

Apparel and Footwear in Turkey

November 2023

Table of Contents

Apparel and Footwear in Turkey

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023

Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023

Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023

Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023

Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023

Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023

Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028

Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028

Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Focus on teenagers continues

Combination collections and sustainable wear merge adult and children's trends

Colour plays an important role in engaging children

PROSPECTS AND OPPORTUNITIES

Price competition is expected to increase

Online sales and organic garments to continue to gain traction

Fast-fashion brands and licensed products to gain momentum

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023

Table 14 - Sales of Childrenswear by Category: Value 2018-2023

Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023

Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023

Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023

Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028

Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028

Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028

Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Apparel accessories continue to gain from the resumption of outdoor lifestyles

Expansion of the offer of apparel accessories, especially scarves

Domestic players leverage knowledge of local market

PROSPECTS AND OPPORTUNITIES

Divergence in demand rates

Apparel accessories fit well with e-commerce

Lower prices to underpin a preference for local brands and products

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023

Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Greater price-sensitivity sees slower growth in menswear compared with womenswear

Athleisure trend continues to inform menswear purchases

Technological and sustainable products support retail value growth

PROSPECTS AND OPPORTUNITIES

Positive but slower growth for menswear

Athleisure trend is set to prove robust

Technology focus is here to stay

CATEGORY DATA

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

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

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

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

Table 37 - NBO Company Shares of Menswear: % Value 2019-2023

Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023

Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023
Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028
Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028
Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028
Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

Womenswear in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourist shopping benefits womenswear
Collaborations continue to gain popularity and reach
Rise of "quiet luxury" in womenswear

PROSPECTS AND OPPORTUNITIES

Focus on quality over quantity
Premium lines to fit with affordable luxury and sustainable trends
The use of AI is expected to grow in womenswear

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2018-2023
Table 52 - Sales of Womenswear by Category: Value 2018-2023
Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023
Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023
Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023
Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023
Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023
Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023
Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023
Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023
Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023
Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023
Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023
Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023
Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028
Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028
Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028
Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

Jeans in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

New trends in jeans
Big name sustainable collections to the fore
Back to the traditional with a modern twist

PROSPECTS AND OPPORTUNITIES

Men's and women's jeans are set to continue to perform well in the forecast period
More focus on ecological responsibilities
More relaxed and voluminous models to continue to gain attention

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023

Table 70 - Sales of Jeans by Category: Value 2018-2023

Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023

Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023

Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023

Table 74 - Sales of Men's Jeans by Category: Value 2018-2023

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023

Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023

Table 78 - Sales of Women's Jeans by Category: Value 2018-2023

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023

Table 81 - NBO Company Shares of Jeans: % Value 2019-2023

Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023

Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028

Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

[Hosiery in Turkey](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hosiery continues its recovery from the pandemic slump

High average unit price boosts retail current value growth

More focus on eco-orientated production and selections

PROSPECTS AND OPPORTUNITIES

Brighter outlook for non-sheer hosiery

Changing lifestyles and dress codes to limit sheer hosiery usage

Penti to lead e-commerce foray in hosiery

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023

Table 96 - Sales of Hosiery by Category: Value 2018-2023

Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023

Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023

Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023

Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023

Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028

Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Greater focus on health and wellness and sustainability continue to shape footwear
Camperlab is in Turkey for the first time
Wearable art in footwear

PROSPECTS AND OPPORTUNITIES

Apparel specialist retailers to continue to concentrate on matching footwear and apparel collections
Physical and fashion merge to add dynamism to children's footwear
Sneakers enjoys highly versatile wear appeal

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023
Table 106 - Sales of Footwear by Category: Value 2018-2023
Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023
Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023
Table 109 - NBO Company Shares of Footwear: % Value 2019-2023
Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023
Table 111 - Distribution of Footwear by Format: % Value 2018-2023
Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028
Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028
Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028
Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Collaborations continue to gain currency
Camperlab enters Turkey for the first time
Wearable art in sneakers

PROSPECTS AND OPPORTUNITIES

The trend towards casualisation in the workplace is set to continue
Brands to be increasingly aligned with social messaging
Adding new functions to improve the offer

CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023
Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023
Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023
Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023
Table 120 - Distribution of Sportswear by Format: % Value 2018-2023
Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028
Table 122 - Forecast Sales of Sportswear 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/apparel-and-footwear-in-turkey/report.