REPUBLIC OF TÜRKİYE
MINISTRY OF TRADE

E-COMMERCE
OUTLOOK IN TÜRKİYE

E-Commerce
Info Platform

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MAY 2025

Foreword by Minister of Trade

E-commerce has become one of the most important building blocks of the global economy today and is rapidly growing and transforming in our country as well. Türkiye has gained significant momentum in e-commerce thanks to developments such as increased internet access, widespread use of mobile devices, and digital payment systems.   Advances in information and communication technologies are further strengthening the e-commerce ecosystem and encouraging innovation in this area. **Our Ministry of Trade** is closely monitoring global developments in e-commerce and taking steps to accelerate our country's growth in this area.

With the increasing volume of e-commerce, it is of great importance to create a secure trading environment, ensure fair competition, and strengthen the legal framework for the sector.   In this regard, easily amendable and inclusive regulations are being developed for this highly dynamic sector.   In this era of rapid digitalization, policies are being implemented to ensure the sustainability of business models and support all stakeholders in the ecosystem.   In this regard, a strong legal framework has also been established in our country.

The young and digitally literate population of Türkiye offers great potential in the field of e-commerce. With advanced logistics infrastructure and fast delivery capabilities, businesses can operate more effectively in the digital environment and gain a competitive advantage. The digitalization process contributes to economic development by offering significant opportunities not only for large brands but also for SMEs and entrepreneurs.

On the other hand, the e-commerce sector in Türkiye contributes significantly not only to economic growth but also to social welfare. In critical times such as disasters and emergencies, e-commerce platforms help strengthen social solidarity by enabling the rapid fulfillment of basic needs. The flexibility offered by digital commerce enables the fastest possible response to the needs of different industries.

The **"E-Commerce Outlook in Türkiye"** report aims to guide stakeholders by providing comprehensive data and analysis on the sector. The content, which is covered in a broad scope ranging from general assessments to detailed reviews, serves as an important reference source for both existing sector actors and new entrepreneurs.

I would like to express my sincere gratitude to everyone who contributed to the preparation of this report, which highlights Turkiye's progress in its digitalization process and its achievements in the field of e-commerce, especially the General Directorate of Domestic Trade.

Professor Ömer BOLAT
Minister of Trade

Foreword by Director General of Domestic Trade

Comprehensive data, one of the key decision-making criteria in commerce, has become increasingly important for all companies today. In this context, it is important to analyze data in the field of e-commerce, as in all areas of trade, and to make predictions for the digital ecosystem of the future.

The Electronic Commerce Information System (ETBIS), which serves as a source of data and analysis benefiting all stakeholders in e-commerce, was established by our Ministry in 2017 and has become an important resource for the development of the sector.

However, considering the constantly changing and evolving nature of e-commerce, a modernization process has been initiated in ETBIS to meet new data requirements that may arise over time. The outputs obtained as a result of these studies form the main findings of the report and provide important clues about the future directions of the sector.

The "E-Commerce Outlook in Türkiye" report provides a detailed analysis of the sector-specific impacts of e-commerce and examines key trends and developments from a comprehensive perspective. The report offers a broad perspective ranging from general assessments to detailed analyses, and aims to guide readers with data-driven evaluations. The comprehensive data contained herein is a valuable resource for understanding the dynamics of the sector and developing strategies for the future.

The data presented in the report clearly demonstrates the positive impact of digitalization on trade, which is a source of great satisfaction for our Ministry.

We hope that this report will serve as an important guide for all stakeholders in the e-commerce sector during their development processes, and we would like to thank all the staff of our E-Commerce Department and everyone who contributed to the preparation of this valuable resource.

Adem BAŞAR
Director General of Domestic Trade

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Introduction

In digitalization age„ e-commerce plays a central role not only in the transformation of the economic structure, but also in the transformation of consumption habits and business models. The **"E-Commerce Outlook in Türkiye"** report, prepared to examine the implications of this transformation in Türkiye from a multifaceted perspective, is designed to serve as a comprehensive resource for a wide range of stakeholders, from sector professionals and policymakers to academics and entrepreneurs.   This Report brings together data, graphs, and thematic analyses that enable a comprehensive assessment of developments in the field of e-commerce.

The **"Basic Statistics"** section of the report reveals the volume growth of e-commerce in Türkiye, presenting indicators such as transaction numbers, average basket values, and volume data calculated in US dollars to illustrate the growth trend in this sector over the years. The annual compound growth rates calculated for the period 2019–2024 vividly reflect the steady rise of e-commerce in Türkiye, while indicators such as e-commerce's share of gross domestic product and its ratio to total trade provide a meaningful framework for understanding the digital economy's role in the country's economy.   This section also details how e-commerce spending varies by age and gender, and presents interesting data on demographic trends in consumer behavior.

Under the heading **"Sector Statistics,"** e-commerce volumes in different sectors are evaluated in terms of their current status and level of digitization according to their own internal dynamics.   The digital performance of relevant sectors was measured using indicators such as e-commerce rates within the total trade volume of sectors, average basket values, and cancellation and return rates; consumer trends were detailed based on the most preferred product groups.

Under the heading **"Statistics on E-Commerce Businesses,"** data is presented on the numerical overview, types of activities, and sizes of businesses operating on digital platforms.   In addition, the profiles of small businesses classified as tradesmen were examined according to age and gender. Evaluations of all businesses engaged in e-commerce activities according to sectors and the number of marketplaces they operate in revealed the diversity and widespread nature of the Turkish e-commerce ecosystem.

The **Monthly and Daily Statistics** section has been prepared to show seasonal fluctuations throughout the year and is supported by data on the monthly distribution of real e-commerce and real retail e-commerce volumes, daily transaction numbers, and the days with the highest and lowest transaction volumes. Information on hourly e-commerce intensity sheds light on temporal changes in user behavior.

Under the heading **Payment and Spending Type Statistics**, indicators such as the distribution of different payment methods within the total volume, the 3D Secure usage rate, and the distribution of e-commerce volume by spending type are included.   This section provides important tips regarding payment security and user preferences.

Under the heading **"E-Commerce Adaptation Index and Provincial Statistics,"** index data revealing the extent to which provinces are integrated into e-commerce activities are presented.   In this section, indicators such as the ratio of sales to purchases in provinces and the e-commerce volume per business have been evaluated according to specific weights, and a provincial e-commerce adaptation index has been created.

On the other hand, our report also covers emerging thematic areas such as **Quick Commerce (Q-Commerce), Sustainable E-Commerce, Digital Entertainment, and Content Consumption,** and concludes with an **econometric perspective**.

The "E-Commerce Outlook in Türkiye" report aims to contribute to the future of digital commerce by raising awareness within the sector, guiding decision-making processes, and providing a resource for all stakeholders in e-commerce.

01

**BASIC
STATISTICS**

1.

CHAPTER

Basic
Statistics

The e-commerce sector in Türkiye has grown steadily in 2024, as it has over the past five years. E-commerce volume increased

by **61.7%**

compared to the previous year, reaching **3 trillion TL,** with **5.91 billion** transactions. The number of retail e-commerce transactions increased by **10.1%** compared to the previous year, reaching **1.85 billion pieces**.

When denominated in US dollars, e-commerce volume increased by **15%** compared to the previous year, rising from US$ 77.89 billion to **US$ 89.58 billion**.

In 2024, the average basket value in e-commerce transactions will be **508 TL,** while the average basket value in retail e-commerce will be **875 TL**.

These figures show the continued growth of e-commerce and clearly demonstrate the impact of digitalization on the sector. The e-commerce sector, which has been growing steadily since 2019, continues to strengthen in recent years as digitalization gains momentum.

Between 2019 and 2024, the annual compound growth rate of the overall e-commerce volume

has reached 85.66% during the same period, the compound annual growth rate of retail e-commerce volume reached

90.82%, showing a **remarkable increase.**
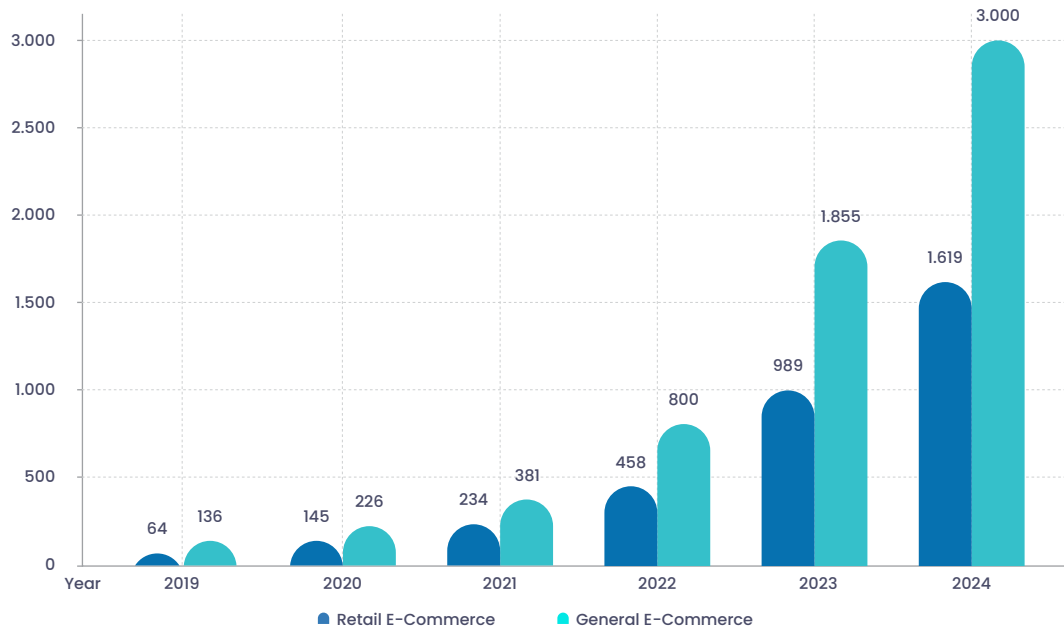
Graph 1. Annual Change in General and Retail E-Commerce Volume (billion TL)

