

Apparel and Footwear in Turkey

Market Direction | 2024-12-13 | 84 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

Report description:

Inflation and interest rates remained high in Turkey over 2024, suppressing consumer expenditure on non-essential goods like apparel and footwear. Retail volume sales faced a sharp decline amid the significant devaluation of the Turkish Lira and soaring retail prices. As the economic crisis evolved, price-sensitive consumers were increasingly drawn to more affordable products while the more affluent population continued to opt for luxury brands. With travel starting to normalise across the world...

Euromonitor International's Apparel and Footwear in Turkey report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023 and analysis by distribution format allowing you to identify the sectors driving growth. It identifies the leading companies, leading brands, and offers strategic analysis of key factors influencing the market. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Apparel, Footwear, Sportswear.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Apparel and Footwear market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Apparel and Footwear in Turkey
Euromonitor International
December 2024

List Of Contents And Tables

APPAREL AND FOOTWEAR IN TURKEY

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

MARKET DATA

Table 1 Sales of Apparel and Footwear by Category: Volume 2019-2024

Table 2 Sales of Apparel and Footwear by Category: Value 2019-2024

Table 3 Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024

Table 4 Sales of Apparel and Footwear by Category: % Value Growth 2019-2024

Table 5 NBO Company Shares of Apparel and Footwear: % Value 2020-2024

Table 6 LBN Brand Shares of Apparel and Footwear: % Value 2021-2024

Table 7 Distribution of Apparel and Footwear by Format: % Value 2019-2024

Table 8 Distribution of Apparel and Footwear by Format and Category: % Value 2024

Table 9 Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029

Table 10 □Forecast Sales of Apparel and Footwear by Category: Value 2024-2029

Table 11 □Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029

Table 12 □Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 Research Sources

WOMENSWEAR IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

High inflation translates to weaker consumer demand

Innovative products support growth of womenswear

Commitment to sustainability at industry and brand level

PROSPECTS AND OPPORTUNITIES

Second-hand womenswear to remain popular for luxury items

'Quiet Luxury' will gain traction in womenswear

GenAI to be more widely embraced

CATEGORY DATA

Table 13 Sales of Womenswear by Category: Volume 2019-2024

Table 14 Sales of Womenswear by Category: Value 2019-2024

Table 15 Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 16 Sales of Womenswear by Category: % Value Growth 2019-2024

Table 17 NBO Company Shares of Womenswear: % Value 2020-2024

Table 18 LBN Brand Shares of Womenswear: % Value 2021-2024

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 19 NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 20 LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 21 NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 22 □LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 23 □NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 24 □LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 25 □NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 26 □LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 27 □Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 28 □Forecast Sales of Womenswear by Category: Value 2024-2029

Table 29 □Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 30 □Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

MENSWEAR IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales decline amid high costs of living

Changing working patterns facilitate shift from formal to informal styles

Innovations in menswear deliver practical and convenient solutions

PROSPECTS AND OPPORTUNITIES

Clothing preferences will be more closely linked to climate change

Generational differences need to be addressed

Retail e-commerce to make inroads in menswear

CATEGORY DATA

Table 31 Sales of Menswear by Category: Volume 2019-2024

Table 32 Sales of Menswear by Category: Value 2019-2024

Table 33 Sales of Menswear by Category: % Volume Growth 2019-2024

Table 34 Sales of Menswear by Category: % Value Growth 2019-2024

Table 35 NBO Company Shares of Menswear: % Value 2020-2024

Table 36 LBN Brand Shares of Menswear: % Value 2021-2024

Table 37 NBO Company Shares of Men's Nightwear: % Value 2020-2024

Table 38 LBN Brand Shares of Men's Nightwear: % Value 2021-2024

Table 39 NBO Company Shares of Men's Outerwear: % Value 2020-2024

Table 40 □LBN Brand Shares of Men's Outerwear: % Value 2021-2024

Table 41 □NBO Company Shares of Men's Swimwear: % Value 2020-2024

Table 42 □LBN Brand Shares of Men's Swimwear: % Value 2021-2024

Table 43 □NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 44 □LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 45 □Forecast Sales of Menswear by Category: Volume 2024-2029

Table 46 □Forecast Sales of Menswear by Category: Value 2024-2029

Table 47 □Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 48 □Forecast Sales of Menswear by Category: % Value Growth 2024-2029

CHILDRENSWEAR IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price sensitivity drives need for affordable products

Falling birth rate continues to dampen sales

Brands focus on teenagers with unique ranges

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

Younger parents increasingly opt to shop online

Childrenswear will continue to see more eco-friendly and organic products

Fast fashion brands in childrenswear will continue to expand

CATEGORY DATA

Table 49 Sales of Childrenswear by Category: Volume 2019-2024

Table 50 Sales of Childrenswear by Category: Value 2019-2024

Table 51 Sales of Childrenswear by Category: % Volume Growth 2019-2024

Table 52 Sales of Childrenswear by Category: % Value Growth 2019-2024

Table 53 NBO Company Shares of Childrenswear: % Value 2020-2024

Table 54 LBN Brand Shares of Childrenswear: % Value 2021-2024

Table 55 Forecast Sales of Childrenswear by Category: Volume 2024-2029

Table 56 Forecast Sales of Childrenswear by Category: Value 2024-2029

Table 57 Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029

Table 58 □Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

SPORTSWEAR IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Leading players continue to dominate in sportswear

