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Prepared By: FAS Staff

Approved By: Jonathan Huang

Report Highlights:

Turkiye is among the world's leading economies and home to a young, mostly urban population of 85.7 million people. This dynamic has fueled the country's rising demand for consumer-oriented agricultural products. In recent years, however, this demand has been tempered somewhat by geopolitical dynamics and persistent economic challenges, most notably record inflation. Notwithstanding these and other trade-related challenges, there are a wide range of export opportunities for U.S. agricultural products. This report provides a blueprint for identifying and capitalizing on these opportunities.

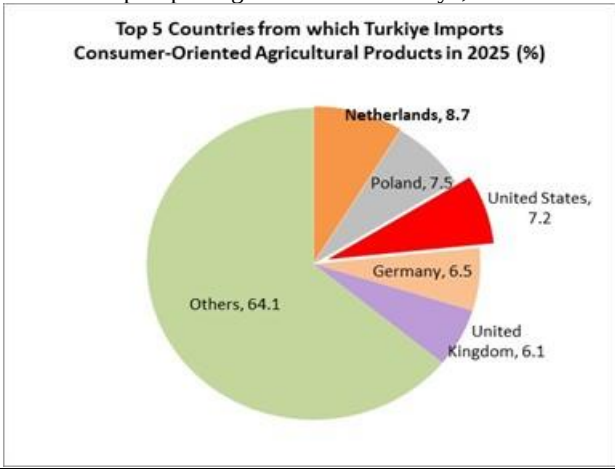
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Executive Summary

The Republic of Turkiye has a young population of 86 million people. The country is in a Customs Union with the EU and is the 16th largest economy in the world. Though the Turkish economy stagnated recently, an annual average GDP growth rate of 3.4 percent is forecasted by the IMF between 2026 and 2028. In most cases, U.S. food exporters should utilize importers in Turkiye to penetrate the market.

Imports of Consumer-Oriented Agricultural Products

Chart 1: Top Exporting Countries to Turkiye, 2025



Food Retail Industry

Despite recent economic headwinds, the retail food industry continues to grow, with sales topping nearly $120 billion in 2025. A young, largely urban population and growing middle class are driving this growth. The sector is dominated by domestic retailers, especially discount chains. Organized/modern retailers now make up most of the grocery market share as traditional retailers slowly exit the market. Online grocery shopping continues to increase since first taking off during the pandemic.

Food Processing Industry

Turkiye has a large and sophisticated food and beverage processing industry which relies on domestic and imported ingredients. As of 2025, there were nearly 61,750 food and beverage manufacturers in Turkiye. The industry, which supplies both domestic and export markets, continues to grow in response to strong consumer demand for increased convenience.

Food Service Industry

In 2024, there were about 113,500 commercial food service restaurants in Türkiye with sales of more than 22.2 billion USD. Sales in USD terms and the numbers of restaurants and transactions lagged behind pre-pandemic levels until 2025. As of 2025, sales exceeded pre-pandemic levels in USD terms but interestingly, the number of food service outlets did not reach pre-pandemic levels.

Quick Facts CY 2025

Imports of Consumer-Oriented Products

$8.8 billion

List of Top 10 Growth Products in Turkiye (Consumer-Oriented Ag. Products) 2023-2025

1. Garlic, fresh or chilled
2. Cocoa Paste, defatted
3. Apples, fresh
4. Cranberry Juice
5. Persimmons, fresh
6. Onions & shallots, fresh
7. Strawberries, frozen
8. Green tea, not fermented
9. Cranberries & blueberries, fresh
10. Kiwi fruit, fresh

Food Industry by Channels (U.S. billion)

Retail Food Industry	$120 billion
Food Service-HRI	$22.2 billion
Food Processing	$97 billion
Food and Agriculture Exports	$31.5 billion

Top 10 Host Country Retailers (based on sales)

1) Bim
2) Migros
3) A101
4) Şok
5) CarrefourSA
6) Sec
7) Ekomini
8) File
9) Hakmar
10) Macrocenter

GDP/Population

Population: *86 million*
GDP: *$1.6 trillion*
GDP per capita: *$18,103*

Sources: CIA World Fact Book, Euromonitor International, Trade Data Monitor, Turkish Statistics Institute (TurkStat).

