

# Consumer Appliances in Turkey

January 2024

Table of Contents

### EXECUTIVE SUMMARY

Consumer appliances record growth, despite the major earthquake which hit the country in February 2023

Devaluation of the TRY and increase in VAT lead to price hikes

Price competition between companies intensifies

E-commerce continues to grow

Consumer appliances has good prospects for ongoing growth

### MARKET INDICATORS

Table 1 - Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024

Table 2 - Replacement Cycles of Consumer Appliances by Category 2018-2024

### MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2018-2023

Table 4 - Sales of Consumer Appliances by Category: Value 2018-2023

Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2018-2023

Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2018-2023

Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023

Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023

Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023

Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023

Table 11 - Sales of Small Appliances by Category: Volume 2018-2023

Table 12 - Sales of Small Appliances by Category: Value 2018-2023

Table 13 - Sales of Small Appliances by Category: % Volume Growth 2018-2023

Table 14 - Sales of Small Appliances by Category: % Value Growth 2018-2023

Table 15 - NBO Company Shares of Major Appliances: % Volume 2019-2023

Table 16 - LBN Brand Shares of Major Appliances: % Volume 2020-2023

Table 17 - NBO Company Shares of Small Appliances: % Volume 2019-2023

Table 18 - LBN Brand Shares of Small Appliances: % Volume 2020-2023

Table 19 - Distribution of Major Appliances by Format: % Volume 2018-2023

Table 20 - Distribution of Small Appliances by Format: % Volume 2018-2023

Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2023-2028

Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2023-2028

Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028

Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028

Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028

Table 29 - Forecast Sales of Small Appliances by Category: Volume 2023-2028

Table 30 - Forecast Sales of Small Appliances by Category: Value 2023-2028

Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Dishwashers offering energy efficiency and improved technologies drive growth

Arçelik AS maintains its lead in dishwashers, thanks to offering products to meet consumer demand

Price promotions and campaigns shape the competitive environment

## PROSPECTS AND OPPORTUNITIES

Dishwashers will be considered more of a necessity over the forecast period

The share of local brands is predicted to increase, thanks to offering trendsetting appliances at affordable prices

E-commerce continues to grow its distribution share

## CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023

Table 34 - Sales of Dishwashers by Category: Value 2018-2023

Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023

Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023

Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023

Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2019-2023

Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023

Table 40 - LBN Brand Shares of Dishwashers: % Volume 2020-2023

Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023

Table 42 - Production of Dishwashers: Total Volume 2018-2023

Table 43 - Forecast Sales of Dishwashers by Category: Volume 2023-2028

Table 44 - Forecast Sales of Dishwashers by Category: Value 2023-2028

Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028

Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

## Home Laundry Appliances in Turkey

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Automatic dryers remain popular for their convenience and perceived germ-killing features

Greater capacities and high-tech models see increased demand

Average unit prices continue to rise, while players create special offers to maintain consumer demand

## PROSPECTS AND OPPORTUNITIES

Ongoing volume sales will be supported by the increasing number of houses

Household penetration of automatic dryers is predicted to increase

E-commerce continues to grow its distribution share

## CATEGORY DATA

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2018-2023

Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023

Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023

Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023

Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023

Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2018-2023

Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023

Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023

Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023

Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023

Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023

Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023

Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028

Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028

Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028

Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

## Large Cooking Appliances in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers desire modern designs, attractive colour schemes, and technology advancements in large cooking appliances

Built-in appliances benefit from special promotional campaigns

Wide range of price points mean there is an affordable large cooking appliance to suit all budgets

#### PROSPECTS AND OPPORTUNITIES

Increased number of modern households to stimulate sales over the forecast period

Average unit prices will continue to rise, while players offer bundle discounts to stimulate sales

E-commerce continues to grow its distribution share

### CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2018-2023

Table 64 - Sales of Large Cooking Appliances by Category: Value 2018-2023

Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023

Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023

Table 67 - Sales of Built-in Hobs by Format: % Volume 2018-2023

Table 68 - Sales of Ovens by Smart Appliances: % Volume 2019-2023

Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023

Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023

Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2019-2023

Table 72 - NBO Company Shares of Ovens: % Volume 2019-2023

Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2019-2023

Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2019-2023

Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023

Table 76 - NBO Company Shares of Cookers: % Volume 2019-2023

Table 77 - NBO Company Shares of Range Cookers: % Volume 2019-2023

Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2018-2023

Table 79 - Production of Large Cooking Appliances: Total Volume 2018-2023

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028

Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028

Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

## Microwaves in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Microwaves continue on a declining trend, as such products are deemed unnecessary

Average unit prices continue to rise, placing further downwards pressure on an already declining category

Energy efficiency remains an important factor for consumers

#### PROSPECTS AND OPPORTUNITIES

Increased number of modern households may stimulate sales over the forecast period

The share of built-in products is set to grow, in line with modern home trends

E-commerce continues to grow its distribution share

## CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2018-2023

Table 85 - Sales of Microwaves by Category: Value 2018-2023

Table 86 - Sales of Microwaves by Category: % Volume Growth 2018-2023

Table 87 - Sales of Microwaves by Category: % Value Growth 2018-2023

Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2019-2023

Table 89 - NBO Company Shares of Microwaves: % Volume 2019-2023

Table 90 - LBN Brand Shares of Microwaves: % Volume 2020-2023

Table 91 - Distribution of Microwaves by Format: % Volume 2018-2023

Table 92 - Production of Microwaves: Total Volume 2018-2023

Table 93 - Forecast Sales of Microwaves by Category: Volume 2023-2028

Table 94 - Forecast Sales of Microwaves by Category: Value 2023-2028

Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028

Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

## Refrigeration Appliances in Turkey

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Refrigeration appliances remains in a volume slump in 2023

