



Passport

Gardening in Turkey

Euromonitor International

June 2022

This sample report is for illustration
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Some content and data have been
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LIST OF CONTENTS AND TABLES

Gardening in Turkey - Category Analysis.....	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
Gardening sales benefit hugely from the lockdowns.....	1
Housing patterns favour gardening.....	1
The average unit prices went up considerably in 2021.....	1
PROSPECTS AND OPPORTUNITIES.....	2
The rate of value sales growth is expected to saturate.....	2
Innovation attracts wealthy new cohort.....	2
E-commerce set to bloom.....	2
CATEGORY DATA.....	2
Table 1 Sales of Gardening by Category: Value 2016-2021.....	2
Table 2 Sales of Gardening by Category: % Value Growth 2016-2021.....	3
Table 3 NBO Company Shares of Gardening: % Value 2017-2021.....	3
Table 4 LBN Brand Shares of Gardening: % Value 2018-2021.....	4
Table 5 Distribution of Gardening by Format: % Value 2016-2021.....	6
Table 6 Forecast Sales of Gardening by Category: Value 2021-2026.....	6
Table 7 Forecast Sales of Gardening by Category: % Value Growth 2021-2026.....	7
Home and Garden in Turkey - Industry Overview.....	9
EXECUTIVE SUMMARY.....	9
Home and garden in Turkey registered positive value growth in 2021.....	9
Increased unit prices was A major driver of market value growth.....	9
The market for home and garden was very fragmented.....	9
E-commerce continues to gain.....	10
What next for home and garden?.....	10
MARKET DATA.....	10
Table 8 Sales of Home and Garden by Category: Value 2016-2021.....	10
Table 9 Sales of Home and Garden by Category: % Value Growth 2016-2021.....	10
Table 10 NBO Company Shares of Home and Garden: % Value 2017-2021.....	11
Table 11 LBN Brand Shares of Home and Garden: % Value 2018-2021.....	12
Table 12 Penetration of Private Label in Home and Garden by Category: % Value 2016-2021.....	13
Table 13 Distribution of Home and Garden by Format: % Value 2016-2021.....	13
Table 14 Distribution of Home and Garden by Format and Category: % Value 2021.....	14
Table 15 Forecast Sales of Home and Garden by Category: Value 2021-2026.....	14
Table 16 Forecast Sales of Home and Garden by Category: % Value Growth 2021-2026.....	15
DISCLAIMER.....	15
SOURCES.....	15
Summary 1 Research Sources.....	15

GARDENING IN TURKEY - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Gardening sales benefit hugely from the lockdowns

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Housing patterns favour gardening

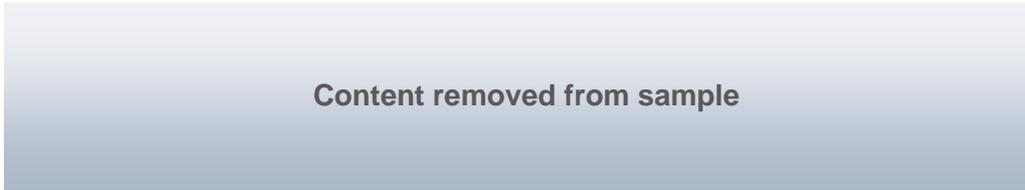
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The average unit prices went up considerably in 2021

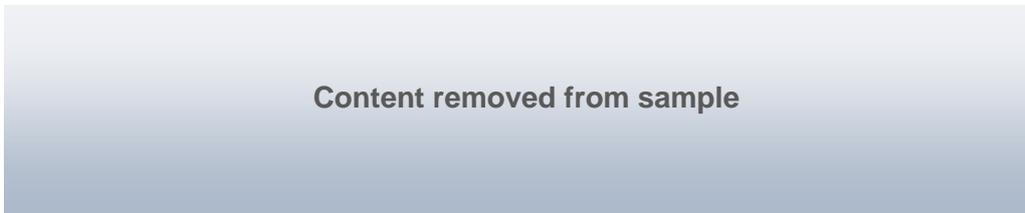
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PROSPECTS AND OPPORTUNITIES