Graph 1 shows the annual change in the total and retail e-commerce volume in Turkiye between 2019 and 2024. The total e-commerce volume increased by **61.7%** in 2024, reaching **3 trillion TL**. The retail e-commerce volume increased by **63.7%** compared to the previous year, reaching **1.619 trillion TL** in 2024.
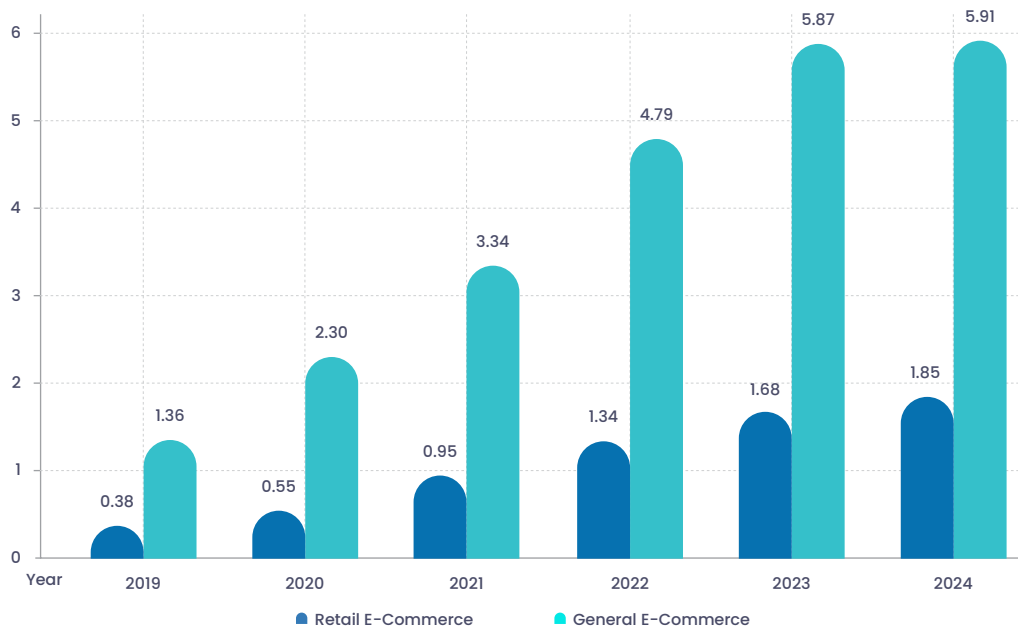
Graph 2. Change in the Number of General and Retail E-Commerce Transactions by Year (in billions)

Graph 2 shows the number of general and retail e-commerce transactions in Türkiye between 2019 and 2024 by year. **The total number of e-commerce transactions reached 5.91 billion in 2024. The number of retail e-commerce transactions increased by 10.1% in 2024 compared to the previous year, reaching 1.85 billion.**

During the **2019-2024** period, the number of general e-commerce transactions increased by **34.15%** in terms of compound annual growth rate, while the annual compound growth rate of retail e-commerce transactions also increased by **37.23%.**
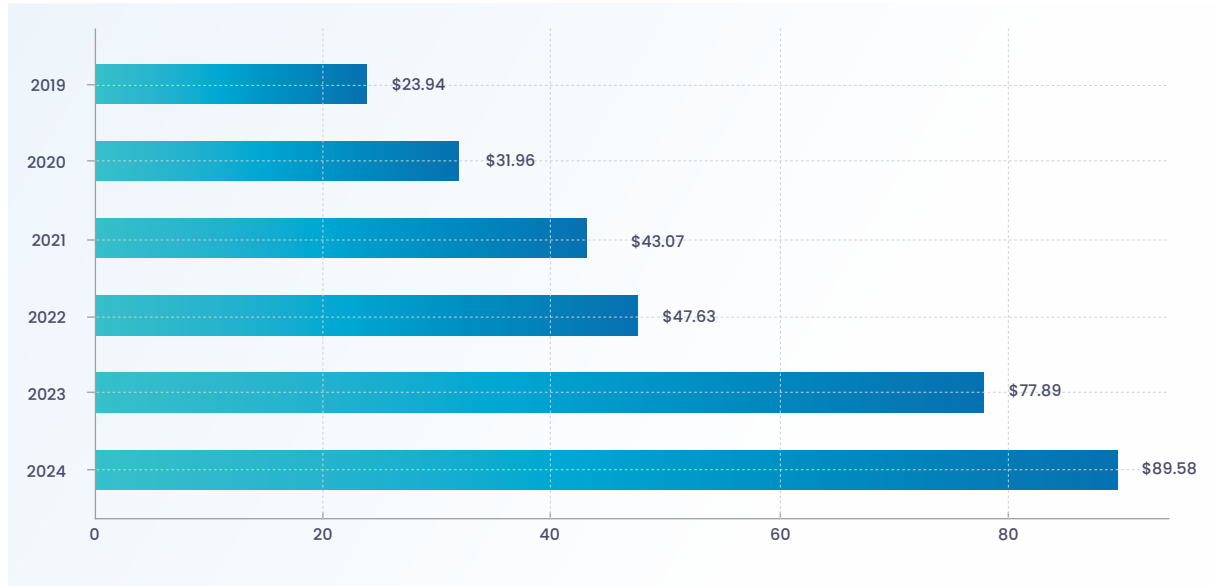
Graph 3. Change in Total E-Commerce Volume in US Dollars* (billion dollars)

Graph 3 shows the annual change in the total e-commerce volume in Türkiye between 2019 and 2024 in US dollars.

The e-commerce volume, which was **23.94 billion US dollars** in 2019, has steadily increased every year, reaching **77.89 billion US dollars** in 2023 and **89.58 billion US dollars** in 2024 with a **15%** growth. Within this framework, the compound annual growth rate of e-commerce volume in US dollars between 2019 and 2024 is **30.2%.**

Graph 4. E-Commerce's Share of Gross Domestic Product (%)

When examining Graph 4, it can be seen that the share of domestic e-commerce volume in 2024 is **6.5%,** in the gross domestic product (GDP) announced by the Turkish Statistical Institute (TÜİK) as **43 trillion 410 billion 514 million TL.**

* All calculations in US dollars in the report are based on the monthly average exchange rate for the relevant periods.

The Ratio of E-Commerce to General Commerce

	January	February	March	April	May	June	July	August	September	October	November	December
E-commerce / General Commerce	22.5%	21.3%	21.2%	18.8%	19.0%	17.9%	17.4%	17.7%	17.7%	17.9%	22.3%	17.8%
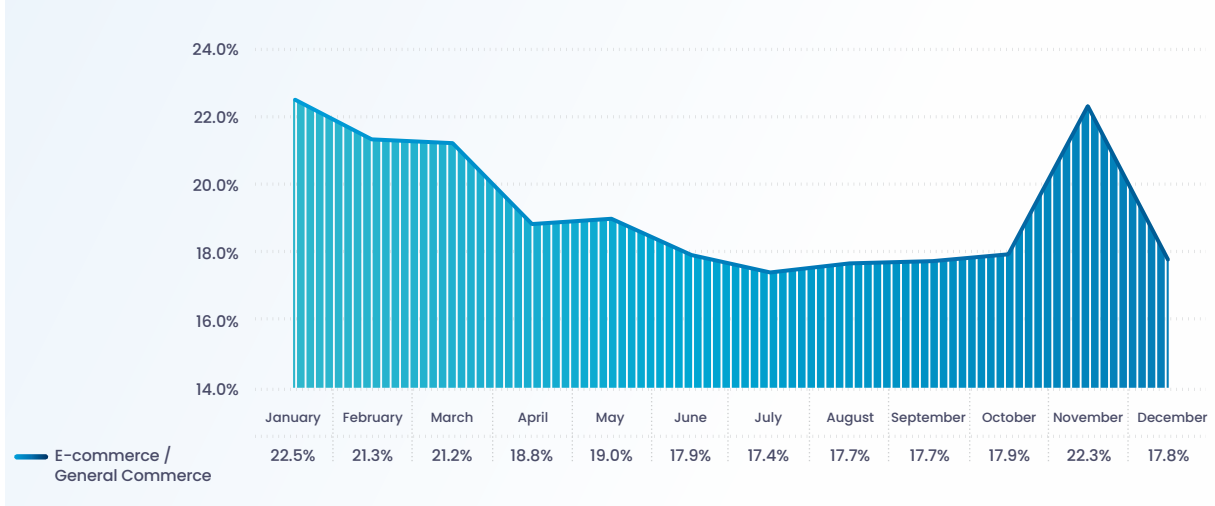
Graph 5. The Ratio of E-Commerce to General Commerce (%, 2024)

The share of e-commerce in total commerce was 19.1% in 2024.   When examined on a monthly basis, changes in the rates have been observed.   The share of e-commerce in total trade was high in the first quarter, remained stable in the second and third quarters, rose again in the fourth quarter due to the impact of campaigns, but fell in the last month of the year.

