USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

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# **Report Name:** Retail Foods Annual

**Country:** Turkiye

**Post:** Ankara

**Report Category:** Retail Foods

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**Report Highlights:**

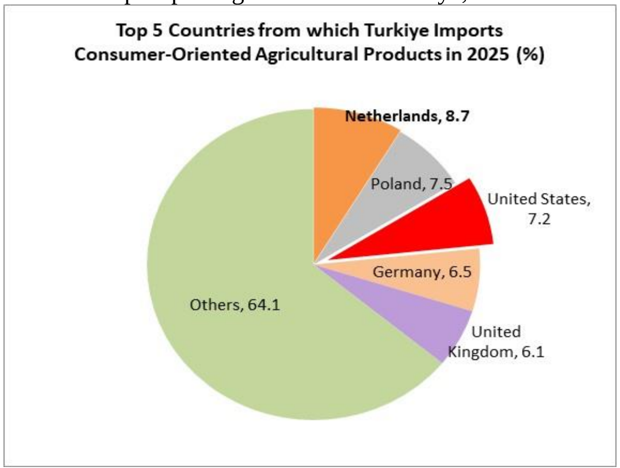
Amid continuing economic headwinds, Turkiye's retail food sector continues to grow, fueled by a young population of 85 million. The sector is predominantly made up of domestic discount chains, and most of the food on store shelves is produced locally. Only 7-8 percent of the nearly $120 billion in annual grocery sales are made up of imported consumer-oriented food items. The United States was the third largest foreign supplier of consumer-oriented products last year, of which tree nuts was the leading category. U.S. walnuts, almonds, cranberries, dates, and wine are among the products with the highest sales potential. U.S. products face tough competition from EU countries that enjoy preferential access under a Customs Union and lower freight costs.

## Executive Summary

Turkiye is the 16th largest economy in the world and is predicted to grow in the coming years fueled by the country's young population of 86 million people and a growing middle class. This same dynamic is driving expansion in the country's retail food sector, including online sales. The sector is mostly dominated by domestic retail chains, which predominantly carry domestic food products.

## 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 2024, there were nearly 58,000 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 $19.5 billion. Constant value sales in Türkiye's consumer foodservice sector declined in 2024, as high inflation prompted many local consumers to reduce discretionary spending.

## Quick Facts

**Imports of Consumer-Oriented Ag. Products 2025**
USD 8.8 billion

**List of Top 10 Growth Products in Turkiye (Imported Consumer Oriented Agricultural Products) 2023-2025**

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

**Food Retailers by Channel (Sales in Million USD*) 2025**

| | |
|---|---|
| **Modern Grocery Retailers** | **79,267** |
| - Convenience Stores | 3,820 |
| - Discounters | 38,758 |
| - Gas station/ Forecourt retailers | 756 |
| - Hypermarkets | 1,397 |
| - Supermarkets | 34,536 |
| **Traditional Grocery Retailers** | **38,484** |
| **Offline Grocery Retailers Total** | **117,751** |
| **Grocery E-commerce** | **2,486** |
| **Total** | **120,238** |

*excl. sales tax

**Top 10 Retailers (based on Marketshare in 2025)**

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

**GDP/Population, 2025**
Population: 86.09 million
GDP: $ 1.60 trillion
GDP Per Capita: $ 18,611

**Sources**: CIA The World Fact Book; Euromonitor International; Turkish Statistical Institute (TurkStat); Trade Data Monitor; Economist Intelligence Unit (EIU), International Monetary Fund (IMF)

| Strengths/Weaknesses/Opportunities/Threats | |
|---|---|
| **Strengths** | **Weaknesses** |
| Long term GDP and disposable income growth. | Domestic and international political challenges. |
| Large population base: young and growing. | Economic instabilities such as exchange rate fluctuations, inflation. |
| **Opportunities** | **Threats** |
| Unsaturated market, open for new items. | Complex, time- consuming, and inconsistent 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 affecting consumption habits. |