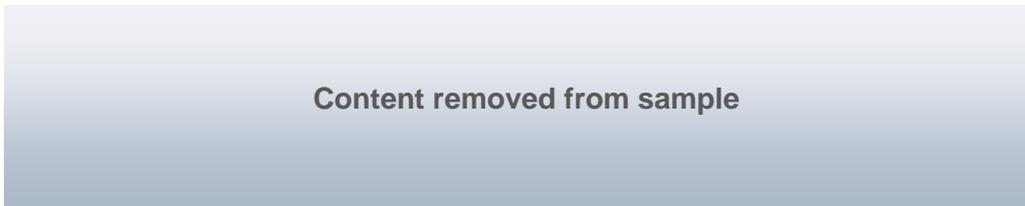
The rate of value sales growth is expected to saturate



Innovation attracts wealthy new cohort



E-commerce set to bloom



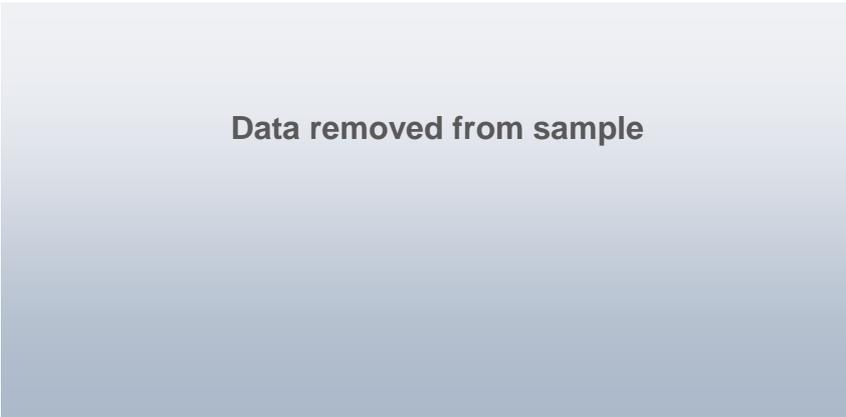
CATEGORY DATA

Table 1 Sales of Gardening by Category: Value 2016-2021

TRY million

	2016	2017	2018	2019	2020	2021
- Garden Care	Data removed from sample					
-- Growing Media						
--- Fertiliser						
--- Soil						
-- Plant Protection						
--- Pest Control						
--- Herbicides						
- Gardening Equipment						

- Gardening Hand Tools
- Gardening Power Tools
- Lawn Mowers
- Walk Power Lawn Mowers
- Riding Lawn Mowers
- Robotic Lawn Mowers
- Watering
- Horticulture
- Indoor Plants
- Seeds
- Other Horticulture
- Pots and Planters
- Other Gardening
- Gardening



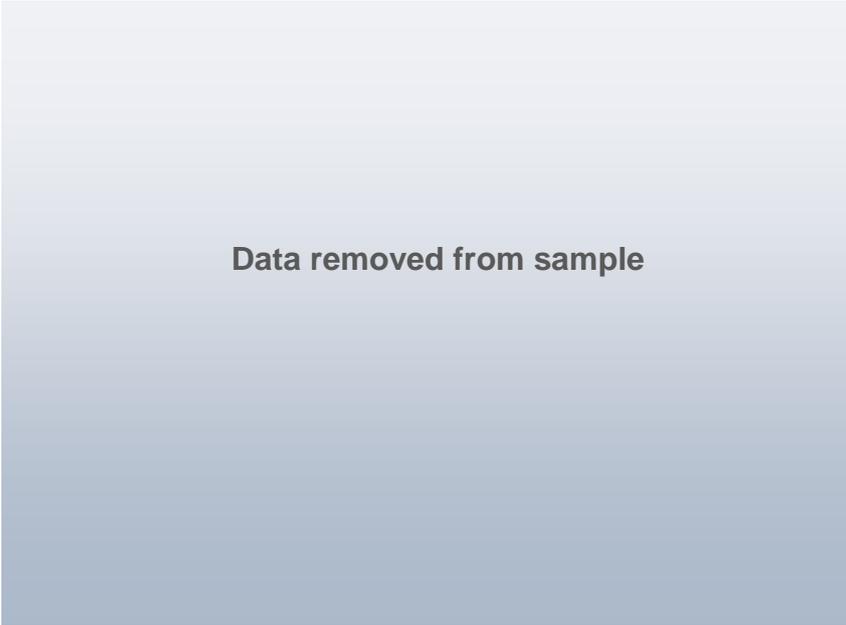
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Gardening by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Garden Care
- Growing Media
- Fertiliser
- Soil
- Plant Protection
- Pest Control
- Herbicides
- Gardening Equipment
- Gardening Hand Tools
- Gardening Power Tools
- Lawn Mowers
- Walk Power Lawn Mowers
- Riding Lawn Mowers
- Robotic Lawn Mowers
- Watering
- Horticulture
- Indoor Plants
- Seeds
- Other Horticulture
- Pots and Planters
- Other Gardening
- Gardening

