



Passport

Direct Selling in Turkey

Euromonitor International

March 2023

This sample report is for illustration
purposes only.

Some content and data have been
changed.

To purchase a full version, please visit
www.euromonitor.com

LIST OF CONTENTS AND TABLES

Direct Selling in Turkey - Category Analysis.....	1
KEY DATA FINDINGS.....	1
2022 DEVELOPMENTS.....	1
Direct selling agents on the rise as the landscape records growth	1
The rising interest in health and wellness boosts the share of health-focused brands	1
Farmasi maintains the lead, while health-focused brands show positive growth	1
PROSPECTS AND OPPORTUNITIES.....	2
Direct selling to grow over the forecast period as home working continues.....	2
Local players to increase market share on the landscape	2
Cultural relevance will ensure the continued growth of direct selling	2
CHANNEL DATA.....	3
Table 1 Direct Selling by Product: Value 2017-2022.....	3
Table 2 Direct Selling by Product: % Value Growth 2017-2022	3
Table 3 Direct Selling GBO Company Shares: % Value 2018-2022	3
Table 4 Direct Selling GBN Brand Shares: % Value 2019-2022	4
Table 5 Direct Selling Forecasts by Product: Value 2022-2027	4
Table 6 Direct Selling Forecasts by Product: % Value Growth 2022-2027	5
Retail in Turkey - Industry Overview.....	6
EXECUTIVE SUMMARY	6
Retail in 2022: The big picture	6
Retail e-commerce continues to expand at the expense of store based retail.....	6
High inflation dampens demand and reduces profitability.....	6
What next for retail?.....	6
OPERATING ENVIRONMENT.....	7
Informal retail.....	7
Opening hours for physical retail	7
Summary 1 Standard Opening Hours by Channel Type 2022.....	7
Seasonality.....	8
MARKET DATA.....	8
Table 7 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022	8
Table 8 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022	9
Table 9 Sales in Retail Offline by Channel: Value 2017-2022.....	9
Table 10 Sales in Retail Offline by Channel: % Value Growth 2017-2022	9
Table 11 Retail Offline Outlets by Channel: Units 2017-2022	9
Table 12 Retail Offline Outlets by Channel: % Unit Growth 2017-2022	10
Table 13 Sales in Retail E-Commerce by Product: Value 2017-2022	10
Table 14 Sales in Retail E-Commerce by Product: % Value Growth 2017-2022	10
Table 15 Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022	10
Table 16 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022	11
Table 17 Sales in Grocery Retailers by Channel: Value 2017-2022	11
Table 18 Sales in Grocery Retailers by Channel: % Value Growth 2017-2022.....	11
Table 19 Grocery Retailers Outlets by Channel: Units 2017-2022.....	12

Table 20	Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022.....	12
Table 21	Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022	12
Table 22	Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022	12
Table 23	Sales in Non-Grocery Retailers by Channel: Value 2017-2022.....	13
Table 24	Sales in Non-Grocery Retailers by Channel: % Value Growth 2017-2022	13
Table 25	Non-Grocery Retailers Outlets by Channel: Units 2017-2022	13
Table 26	Non-Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022	14
Table 27	Retail GBO Company Shares: % Value 2018-2022	14
Table 28	Retail GBN Brand Shares: % Value 2019-2022	15
Table 29	Retail Offline GBO Company Shares: % Value 2018-2022.....	15
Table 30	Retail Offline GBN Brand Shares: % Value 2019-2022.....	16
Table 31	Retail Offline LBN Brand Shares: Outlets 2019-2022.....	17
Table 32	Retail E-Commerce GBO Company Shares: % Value 2018-2022	17
Table 33	Retail E-Commerce GBN Brand Shares: % Value 2019-2022	18
Table 34	Grocery Retailers GBO Company Shares: % Value 2018-2022	19
Table 35	Grocery Retailers GBN Brand Shares: % Value 2019-2022	19
Table 36	Grocery Retailers LBN Brand Shares: Outlets 2019-2022	20
Table 37	Non-Grocery Retailers GBO Company Shares: % Value 2018-2022.....	21
Table 38	Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022.....	21
Table 39	Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022	22
Table 40	Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027	23
Table 41	Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027	23
Table 42	Forecast Sales in Retail Offline by Channel: Value 2022-2027	23
Table 43	Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027	24
Table 44	Forecast Retail Offline Outlets by Channel: Units 2022-2027	24
Table 45	Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027	24
Table 46	Forecast Sales in Retail E-Commerce by Product: Value 2022-2027	24
Table 47	Forecast Sales in Retail E-Commerce by Product: % Value Growth 2022-2027	25
Table 48	Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027	25
Table 49	Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027	25
Table 50	Forecast Sales in Grocery Retailers by Channel: Value 2022-2027	25
Table 51	Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027	26
Table 52	Forecast Grocery Retailers Outlets by Channel: Units 2022-2027	26
Table 53	Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027	27
Table 54	Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027.....	27
Table 55	Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027	27