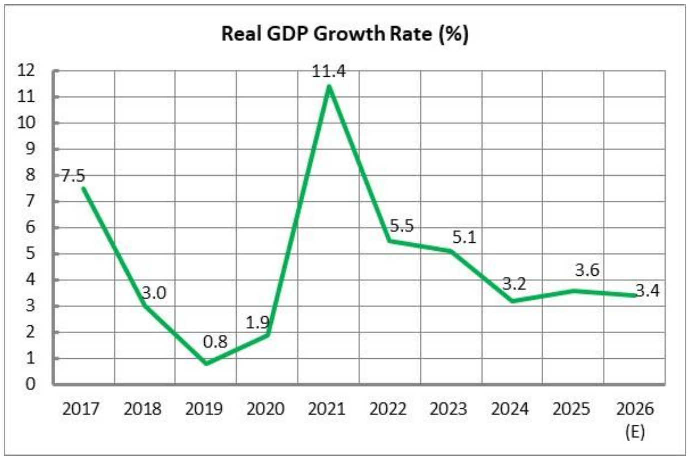
# I. MARKET SUMMARY

The Republic of Turkiye, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea to the north and the Mediterranean Sea in the south, has a young population of 86 million as of 2025. The median age is 35, and 68 percent of the population is between the ages of 15 and 64. The urbanization rate has reached 83 percent, with rapid urbanization in the last 25 years; about 67 percent of the population is in high-density urban areas.[1] These demographic conditions, coupled with an increasing trend in household income over the last two decades (except for the last few years) are among the key factors driving growth in the retail food industry.

Turkiye is the 16th largest economy in the world as of 2025 according to the IMF. For the last 5 years (2021-25), the average annual real GDP growth rate was about 5.8 percent. In the next five years (2026-30), the IMF predicts growth will cool down to 3.7 percent.

Although in general the economy seems to be slowly recovering compared to the previous few years when the Government of Turkiye (GoT) applied unorthodox macroeconomic policies, there are still major challenges ahead. Market analysts remain skeptical of when the Turkish economy will recover, despite the GoT's application of more orthodox economic policy and greater market predictability after the June 2023 general elections. Perceptions of deteriorating rule of law, erosion of institutions, decay of the meritocracy system, and limits on domestic freedoms continue to be major challenges for the economy as a whole. The World Justice Project ranked Turkey 118th out of 143 countries in its 2025 Rule of Law Index[2].

**Chart 2: Real GDP growth rate of Turkiye**




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

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 CHP majors have been arrested on what many consider spurious allegations of wrongdoing. Finally, in May 2026, a court in Ankara annulled the results of the 2023 ordinary general congress of CHP, the main opposition party. Many political analysts are believe that the ruling AK party is preparing for snap elections in the second half of 2027. 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.[3,4]

[1] Source for demographic data: Turkish Statistical Institute (TurkStat). Many analysts don't agree with TurkStat and say that there are about 95 - 100 million people residing in Turkiye when illegal immigrants are included. Those analysts claim this is one of the important reasons for the food inflation as these people need to be fed but are not counted.

[2] https://worldjusticeproject.org/rule-of-law-index/global/2025/T%C3%BCrkiye/

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

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

Inflation has been a major economic challenge since 2018. Rising international commodity prices, the COVID-19 pandemic, unorthodox government policies, a major earthquake in 2023, domestic political challenges, and the deprecation of the Turkish lira against major currencies are among the factors that have contributed to rising inflation. Consumer price index (CPI) inflation reached its peak at 86 percent in October 2022 and decreased to 31 percent by the end of 2025. Food and beverage inflation also came down to 28 percent at the end of 2025 after several years of hyperinflation, eroding the living standards of consumers, especially for lower and lower-middle income households. Through May 2026, food and beverage inflation was 35 percent, in parallel with the general CPI index and almost unchanged from one year ago.[5]

According to Euromonitor, total retail sales (excluding sales tax) in 2025 reached $224 billion, of which nearly $120 billion was grocery sales. There are nearly 370,000 chain and independent grocery retailers, as well as online grocery sales.

Discount markets performed better than any other kind of grocery markets/shops in 2025; this can be attributed to ongoing hardships in the economy related to high inflation and the working class's chronic loss of purchasing power in last several years. Private label product lines which are cheaper grew, as well as outlet chains in the market.

The pandemic accelerated the growth in online grocery sales, especially in larger cities like Istanbul, Izmir, Bursa, Ankara, and even in some smaller cities. Online grocery shopping went from 1.2 percent of all grocery sales (offline and online) in 2019 to 2.1 percent in 2025. This percentage is expected to increase as consumers, who have traditionally preferred shopping in stores, become more comfortable ordering online.