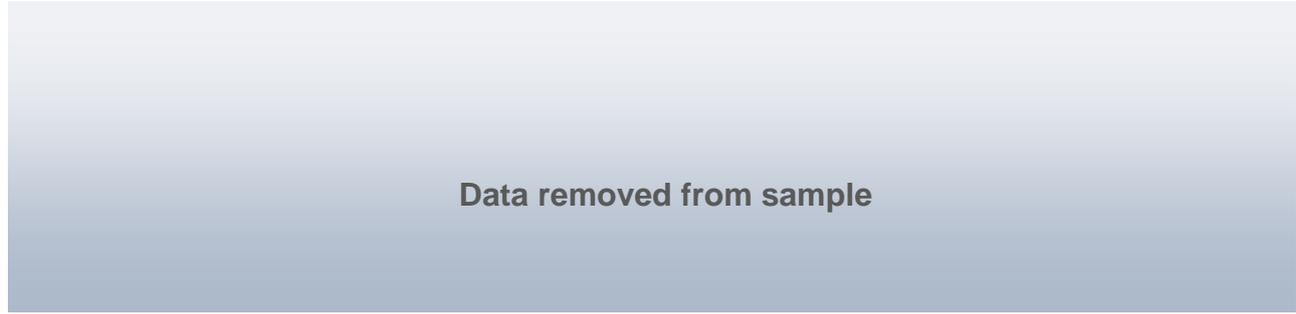


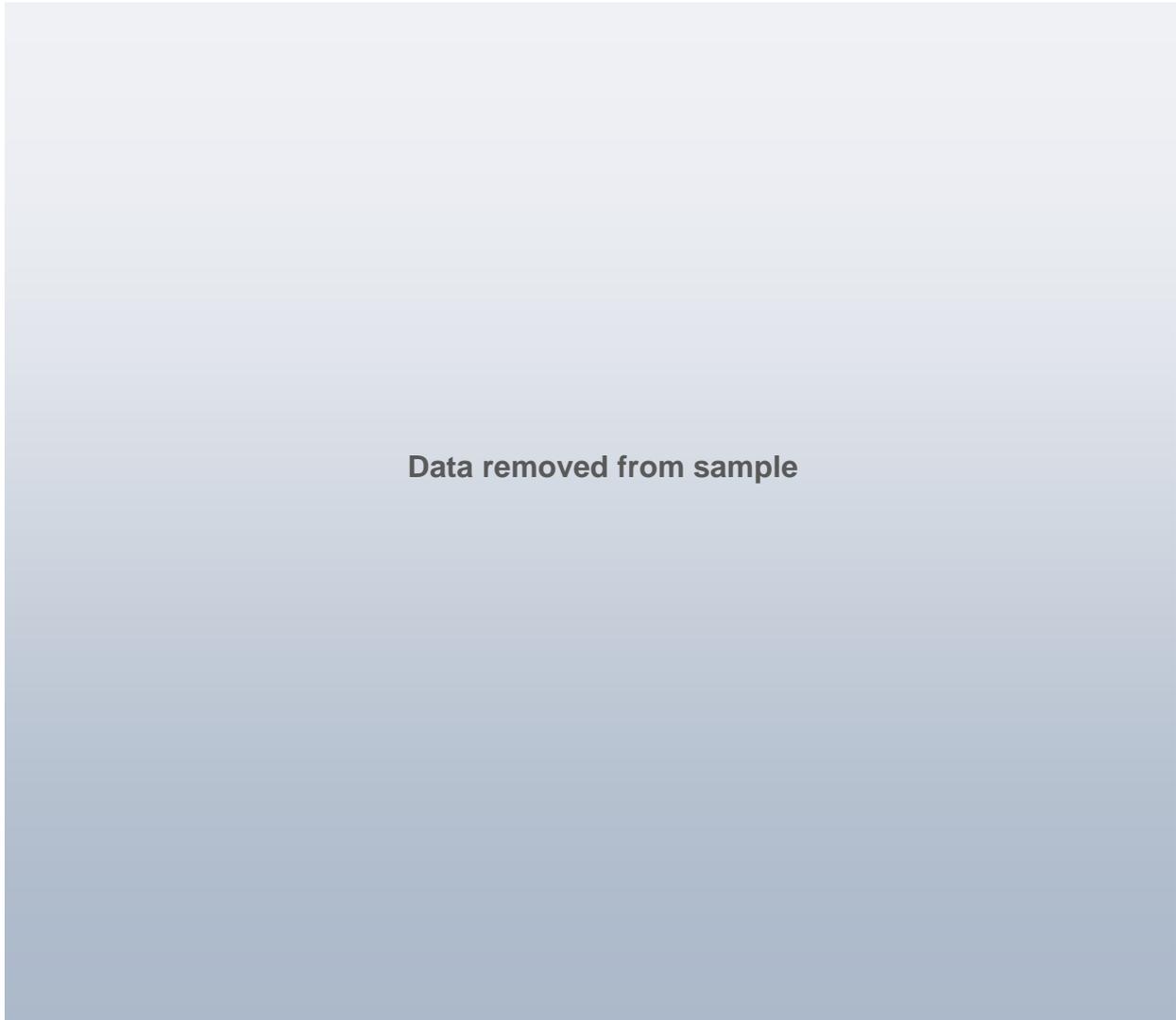
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Gardening: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021

