 81 Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2024-2029
- Table 82 Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2024-2029
- Table 83 Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2024-2029

Consumer Foodservice By Location in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ongoing recovery of inbound tourism limits decline in constant value sales of consumer foodservice through lodging Reduced spend per transaction in consumer foodservice through travel

Standalone consumer foodservice locations remain dominant

PROSPECTS AND OPPORTUNITIES

Rise in inbound tourism will help to offset domestic economic weakness

Turkey's growing appeal as a tourism destination will continue to boost consumer foodservice through travel Locations that blend retail, entertainment and dining will prosper

CATEGORY DATA

- Table 84 Consumer Foodservice by Location: Units/Outlets 2019-2024
- Table 85 Sales in Consumer Foodservice by Location: Number of Transactions 2019-2024
- Table 86 Sales in Consumer Foodservice by Location: Foodservice Value 2019-2024
- Table 87 Consumer Foodservice by Location: % Units/Outlets Growth 2019-2024
- Table 88 Sales in Consumer Foodservice by Location: % Transaction Growth 2019-2024
- Table 89 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2019-2024
- Table 90 Consumer Foodservice through Standalone: Units/Outlets 2019-2024
- Table 91 Sales in Consumer Foodservice through Standalone: Number of Transactions 2019-2024
- Table 92 Sales in Consumer Foodservice through Standalone: Foodservice Value 2019-2024
- Table 93 Consumer Foodservice through Standalone: % Units/Outlets Growth 2019-2024
- Table 94 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2019-2024
- Table 95 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2019-2024
- Table 96 Consumer Foodservice through Leisure: Units/Outlets 2019-2024
- Table 97 Sales in Consumer Foodservice through Leisure: Number of Transactions 2019-2024
- Table 98 Sales in Consumer Foodservice through Leisure: Foodservice Value 2019-2024
- Table 99 Consumer Foodservice through Leisure: % Units/Outlets Growth 2019-2024
- Table 100 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2019-2024
- Table 101 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2019-2024
- Table 102 Consumer Foodservice through Retail: Units/Outlets 2019-2024
- Table 103 Sales in Consumer Foodservice through Retail: Number of Transactions 2019-2024
- Table 104 Sales in Consumer Foodservice through Retail: Foodservice Value 2019-2024
- Table 105 Consumer Foodservice through Retail: % Units/Outlets Growth 2019-2024

- Table 106 Sales in Consumer Foodservice through Retail: % Transaction Growth 2019-2024
- Table 107 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2019-2024
- Table 108 Consumer Foodservice through Lodging: Units/Outlets 2019-2024
- Table 109 Sales in Consumer Foodservice through Lodging: Number of Transactions 2019-2024
- Table 110 Sales in Consumer Foodservice through Lodging: Foodservice Value 2019-2024
- Table 111 Consumer Foodservice through Lodging: % Units/Outlets Growth 2019-2024
- Table 112 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2019-2024
- Table 113 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2019-2024
- Table 114 Consumer Foodservice through Travel: Units/Outlets 2019-2024
- Table 115 Sales in Consumer Foodservice through Travel: Number of Transactions 2019-2024
- Table 116 Sales in Consumer Foodservice through Travel: Foodservice Value 2019-2024
- Table 117 Consumer Foodservice through Travel: % Units/Outlets Growth 2019-2024
- Table 118 Sales in Consumer Foodservice through Travel: % Transaction Growth 2019-2024
- Table 119 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2019-2024
- Table 120 Forecast Consumer Foodservice by Location: Units/Outlets 2024-2029
- Table 121 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2024-2029
- Table 122 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2024-2029
- Table 123 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2024-2029
- Table 124 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2024-2029
- Table 125 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2024-2029
- Table 126 Forecast Consumer Foodservice through Standalone: Units/Outlets 2024-2029
- Table 127 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2024-2029
- Table 128 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2024-2029
- Table 129 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2024-2029
- Table 130 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2024-2029
- Table 131 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2024-2029
- Table 132 Forecast Consumer Foodservice through Leisure: Units/Outlets 2024-2029
- Table 133 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2024-2029
- Table 134 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2024-2029
- Table 135 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2024-2029
- Table 136 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2024-2029
- Table 137 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2024-2029
- Table 138 Forecast Consumer Foodservice through Retail: Units/Outlets 2024-2029
- Table 139 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2024-2029
- Table 140 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2024-2029
- Table 141 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2024-2029
- Table 142 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2024-2029
- Table 143 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2024-2029
- Table 144 Forecast Consumer Foodservice through Lodging: Units/Outlets 2024-2029
- Table 145 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2024-2029
- Table 146 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2024-2029
- Table 147 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2024-2029
- Table 148 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2024-2029
- Table 149 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2024-2029
- Table 150 Forecast Consumer Foodservice through Travel: Units/Outlets 2024-2029
- Table 151 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2024-2029
- Table 152 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2024-2029
- Table 153 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2024-2029
- Table 154 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2024-2029
- Table 155 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2024-2029

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 focusing 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/consumer-foodservice-in-turkey/report.