

Turkey Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Turkey Foodservice Market size is estimated at USD 13.88 billion in 2024, and is expected to reach USD 24.10 billion by 2029, growing at a CAGR of 11.67% during the forecast period (2024-2029).

Increasing affinity toward meat-based fast food and the expansion of franchise outlets are propelling the growth of QSRs.

- By segment, quick service restaurants (QSRs) held the largest share of the overall market in 2022. The sub-segment is anticipated to register a CAGR of 8.46% from 2023 to 2029. This is due to the popularity of convenience food, which can be provided within a limited time. The young Turks prefer chicken wings, hamburgers, wraps, pizzas, and meat-based products. For instance, in 2022, 75.2% of young people preferred hamburgers, followed by wraps and pizzas at 30.7% and 21.1%, respectively. Operators are employing franchise networks to expand their business across the nation rather than building company-operated outlets as it is cost-effective.

- Cafes & bars comprise the second-largest sub-segment in the market. It grew significantly in 2022 due to improved economic indicators and a resurgence in tourism. Most Europeans visit Turkey to cherish the traditional food and Turkish specialty tea and coffee, as those are well-known across the world. With the influx of European travelers, Turkey's tourism numbers rebounded as of 2023. In particular, 12.25% of visitors from Russia, 9.12% from Bulgaria, and 8.13% from Germany were anticipated to help Turkey's tourist numbers reach their peak in 2022.

- In the full service restaurant sub-segment, Middle Eastern restaurants dominated the market in 2022. A majority of the Turks are comprised of Iranians and Arabians. Thus, cuisines like Kurdish, Egyptian, and Arabian are popular in the region. Foods like shawarma, kebab, falafel, biriyani, dolma, and berbesel are widely consumed in Turkey. Arabic restaurants like Mahmiye, Green Garden, and Ziyafet Kuzu Cevirme employ typical Turkish local ingredients to make food more reminiscent of Turkish cuisine.

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Thus, the market studied is expected to register a CAGR of 12.55% during the forecast period.

Turkey Foodservice Market Trends

Cafes & bars dominate the food service outlets in Turkey, followed by QSRs

- Foodservice outlets in Turkey were dominated by cafes & bars, followed by quick service restaurants (QSRs) and full-service restaurants (FSRs), in 2022. The cafes & bars sub-segment is expected to register a CAGR of 4.30% during the study period. This growth can be attributed to the increasing demand for vintage bars, nightclubs, and cafes, as well as the popularity of Turkish alcohol and a wide variety of Arabian appetizers. As a result, the number of outlets grew from 72,634 in 2020 to 73,142 in 2022. The number of foodservice outlets in Turkey declined by 25.53% in 2023 compared to the previous year, which was due to the earthquake in Turkey and Syria. It led to destruction of infrastructure and displacement of people from the major cities of Antakya, Sanliurfa and Aleppo. More than 8,000 buildings, highways, and seaports were demolished. The country is currently in the process of massive reconstruction to restore economic activity.

- Cloud kitchen is expected to be the fastest-growing sub-segment in the market studied. It is projected to register a CAGR of 6.55% during the forecast period. The cloud kitchen industry witnessed significant growth following the pandemic, driven by the surge in online food delivery and takeaways. Popular food delivery applications like Trendyol and Yemeksepeti were downloaded over 76 million times to date. The majority of Turkish people rely on meal delivery apps to order food. The number of quick service restaurants is also growing due to consumers' preference for convenient and affordable food options. The high meat consumption in the nation has fueled the demand for foods like pizza, hamburgers, and chicken teriyaki. In 2021, the average daily consumption of red meat was 49.34 g, and the average yearly consumption of chicken was 21 kg per person. The leading quick service restaurant chains in Turkey with the highest number of stores include Burger King (700 stores), McDonald's (589 stores), and Pizza Hut (171 stores).

Full service restaurants have the highest average order value in 2022, driven by economic recovery and expansion of services among key players

- In Turkey, full-service restaurants (FSRs) had the highest average order value in 2022 compared to other foodservice types, with a price of USD 13.74. FSRs have implemented various technological advancements to enhance efficiency and customer experience. Mobile order-and-pay, personal POS tablets, and automated processes have streamlined the steps of service. Restaurant management software, including point-of-sale systems, has become an essential tool for operators in tracking inventory, sales, and other aspects of business operations. This trend is expected to continue, with more restaurants adopting additional restaurant management software features for payroll, reservations, and accounting.

- The demand for cloud kitchens in Turkey is projected to increase due to the busy schedules of individuals and the growing penetration of e-commerce channels. Technology-driven smart cloud kitchens offer enhanced efficiency and consistency in taste and quality. Artificial intelligence and machine learning are utilized to accurately predict the number and quantity of ingredients required for daily cooking, minimizing order delays, and improving inventory management, resulting in faster order execution and reduced wastage. Popular dishes ordered through cloud kitchens in 2022 include fries, salads, bowls, and kofte. The average order

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value for cloud kitchens saw a significant increase of 12.13% in 2022 compared to 2021. Fast food has gained popularity in Turkey, leading to QSR chains expanding their menu selections. Examples of rapidly expanding fast-food options in the country include sandwiches, Dondurma (Turkish ice cream), and Sufle. These items had an average price of USD 2.87, representing almost half the average order value of QSRs in 2022.

Turkey Foodservice Industry Overview

The Turkey Foodservice Market is fragmented, with the top five companies occupying 4.27%. The major players in this market are Anadolu Restoran ?sletmeleri Ltd STI, DP Eurasia NV, Kofteci Ramiz, Simit Sarayi Yatirim Ve Ticaret Anonim Sirketi and TAB Gida (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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