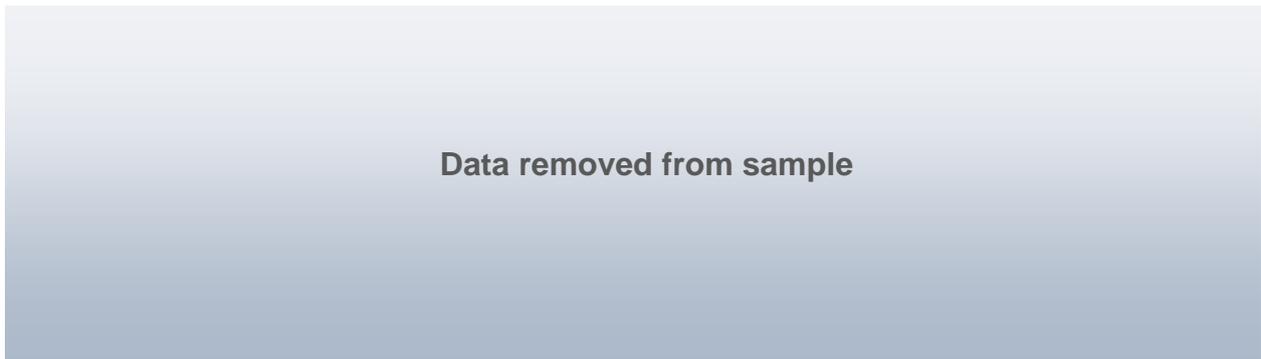




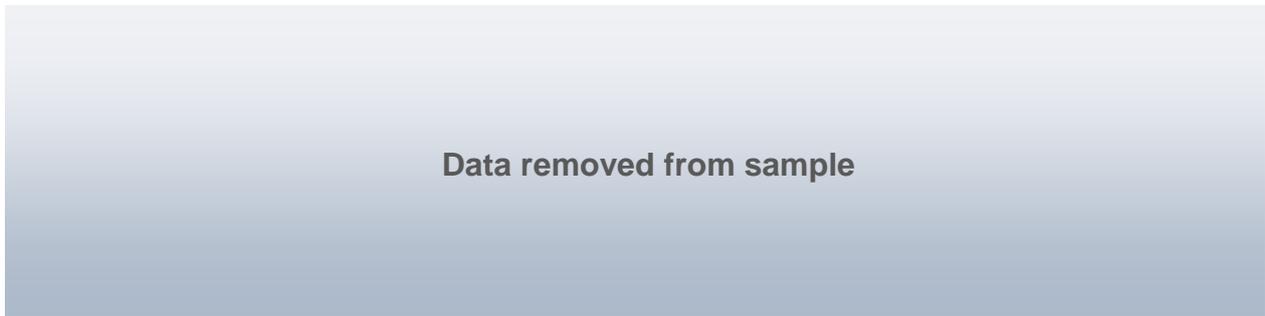
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Gardening: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Distribution of Gardening by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Forecast Sales of Gardening by Category: Value 2021-2026