January-February-March (22.5%–21.3%–21.2%): The year 2024 has started with a high rate. Throughout the first quarter, rates remained high, indicating that consumer behavior continued to shift toward e-commerce.

April-May (18.8%-19.0%): The share of e-commerce in total trade showed a downward trend during the spring months.   It is believed that the increasing consumer preference for traditional shopping channels has led to this situation.

June-July-August (17.9%-17.4%-17.7%): During the summer months, the ratio of e-commerce to total trade remained at the lowest levels of the year.   The increase in vacation and travel plans during this period has led to a slowdown in e-commerce, which is similar to consumer trends in previous years.

September-October-November (17.7%-17.9%-22.3%): Demand for e-commerce increased significantly due to the return to school in the fall and the increase in education spending, as well as the impact of campaigns held in November.

December (17.8%): As a result of the intense shopping period in November, consumers reduced their spending in December, causing the rate to decline.

* The ratio of e-commerce volume to total trade volume has been calculated based on real values according to NACE classifications for total trade.   When making this calculation, the amounts included in the NACE codes relating to e-commerce in general trade were taken into account.

Distribution of E-Commerce Spending by Age and Gender

58%
Female

42%
Male
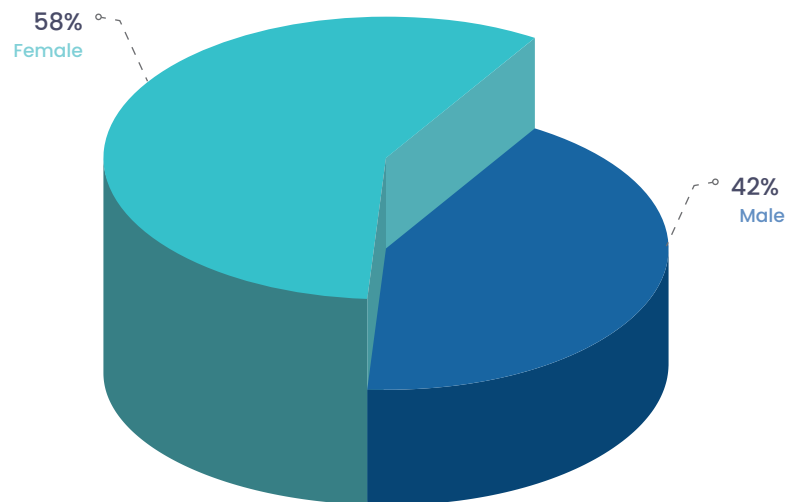
Graph 6. Distribution of E-Commerce Spending by Gender of Buyers (%, 2024; Marketplaces)

In 2024, **58%** of e-commerce spending through marketplaces was made by female users. Male users, on the other hand, have a **42%** share. Distribution demonstrates the significant role women play in the digital retail ecosystem. The frequency of shopping in categories that are more popular among female users, such as **clothing, personal care, cosmetics, and home decoration,** stands out as one of the main reasons for this proportional superiority.
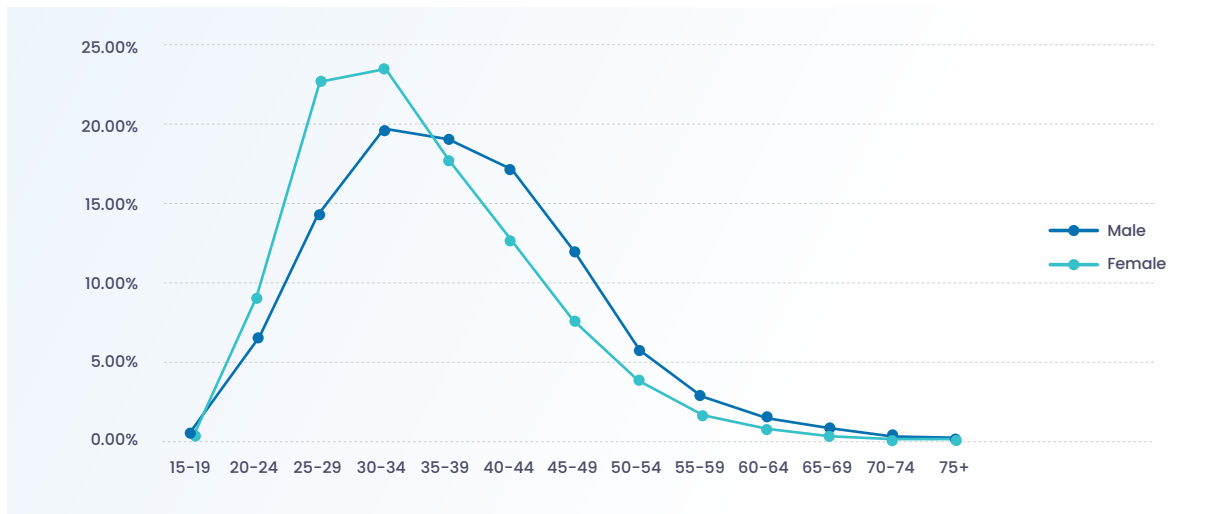
Graph 7. Distribution of E-Commerce Spending by Age Group and Gender (%, 2024; Marketplaces)

According to 2024 data, the highest rates of e-commerce spending by age group and gender are seen among both female and male users in the **25–34 age** range. In this age group, the percentage of female users reaches its highest level at approximately **24%,** while the percentage of male users also shows a significant concentration at approximately **20%**.

The **25-44 age** group is the bracket in which total spending is highest for both genders. Spending begins to decline for both genders in the **35–39 age** group. Spending by male users in the same age group and older is higher than spending by female users.

The share of spending by the **50+** age group in total spending is declining significantly, falling below **2%** for the **65+** age group.

Generally speaking, female users aged **20–34** spend more than male users, but this difference decreases in the **35+ age group**, where male users tend to spend more than female users. In the **60+ age group**, the difference in spending between the genders is quite small.
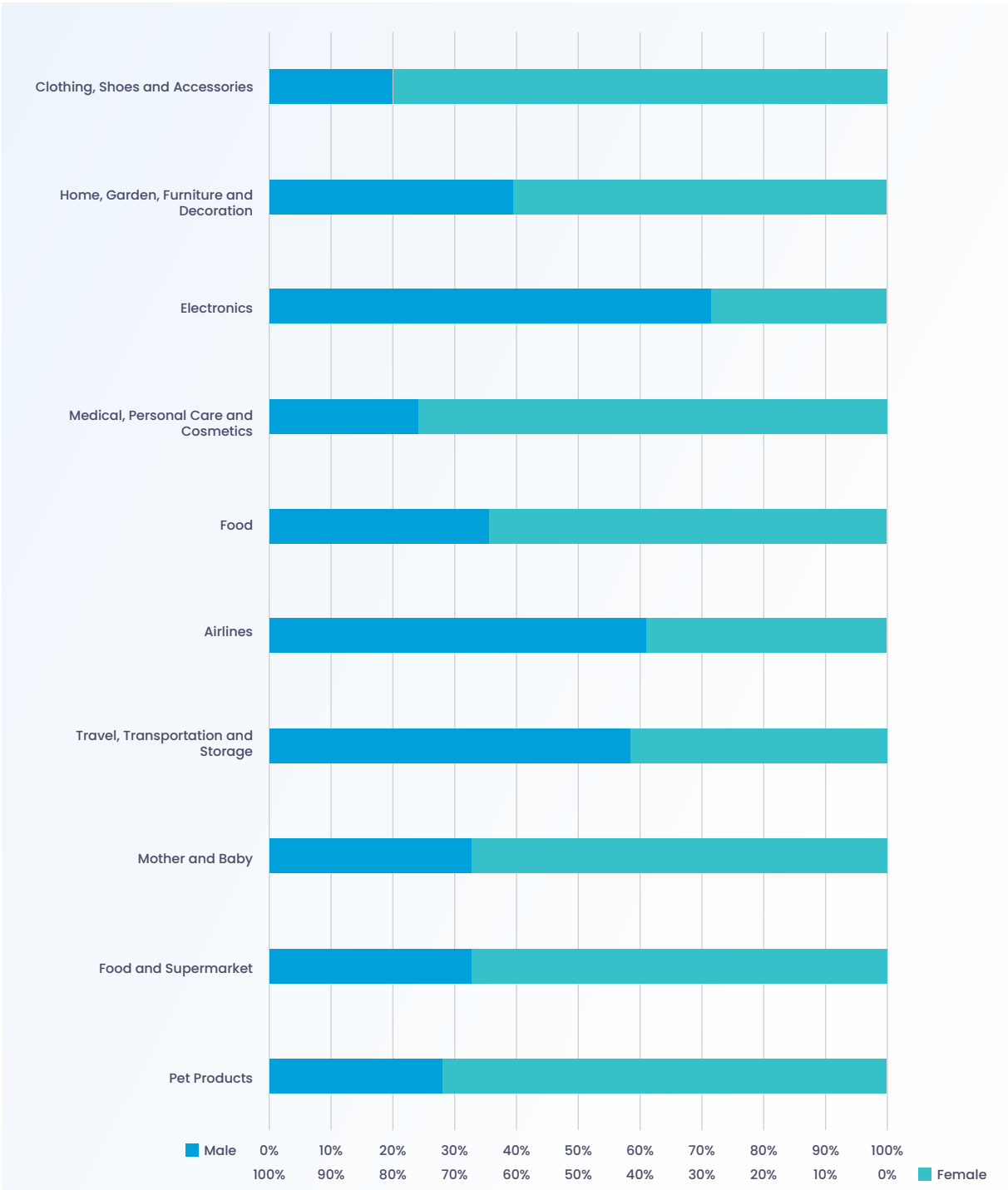
Graph 8. Distribution of E-Commerce Spending by Sector and Gender (%, 2024; Marketplaces)