Table 56	Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027	27
Table 57	Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027	28
Table 58	Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027	28
Table 59	Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027	28
DISCLAIMER		29
SOURCES.....		29
Summary 2	Research Sources.....	29

DIRECT SELLING IN TURKEY - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2022 DEVELOPMENTS

Direct selling agents on the rise as the landscape records growth

Content removed from sample

The rising interest in health and wellness boosts the share of health-focused brands

Content removed from sample

Farmasi maintains the lead, while health-focused brands show positive growth

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Direct selling to grow over the forecast period as home working continues

Content removed from sample

Local players to increase market share on the landscape

Content removed from sample

Cultural relevance will ensure the continued growth of direct selling

Content removed from sample

Content removed from sample

CHANNEL DATA

Table 1 Direct Selling by Product: Value 2017-2022

TRY million	2017	2018	2019	2020	2021	2022
<ul style="list-style-type: none"> - Other Products Direct Selling - Home Products Direct Selling - Foods Direct Selling - Drinks and Tobacco Direct Selling - Appliances and Electronics Direct Selling - Health and Beauty Direct Selling - Fashion Direct Selling 	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Direct Selling by Product: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax

	2021/22	2017-22 CAGR	2017/22 Total
<ul style="list-style-type: none"> - Other Products Direct Selling - Home Products Direct Selling - Foods Direct Selling - Drinks and Tobacco Direct Selling - Appliances and Electronics Direct Selling - Health and Beauty Direct Selling - Fashion Direct Selling 	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Direct Selling GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax Company	2018	2019	2020	2021	2022
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Direct Selling GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax

Brand	Company (GBO)	2019	2020	2021	2022
-------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Direct Selling Forecasts by Product: Value 2022-2027

TRY million

	2022	2023	2024	2025	2026	2027
--	------	------	------	------	------	------

- Other Products Direct Selling
- Home Products Direct Selling
- Foods Direct Selling
- Drinks and Tobacco Direct Selling
- Appliances and Electronics Direct Selling
- Health and Beauty Direct Selling
- Fashion Direct Selling
- Direct Selling

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 6 Direct Selling Forecasts by Product: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

	2022/2023	2022-27 CAGR	2022/27 Total
- Other Products Direct Selling	Data removed from sample		
- Home Products Direct Selling			
- Foods Direct Selling			
- Drinks and Tobacco Direct Selling			
- Appliances and Electronics Direct Selling			
- Health and Beauty Direct Selling			
- Fashion Direct Selling			
Direct Selling			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

RETAIL IN TURKEY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Retail in 2022: The big picture

Content removed from sample

Retail e-commerce continues to expand at the expense of store based retail

Content removed from sample

High inflation dampens demand and reduces profitability

Content removed from sample

What next for retail?

Content removed from sample

Content removed from sample

OPERATING ENVIRONMENT

Informal retail

Content removed from sample

Opening hours for physical retail

Content removed from sample

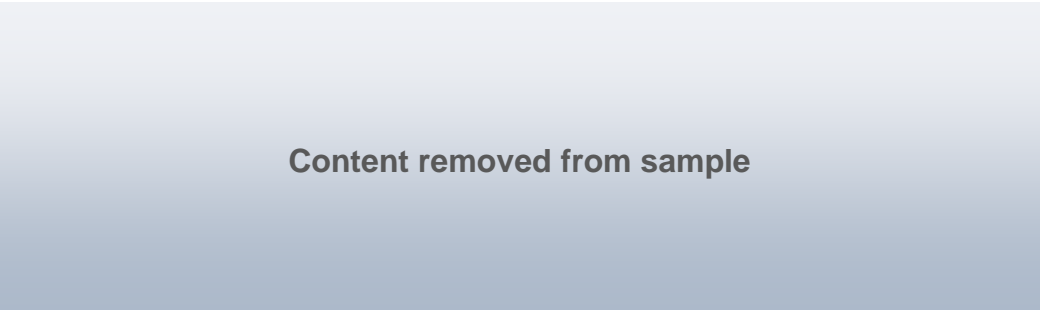
Summary 1 Standard Opening Hours by Channel Type 2022