When it comes to shopping at brick-and-mortar grocery stores, the discount chains (BIM, A101 and Şok) have shown their unique ability to meet many Turkish consumers' preference for proximity shopping and lower prices. The presence of international grocery chains is limited and seems to have reached its growth potential for the time being given the strong competition from local supermarket chains.

**Photo 1:** A bonVeno store in Istanbul


Recently, two important developments occurred in the grocery retail scene in Turkiye. First, the German *Metro Group* began to open bonVeno convenience stores, mostly in Istanbul. *Metro Group* has operated Metro gross markets in Turkiye since the 1990s and are the only foreign owner left in the grocery retail space. BonVeno opened one store in 2023, but by 2026 had 60 stores. They aim to reach 1,000 stores by 2030. The stores are between 45 to 300 square meters ($m^2$) (485 – 3,230 square feet). BonVeno carries more ready to eat food service items like sandwiches, salads, hotdogs, pizza, cookies, and coffee compared to their main competitors which are simply smaller versions of the larger chain they are part of. *Metro Group's* private labels are supplied in bonVeno outlets as well as other

[5] Source for all inflation figures is TurkStat. Annual CPI inflation is 33 percent as of May 2026 and annual *12 month moving average* CPI inflation is 32 percent as of May 2025. Inflation measured by domestic producer price index (PPI) was 28 percent annually as of for 2025 and was 29 percent annually as of May 2025. Many reliable analysts criticize TurkStat inflation calculations and claim that real inflation is about double of what TurkStat calculates. According to ENAG annual inflation in 2025 was 56 percent and May 2026 annal inflation is 53 percent.

brands. BonVeno carries more items for health-conscious urban consumers compared to other convenience markets.

Secondly, Carrefour in Turkiye (CarrefourSA) was sold to a Turkish holding who also owns A101 discount markets as of April 2026 (pending approval from Turkish Competition Board). Both Turkish and French partners of CarrefourSA sold their shares. The chain will continue to operate under the CarrefourSA brand for a minimum period of two years under a brand licensing agreement.

Launched in 2020 as a measure to control food and beverage inflation, the semi-state administered Turkish Agricultural Credit Cooperatives Markets (TTKKM) have quickly grown throughout Turkiye, especially in lower and middle income neighborhoods.[6, 7] The stores claim to sell agricultural products and basic foodstuffs priced 10-15 percent lower than competitors (subsidized by the government and the Turkish Agricultural Credit Cooperatives), but ground-truthing shows that many items are not lower priced compared to discounters. Analysts claim that this is due to mismanagement in the entity. At the end of 2025, TTKKM declared an annual loss of about $102 million.[8, 9] As of November 2025, the name of the markets was changed to Koop Market (KM), likely as an attempt to distance the markets from their semi-government ownership. Many market sources and competing grocery outlets view the KM market chain as an unwelcome government intervention in the free market economy.

Imported high value food items are mostly sold in hypermarkets, which are located in wealthier urban areas. These stores include Migros, CarrefourSA, Metro Grossmarkets and premium grocery chains such as Macrocenter, as well as more regional gourmet chains like Gourmet Garage. Standalone gourmet/premium food stores that in major city centers like Istanbul, Izmir, Ankara, Bodrum, Antalya, Bursa, and Cesme also sell imported goods. Imported specialty or high value food items are generally not sold in discount grocery chains or in regional grocery chains, though imported commodities such as rice, walnuts, almonds, and a few imported fresh fruits like bananas and avocados may be available there.

Based on Post analysis, demand for imported higher-value processed food products is expected to increase in the long run, especially in Turkiye's urban, westernized city centers, where consumers are relatively wealthier, open to new flavors and food experiences, and travel internationally. However, for the time being, difficult economic conditions facing Turkish middle-income households is holding back demand for many of these imported products.

| **ADVANTAGES** | **CHALLENGES** |
|---|---|
| Future growth prospects for long-term GDP and disposable income. | Domestic and international political and security challenges. |
| Large population base: relatively young and growing, middle and upper middle class. | High import duties on processed/packaged food and agricultural products. |
| High and increasing urbanization rate. | Lack of transparency in rules and regulations. |
| Strong and steady retail market growth expected. | Economic instabilities, such as exchange rate fluctuations and on-going currency depreciation. |