According to 2024 data, the distribution of e-commerce spending by sector and gender shows differences. Spending by female users is significantly higher than that of male users in the clothing, footwear and accessories, medical, personal care and cosmetics, and pet products sectors.

In the electronics, air travel, transportation, and storage sectors, spending by male users is higher than that of female users.

This data show that e-commerce spending varies by gender across sectors and that there is a clear user trend in some sectors.
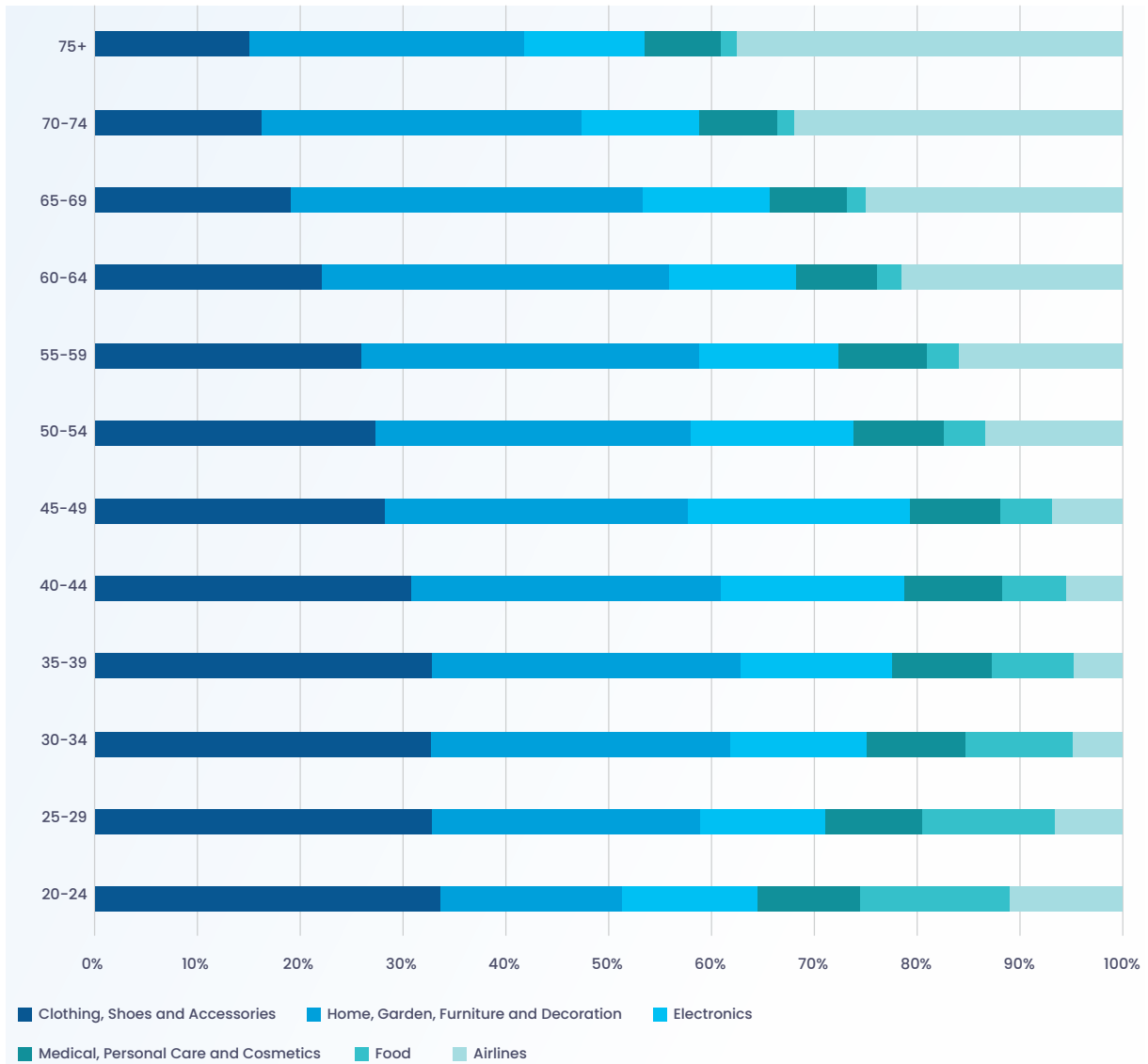
Graph 9. Distribution of E-Commerce Spending by Sector and Age Group (%, 2024; Marketplaces)

According to 2024 data, when the sectoral distribution of e-commerce spending by age group is examined, it is seen that certain sectors are preferred more intensively in specific age groups.

Users aged between 20 and 44 spend most of their money on clothing, footwear, and accessories. This sector stands out significantly in the 20-34 age group. In the 35-44 age group following this age group, clothing spending remain high, while the share of the home, garden, furniture, and decoration sectors and the electronics sector is increasing.

The home, garden, furniture, and decoration sector is attracting attention among those aged 45-64. Spending on the airline sector is increasing among those aged 50 and above. In addition, it can be seen that the proportion of total spending on food decreases as age groups increase.

02.

SECTOR
STATISTICS

CHAPTER

Sector
Statistics

Sector	Value
Education and Consulting Services	27.82
Sports and Outdoor	28.81
Software	45.71
Medical, Personal Care and Cosmetics	90.32
Home, Garden, Furniture and Decoration	143.72
Food and Supermarket	144.29
Food	171.42
White Goods and Small Appliances	173.89
Electronics	176.92
Travel, Transportation and Storage	180.23
Airlines	208.90
Clothing, Shoes and Accessories	301.34

Graph 10. E-commerce Volume by Sector in 2024 (billion TL)*

When examining Graph 10, it can be seen that the clothing, footwear, and accessories sector ranks first with **301 billion TL** in 2024. This sector is followed by the airline, travel, transportation and storage, and electronics sectors.

The Ratio of E-Commerce to General Commerce by Sector

The ratio of e-commerce volume to the total trade volume of the relevant sector shows that some sectors perform above the overall e-commerce ratio of **19.1%,** while traditional trade continues to dominate in other sectors.

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* As part of the ETBIS Modernization Project, a methodology was developed to calculate sector sizes more accurately, transitioning from an activity-based sector breakdown to a product-based sector breakdown. Therefore, differences may be observed in some sectors when compared to previous years.

1. Electronics

The share of e-commerce in the electronics sector within the overall trade was **28.3%** on average throughout the year. In November, this rate peaked at **38%.** In December, however, a sharp decline **(24.9%)** was observed. In general, demand has been volatile throughout the year and is believed to have been triggered by seasonal campaigns.