Channel	24-hour opening?	Monday-Thursday	Friday	Saturday	Sunday
Supermarkets	Data removed from sample				
Apparel and footwear specialists					
Department stores					
Variety stores					

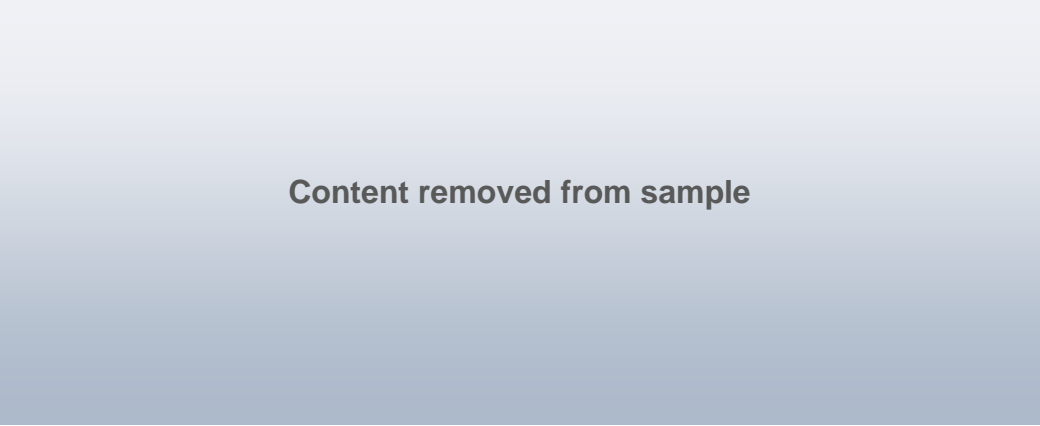
Source: Euromonitor International

Note: These reflect typical opening hours outside of lockdown

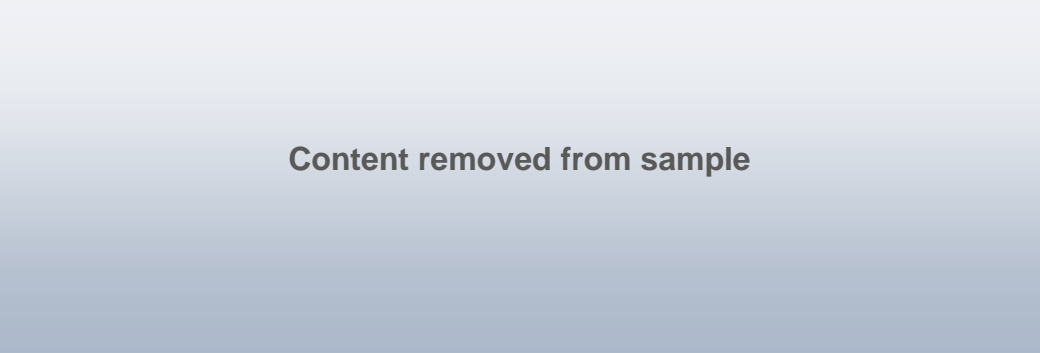
Seasonality



Black Friday



Ramadan (Eid al Fitr)



MARKET DATA

Table 7 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

TRY million	2017	2018	2019	2020	2021	2022
Retail E-Commerce	Data removed from sample					
Retail Offline						
Retail						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 8 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax

	2021/22	2017-22 CAGR	2017/22 Total
Retail E-Commerce	Data removed from sample		
Retail Offline			
Retail			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 9 Sales in Retail Offline by Channel: Value 2017-2022

TRY million

	2017	2018	2019	2020	2021	2022
Direct Selling	Data removed from sample					
Vending						
Non-Grocery Retailers						
Grocery Retailers						
Retail Offline						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 10 Sales in Retail Offline by Channel: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax

	2021/22	2017-22 CAGR	2017/22 Total
Direct Selling	Data removed from sample		
Vending			
Non-Grocery Retailers			
Grocery Retailers			
Retail Offline			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 11 Retail Offline Outlets by Channel: Units 2017-2022

outlet

	2017	2018	2019	2020	2021	2022
Non-Grocery Retailers	Data removed from sample					
Grocery Retailers						
Retail Offline						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 12 Retail Offline Outlets by Channel: % Unit Growth 2017-2022

% unit growth	2021/22	2017-22 CAGR	2017/22 Total
Non-Grocery Retailers	Data removed from sample		
Grocery Retailers			
Retail Offline			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 13 Sales in Retail E-Commerce by Product: Value 2017-2022

TRY million	2017	2018	2019	2020	2021	2022
- Other Products E-Commerce	Data removed from sample					
- Home Products E-Commerce						
- Foods E-Commerce						
- Drinks and Tobacco E-Commerce						
- Appliances and Electronics E-Commerce						
- Health and Beauty E-Commerce						
- Fashion E-Commerce						
Retail E-Commerce by Product						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 14 Sales in Retail E-Commerce by Product: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax	2021/22	2017-22 CAGR	2017/22 Total
- Other Products E-Commerce	Data removed from sample		
- Home Products E-Commerce			
- Foods E-Commerce			
- Drinks and Tobacco E-Commerce			
- Appliances and Electronics E-Commerce			
- Health and Beauty E-Commerce			
- Fashion E-Commerce			
Retail E-Commerce by Product			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 15 Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

	2017	2018	2019	2020	2021	2022
Value sales TRY million	Data removed from sample					
Outlets						
Selling Space '000 sq m						
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources					

Table 16 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

% growth	2021/22	2017-22 CAGR	2017/22 Total
Value sales TRY million	Data removed from sample		
Outlets			
Selling Space '000 sq m			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources		

Table 17 Sales in Grocery Retailers by Channel: Value 2017-2022

TRY million	2017	2018	2019	2020	2021	2022
- Small Local Grocers	Data removed from sample					
- Foods/Drink/Tobacco Specialists						
- Warehouse Clubs						
- Discounters						
- Hypermarkets						
- Supermarkets						
-- Forecourt Retailers						
-- Convenience Stores						
- Convenience Retailers						
Grocery Retailers						
Source:						

Table 18 Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax	2021/22	2017-22 CAGR	2017/22 Total
- Small Local Grocers	Data removed from sample		
- Foods/Drink/Tobacco Specialists			
- Warehouse Clubs			
- Discounters			
- Hypermarkets			
- Supermarkets			
-- Forecourt Retailers			
-- Convenience Stores			
- Convenience Retailers			
Grocery Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Grocery Retailers Outlets by Channel: Units 2017-2022

outlet	2017	2018	2019	2020	2021	2022
- Small Local Grocers	Data removed from sample					
- Foods/Drink/Tobacco Specialists						
- Warehouse Clubs						
- Discounters						
- Hypermarkets						
- Supermarkets						
-- Forecourt Retailers						
-- Convenience Stores						
- Convenience Retailers						
Grocery Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

% unit growth	2021/22	2017-22 CAGR	2017/22 Total
- Small Local Grocers	Data removed from sample		
- Foods/Drink/Tobacco Specialists			
- Warehouse Clubs			
- Discounters			
- Hypermarkets			
- Supermarkets			
-- Forecourt Retailers			
-- Convenience Stores			
- Convenience Retailers			
Grocery Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

	2017	2018	2019	2020	2021	2022
Value sales TRY million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

% growth

	2021/22	2017-22 CAGR	2017/22 Total
Value sales TRY million	Data removed from sample		
Outlets			
Selling Space '000 sq m			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources		

Table 23 Sales in Non-Grocery Retailers by Channel: Value 2017-2022

TRY million	2017	2018	2019	2020	2021	2022
- Other Non-Grocery Retailers	Data removed from sample					
- Leisure and Personal Goods Specialists						
- Health and Beauty Specialists						
- Home Products Specialists						
- Appliances and Electronics Specialists						
- Apparel and Footwear Specialists						
- General Merchandise Stores						
Non-Grocery Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 Sales in Non-Grocery Retailers by Channel: % Value Growth 2017-2022

