



# Consumer Foodservice in Turkey

March 2026

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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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Independents maintain leading share

Menu innovation accelerates with new takes on traditional flavours

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Cafés/bars show resilience as innovation fuels growth

#### INDUSTRY PERFORMANCE

Cafés/bars remain important venues for socialising and small purchases

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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#### KEY DATA FINDINGS

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Full-service restaurants adapt to challenging operating conditions

#### 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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Limited-service restaurants remain resilient amid affordability and convenience  
Chained pizza outlets lead through innovation, efficiency and digital engagement  
Delivery grows in importance

#### WHAT'S NEXT?

Chains expand through scale while independents lean on delivery platforms to sustain reach  
Drive-through and delivery to gain momentum  
Börek and traditional pastries fuel growth in bakery-focused outlets

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#### 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?

Self-service cafeterias in Turkey face gradual value decline amid rising competition

Acceleration of omnichannel fulfilment to meet growing demand

Shift in meal card usage will challenge self-service cafeterias

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### Street Stalls/Kiosks in Turkey

#### KEY DATA FINDINGS

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#### INDUSTRY PERFORMANCE

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Chained operators lead growth

Kiosk format gains momentum

#### WHAT'S NEXT?

Challenging outlook for independent operators  
Innovation and automation will continue apace  
Frozen yogurt and fruit kiosks to expand across urban locations

#### COMPETITIVE LANDSCAPE

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[Consumer Foodservice By Location in Turkey](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Standalone outlets show flexibility while tourism propels growth across travel locations

#### INDUSTRY PERFORMANCE

Travel is fastest-growing non-standalone location  
Standalone outlets show greater resilience  
Value-for-money strategies vary by location

#### WHAT'S NEXT?

Travel locations to lead non-standalone growth through inbound tourism  
Standalone locations will continue to attract consumers  
Shopping and leisure venues offer growth opportunities  
Urbanisation will impact consumer foodservice

#### COMPETITIVE LANDSCAPE

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