TRY million

	2021	2022	2023	2024	2025	2026
- Garden Care	Data removed from sample					
-- Growing Media						
--- Fertiliser						
--- Soil						
-- Plant Protection						
--- Pest Control						
--- Herbicides						
- Gardening Equipment						
-- Gardening Hand Tools						
-- Gardening Power Tools						
-- Lawn Mowers						
--- Walk Power Lawn Mowers						
--- Riding Lawn Mowers						
--- Robotic Lawn Mowers						
-- Watering						
- Horticulture						
-- Indoor Plants						
-- Seeds						
-- Other Horticulture						
- Pots and Planters						
- Other Gardening						
Gardening						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 7 Forecast Sales of Gardening by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Garden Care	Data removed from sample		
-- Growing Media			
--- Fertiliser			
--- Soil			
-- Plant Protection			
--- Pest Control			
--- Herbicides			
- Gardening Equipment			
-- Gardening Hand Tools			
-- Gardening Power Tools			
-- Lawn Mowers			
--- Walk Power Lawn Mowers			
--- Riding Lawn Mowers			
--- Robotic Lawn Mowers			
-- Watering			
- Horticulture			
-- Indoor Plants			
-- Seeds			
-- Other Horticulture			
- Pots and Planters			
- Other Gardening			
Gardening			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

HOME AND GARDEN IN TURKEY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Home and garden in Turkey registered positive value growth in 2021

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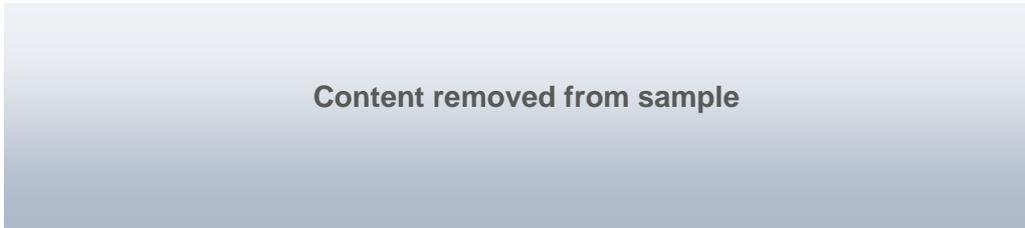
Increased unit prices was A major driver of market value growth

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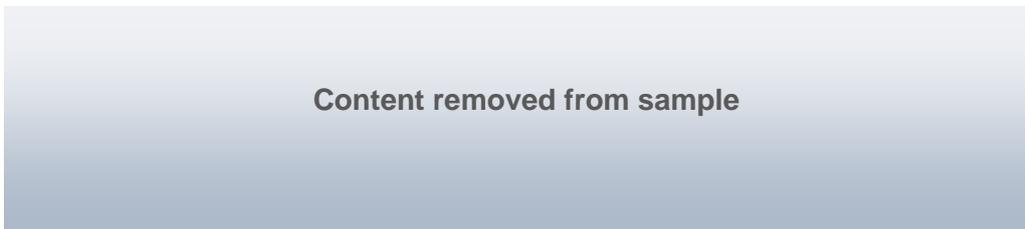
The market for home and garden was very fragmented

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E-commerce continues to gain



What next for home and garden?



MARKET DATA

Table 8 Sales of Home and Garden by Category: Value 2016-2021

TRY million	2016	2017	2018	2019	2020	2021
Home Improvement and Gardening	Data removed from sample					
Home Improvement Gardening						
Homewares and Home Furnishings						
Homewares						
Home Furnishings						
Home and Garden						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Home and Garden by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Home Improvement and Gardening	Data removed from sample		
Home Improvement Gardening			
Homewares and Home Furnishings			
Homewares			

Home Furnishings
Home and Garden

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Home and Garden: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 LBN Brand Shares of Home and Garden: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Penetration of Private Label in Home and Garden by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Gardening	Data removed from sample					
Home and Garden						
Home Furnishings						
Home Improvement						
Home Improvement and Gardening						
Homewares and Home Furnishings						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Home and Garden by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						

- Homeshopping
- E-Commerce
- Direct Selling
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Home and Garden by Format and Category: % Value 2021

% retail value rsp

	Home Improvement and Gardening	Home Improvement	Gardening	Homewares and Home Furnishings	Homewares	Home Furnishings
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Supermarkets						
-- Hypermarkets						
-- Discounters						
-- Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Home and Garden Specialist Retailers						
--- Home Improvement and Gardening Stores						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: HIG = home improvement and gardening; HI = home improvement; GD = gardening; HHF = homewares and home furnishings; HW = homewares; HF = home furnishings

Table 15 Forecast Sales of Home and Garden by Category: Value 2021-2026

TRY million

	2021	2022	2023	2024	2025	2026
Home Improvement and Gardening	Data removed from sample					
Home Improvement Gardening						
Homewares and Home						

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5

2021/26 Total

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DISCLAIMER

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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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Data removed from sample

Source: Euromonitor International