Large capacity fridge-freezers see good demand

E-commerce continues to grow its distribution share

## PROSPECTS AND OPPORTUNITIES

Volume sales are expected to return to positive growth over the forecast period

The share of products with higher energy efficiency is set to increase

Average unit prices predicted to continue rising

## CATEGORY DATA

Table 97 - Sales of Refrigeration Appliances by Category: Volume 2018-2023

Table 98 - Sales of Refrigeration Appliances by Category: Value 2018-2023

Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023

Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023

Table 101 - Sales of Freezers by Format: % Volume 2018-2023

Table 102 - Sales of Freezers by Volume Capacity: % Volume 2018-2023

Table 103 - Sales of Fridge Freezers by Format: % Volume 2018-2023

Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023

Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023

Table 106 - Sales of Fridges by Volume Capacity: % Volume 2018-2023

Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023

Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023

Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023

Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023

Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2019-2023

Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023

Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023

Table 114 - Production of Refrigeration Appliances: Total Volume 2018-2023

Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028

Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028

Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028

Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

## Air Treatment Products in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The hot summer of 2023 has helped to support growth in air treatment products  
Average unit prices continue to rise, affecting appliances in a cross-category trend  
Air purifiers remain popular, despite being a somewhat expensive “niche”

#### PROSPECTS AND OPPORTUNITIES

Ongoing heatwaves, air pollution, and the building of new houses will support sales over the forecast period  
Local players expected to gain shares thanks to their offer of high quality and affordable prices  
Energy efficiency and added-value features set to become increasingly popular

#### CATEGORY DATA

Table 119 - Sales of Air Treatment Products by Category: Volume 2018-2023  
Table 120 - Sales of Air Treatment Products by Category: Value 2018-2023  
Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023  
Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023  
Table 123 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023  
Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023  
Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023  
Table 126 - Distribution of Air Treatment Products by Format: % Volume 2018-2023  
Table 127 - Production of Air Conditioners: Total Volume 2018-2023  
Table 128 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028  
Table 129 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028  
Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028  
Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

## Food Preparation Appliances in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Food preparation appliances continue to be supported by home-cooking and home-baking trends  
Average unit prices continue to rise, affecting appliances in a cross-category trend  
The sales of juice extractors went down

#### PROSPECTS AND OPPORTUNITIES

Increasing number of modern houses will continue to support sales  
Local brands expected to maintain and grow their share, thanks to offering an attractive quality-to-price ratio  
E-commerce continues to grow its distribution share

#### CATEGORY DATA

Table 132 - Sales of Food Preparation Appliances by Category: Volume 2018-2023  
Table 133 - Sales of Food Preparation Appliances by Category: Value 2018-2023  
Table 134 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023  
Table 135 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023  
Table 136 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023  
Table 137 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023  
Table 138 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023  
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028  
Table 140 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

## Personal Care Appliances in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising urbanisation and out-of-home lifestyles support growth in personal care appliances

Hair care appliances shows the strongest performance

Average unit prices continue to rise, affecting appliances in a cross-category trend

#### PROSPECTS AND OPPORTUNITIES

The image-conscious young population will be a major driver of growth over the forecast period

Competition set to be based on advancements in technology and price

E-commerce continues to grow its distribution share

#### CATEGORY DATA

Table 143 - Sales of Personal Care Appliances by Category: Volume 2018-2023

Table 144 - Sales of Personal Care Appliances by Category: Value 2018-2023

Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023

Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023

Table 147 - Sales of Body Shavers by Format: % Volume 2018-2023

Table 148 - Sales of Hair Care Appliances by Format: % Volume 2018-2023

Table 149 - NBO Company Shares of Personal Care Appliances 2019-2023

Table 150 - LBN Brand Shares of Personal Care Appliances 2020-2023

Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023

Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028

Table 153 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028

Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

## Small Cooking Appliances in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Light fryers continue to attract attention, thanks to been perceived as healthy and energy efficient small cooking appliances

Espresso coffee machines help to drive growth in coffee machines

Average unit prices continue to rise, affecting appliances in a cross-category trend

#### PROSPECTS AND OPPORTUNITIES

Sales will be driven by growth in light fryers and coffee machines

Rice cookers and slow cookers have little potential for growth

Competition between local and international brands is set to become fiercer

#### CATEGORY DATA

Table 156 - Sales of Small Cooking Appliances by Category: Volume 2018-2023

Table 157 - Sales of Small Cooking Appliances by Category: Value 2018-2023

Table 158 - Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023

Table 159 - Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023

Table 160 - Sales of Freestanding Hobs by Format: % Volume 2018-2023

Table 161 - NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023

Table 162 - LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023



Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023  
 Table 164 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028  
 Table 165 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028  
 Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028  
 Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

## Vacuum Cleaners in Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stick and robotic vacuum cleaners drive sales in the category  
 Average unit prices continue to rise, affecting appliances in a cross-category trend  
 Local companies become increasingly relevant in vacuum cleaners

#### PROSPECTS AND OPPORTUNITIES

Convenience and energy efficiency are set to shape ongoing consumer demand  
 Vacuum cleaners with dust bags set to become increasingly outdated  
 E-commerce continues to grow its distribution share

#### CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2018-2023  
 Table 169 - Sales of Vacuum Cleaners by Category: Value 2018-2023  
 Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023  
 Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023  
 Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023  
 Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023  
 Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023  
 Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023  
 Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028  
 Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028  
 Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028  
 Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-appliances-in-turkey/report](https://www.euromonitor.com/consumer-appliances-in-turkey/report).