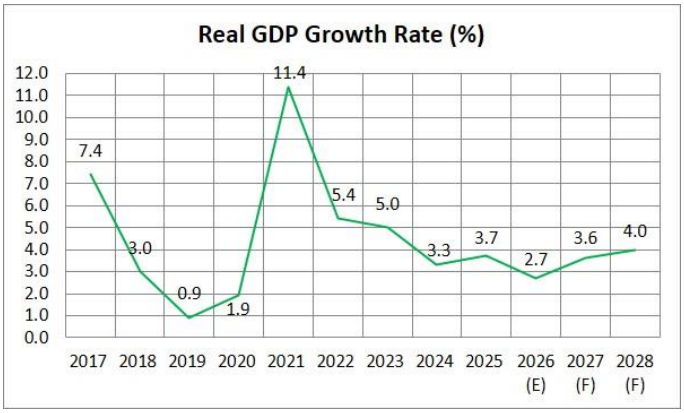
Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
Long-term GDP and disposable income growth	Domestic and international political challenges
Large population base: young and growing	Current economic downturn, inflation and currency volatility
Opportunities	**Challenges**
Unsaturated market, open for new items	Complex and time-consuming import procedures
Growing demand for high value packed food; ready to-eat/cook meals as the share of working women increases	Strong traditional food and cuisine affect consumption habits. There is a developed domestic food processing industry that also exports.

I. MARKET OVERVIEW

The Republic of Turkiye is located in the southeast of Europe, northwest of the Middle East, bordering the Black Sea to the north and the Mediterranean Sea to the south. The country has a young population of 86 million, with a median age of about 35 years.[1] Turkiye has rapidly urbanized over the last two decades, with more than three-quarters of the population now living in urban areas. This mostly young, urban population, along with a growing middle class are among various factors contributing to increased consumption of consumer-oriented agricultural products. However, the country's challenging economic conditions during the last few years have tempered this upward trend in consumption.

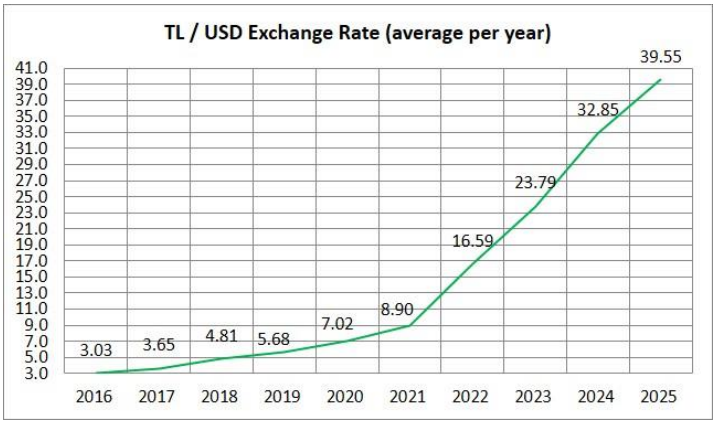
Chart 2: Real GDP Growth Rate



Source: Turkish Statistical Institute. (E) Estimate by IMF. (F) Forecast by IMF.

According to the International Monetary Fund (IMF), Turkiye was the 16th largest economy in the world in 2025. The country's Gross Domestic Product (GDP) growth is at 3.7 percent in 2025, slightly up from the previous year but down from 2021-2023's high growth rates (see Chart 2). The 11 and 5.4 percent growth rates of 2021 and 2022 were caused by excessive government expenditures and expansive monetary policy, which many analysts think is one of the main reasons for the high inflation in the following years. Some other reasons for the economy's deterioration are the effects of the Government of Turkiye's (GoT) unorthodox market interventions prior to 2024, geopolitical developments in the region, perceptions of the loss of rule of law[2], erosion of institutions, decay of the meritocracy system, limits on domestic freedoms and continued worry of a global economic slowdown. In the coming years, the economic growth is expected to reach 4 percent (see Chart 2).

Chart 3: TL/USD Exchange Rate



Source: Central Bank of Turkiye (CBT).

Although the GoT abandoned unorthodox economic policies after 2024 municipal elections in which the ruling AKP was defeated and applied an economic program to tighten monetary policy, increase interest rates, and decrease inflation, the results have not been satisfactory so far according to many analysts. Several major domestic political incidents have continued to adversely affect the economy. In March 2025, the GoT arrested Ekrem Imamoglu, the hugely popular Istanbul mayor and a key political rival of President Erdogan just days after stripping him of his university diploma, threatening his ability to enter future presidential elections as a candidate. From March 2025 to May 2026, 31 elected majors from the CHP, the main opposition party, have been arrested on what many consider spurious allegations of wrongdoing (some of whom were released later). Finally, in May 2026, a court in Ankara annulled the results of the 2023 general elections for leadership of the party, done in scheduled congress of CHP. The former chairman of the party took over the leadership despite the allegations of cooperation with the ruling party to return to the

[1] Turkish Statistics Institute (TurkStat), 2024. Many analysts do not agree with TurkStat and say that there are more people residing in Turkiye when illegal immigrants are included.

