



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 Gıda San ve Tic AS leads sales

Bereket Döner leads growth

Yum! Brands to relaunch KFC in Turkey with new franchise partner

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Cafés/bars show resilience as innovation fuels growth

INDUSTRY PERFORMANCE

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Chained specialist coffee and tea shops drive growth

Value-for-money becomes key focus

WHAT'S NEXT?

Cafés/bars poised for slow, yet steady growth amid rising demand for premium experiences.

Chained cafés to invest in fulfilment strategies

Cafés to boost growth through bakery offerings and takeaway innovations

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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

Full-service restaurants strengthen omnichannel fulfilment to capture growing off-premise demand

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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?

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Acceleration of omnichannel fulfilment to meet growing demand

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INDUSTRY PERFORMANCE

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Chained operators lead growth

Kiosk format gains momentum

WHAT'S NEXT?

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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?

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Standalone locations will continue to attract consumers
Shopping and leisure venues offer growth opportunities
Urbanisation will impact consumer foodservice

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