[6] Over 2,000 stores, present in all provinces of Turkiye as of end of 2025.
[7] Tarim Kredi Kooperatif Market in Turkish, https://www.kooperatifmarket.com.tr/
[8] With June 2026 foreign exchange (FX) rate of 46.50 TL/USD.
[9] News in Turkish: https://www.tarimdanhaber.com/tarim-kredi-marketlerde-47-milyar-tllik-dev-zarar-teknik-iflastan-son-anda-kurtuldu

| | |
|---|---|
| Unsaturated market, open for new items. | Complex and time-consuming import procedures. |
| Internationally traveling new generation open to more 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. | Risk of similar products being developed domestically, such as packaged confectionery products and ready to eat meals. |
| Fast growing modern organized grocery chains. | Unregistered economy can create some unfair competition. |
| Positive perception for high-value processed products from the United States. | There is a zero tolerance for genetically engineered products or ingredients for food use in Turkiye. |
| Strong food culture and tradition of gathering for meals in large groups, so new products fitting into 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, new labeling and advertising restrictions are being developed on salt/fat/sugar content. |
| Many regulations are similar to those of the EU, making it easier for some companies already exporting to the EU to expand their business into Turkiye. | Competition from many products imported under FTAs or European countries with lower or zero tariffs. |

Source: FAS/Turkiye Staff Analysis

## II. ROAD MAP FOR MARKET ENTRY

### ENTRY STRATEGY

Normally, a good way to start selling retail food in Turkiye is using a local agent. 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. 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. Turkiye straddles southern European and Middle Eastern cultures, and relationships are very important for business. This makes already existing relations and connections in the country especially important.

Turkiye's import processes and regulations can be difficult to navigate, so local agents are vital. For details on the requirements, please refer to FAS Turkiye reports on Food and Agricultural Import Regulations and Standards and Required Certificates. Please also refer to our Exporters Guide for an overview of the market and steps for market entry.

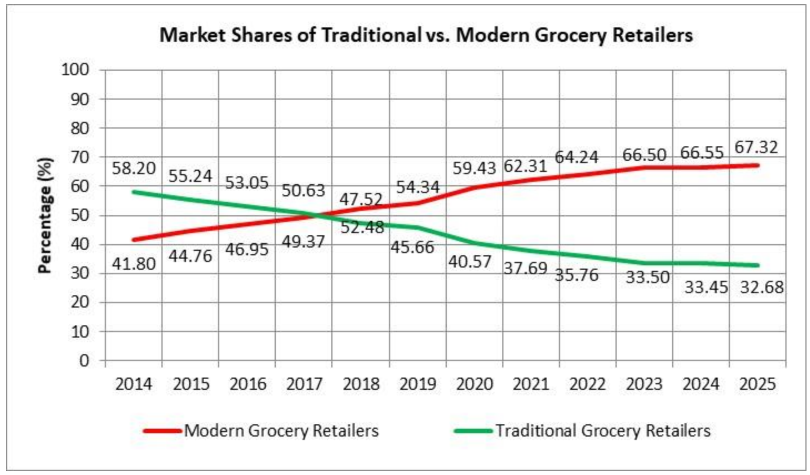
In very rare cases, some organized retailers may import food items directly, such as high turnover products. But in general, retailers will buy directly from a Turkish company that is importing the product.

## MARKET STRUCTURE

In total, there are more than 200 grocery chains in Turkiye having more than five stores. Grocery retailers are classified into two major groups: organized/modern and traditional. Organized grocery retailers are comprised of multi-format retail chains, discount grocery chains, regional grocery chains and gas station convenience stores.