% current value growth, retail value rsp excl sales tax

	2021/22	2017-22 CAGR	2017/22 Total
- Other Non-Grocery Retailers	Data removed from sample		
- Leisure and Personal Goods Specialists			
- Health and Beauty Specialists			
- Home Products Specialists			
- Appliances and Electronics Specialists			
- Apparel and Footwear Specialists			
- General Merchandise Stores			
Non-Grocery Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 Non-Grocery Retailers Outlets by Channel: Units 2017-2022

outlet	2017	2018	2019	2020	2021	2022
- Other Non-Grocery Retailers	Data removed from sample					

- Leisure and Personal Goods Specialists
 - Health and Beauty Specialists
 - Home Products Specialists
 - Appliances and Electronics Specialists
 - Apparel and Footwear Specialists
 - General Merchandise Stores
- Non-Grocery Retailers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 26 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

% unit growth

2021/22 2017-22 CAGR 2017/22 Total

- Other Non-Grocery Retailers
 - Leisure and Personal Goods Specialists
 - Health and Beauty Specialists
 - Home Products Specialists
 - Appliances and Electronics Specialists
 - Apparel and Footwear Specialists
 - General Merchandise Stores
- Non-Grocery Retailers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 27 Retail GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax
Company

2018 2019 2020 2021 2022

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 28 Retail GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax

Brand	Company (GBO)	2019	2020	2021	2022
-------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 29 Retail Offline GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax

Company	2018	2019	2020	2021	2022
---------	------	------	------	------	------

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 30 Retail Offline GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax					
Brand	Company (GBO)	2019	2020	2021	2022

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 31 Retail Offline LBN Brand Shares: Outlets 2019-2022

sites/outlets Brand (GBO)	Company (NBO)	2019	2020	2021	2022
------------------------------	---------------	------	------	------	------

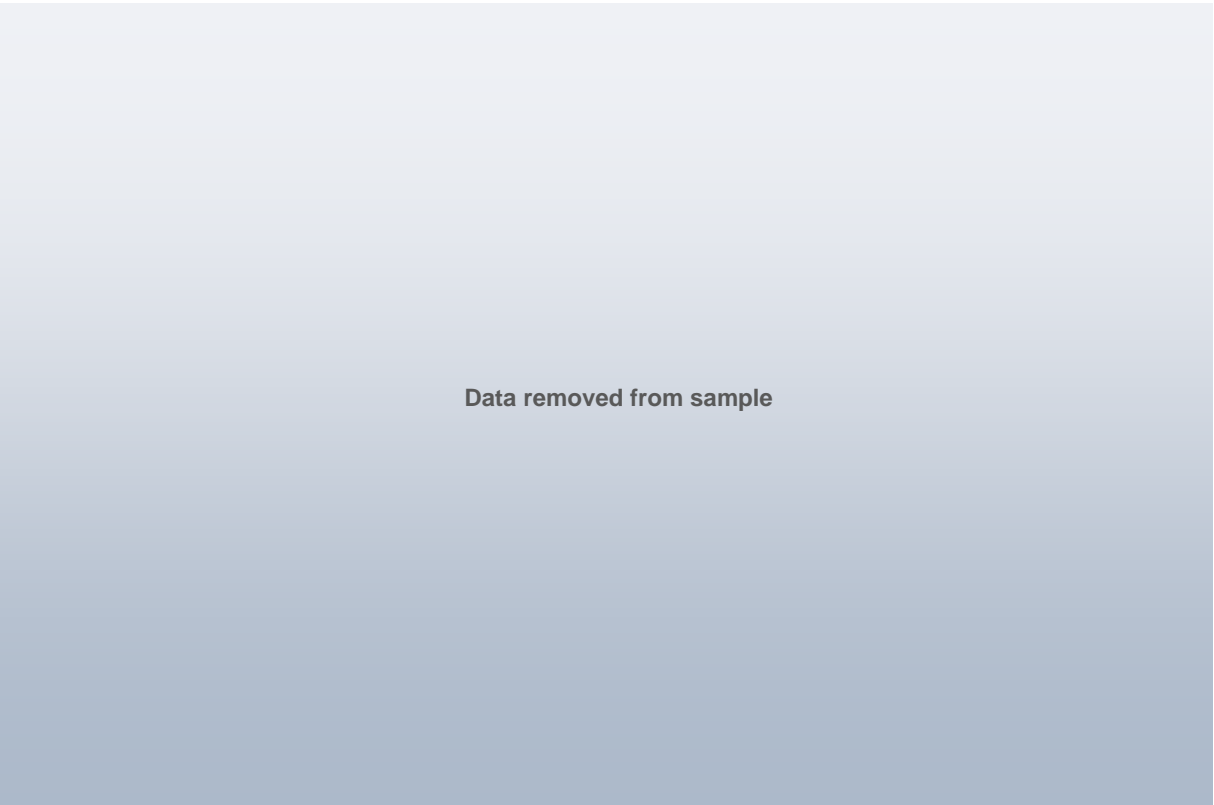
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 32 Retail E-Commerce GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax Company	2018	2019	2020	2021	2022
--	------	------	------	------	------