[2] The World Justice Project ranked Turkey 118th out of 143 countries in its Rule of Law Index 2025: https://worldjusticeproject.org/rule-of-law-index/global/2025/T%C3%BCrkiye/

leadership seat of CHP. The chairman that was elected by 2023 CHP congress elections, Ozgur Ozel, had to leave CHP and he then established a new opposition party called Yeni Party (YP) in July 2026, which became the main opposition party, since YP has more seats in the parliament than CHP, formerly the main opposition. As of October 2026, Turkish police raided one of the most watched pro-opposition news TV channels, Halk TV, appointing a government trustee to administer the media outlet with allegations of bribery, bid rigging and money laundering. Turkiye ranks 163rd out of 180 countries according to the Reporters Without Borders' world press freedom index.[3] Upon these developments, many political analysts believe that the ruling AKP party is preparing for early elections in the second half of 2027 but the governing party has denied this, stating that there will be elections in Spring 2028. The aforementioned incidents shocked the Istanbul Stock Exchange, deteriorated the value of the Turkish lira (TL), and depleted the foreign exchange reserve of the Central Bank of the Republic of Turkiye (CBRT). Market analysts have stated that any disinflationary trends previously seen were damaged, and investor confidence took a hit.[4,5]

The year-end CPI inflation rate for 2025 was 30.89 down from the 44.38 percent year-end rate in 2024. The CPI inflation dropped to 29.73 percent by the end of September 2026. Although going in the right direction, market sources believe the inflation rate to be rather high despite efforts to decrease it for almost three years. Additionally, some commentators reported that the Central Bank of Turkiye's early start of cutting policy interest rates in December 2024 might hinder the fight with inflation.

The TL continued to lose value against major currencies like the USD and Euro, however the rate of the value decrease has been less compared to inflation rates in the last few years. This relative overvaluation of the TL creates major challenges for the economy, leading to bankruptcies in some industries which depend on exports for income, such as but not limited to textile and garment production.

A few other factors which continue to risk the future macroeconomic outlook are geopolitical developments (like the wars in Ukraine and Iran which are both neighbors of Turkiye), over $100 billion in damage from the February 2023 earthquakes, the perception of lack of rule of law, a sense of increasing corruption in the state, a high current account deficit, and limits on certain domestic freedoms.

While the GoT declared that they were shifting away from unorthodox economic policies, a factor of uncertainty remains for foreign and domestic investors, and the near-term outlook does not provide much in the way of significantly positive updates to the purchasing power of low- and mid-income Turkish buyers. In the face of high prices caused by high inflation rates,[6] many consumers have scaled back on discretionary purchases and changed their eating patterns to get by. Many market players indicate a sensation of increasing income/wealth inequality in recent years which most negatively affects the purchasing power of middle-class consumers; this negatively affects the sentiment of the public.

The GoT seeks to attract foreign direct investment (FDI) to spur economic growth into different sectors of the economy, including agro-processing. FDI levels have been low because of inconsistent economic policies and concerns about the rule of law. In recent years, there has been an increase in investments from Gulf countries. The International Investors Association of Turkiye declared in their annual report in December 2025 that FDI inflows increased 12 percent in 2025 on top of a 10 percent increase in 2024, after a decline of 28 percent in

[3] https://apnews.com/article/turkey-tv-raid-halk-erdogan-press-freedom-59176d1028ef288e959f06e123dd7009; https://www.reuters.com/business/media-telecom/turkish-police-raid-office-opposition-tv-channel-broadcaster-says-2026-10-14/; https://www.ft.com/content/0c178261-2c29-4677-9649-5b9257662d7e?syn-25a6b1a6=1

[4] https://money.usnews.com/investing/news/articles/2025-05-13/turkeys-recent-political-events-hit-economy-reserves-says-ebrd

