

Turkey Duty-Free and Travel Retail Market Size, Share, Trends and Forecast by Product Type, Distribution Channel, and Region, 2026-2034

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Abstracts

The Turkey duty-free and travel retail market size reached USD 606.1 Million in 2025. Looking forward, IMARC Group expects the market to reach USD 1,202.6 Million by 2034, exhibiting a growth rate (CAGR) of 7.59% during 2026-2034. Rising tourist arrivals, new airport infrastructure, expanded airline connectivity, and increasing disposable income are some of the factors contributing to the Turkey duty-free and travel retail market share. Strategic locations like Istanbul Airport and strong partnerships with global brands further support category expansion in beauty, fashion, alcohol, and confectionery.

TURKEY DUTY-FREE AND TRAVEL RETAIL MARKET TRENDS:

Expansion of Locally-Driven Retail in Emerging Hubs

Increased focus on regional airports with growing passenger volumes is creating new opportunities for retail operators to establish a foothold in previously untapped locations. As new international gateways open, there's a visible move toward offering product ranges that reflect local culture and preferences. This approach not only enhances the traveler experience but also supports tourism and commerce. Mid-sized airports with high growth potential are becoming viable entry points for global operators aiming to diversify geographically. A focus on terminals with both domestic and international reach ensures a broad customer base, while culturally tailored assortments help drive engagement. These developments indicate that retail formats tied closely to regional identity are gaining importance in markets with rising connectivity and visitor flows. These factors are intensifying the Turkey duty-free and travel retail market growth. For example, in October 2024, Avolta AG secured its first duty-free contract in Turkey at the

newly opened Mersin International Airport in Mersin. The company would operate 1,000 m² of retail space in the Departures and Arrivals areas, offering a locally inspired product mix. The airport, with a capacity of 9 Million passengers, aims to boost regional tourism and connectivity across domestic and international routes.

Shift toward Large-Scale, Locally-Rooted Retail Operations

Operators with a strong regional footprint are expanding their presence by securing contracts at high-traffic airports. There's a noticeable move toward large-format retail spaces that combine global brand offerings with concepts rooted in local culture and design. Experience in multi-location management is becoming a key factor in winning new contracts, especially in competitive locations. Retail zones now go beyond traditional duty-free, incorporating curated luxury zones and locally themed areas to attract a wider customer mix. This approach blends commercial scale with regional character, catering to diverse traveler expectations. The growing preference for operators that can deliver both operational expertise and cultural relevance highlights a changing landscape in airport retail across well-established travel hubs. For instance, in September 2024, AT Duty Free took over the duty-free operations at Antalya Airport, replacing Avolta-owned Dufry. This marks AT's fifth airport in Turkey. The retailer will manage 12,000 m² of space, featuring core duty-free, Luxury Square, and the Old Bazaar concept. AT plans to apply its experience from 21 airports and one cruise port across seven countries to the new location.

TURKEY DUTY-FREE AND TRAVEL RETAIL MARKET SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the country and regional levels for 2026-2034. Our report has categorized the market based on product type and distribution channel.

Product Type Insights:

Beauty and Personal Care

Wines and Spirits

Tobacco

Eatables

Fashion Accessories and Hard Luxury

Others

The report has provided a detailed breakup and analysis of the market based on the product type. This includes beauty and personal care, wines and spirits, tobacco, eatables, fashion accessories and hard luxury, and others.

Distribution Channel Insights:

Airports

Airlines

Ferries

Others

A detailed breakup and analysis of the market based on the distribution channel have also been provided in the report. This includes airports, airlines, ferries, and others.

Regional Insights:

Marmara

Central Anatolia

Mediterranean

Aegean

Southeastern Anatolia

Black Sea

Eastern Anatolia

The report has also provided a comprehensive analysis of all the major regional markets, which include Marmara, Central Anatolia, Mediterranean, Aegean, Southeastern Anatolia, Black Sea, and Eastern Anatolia.

COMPETITIVE LANDSCAPE:

The market research report has also provided a comprehensive analysis of the competitive landscape. Competitive analysis such as market structure, key player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided.

KEY QUESTIONS ANSWERED IN THIS REPORT

How has the Turkey duty-free and travel retail market performed so far and how will it perform in the coming years?

What is the breakup of the Turkey duty-free and travel retail market on the basis of product type?

What is the breakup of the Turkey duty-free and travel retail market on the basis of distribution channel?

What is the breakup of the Turkey duty-free and travel retail market on the basis of region?

What are the various stages in the value chain of the Turkey duty-free and travel retail market?

What are the key driving factors and challenges in the Turkey duty-free and travel retail market?

What is the structure of the Turkey duty-free and travel retail market and who are the key players?

What is the degree of competition in the Turkey duty-free and travel retail market?

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