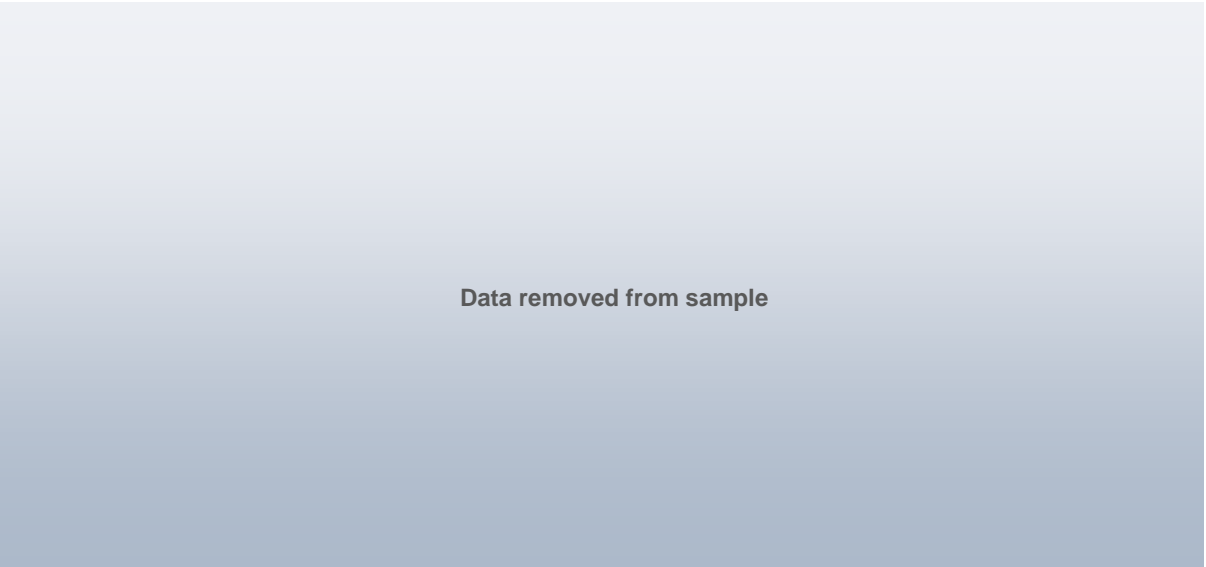
Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 33 Retail E-Commerce GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax					
Brand	Company (GBO)	2019	2020	2021	2022



Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 34 Grocery Retailers GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax	2018	2019	2020	2021	2022
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 35 Grocery Retailers GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax		2019	2020	2021	2022
Brand	Company (GBO)				

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 36 Grocery Retailers LBN Brand Shares: Outlets 2019-2022

sites/outlets Brand (GBO)	Company (NBO)	2019	2020	2021	2022
------------------------------	---------------	------	------	------	------

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 37 Non-Grocery Retailers GBO Company Shares: % Value 2018-2022

% retail value rsp excl sales tax	2018	2019	2020	2021	2022
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 38 Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022

% retail value rsp excl sales tax		2019	2020	2021	2022
Brand	Company (GBO)				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 39 Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022

sites/outlets Brand (GBO)	Company (NBO)	2019	2020	2021	2022
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 40 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

TRY million

	2022	2023	2024	2025	2026	2027
Retail E-Commerce	Data removed from sample					
Retail Offline						
Retail						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 41 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

	2022/2023	2022-27 CAGR	2022/27 Total
Retail E-Commerce	Data removed from sample		
Retail Offline			
Retail			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Sales in Retail Offline by Channel: Value 2022-2027