	January	February	March	April	May	June	July	August	September	October	November	December
Electronics	27.9%	26.4%	30.1%	25.7%	26.6%	29.7%	26.1%	26.5%	28.5%	27.3%	38.0%	24.9%
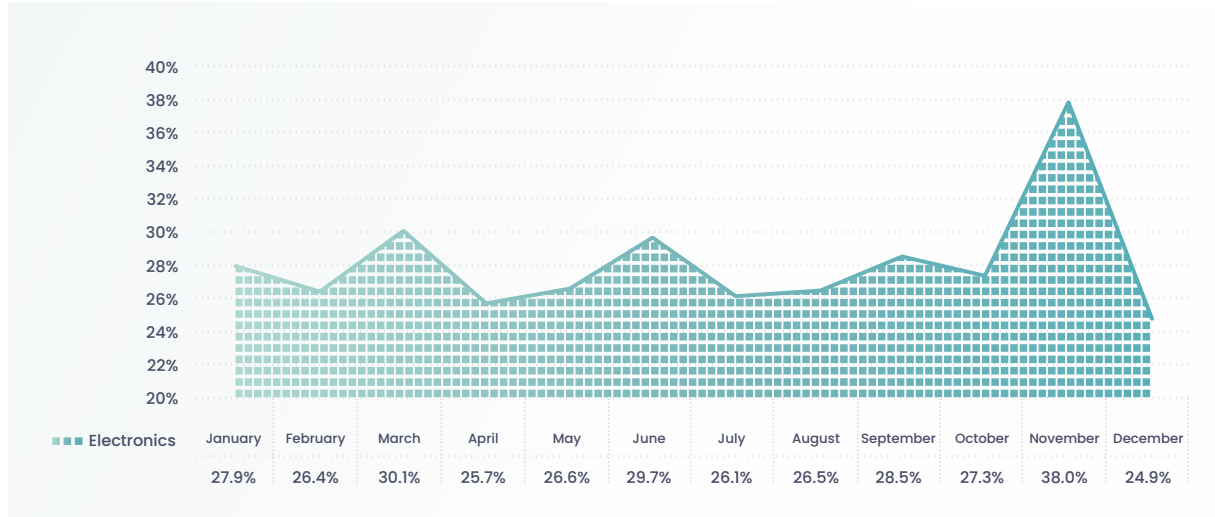
Graph 11. The Ratio of E-Commerce to General Commerce in the Electronics Sector (%, 2024)

2. Food and Supermarket

E-commerce in the food and supermarket sector accounts for only **4.3%** of total trade. The sector has shown a steady trend throughout the year and has been relatively unaffected by seasonal factors. In this sector, where traditional shopping habits are strong, the lower rate of digitization also reveals the existence of potential.

	January	February	March	April	May	June	July	August	September	October	November	December
Food and Supermarket	4.7%	4.5%	4.4%	4.2%	4.4%	4.2%	4.2%	4.2%	4.1%	4.2%	4.7%	4.1%
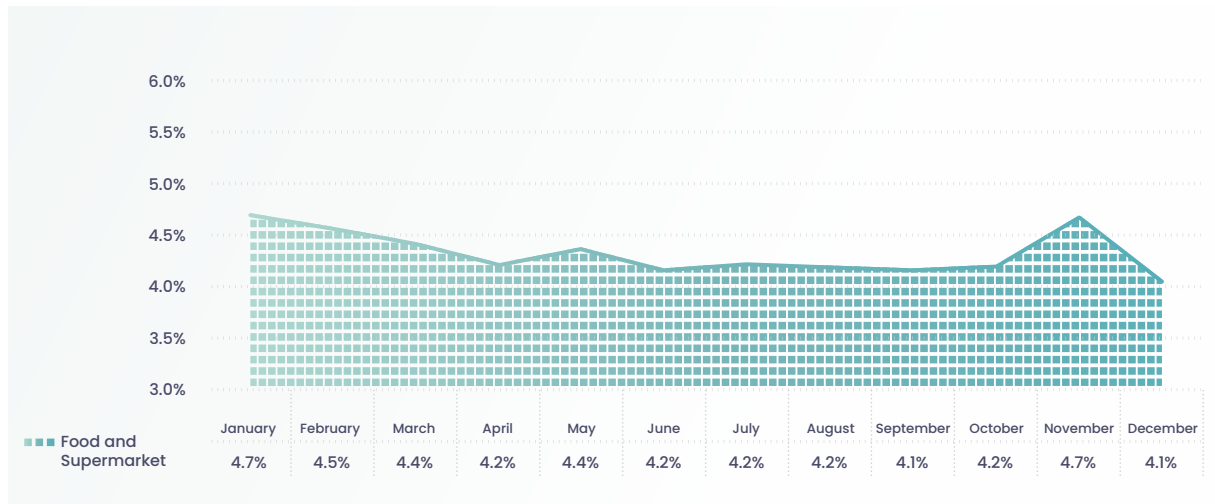
Graph 12. The Ratio of E-Commerce to General Commerce in the Food and Supermarket Sector (%, 2024)

3. Clothing, Shoes and Accessories

The average annual ratio of e-commerce to total trade in the clothing, footwear, and accessories sector was **22.1%**. This rate peaked at **30.2%** in November. Seasonal campaigns and sales periods have particularly contributed to this increase. The sector, which hit its lowest point in April at **18%,** recovered in the second half of the year and showed an upward trend until the end of November.

	January	February	March	April	May	June	July	August	September	October	November	December
Clothing, Shoes and Accessories	24.1%	21.9%	24.7%	18.0%	22.4%	19.6%	20.0%	19.4%	20.0%	22.1%	30.2%	22.5%
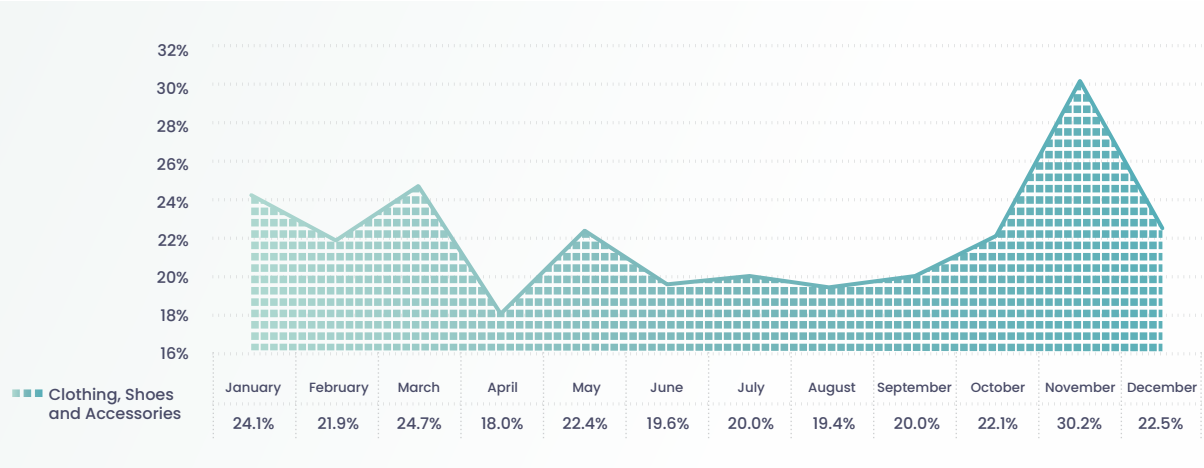
Graph 13. The Ratio of E-Commerce to General Commerce in the Clothing, Footwear, and Accessories Sector (%, 2024)

4. Books and Magazines

When examining the share of e-commerce in general trade, the book and magazine sector, which has one of the highest e-commerce shares, has a ratio of **53%.** The share of e-commerce in the sector exceeded **65%** in March and November. In the summer months, however, there was a noticeable decline (**36.4%** in August). This situation can be attributed to a decrease in demand during the holiday season. The sector is one of the most suitable sectors for e-commerce shopping.

	January	February	March	April	May	June	July	August	September	October	November	December
Books and Magazines	58.6%	65.0%	65.2%	58.5%	58.2%	56.4%	48.3%	36.4%	42.7%	57.0%	66.7%	52.5%
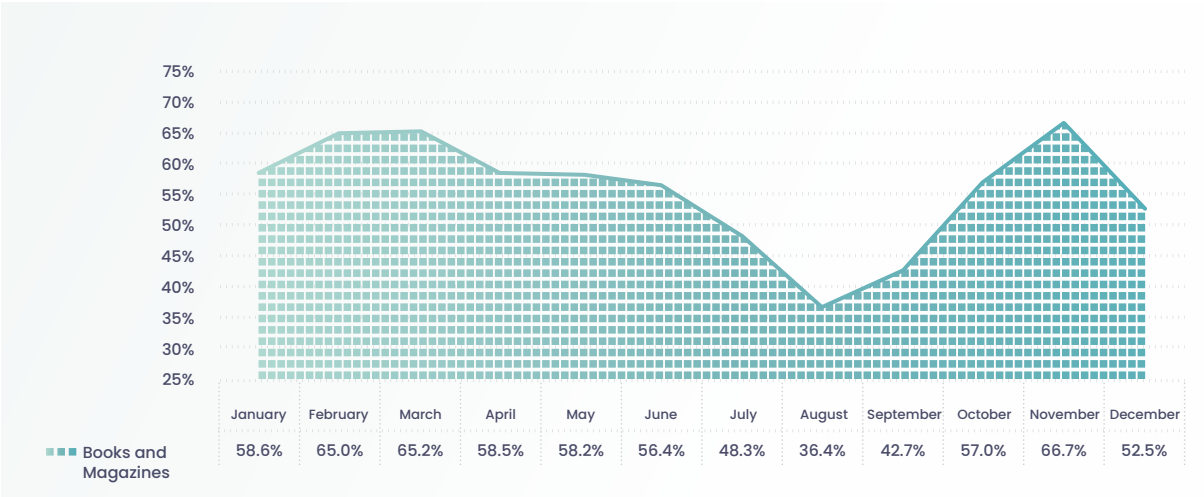
Graph 14. The Ratio of E-Commerce to General Commerce in the Books and Magazines Sector (%, 2024)

5. Motorized and Non-Motorized Vehicles, Services, Spare Parts, and Accessories

There was a significant increase in this sector in November, reaching a rate of **63.2%.** This jump indicates intense consumer demand for year-end vehicle and parts purchases (winter tires, etc.), in addition to campaigns. In other months, relatively low rates ranging from **13.5%** to **27.3%** were observed.