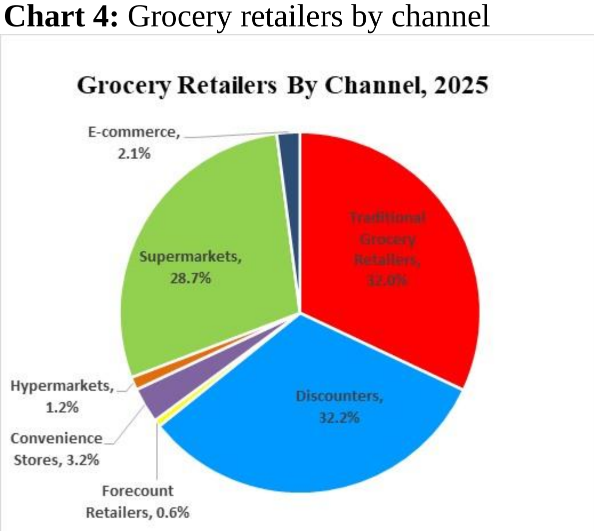
The largest chunk of the traditional local grocery retailers are standalone grocery stores, called *bakkal* in Turkish. They are typically up to 500 square feet in size and sell high-turnover grocery products. There are also separate stores in each town or neighborhood specializing in fresh produce, meat, nuts/dried food items, and bread/baked goods. The other major channel in the traditional market structure is open-air bazaars/markets (*pazar* in Turkish) where fresh produce, nuts, fish, and even some textiles are sold by producers and traders.

**Chart 3:** Traditional vs Modern Retailers




Source: Euromonitor International

**Chart 4:** Grocery retailers by channel




Source: Euromonitor International

The market share of modern organized grocery retailers is increasing, eating up the share of the traditional grocery retailers. Although modern organized grocery chains are increasing their presence, traditional grocery retailers like *bakkals* and *pazars* are still a major way of grocery shopping in Turkiye.

Another useful classification of grocery retail stores in Turkiye is regional grocery chains, national grocery chains, and international grocery chains.

Regional grocery chains have stores in one or a few cities in Turkiye; they are all domestically owned companies. They rarely carry any imported food except agricultural commodities such as almonds, walnuts, rice, bananas, lentils, and dried beans. They are a large and important part of the retail picture in general, but not for imported processed goods, with a few exceptions.

National grocery chains are supermarket chains with stores across Turkiye in almost all cities. They can be discount, regular, or premium stores. International grocery chains are companies with international ownership and outlets outside of Turkiye. As of 2026 only two international chains are left in the country, both under the same owner (Metro Group from Germany with Metro Gross Markets and bonVeno).

## TOP FOOD RETAILERS IN TURKIYE & COMPANY PROFILES

### Table 1: Top 10 Grocery Store Chains by Number of Stores[10]

| | Grocery Chain | Chain Type | Number of Stores 2024 | Number of Stores 2025 | New Stores in 2025 |
|---|---|---|---|---|---|
| 1 | BIM* | National Discount | 13,583 | 14,576 | 993 |
| 2 | Sok** | National Discount | 11,465 | 11,797 | 332 |
| 3 | A 101 | National Discount | 13,158 | 13,550 | 392 |
| 4 | Migros (M, MM, MMM, 5M, M-Jet)*** | National | 3,569 | 3,895 | 326 |
| 5 | Sec** | National Convenience | 2,844 | 3,748 | 904 |
| 6 | Ekomini*** | National Convenience | 2,305 | 2,346 | 41 |
| 7 | Hakmar | Regional - Istanbul & vicinity | 800 | 812 | 12 |
| 8 | CarrefourSA (CarrefourSA, Carrefour Express) | National | 691 | 705 | 14 |
| 9 | File* | National | 287 | 329 | 42 |
| 10 | Onur | Regional - Istanbul & vicinity | 159 | 158 | -1 |
| | **Total of Top 10** | All types | 48,861 | 51,916 | 3,055 |

Source: Euromonitor International

* BIM and File are owned by same company, BIM.
** Sok and Sec markets are owned by the same holding company, Yildiz Holding.
*** Migros and Ekomini markets are owned by the same holding company, Anadolu Holding.

### Table 2: Top Gas Station Grocery Convenience Shops by Number of Stores

| | Gas Station Grocery Convenience | Number of Stores 2024 | Number of Stores 2025 | New Stores in 2025 |
|---|---|---|---|---|
| 1 | Petrol Ofisi Gas Station Markets | 1,887 | 1,952 | 65 |
| 2 | Opet Gas Station Full Markets | 1,330 | 1,358 | 28 |
| 3 | Shell Gas Station Shops & Shell Select Shops | 1,015 | 1,272 | 257 |
| 4 | Total Gas Station Stores | 396 | 427 | 31 |
| 5 | BP Gas Station Shops | 294 | 271 | -23 |
| | **Total** | 4,922 | 5,280 | 358 |