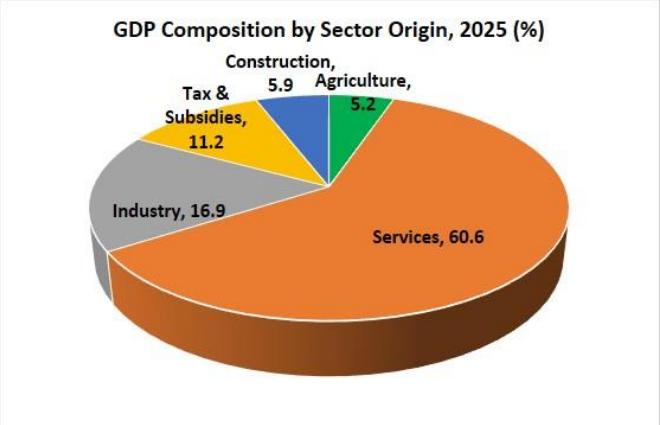
[5] https://www.theguardian.com/world/2026/may/21/turkey-court-removes-head-chp-party-ozgur-ozel-erdogan

[6] Food and non-alcoholic beverage inflation rate was 28.31 percent for 2025 according to TurkStat. Some other independent sources such as ENAG report much higher inflation rates, about double of TurkStat rates. Annual food inflation was 27.62 percent as of end of September 2026.

2023 compared to 2022.[7] This is an indication that going back to orthodox macroeconomic policies in 2024 brought some positive response from foreign investors. See the State Department's 2026 Investment Climate Statement for more information about the overall business and investment climate in Turkiye.

In 2024, the agriculture sector represented about 5 percent, or $84 billion, of Turkiye's total GDP. This sector depends on domestic and imported agricultural products to fuel its food processing and manufacturing companies. Preferential trade arrangements allow certain imports to come in at lower duties, especially processed food products from Europe, which is Turkiye's largest trading partner.

Chart 4: Composition of GDP



Source: Turkish Statistics Institute

As an Associate Member of the European Union (EU), Turkiye is aligning some of its regulations with the EU, though not all. Turkiye is also part of the Customs Union with the EU, which allows preferential access for processed food imports, but not primary agricultural products. In addition, Turkiye has Free Trade Agreements (FTA) with the European Free Trade Association (EFTA) countries as well as 22 other countries. These preferential trade arrangements make it difficult for certain U.S. products to compete in the market.

Table 1: Important Socio-economic Parameters for Turkiye

Parameter	Value
Population	86.09 million (2025)
Median Age	34 (2025)
Labor Force (ages 15-64)	58.9 million (2025)
Unemployment Rate (ages 15-64)	8.3 percent (2025)
Unemployment Among Youth (ages 15-24)	15.3 percent (2025)
GDP	$1.6 trillion (2025)
GDP per Capita	$18,103 (2025)
Trade Balance	$-92 billion (2025)
Tourists (# of foreign citizens entering*)	64 million (2025)
Inflation – CPI year-end	30.89 percent (2025) [29.73%, September 2026]
Exchange Rate (end of period)	42.92 TRL/USD (2024) [49.02 TRL/USD, September 2026]
Number of Companies with Foreign Capital	88,766 (Total as end of 2025) [15,742 are Syrian, mostly SME refugee enterprise; 2,340 are US capital enterprise]
Major Export Markets (all products)	Germany (8.1%), UK (6.1%), USA (6.0%), Italy (4.8%), Iraq (4.5%), France (4.1%), Spain (3.8%), UAE (3.4%), Romania (3.1%), Netherlands (3.0%) (2025)
Major Import Sources (all products)	China (13.6%), Russia (11.6%), Germany (8.2%), USA (4.9%), Switzerland (4.3%), Italy (4.3%), France (3.5%), South Korea (2.8%), Spain (2.8%), UAE (2.6%) (2025)
Major Cities	Istanbul (15.7 m), Ankara (5.9 m), Izmir (4.5 m), Bursa (3.2 m), Antalya (2.7 m), Konya (2.3 m), Adana (2.3 m), Sanliurfa (2.2 m), Gaziantep (2.2 m), Kocaeli (2.1 m) and 14 other cities over one million population (2025)