	January	February	March	April	May	June	July	August	September	October	November	December
Motorized and Non-Motorized Vehicles, Services, Spare Parts, and Accessories	13.5%	19.3%	21.9%	18.6%	17.0%	19.5%	16.9%	15.7%	14.2%	20.5%	63.2%	27.3%
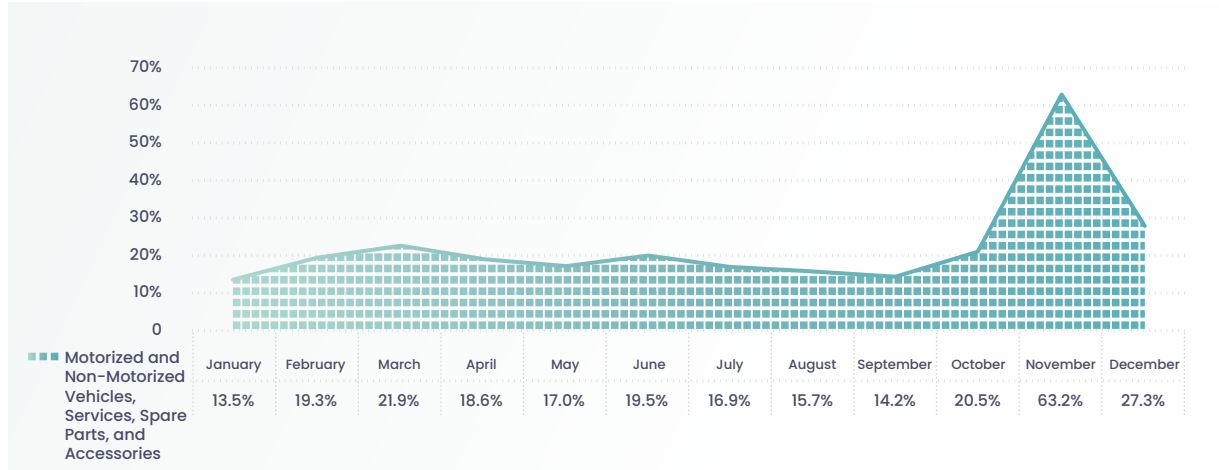
Graph 15. The Ratio of E-Commerce to General Commerce in the Motorized and Non-Motorized Vehicle, Service, Spare Parts, and Accessories Sector (%, 2024)

6. Sports and Outdoor

In sports and outdoor products, e-commerce accounts for an average of **30.5%** of total trade throughout the year, which is quite high. The sector peaked at **42.6%** in November and ended the year at **35.7%** in December. Although a relative decline in demand was observed during the summer period (**26.1%** in August), the year as a whole showed strong performance.

	January	February	March	April	May	June	July	August	September	October	November	December
Sports and Outdoor	28.6%	26.8%	30.0%	28.2%	28.3%	30.7%	28.1%	26.1%	29.9%	29.6%	42.6%	35.7%
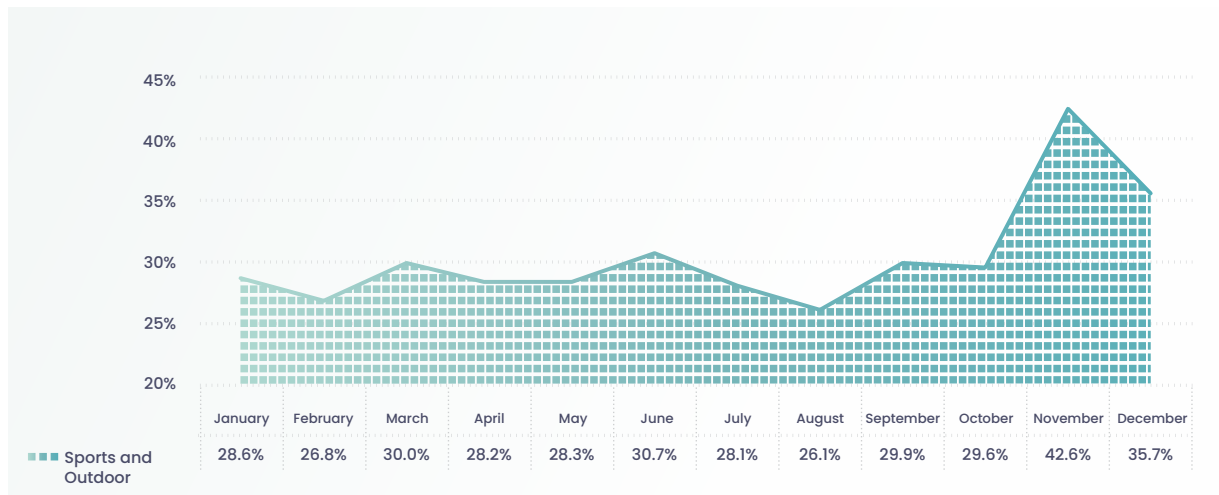
Graph 16. The Ratio of E-Commerce to General Commerce in the Sports and Outdoor Sector (%, 2024)

7. Food Delivery

The ratio of e-commerce to total trade in the food delivery sector is **10.9%**. This area has seen relatively stable performance throughout the year, with changes observed within a narrow band of between **10%** and **12%**. The highest rate was recorded in January (**12%**), while the lowest rate was recorded in July and August (**10.3%**). This situation indicates seasonal shopping preferences.

	January	February	March	April	May	June	July	August	September	October	November	December
Food	12.0%	10.8%	11.2%	11.1%	11.1%	10.7%	10.3%	10.3%	10.5%	11.0%	11.5%	10.5%
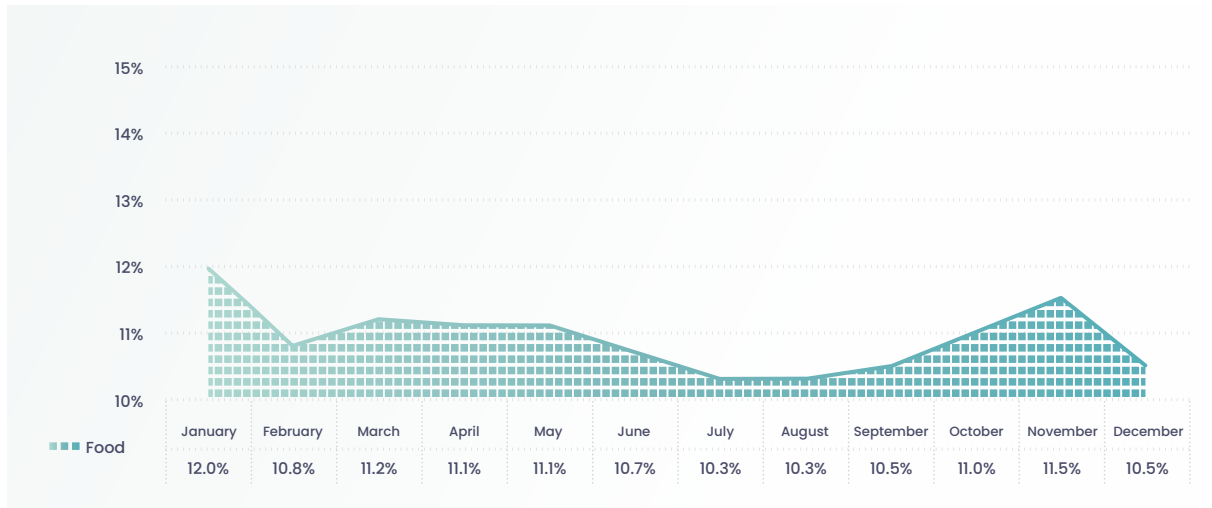
Graph 17. The Ratio of E-Commerce to General Commerce in the Food Delivery Sector (%, 2024)
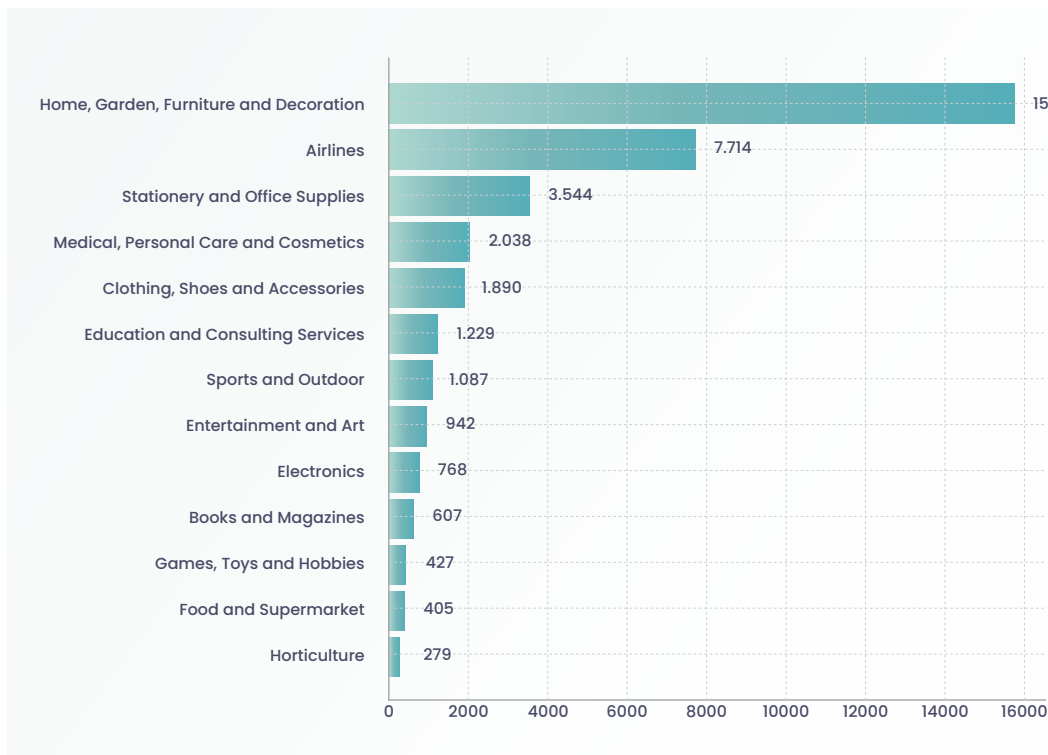
Graph 18. Average Basket Value by Sector (TL, 2024)