Source: Euromonitor International

### Table 3: Market Share of Organized Grocery Retail in Turkiye: Top 10

| | Grocery Chain | Chain Type | Market Share (%)* 2025 | Sales (mill. USD) 2025 |
|---|---|---|---|---|
| 1 | BIM ** | National Discount | 18.4 | 21,714 |
| 2 | Migros (M, MM, MMM, 5M, M-Jet)*** | National Discount | 9.2 | 10,848 |
| 3 | A101 | National Discount | 7.8 | 9,128 |
| 4 | Sok **** | National Discount | 6.0 | 7,586 |
| 5 | CarrefourSA(CarrefourSA, Carrefour Express) | National (Int. Owned) | 1.8 | 2,140 |
| 6 | Sec**** | National Convenience | 1.0 | 1,138 |
| 7 | Ekomini*** | Regional - Istanbul & vicinity | 0.5 | 583 |
| 8 | File** | National Convenience | 0.5 | 567 |
| 9 | Hakmar | National Convenience | 0.5 | 557 |
| 10 | Macrocenter*** | Regional - Western Turkiye, premiu | 0.3 | 368 |
| | **Total of Top 10** | All types above | **46.0** | **54,630** |

Source: Euromonitor International
* The market shares are in the organized grocery retail category; traditional grocers are not included.

[10] The table does not include semi-state administered Tarim Kredi Kooperatif Market which has over 2,000 stores and would be number 6 in the table.

** BIM and File are owned by same company, BIM.
*** Migros, Ekomini and Macrocenter are owned by same holding company, Anadolu Holding.
**** Sok and Sec markets are owned by same holding company, Yildiz Holding.

**BIM** is a hard discounter that sells 80 percent of products as private label. It is present throughout the country. Stores are usually 3,000-6,000 square feet.

**A101** is a hard discount market chain with the greatest number of stores in Turkiye and is a major competitor of BIM, with stores in similar locations. Like BIM, they only sell some imported commodities – they do not sell imported packaged or processed foods.

**Migros** is a multi-format supermarket chain. The smallest format is a convenience store designed to compete with discounters and *bakkals* called M-Jet. The small supermarket format is called M Migros, the larger supermarket format is called MM Migros, and hypermarket formats are called MMM Migros and 5M Migros. Their MacroCenter brand stores are gourmet stores selling a premium shopping experience.

**Şok** (pronounced *shock*) is also a discount market chain. Şok is owned by Yildiz Holding, which is the most prominent packaged food and packaged confectionery producer of Turkiye, under the famous brand Ülker. Thirty-five percent of all the products in Şok are private label and the rest are typically Yildiz Holding's own well-known brands.

**CarrefourSA** is a multi-format supermarket chain with convenience markets called Carrefour Express, supermarkets and hypermarkets. As of 2026, both Carrefour of France and Turkish Sabanci Holding sold their shares to Turgut Aydin Holding (also owner of A101) and CarrefourSA in Turkiye became a national market chain.

**Metro Gross Market** is hybrid of cash and carry and warehouse club formats in Turkiye; opened in 1990 as a cash and carry but shaped according to local needs to compete. Lately, it has opened bonVeno convenience stores in Turkiye which is a premium convenience market and serves some ready to eat items and coffee.

## III. COMPETITION

Approximately 7-8 percent of all grocery sales are made up of imported consumer-oriented agricultural products. According to Post's market observations, imported processed food products for retail sale face strong local competition. Turkiye has a well-developed food processing sector that produces good quality food items for both domestic and overseas markets.

In addition to local production, products from European countries are also important. Turkiye has a customs union with the EU, so European processed food items face low or no customs tariffs. Furthermore, proximity is a major benefit with lower freight costs and shorter delivery times from Europe. Trucks are often used for transportation between Europe and Turkiye. Turkiye also has an FTA with the European Free Trade Association (EFTA) countries (Switzerland, Norway, Iceland, and Liechtenstein), giving them preferential customs advantages as well. In addition, Turkiye has FTAs with 22 other countries with many including preferential tariff rates on food and agriculture products.

In recent years, the United States has been one of the top suppliers of some consumer oriented agricultural products to Turkey. The leading U.S. items in this category are tree nuts, including walnuts, almonds, and pistachios, food preparations, and whisky.