* Including Turkish citizens residing abroad who visited with a foreign passport

[7] https://yased.org.tr/reports

ADVANTAGES	CHALLENGES
Long-term growth in GDP and disposable income.	Economic policies as well as domestic and international political challenges undermine economic stability. Exchange rate fluctuations and increasing inflation.
Strong and steady retail market, as well as more dual income households, drives new demand for processed, frozen, prepared food and ingredients.	Artisan domestic products such as baked goods and cheese utilize domestic ingredients and have strong existing relationships with ingredient suppliers.
Large population base: young and growing, middle and upper middle class are growing.	Lack of transparency in rules and regulations.
High and increasing urbanization rate; increasing rates of female participation in work force.	High import duties on processed/packaged food and agricultural products.
A growing market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry that requires a wide range of ingredients inputs. The industry is also open to new ingredients, like additives and processing aids.	Importing can be complex: Time-consuming and non-transparent import procedures.
An internationally savvy new generation of Turks are more open to new tastes from abroad.	Strong traditional food and cuisine affecting consumption habits.
Growing demand for high value packaged food; ready to-eat/cook meals as the share of working women increases.	The Turkish industry has developed many western-origin products domestically, such as packaged confectionery products and ready-to-eat meals.
Fast-growing modern, organized grocery chains.	Unregistered economy can create unfair competition.
Positive perception for products from the United States.	No genetically engineered products or ingredients are approved for food use in Turkiye.
Strong food culture and a tradition of gathering for meals in large groups, so new products fitting into the existing food culture and eating habits are easily adopted.	Marketing for some products can be difficult: Labeling laws limit health-related claims, and regulations limit alcohol advertising.
Many regulations are like those of the EU, so expansion to Turkiye can be easier for companies already exporting to Europe.	Competition from many products imported under FTAs or European countries with lower tariffs.

II. EXPORTER BUSINESS TIPS

a. MARKET RESEARCH

It is important to conduct market research before deciding to launch business relations in Turkiye; either a detailed analysis or a quick market scan, depending on your product and experience level with Turkiye, is necessary. It is essential to make sure that there is a market for a specific product. Even if you are experienced in neighboring regions, the Turkish market might be quite different than expected. It is a mix of Middle Eastern, Western European, and U.S. cultures, traditions, consumers, and business practices. Markets, companies, and consumers in Turkiye are less transparent compared to Western Europe and the United States. It is often harder and more expensive to access market intelligence compared to developed economies. Most of

the market intelligence and business is conducted based on personal relationships. Getting a reliable local partner/agent is a good way of starting relationship-based market research. Visit our country page for other free FAS exporter assistance reports. Other reports can be purchased from various sources such as, but not limited to, Euromonitor or Nielsen.

b. LOCAL BUSINESS CUSTOMS & TRENDS

After conducting market research and determining that there is a potential market in Turkiye for the food/agricultural item that you are exporting, it is important to develop a good strategy for market entry while considering local business customs. As part of that strategy, it is critical to invest in developing business relationships. Relationships are very important for transacting business and getting things done. Turkiye is a country with a business culture and people that is somewhat like Southern/Western European countries/cultures; on the other hand, it has many qualities taken from Middle Eastern/Islamic cultures and Central Asian, Turkic cultures. Business life and habits are all affected by the mix of cultures and traditions, so it is important to understand your counterparts.

In most cases, a local business partner is very useful to understand the culture context. Some points to consider are:

- Dress well for business meetings, especially if it is the "getting to know each other" stage. Overdress if not sure what to wear. Dress conservatively if not sure. Shorts, sandals, and sportswear are not taken well in business environments, especially for men, even in southern beach cities.
- Punctuality is taken more seriously compared to Mediterranean and Middle Eastern cultures. Standard time is three hours ahead of Greenwich Mean Time (GMT). Turkiye has not observed daylight savings time since 2016.
- Take Turkish and Islamic holidays into consideration. Although business is conducted at all times, it is smart to consider the Islamic holy month of Ramadan and avoid events during the two major Bayram religious holidays and Turkish Republic Day. It is important to judge how much value your counterpart attaches to these days. If unknown, err on the side of caution to avoid serious offense.
- Family is important in Turkiye; the superiors in the company are often seen as father/mother figures that need to take care of the employees in many senses.
- Turkish people take pride in their rich history and cultural heritage. Try to learn something about Turkish/Ottoman history.
- Turkish people are also proud of their rich and varied cuisine. When you try Turkish food, compliments are appreciated.
- Turkish coffee and tea have a special role in Turkish culture and also in business meetings. They will be offered at the start of a meeting as a courtesy. It is polite to accept one of those beverages when offered or ask for a glass of water.
- Turkish businesspeople prefer to work with people they know and trust on a personal level. In-person meetings and business lunches and dinners are important to build personal and business relationships; it is a good sign when invited. Try to accept when possible. These relations will affect business opportunities.
- Almost everything is taken personally. There is a very fine line between personal and business matters.
- In Turkish culture, it is important to take good care of business guests (as they do with personal guests), especially foreign ones. Reciprocity is expected and taken as a positive indicator when done properly.