According to Graph 18, which provides insight into sectoral price-lining and pricing trends specific to each sector in e-commerce, the sectors with the highest average basket value in 2024 will be home, garden, furniture, and decoration; airlines; and stationery and office supplies.
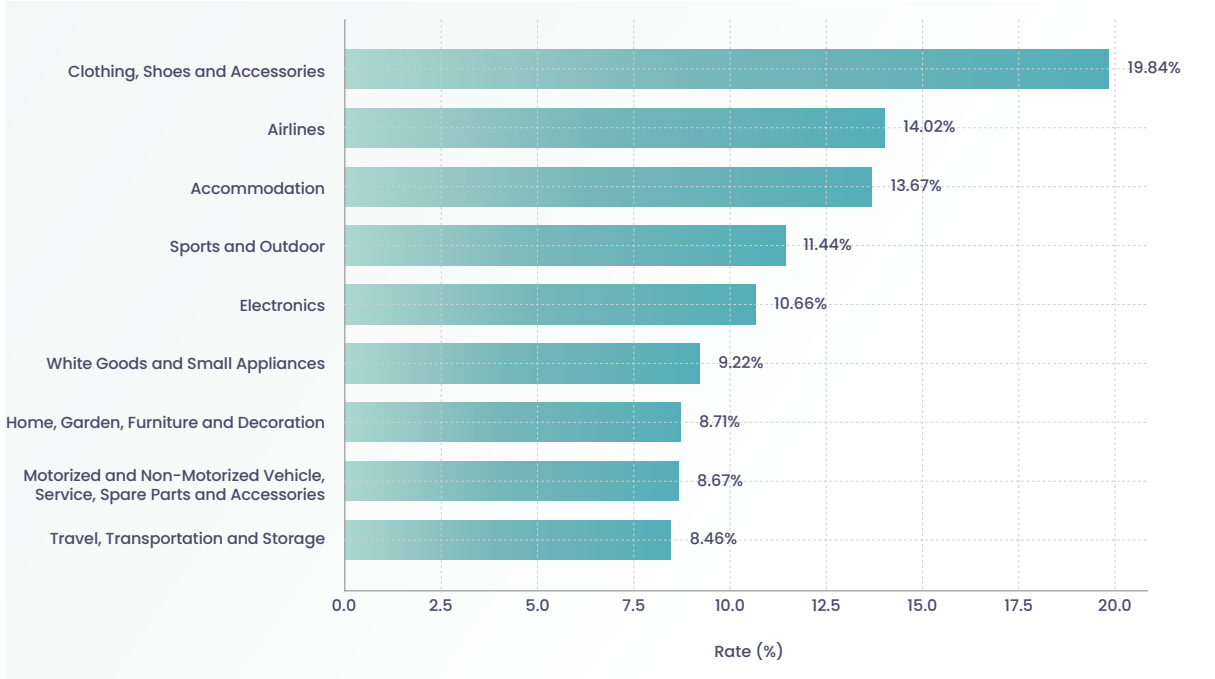
Graph 19. The Ratio of Cancellation and Return by Sector (%, 2024)

According to the graph, the highest cancellation and return rate is **19.84%** in the clothing, footwear, and accessories sector. This sector is followed by the airlines, accommodation, sports and outdoor, electronics, and white goods and small appliances sectors. The average price of canceled and returned products and services was **656 TL**.

Top-Selling Products by Sector

The best-selling products in e-commerce in general and in sub-sectors more clearly reflect consumer demands and preferences. These product groups are listed in Table 1.

Table 1. Top-Selling Products by Sector (2024; Marketplaces)

General E-Commerce

Shoes, Shirts and Tops, Vacuum Cleaners, Pants, Laptops, Dresses, Coats and Jackets, Cell Phones, Books

Mother and Baby

Body Shampoos, Follow-on Milk Formulas, Baby Snacks, Baby Drinks, Baby Food, Baby Diapers, Baby Wipes

White Goods and Small Appliances

Vacuum Cleaners, Espresso Machines, Toasters, Pressure Cookers, Sewing Machines, Frying Pans, Washing Machines, Dryers, Refrigerators, Air Conditioners, Deep Fryers

Entertainment and Art

Guitars, Electronic Drums, Musical Instrument Amplifier Pedals, Melodicas, Violins, Clarinets, Musical Keyboards, Flutes

Electronics

Mobile phones, laptops, televisions, desktop computers, tablet computers, computer monitors, printers

Food and Supermarket

Cheese, Fresh and Frozen Fruit, Cooking Oil, Nuts and Fruit Mixes, Laundry Detergent, Chips, Eggs, Yogurt, Toilet Paper, Bread and Pastries, Paper Towels

Pet Products

Cat Food, Dog Food, Cat Litter, Cat Toilets, Cat Beds, Cat Treats, Dog Clothes, Dog Treats, Cat Toys, Bird Feed

Clothing, Shoes and Accessories

Shoes, Shirts and Blouses, Trousers, Dresses, Coats and Jackets, Pajamas, Underwear, Socks, Homewear, Vests

Construction, Building Materials, and Real Estate

Electric Hand Drills, Concrete and Wall Cleaners, Angle Grinders, Portable Ladders, Paint, Circular Hand Saws, Tool Bags

Stationery and Office Supplies

Art Pencils, Art Brushes, Craft & Office Scissors, Art & Craft Paint, Writing Pens, Drawing & Coloring Paper, Craft & Office Adhesive

Books and Magazines

Books, Magazines and Newspapers, Paper Products, Stationery, Notebooks, Party supplies

Jewelry

Gold Bullion, Bracelets, Necklaces, Earrings, Rings, Jewelry Sets

Medical, Personal Care and Cosmetics

Perfumes and Colognes, Shampoos and Conditioners, Perm and Straightening Machines, Sunscreens, Compressed Skin Care Masks

Motorized and Non-Motorized Vehicles, Services, Spare Parts, and Accessories

Motorcycle Protective Equipments, Motor Vehicle Seats, Motor Vehicle Chassis and Body Parts, Motor Vehicle Rims and Wheels

Games, Toys and Hobbies

Educational Toys, Light Strings and Wires, Building Set Toys, Turntables and Record Players, Plasticine Mixtures, Gift Boxes and Metal Boxes, Guitar Accessories, Yarn and Wool Tools

Sports and Outdoor

Vehicles, Motorcycle and Scooter Transport Equipment, Treadmills, Skateboard Pads, Bicycle Spoke Screws, Electric Bike Conversion Kits, Elliptical Bikes, Swimming Goggles and Masks

03.

