Euromonitor International

Consumer Foodservice in Turkey

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Consumer Foodservice in Turkey

EXECUTIVE SUMMARY

Consumers trade down while operators adapt menus and portion sizes amid inflation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflationary pressures constrain household spending

Online ordering has become integral to the industry

Operators favour retention over reach

WHAT'S NEXT?

Modest growth anticipated as operators balance innovation and affordability

Shift towards innovative formats and menu experiences

Sustainability to become integral part of foodservice operations

COMPETITIVE LANDSCAPE

TAB Gida San ve Tic AS leads sales

Bereket Döner leads growth

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Chained specialist coffee and tea shops drive growth
Value-for-money becomes key focus

WHAT'S NEXT?

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Full-service restaurants adapt to challenging operating conditions

INDUSTRY PERFORMANCE

Foodservice sales rise in full-service restaurants, despite price pressures
Chained Middle Eastern full-service restaurants lead growth
Fulfilment continues to evolve, as players expand reach beyond physical locations

WHAT'S NEXT?

Middle-Eastern outlets will maintain their dominance, while Asian establishments will see strongest growth
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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Chains expand through scale while independents lean on delivery platforms to sustain reach
Drive-through and delivery to gain momentum
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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Self-service cafeterias register lacklustre performance

Independent benefit from greater agility

Self-service cafeterias expand off-premise fulfilment

WHAT'S NEXT?

Self-service cafeterias in Turkey face gradual value decline amid rising competition

Acceleration of omnichannel fulfilment to meet growing demand

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COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Street stalls/kiosks benefit from flexible business models

Chained operators lead growth

Kiosk format gains momentum

WHAT'S NEXT?

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Innovation and automation will continue apace
Frozen yogurt and fruit kiosks to expand across urban locations

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INDUSTRY PERFORMANCE

Travel is fastest-growing non-standalone location
Standalone outlets show greater resilience
Value-for-money strategies vary by location

WHAT'S NEXT?

Travel locations to lead non-standalone growth through inbound tourism
Standalone locations will continue to attract consumers
Shopping and leisure venues offer growth opportunities
Urbanisation will impact consumer foodservice

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