c. GENERAL CONSUMER TASTES & TRENDS

Although there is a strong Turkish culinary tradition and ample processed food production in the country, upper-middle- and upper-income level consumers, especially in large cities like Istanbul, Izmir, Ankara,

Antalya, Bursa, etc., tend to be open to new, imported tastes. Young and single professionals in metropolitan areas tend to have more interest in international travel compared to their parents. Thanks to this younger metropolitan population with increasing disposable income, there is an increased awareness of international tastes and an influx of international cuisine in Turkiye in the last two decades. This is seen in the rise of Italian restaurants, sushi places, Mexican restaurants, Indian restaurants, East Asian restaurants and takeaways, American-style diners, luxury burger houses, various fast-food chains predominantly from the United States, and many fusion cuisines. In the last decade or so, Turkish supermarkets have been featuring more international ingredients and imported processed food compared to almost nothing a decade ago.

According to Post's observations, thanks to the same demographic group, the healthy, functional, and organic food sectors are growing as well. Consumers are becoming increasingly educated about and aware of the quality, nutritional value, and packaging of their food. They tend to be more aware of the food safety and expiration date of the foods they consume compared to a few decades ago. Except for those at higher income levels, Turkish consumers are generally price sensitive, which has contributed to the rise of discount retailers and private label brands.

III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

a. CUSTOMS CLEARANCE AND DOCUMENTS GENERALLY REQUIRED BY THE COUNTRY AUTHORITY FOR IMPORTED FOOD

Import procedures are complicated and burdensome in Turkiye. Generally, a local business ally eases the process, as they are familiar with the procedures. For details on the requirements, please refer to FAS Turkiye reports on Food and Agricultural Import Regulations and Standards and Required Certificates. The U.S. Foreign Commercial Service also gives some general information on import procedures to Turkiye.

In most cases, some counseling with a customs broker or consultant in Turkiye is useful as they often understand the complex import processes better than a new-to-the-market, lesser-experienced company. You might contact Istanbul, Izmir , Mersin, or Ankara Customs Brokers Association (link in Turkish), depending on your needs.

b. COUNTRY LANGUAGE LABELING REQUIREMENTS

Turkish Ministry of Agriculture and Forestry published two separate regulations: The "Turkish Food Codex Regulation on Food Labeling and Provision of Information to Consumers" (available here in Turkish) and "The Turkish Food Codex Regulation on Nutrition Claims" (available here in Turkish). As with the prior versions of the regulations, these were prepared in parallel to the relevant the EU Directives and Regulations within the framework of EU harmonization.

Please review Section II of our Food and Agricultural Import Regulations and Standards Report if you need details on labeling requirements. In general, most labeling requirements can be met with a sticker affixed to the outside packaging of imported processed food with the appropriate information available in Turkish.[8]

c. TARIFFS and FOREIGN TRADE AGREEMENTS (FTAs)

There are varying tariffs for most food and agricultural items imported from the United States to Turkiye. The tariff rates may be checked at the Turkish Ministry of Trade web page by HS code. Please select "GTIP arama" for HS code search and later select "Birlesik Devletler" for United States. As of September 2025, additional tariffs on several agricultural/food items from the United States that were levied in June 2018 have been removed.

[8] Nevertheless, each product should be examined, and a decision of packaging and labeling should be made separately.

Turkiye is in a Customs Union with the EU. In addition, Turkiye has active Free Trade Agreements with European Free Trade Association (EFTA) Countries (Norway, Liechtenstein, Iceland, Switzerland) and 22 other countries. Furthermore, FTAs with Ukraine, Lebanon, Sudan, and Qatar have been signed but not ratified yet. Additionally, Türkiye has four Preferential Trade Agreements (PTA) in force with Iran, Azerbaijan, Pakistan and Uzbekistan.

Due to the FTAs with the EU, UK, and EFTA, European countries are major competitors for U.S. products in categories such as packaged foods and food processing ingredients and additives.