**Table 4: Top Countries supplying Turkiye's Imported Consumer-Oriented Agricultural Products**

Thousands of USD

| | Product | Imports 2023 | Imports 2024 | Imports 2025 | % Share 2025 |
|---|---|---|---|---|---|
| 1 | Netherlands | 473,170 | 552,502 | 763,932 | 8.72 |
| 2 | Poland | 380,632 | 533,642 | 655,033 | 7.47 |
| 3 | United States | 583,614 | 621,646 | 627,730 | 7.16 |
| 4 | Germany | 412,050 | 480,332 | 569,596 | 6.50 |
| 5 | United Kingdom | 333,351 | 412,313 | 534,594 | 6.10 |
| 6 | China | 125,601 | 236,023 | 500,376 | 5.71 |
| 7 | Iran | 206,972 | 283,081 | 450,127 | 5.14 |
| 8 | France | 324,636 | 408,085 | 431,401 | 4.92 |
| 9 | Italy | 270,094 | 332,874 | 404,950 | 4.62 |
| 10 | Vietnam | 134,379 | 179,452 | 276,075 | 3.15 |
| | Others | 2,543,323 | 2,806,250 | 3,551,533 | 40.52 |
| | Consumer-Oriented Agricultural Total from All the World | 5,787,823 | 6,846,202 | 8,765,347 | 100.00 |

Source: Trade Data Monitor

## IV. BEST PRODUCT PROSPECT CATEGORIES

Turkiye is a highly competitive and price sensitive market. Prospective exporters should look at Turkiye as a long-term market opportunity and be persistent. A recognized brand has an advantage in the market, with Oreo cookies being an example. Although good quality, cheaper, domestically made substitutes are available in the market, Oreo has maintained its presence on store shelves. Exporters should be sensitive in brand positioning and be prepared for sufficient marketing activities and advertising.

### PRODUCTS PRESENT IN THE MARKET THAT HAVE GOOD POTENTIAL

1. **Walnuts and Almonds:** Turkiye is traditionally a nuts, dried fruits, and dried vegetables consuming culture. Local production exists, but imports are required to meet the large and growing demand. Walnuts and almonds from California are dominant in the Turkish market, sold packaged or unpackaged by local importers, and liked by consumers. For further information see the Turkiye Tree Nuts Annual Report.

2. **Dates:** Dates are culturally important in Turkiye and often eaten as part of religious rituals during Ramadan. Turkiye doesn't grow any dates but imports mainly from Israel, Saudi Arabia, and Tunisia, according to contacts in the sector. There have been date imports from the United States in the past, but not very recently. California dates have sparked the interest of potential importers. Finding the right time to enter the market is important, as well as finding strategies for reducing refrigerated transportation costs.

3. **Cranberries and Dried Fruits:** There is also some potential for other dried berries which are not produced in Turkiye, such as cranberries. Dried cranberries have entered the market in recent years and have become popular among consumers as a snack food, and there is growth potential for expanding the uses.

4. **Spices:** Turkiye is traditionally a spice consuming country and produces many kinds of spices and herbs but does rely on some imports as well. In recent years, high quality U.S.-branded spices have gained the attention of well-traveled higher income consumers in Turkiye. For example, cayenne pepper, crushed red chili peppers, black pepper, and some other niche spices have a potential in Turkiye with high-end customers in premium outlets and specialty/gourmet stores.

5. **Functional foods:** Functional food consumption is increasing. There is a healthy eating trend among high end and even middle-class consumers. Gluten-free and diabetic-sensitive products are available, but much more variety is needed to fill the gap in the market. Diet products are also increasing with health-conscious consumers. Baby foods and kid-focused foods that are 'enriched' are in the market in limited varieties and have potential to grow. See FAS FAIRS reports for requirements limiting what claims can be made on labels.

6. **Gourmet/Ethnic Food Ingredients:** With increasing disposable income, a new generation of Turkish consumers in upper-middle- and upper-income households tend to be more open to international food as they engage with more international leisure and business travel. Tex-Mex, Chinese, Japanese, Indian, Thai, Italian, Lebanese, and Syrian restaurants are in the market. Gourmet and ethnic food ingredients have potential for home consumption as well as hotels and restaurants.