Focus on female demographics in sportswear

Less formal working attire supports athleisure trend

PROSPECTS AND OPPORTUNITIES

Sportswear faces a buoyant growth period

Consumers embrace functional sportswear

Fashion brands to show greater interest in sportswear

CATEGORY DATA

Table 59 Sales of Sportswear by Category: Value 2019-2024

Table 60 Sales of Sportswear by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Sportswear: % Value 2020-2024

Table 62 LBN Brand Shares of Sportswear: % Value 2021-2024

Table 63 Distribution of Sportswear by Format: % Value 2019-2024

Table 64 Forecast Sales of Sportswear by Category: Value 2024-2029

Table 65 Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

JEANS IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Turkish apparel company joins CDP Global A List

Apparel specialists expand into jeans category

Comfortable styles are popular in jeans

PROSPECTS AND OPPORTUNITIES

Jeans to post healthy volume growth

Chinos are a growing competitive threat

AI applications used to replicate models in catalogues

CATEGORY DATA

Table 66 Sales of Jeans by Category: Volume 2019-2024

Table 67 Sales of Jeans by Category: Value 2019-2024

Table 68 Sales of Jeans by Category: % Volume Growth 2019-2024

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 69 Sales of Jeans by Category: % Value Growth 2019-2024
Table 70 Sales of Men's Jeans by Category: Volume 2019-2024
Table 71 Sales of Men's Jeans by Category: Value 2019-2024
Table 72 Sales of Men's Jeans by Category: % Volume Growth 2019-2024
Table 73 Sales of Men's Jeans by Category: % Value Growth 2019-2024
Table 74 Sales of Women's Jeans by Category: Volume 2019-2024
Table 75 □Sales of Women's Jeans by Category: Value 2019-2024
Table 76 □Sales of Women's Jeans by Category: % Volume Growth 2019-2024
Table 77 □Sales of Women's Jeans by Category: % Value Growth 2019-2024
Table 78 □NBO Company Shares of Jeans: % Value 2020-2024
Table 79 □LBN Brand Shares of Jeans: % Value 2021-2024
Table 80 □Forecast Sales of Jeans by Category: Volume 2024-2029
Table 81 □Forecast Sales of Jeans by Category: Value 2024-2029
Table 82 □Forecast Sales of Jeans by Category: % Volume Growth 2024-2029
Table 83 □Forecast Sales of Jeans by Category: % Value Growth 2024-2029
Table 84 □Forecast Sales of Men's Jeans by Category: Volume 2024-2029
Table 85 □Forecast Sales of Men's Jeans by Category: Value 2024-2029
Table 86 □Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029
Table 87 □Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029
Table 88 □Forecast Sales of Women's Jeans by Category: Volume 2024-2029
Table 89 □Forecast Sales of Women's Jeans by Category: Value 2024-2029
Table 90 □Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029
Table 91 □Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

HOSIERY IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hosiery comes up against some challenges

Focus on sustainability is gaining traction

High average unit prices boost current value growth

PROSPECTS AND OPPORTUNITIES

Hosiery is expected to register healthy growth over the forecast period

Low cost retailers will attract consumers

E-commerce is expected to prosper in hosiery

CATEGORY DATA

Table 92 Sales of Hosiery by Category: Volume 2019-2024
Table 93 Sales of Hosiery by Category: Value 2019-2024
Table 94 Sales of Hosiery by Category: % Volume Growth 2019-2024
Table 95 Sales of Hosiery by Category: % Value Growth 2019-2024
Table 96 NBO Company Shares of Hosiery: % Value 2020-2024
Table 97 LBN Brand Shares of Hosiery: % Value 2021-2024
Table 98 Forecast Sales of Hosiery by Category: Volume 2024-2029
Table 99 Forecast Sales of Hosiery by Category: Value 2024-2029
Table 100 Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029
Table 101 □Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

APPAREL ACCESSORIES IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Apparel accessories posts healthy volume growth

LC Waikiki continues to lead in apparel accessories

Domestic companies are highly responsive to local needs

PROSPECTS AND OPPORTUNITIES

Rising unit prices expected as consumers shift to branded apparel accessories

Product expansion from specialist apparel accessories retailers

Online retailing will continue to witness significant growth

CATEGORY DATA

Table 102 Sales of Apparel Accessories by Category: Volume 2019-2024

Table 103 Sales of Apparel Accessories by Category: Value 2019-2024

Table 104 Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 105 Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 106 NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 107 LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 108 Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 109 Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 110 Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 111 □Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

FOOTWEAR IN TURKEY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sportswear witnesses dynamic volume growth

Second-hand luxury footwear resonates with millennials

Foreign e-commerce limits and higher custom duties imposed

PROSPECTS AND OPPORTUNITIES

Footwear category is expected to record healthy growth

Local players aim to increase e-commerce sales

Store expansion expected among Turkish players

CATEGORY DATA

Table 112 Sales of Footwear by Category: Volume 2019-2024

Table 113 Sales of Footwear by Category: Value 2019-2024

Table 114 Sales of Footwear by Category: % Volume Growth 2019-2024

Table 115 Sales of Footwear by Category: % Value Growth 2019-2024

Table 116 NBO Company Shares of Footwear: % Value 2020-2024

Table 117 LBN Brand Shares of Footwear: % Value 2021-2024

Table 118 Distribution of Footwear by Format: % Value 2019-2024

Table 119 Forecast Sales of Footwear by Category: Volume 2024-2029

Table 120 Forecast Sales of Footwear by Category: Value 2024-2029

Table 121 □Forecast Sales of Footwear by Category: % Volume Growth 2024-2029

Table 122 □Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Apparel and Footwear in Turkey

Market Direction | 2024-12-13 | 84 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-20"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com