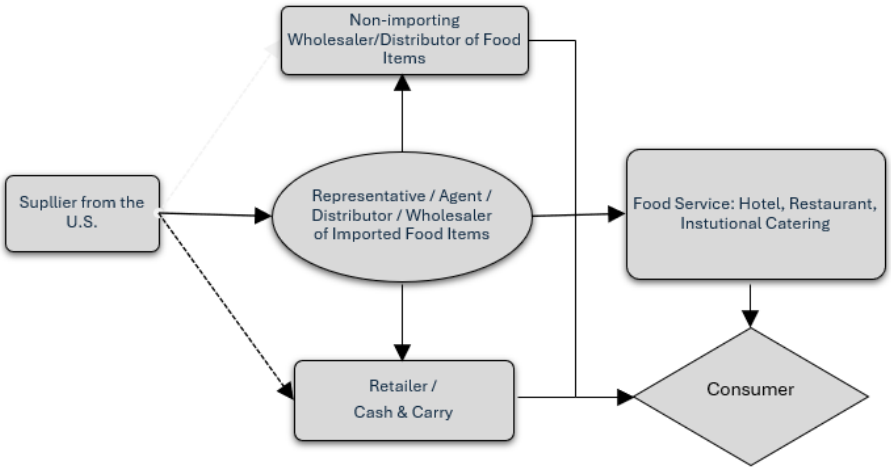
d. TRADEMARKS and PATENTS

The Turkish Patent and Trademark Office under the Turkish Ministry of Industry and Technology is responsible for patents and trademarks. You can take a look at the Turkish industrial property law which governs the patents and trademarks and related regulations (link in Turkish) about the applications of the law.

IV. MARKET SECTOR STRUCTURE and TRENDS

a. SUPPLY CHAIN & PRODUCT FLOW

A good way of exporting to Turkiye is using a local agent in the country. This agent is sometimes an importer, distributor, wholesaler, a commission-based trader, or some combination thereof. Local representatives will have experience in market development and contact information of potential buyers, such as the organized grocery retailers, food processors, and/or food service sector. A good representative can guide you in the market, including on import rules and regulations, which ports to utilize, local business practices, conducting market intelligence formally or informally, starting sales calls, etc.



The chart above represents the flow of consumer oriented agricultural goods. In some cases, retailer/cash & carry outlets might import items themselves rather than buying from an importer.

b. RETAIL FOOD SECTOR

Despite the political and economic challenges that Turkiye has faced in recent years, the food retail industry has been growing. Grocery retail sales were $120 billion including e-commerce grocery sales (excl. sales taxes) in 2025 which constituted 54 percent of all retail sales through approximately 370,000 organized and unorganized grocery retailers and various e-commerce sites. The number of discount chains has been growing over the past decade, including their private label products. Several foreign market chains have left the market, leaving the stage mostly for domestic chains. Although it is still limited in sales, there is increasing demand for imported processed food. There is also an increasing trend of online shopping for groceries in major cities,

especially in larger cities like Istanbul, Ankara, Izmir, and Bursa, as the number of companies that offer online ordering and delivery increase. There was a major boost to grocery e-commerce in 2020 due to COVID-19 restrictions, and the trend in online grocery sales continues. In recent, record food inflation has impacted consumer buying behavior.[9] Please read our Retail Foods Report for detailed analysis of the sector.

c. HOTEL, RESTAURANT, INSTITUTIONAL (HRI) FOOD SERVICE SECTOR

Deteriorating macro-economic conditions following the COVID-19 pandemic adversely affected the HRI industry. The pandemic spurred increased demand for restaurant home delivery services, and this trend continues as consumers increasingly desire greater convenience.

Rising inflation and a depreciating currency has increased operational costs (e.g., rent, electricity, labor) for food service companies in Turkiye, forcing them to raise their sales prices. At the same time, persistent inflation has eroded consumers' buying power, causing them to switch to cheaper dining-out options, such as fast food and street stalls. One reason fast-food companies weathered the pandemic better than sit-down restaurants was because they could efficiently deliver food to customers' doorstep at a lower cost. Altogether, in 2025 there were about 122,000 commercial food service locations throughout the country, a 2.8 percent increase from 2024. About five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises. Please read FAS Turkiye's Food Service: HRI Report for detailed analysis of the sector.

d. FOOD PROCESSING SECTOR

Turkiye has a large and sophisticated food and beverage manufacturing sector, which relies on domestic and imported ingredients. As of 2025, there were nearly 61,750 food and beverage manufacturers in Turkiye. With the declining purchasing power, people have been eating out less and cooking more at home, causing an increase in sales of cooking ingredients and meals. The food processing industry constitutes approximately 15 percent of all production industries. Despite current economic headwinds, the processed food industry is expected to continue growing in the coming years. Much of this growth will be fueled by several demographic trends, including continued urbanization, a large young population, an increase in the number women in the workforce, a rising number of college students, and an increasing number of single-person households. Even though U.S. processed foods and food processing ingredients face strong competition from local suppliers and from European countries, there are still market opportunities for U.S. producers. Please read FAS Turkiye's Food Processing Ingredients Report for more details.