7. **Wine:** Although there are a variety of local and imported wines in the market, there is potential for wine imports from the United States for enthusiasts that are keen to taste different wines and high-end consumers who are less price sensitive. There are opportunities for beer as well, but it is more price sensitive. Of note, Turkiye has high consumption taxes and import tariffs for alcoholic beverages and there are also marketing restrictions to be aware of. There is a 218 percent tax (incl. customs tariffs, special consumption tax and VAT) on U.S. origin wines and 192 percent tax on EU and Chile origin wines. See our reports and updates for details.

8. **Non-alcoholic beverages:** There is a growing market for healthy beverages, such as teas or juices, with a focus on natural, plant based, organic beverages. These beverages are typically sold in cafés and restaurants in addition to supermarkets. There are restrictions on health claims and on energy drinks to consider, see FAIRS reports for details.

**PRODUCTS NOT PRESENT IN SIGNIFICANT QUANTITIES BUT WHICH HAVE GOOD SALES POTENTIAL**

1. **Nutrition bars:** Nutrition bars promoting a heathy lifestyle are trendy in Turkiye. There are some locally produced brands, but product lines remain limited. Imported products with specific attributes like a vitamin, protein, etc. have market. These products are for the high-end consumers and should be promoted as such, including the choice of the stores in which to be sold.

2. **Pecans:** Pecans have made some progress in Turkiye in the last few years, but because they are perceived as substitutes to walnuts and have a higher tariff, the high price limits consumption. There are targeted opportunities for growth, including high-end consumer confectionary and specialty baked goods.

3. **Ready-made meals:** Ready-to-eat and ready-to-cook meals have an increasing sales potential in Turkiye as the structure of households evolves. Dual-income households and urban single households are on the rise.

**PRODUCTS NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS**

1. **Food Items from Genetically Engineered Crops:** Any food item that is genetically engineered or contains any trace amounts of genetically engineered content is not currently allowed for import to Turkiye for human consumption. No genetically engineered/GMO products have been approved for food use in Turkiye. This barrier impacts all food categories and import processes, and testing is rigorous and complex. Please see the Turkiye Biotechnology and Other New Production Technologies Annual Report for more information on the situation.

2. **High Quality Beef Products:** There is potential demand for high quality beef products, especially for the luxury market, including for new steak restaurants that have grown in popularity. However, the complex import requirements that include having Turkish inspectors visit the production plant during slaughtering essentially exclude U.S. meat exports from the market. Please see our report on the livestock sector or contact our office with additional questions.
3. **Organic Sugar:** Industry contacts indicate that there is demand for organic sugar, but there are regulatory barriers to import it into Turkiye.

## V. KEY CONTACTS AND FURTHER INFORMATION

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

Turkish Statistics Institute (TurkStat)

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 Importers Association (TUGIDER)

Food Retailers' Association (GPD)

Turkish Federation of Retailers (TPF)

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

Association of Food Additives and Ingredients Manufacturers (GIDABIL)

For other agricultural industry reports on Turkiye and other countries in the world, visit the Foreign Agricultural Service (FAS)' internet page. FAS Turkiye's Food and Agricultural Import Regulations and Standards Report (FAIRS) and Food and Agricultural Import Regulations and Standards Export Certificate Report provide detailed resources on regulations and import requirements for companies that wish to export food to Turkiye.

Contact the FAS Turkiye offices via the information below:

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| Office of Agricultural Affairs<br>Unites States Department of Agriculture<br>U.S. Embassy Ankara<br>1480 Sk. No:1 Cukurambar, Cankaya, 06530<br>Ankara, Turkiye<br>Telephone: +90 312 294 0872<br>E-mail: agankara@usda.gov | Office of Agricultural Affairs<br>Unites States Department of Agriculture<br>U.S. Consulate General Istanbul<br>Ucsehitler Sokak No:2, Istinye, 34460<br>Istanbul, Turkiye<br>Telephone: +90 212 335 9068<br>E-mail: agistanbul@usda.gov |

Attending food industry trade shows in Turkiye can be helpful to better understand the market and competition. Major shows include Anfas Food Product, World Food Istanbul, and F Istanbul. Additionally, a high percentage of large Turkish buyers usually visit Anuga in Germany, Sial in France, Seafood Expo Global in Spain, and Gulfood in Dubai. Please see FAS Turkiye's GAIN report about major food and beverage related trade shows in Turkiye.

**Attachments:**

No Attachments