

Consumer Appliances in Turkey

January 2024

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EXECUTIVE SUMMARY

Consumer appliances record growth, despite the major earthquake which hit the country in February 2023

Devaluation of the TRY and increase in VAT lead to price hikes

Price competition between companies intensifies

E-commerce continues to grow

Consumer appliances has good prospects for ongoing growth

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Dishwashers offering energy efficiency and improved technologies drive growth

Arçelik AS maintains its lead in dishwashers, thanks to offering products to meet consumer demand

Price promotions and campaigns shape the competitive environment

PROSPECTS AND OPPORTUNITIES

Dishwashers will be considered more of a necessity over the forecast period

The share of local brands is predicted to increase, thanks to offering trendsetting appliances at affordable prices

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2023 DEVELOPMENTS

Automatic dryers remain popular for their convenience and perceived germ-killing features

Greater capacities and high-tech models see increased demand

Average unit prices continue to rise, while players create special offers to maintain consumer demand

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Household penetration of automatic dryers is predicted to increase

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Built-in appliances benefit from special promotional campaigns

Wide range of price points mean there is an affordable large cooking appliance to suit all budgets

PROSPECTS AND OPPORTUNITIES

Increased number of modern households to stimulate sales over the forecast period

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2023 DEVELOPMENTS

Microwaves continue on a declining trend, as such products are deemed unnecessary

Average unit prices continue to rise, placing further downwards pressure on an already declining category

Energy efficiency remains an important factor for consumers

PROSPECTS AND OPPORTUNITIES

Increased number of modern households may stimulate sales over the forecast period

The share of built-in products is set to grow, in line with modern home trends

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Refrigeration appliances remains in a volume slump in 2023

Large capacity fridge-freezers see good demand

E-commerce continues to grow its distribution share

PROSPECTS AND OPPORTUNITIES

Volume sales are expected to return to positive growth over the forecast period

The share of products with higher energy efficiency is set to increase

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2023 DEVELOPMENTS

The hot summer of 2023 has helped to support growth in air treatment products
Average unit prices continue to rise, affecting appliances in a cross-category trend
Air purifiers remain popular, despite being a somewhat expensive “niche”

PROSPECTS AND OPPORTUNITIES

Ongoing heatwaves, air pollution, and the building of new houses will support sales over the forecast period
Local players expected to gain shares thanks to their offer of high quality and affordable prices
Energy efficiency and added-value features set to become increasingly popular

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Average unit prices continue to rise, affecting appliances in a cross-category trend
The sales of juice extractors went down

PROSPECTS AND OPPORTUNITIES

Increasing number of modern houses will continue to support sales
Local brands expected to maintain and grow their share, thanks to offering an attractive quality-to-price ratio
E-commerce continues to grow its distribution share

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Hair care appliances shows the strongest performance

Average unit prices continue to rise, affecting appliances in a cross-category trend

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The image-conscious young population will be a major driver of growth over the forecast period

Competition set to be based on advancements in technology and price

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Small Cooking Appliances in Turkey

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Light fryers continue to attract attention, thanks to been perceived as healthy and energy efficient small cooking appliances

Espresso coffee machines help to drive growth in coffee machines

Average unit prices continue to rise, affecting appliances in a cross-category trend

PROSPECTS AND OPPORTUNITIES

Sales will be driven by growth in light fryers and coffee machines

Rice cookers and slow cookers have little potential for growth

Competition between local and international brands is set to become fiercer

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 Average unit prices continue to rise, affecting appliances in a cross-category trend
 Local companies become increasingly relevant in vacuum cleaners

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