V. AGRICULTURAL and FOOD IMPORTS

a. AGRICULTURAL & FOOD IMPORT STATISTICS

Examining the two consecutive growth figures of imports of all agriculture and related products from the world to Turkiye compared to two years ago (2024 vs 2022), the top five products that have shown the most growth based on significant imports ($1 million and more) were persimmons, meat of bovine animals (fresh), garlic (fresh and frozen), meat of sheep (nesoi, fresh), and offal of bovine animals (frozen). For additional information please see the USDA/FAS BICO report in Appendix I of this report.

b. BEST HIGH-VALUE, CONSUMER-ORIENTED PRODUCT PROSPECTS CATEGORIES

Tree nuts, functional foods, sauces, gourmet/ethnic food ingredients, spices, certain dried fruits, distilled spirits, wine and non-alcoholic beverages are among the best high-value consumer-oriented food products with market potential. Please see our Retail Foods Report for more details.

[9] According to some independent NGOs, real inflation is double TurkStat figures as mentioned in foot note 6.

VI. KEY CONTACTS and FURTHER INFORMATION

Turkish importers, agents, or distribution companies typically attend large trade shows such as Anuga in Germany, Sial in France, Gulfood in Dubai and Seafood Expo Global in Spain. Food trade shows in Turkiye can be helpful to visit before deciding to enter the market and promoting a product. Foodist Istanbul, World Food Istanbul, Anfas Food Product, , IbakTech, Ekoloji Izmir Exhibition, Gourmet Izmir OliveTech Exhibition, Future Fish EuroAsia, and F Istanbul are good shows to visit and excellent opportunities to meet importers. Please also take look at our Important Food and Agriculture Related Exhibitions in Turkiye report for many other niche exhibitions.

Entering the Turkish market often requires a long-term perspective and persistence, as building trust is important. Correct and thorough market analysis must be done before entry. Turkiye is a large country and has a very diverse set of consumers, retailers, HRI, and food processing entities. We recommend reviewing our other reports and contacting the FAS Turkiye office with any questions. Foreign Agriculture Service (FAS) offices listed below may assist with connecting U.S. food exporters and Turkish importers.

Office of Agricultural Affairs United States Department of Agriculture U.S. Embassy Ankara 1480 Sokak No:1, 06530 Cukurambar, Ankara, Turkiye Telephone: +90 312 455 5555 E-mail: agankara@usda.gov	Office of Agricultural Affairs United States Department of Agriculture U.S. Consulate General Istanbul Ucsehitler Sokak No:2, Istinye, 34460 Istanbul, Turkiye Telephone: +90 212 335 9068 E-mail: agistanbul@usda.gov

Useful Links to Government & Industry Organizations

Republic of Turkiye, Ministry of Agriculture and Forestry (MinAF)

Union of Chambers and Commodity Exchanges of Turkiye (TOBB)

Foreign Economic Relations Board of Turkiye (DEIK)

Investment Support and Promotion Agency of Turkiye (ISPAT)

All Foods Foreign Trade Association (TUGIDER)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

Association of Food Additives and Ingredients Manufacturers (GIDABIL)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

All Foods Foreign Trade Association (TUGIDER)

Turkish Federation Retailers (TPF)

Food Retailers Association (GPD)

Istanbul Retailers Association

Turkish Tourism, Restaurant Investors and Gastronomic Establishments Association (TURYID)

Istanbul Food Industrialists Association (IYSAD)

Out of House Consumption Suppliers Association (ETUDER)

Turkish Tourism Investors Association (TTYD)

Hotel Association of Turkiye (TUROB)

Turkish Small Hotels Association

All Restaurants and Tourism Establishments Association (TURES)

Association of Turkish Travel Agencies (TURSAB)

Turkish Statistics Institute (TurkStat)

Attachments: 2019-2025 BICO Report Turkiye.pdf