TRY million

	2022	2023	2024	2025	2026	2027
Direct Selling	Data removed from sample					
Vending						
Non-Grocery Retailers						
Grocery Retailers						
Retail Offline						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Forecast value data in constant terms

Table 43 Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

	2022/2023	2022-27 CAGR	2022/27 Total
Direct Selling	Data removed from sample		
Vending			
Non-Grocery Retailers			
Grocery Retailers			
Retail Offline			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 44 Forecast Retail Offline Outlets by Channel: Units 2022-2027

outlet	2022	2023	2024	2025	2026	2027
Non-Grocery Retailers	Data removed from sample					
Grocery Retailers						
Retail Offline						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 45 Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

% unit growth	2022/23	2022-27 CAGR	2022/27 Total
Non-Grocery Retailers	Data removed from sample		
Grocery Retailers			
Retail Offline			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 46 Forecast Sales in Retail E-Commerce by Product: Value 2022-2027

TRY million	2022	2023	2024	2025	2026	2027
- Other Products E-Commerce	Data removed from sample					
- Home Products E-Commerce						
- Foods E-Commerce						
- Drinks and Tobacco E-Commerce						
- Appliances and Electronics E-Commerce						
- Health and Beauty E-Commerce						

- Fashion E-Commerce
Retail E-Commerce by
Product

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Forecast value data in constant terms

Note 2: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 47 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

2022/2023 2022-27 CAGR 2022/27 Total

- Other Products E-Commerce
- Home Products E-Commerce
- Foods E-Commerce
- Drinks and Tobacco E-Commerce
- Appliances and Electronics E-Commerce
- Health and Beauty E-Commerce
- Fashion E-Commerce
Retail E-Commerce by Product

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 48 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

2022 2023 2024 2025 2026 2027

Value sales TRY million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 49 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

% growth

2022/23 2022-27 CAGR 2022/27 Total

Value sales TRY million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 50 Forecast Sales in Grocery Retailers by Channel: Value 2022-2027

TRY million

	2022	2023	2024	2025	2026	2027
- Small Local Grocers	Data removed from sample					
- Foods/Drink/Tobacco Specialists						
- Warehouse Clubs						
- Discounters						
- Hypermarkets						
- Supermarkets						
-- Forecourt Retailers						
-- Convenience Stores						
- Convenience Retailers						
Grocery Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 51 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

	2022/2023	2022-27 CAGR	2022/27 Total
- Small Local Grocers	Data removed from sample		
- Foods/Drink/Tobacco Specialists			
- Warehouse Clubs			
- Discounters			
- Hypermarkets			
- Supermarkets			
-- Forecourt Retailers			
-- Convenience Stores			
- Convenience Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 52 Forecast Grocery Retailers Outlets by Channel: Units 2022-2027

outlet	2022	2023	2024	2025	2026	2027
- Small Local Grocers	Data removed from sample					
- Foods/Drink/Tobacco Specialists						
- Warehouse Clubs						
- Discounters						
- Hypermarkets						
- Supermarkets						
-- Forecourt Retailers						
-- Convenience Stores						
- Convenience Retailers						
Grocery Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 53 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

% unit growth	2022/23	2022-27 CAGR	2022/27 Total
- Small Local Grocers	Data removed from sample		
- Foods/Drink/Tobacco Specialists			
- Warehouse Clubs			
- Discounters			
- Hypermarkets			
- Supermarkets			
-- Forecourt Retailers			
-- Convenience Stores			
- Convenience Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 54 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

	2022	2023	2024	2025	2026	2027
Value sales TRY million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 55 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

% growth	2022/23	2022-27 CAGR	2022/27 Total
Value sales TRY million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 56 Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027

TRY million	2022	2023	2024	2025	2026	2027
- Other Non-Grocery Retailers	Data removed from sample					
- Leisure and Personal Goods Specialists						
- Health and Beauty Specialists						

- Home Products Specialists
 - Appliances and Electronics Specialists
 - Apparel and Footwear Specialists
 - General Merchandise Stores
- Non-Grocery Retailers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms

Table 57 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027

% constant value growth, retail value rsp excl sales tax

	2022/2023	2022-27 CAGR	2022/27 Total
<ul style="list-style-type: none"> - Other Non-Grocery Retailers - Leisure and Personal Goods Specialists - Health and Beauty Specialists - Home Products Specialists - Appliances and Electronics Specialists - Apparel and Footwear Specialists - General Merchandise Stores <p>Non-Grocery Retailers</p>	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 58 Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027

outlet	2022	2023	2024	2025	2026	2027
<ul style="list-style-type: none"> - Other Non-Grocery Retailers - Leisure and Personal Goods Specialists - Health and Beauty Specialists - Home Products Specialists - Appliances and Electronics Specialists - Apparel and Footwear Specialists - General Merchandise Stores <p>Non-Grocery Retailers</p>	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 59 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

% unit growth

2022/23

2022-27 CAGR

2022/27 Total

- Other Non-Grocery Retailers
 - Leisure and Personal Goods Specialists
 - Health and Beauty Specialists
 - Home Products Specialists
 - Appliances and Electronics Specialists
 - Apparel and Footwear Specialists
 - General Merchandise Stores
- Non-Grocery Retailers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 13 February 2023

Report closing date: 9 March 2023

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2022 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

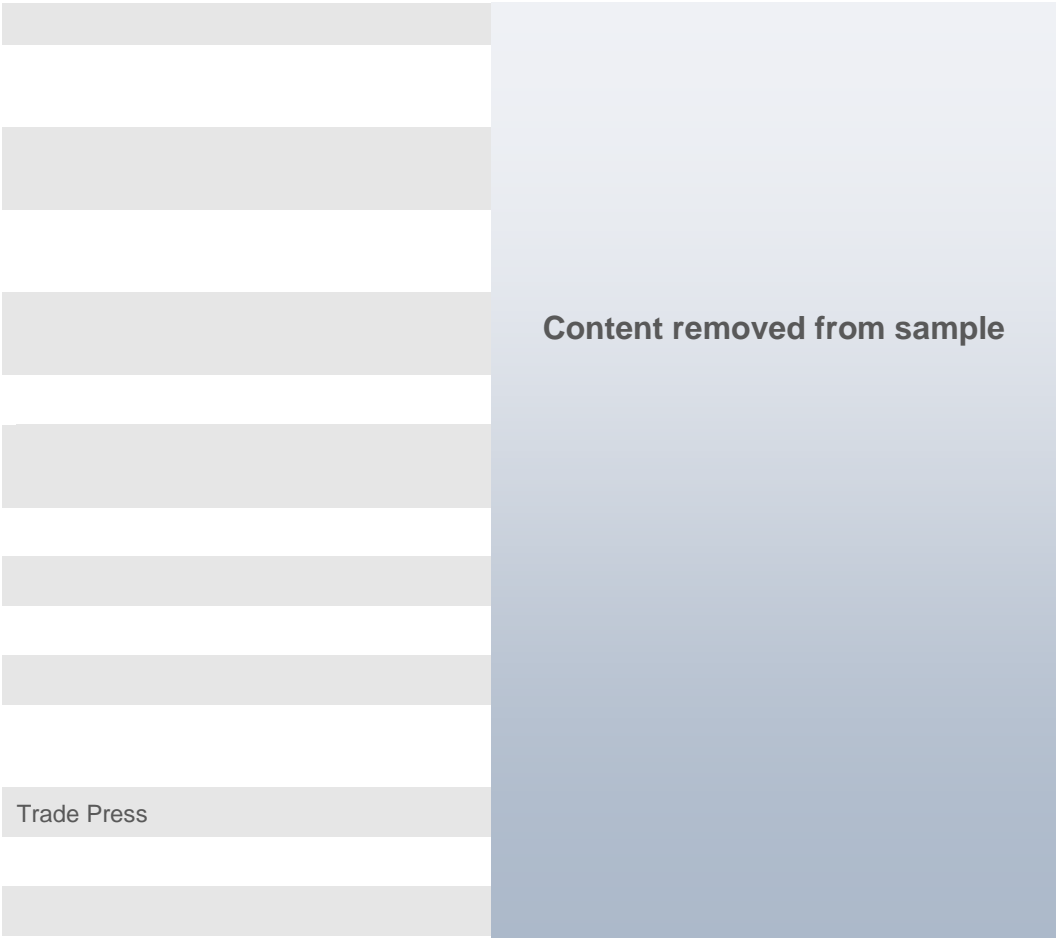
Sources used during research include the following:

Summary 2 Research Sources

Official Sources

Trade Associations

Content removed from sample



Source: Euromonitor International