STATISTICS ON
E-COMMERCE BUSINESSES

CHAPTER

Statistics on
E-Commerce Businesses

Chart 20 shows the number of registered enterprises engaged in e-commerce activities by years. **In 2024, 600.800 enterprises engaged in e-commerce activities in Türkiye.**
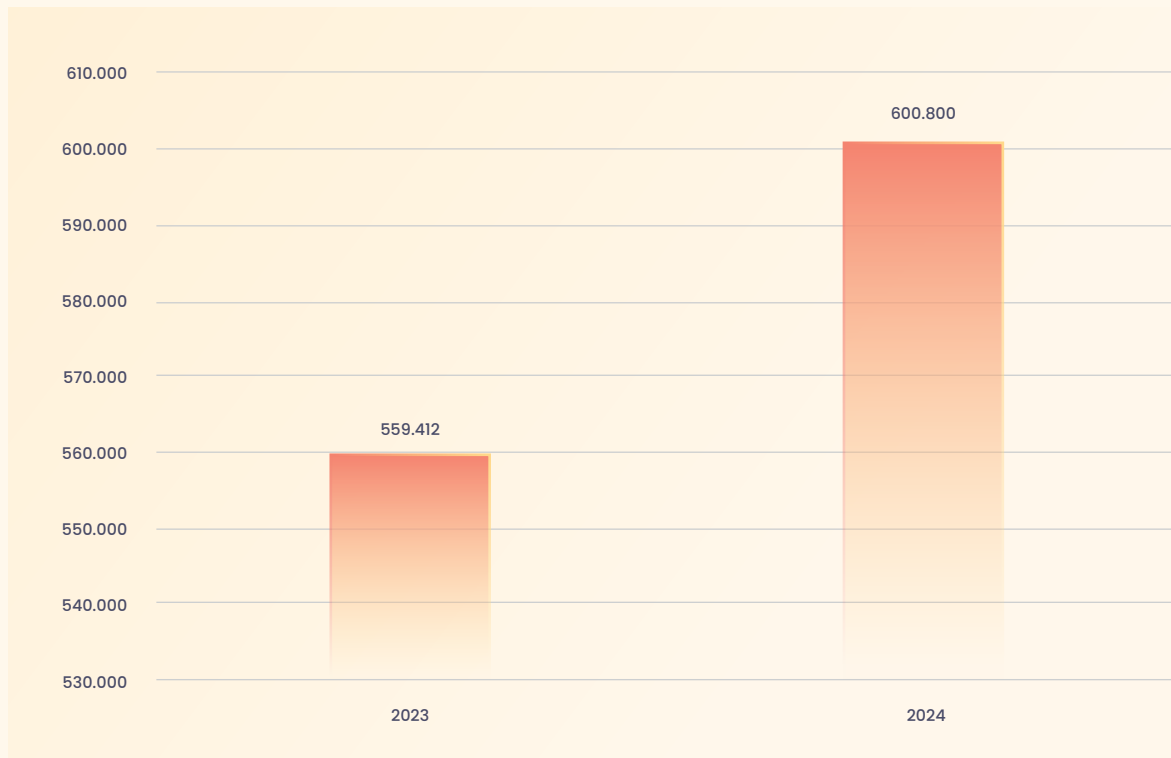
Graph 20. Number of Businesses Engaged in E-Commerce Activities by Year (2023-2024)

78.6%

17.8%

- Joint Stock Company
- Limited Liability Company
- Sole Proprietorship

In Türkiye, **78.6%** of businesses engaged in e-commerce activities are sole proprietorship, **17.8%** is limited liability company and **3.6%** is joint stock company.

3.6%
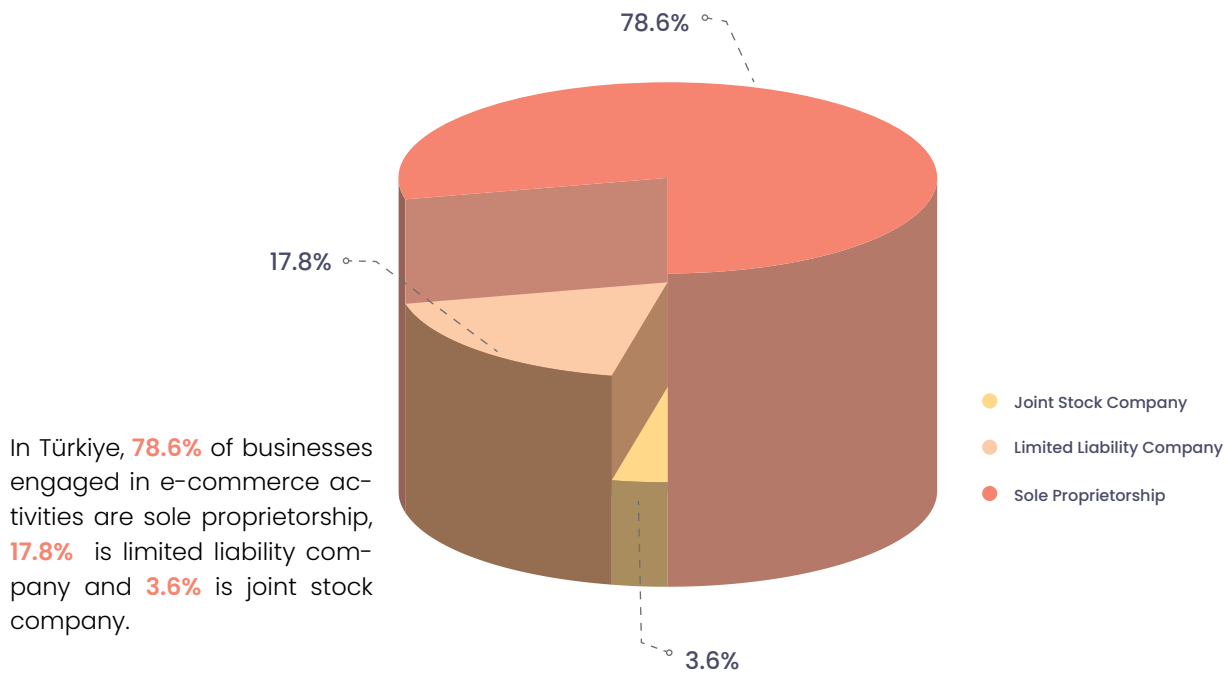
Graph 21. Distribution of Businesses Engaged in E-Commerce by Type (%, 2024)

Age	Female	Male
75+	0.44%	0.87%
70-74	0.84%	1.24%
65-69	1.78%	2.65%
60-64	3.00%	4.25%
55-59	4.42%	5.55%
50-54	8.09%	7.26%
45-49	12.25%	11.11%
40-44	16.22%	14.93%
35-39	16.47%	15.98%
30-34	16.63%	15.63%
25-29	14.53%	14.15%
20-24	4.96%	6.05%
15-19	0.30%	0.32%
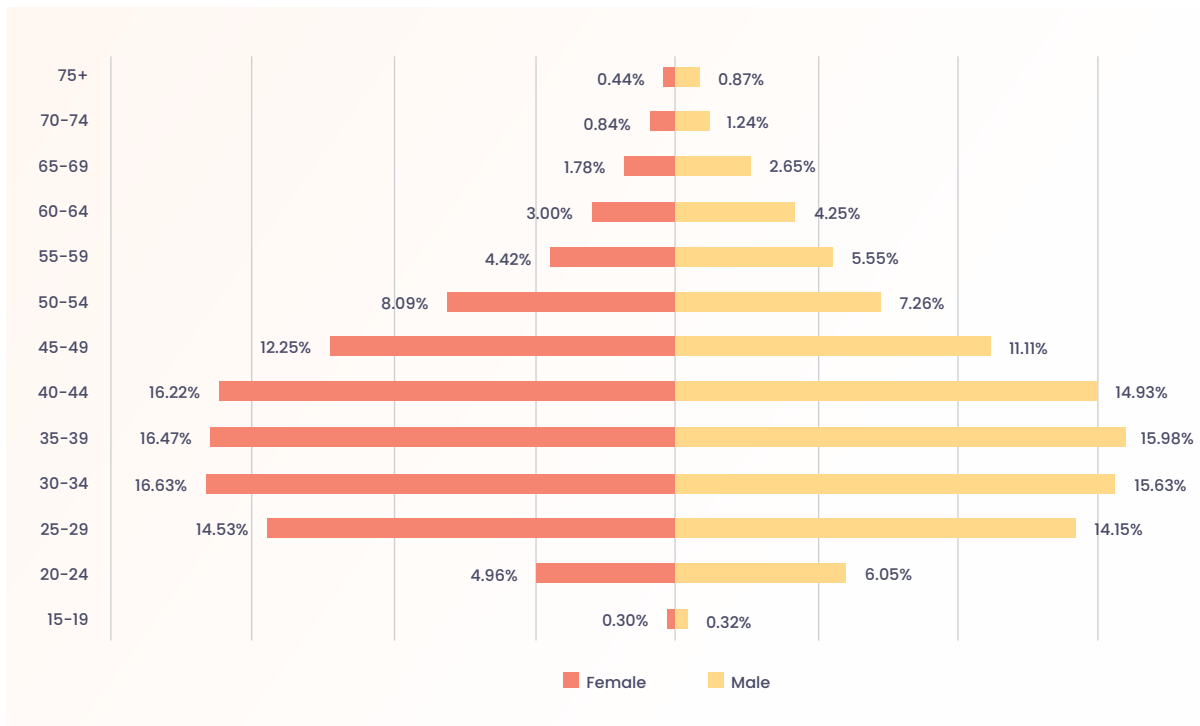
Female **Male**

Graph 22. Distribution of Tradesmen Engaged in E-Commerce by Gender and Age (%, 2024)

In Türkiye, **72.8% of tradesmen engaged in e-commerce activities are male and 27.2% are female.** Graph 22 shows that the majority of male business owners are between the ages of 35-39, while the majority of female business owners are between the ages of 30-34.

2.0%
Very large sized
business

11.5%
large sized
business

14.4%
Medium-sized
business

72.1%
Small-sized
Business
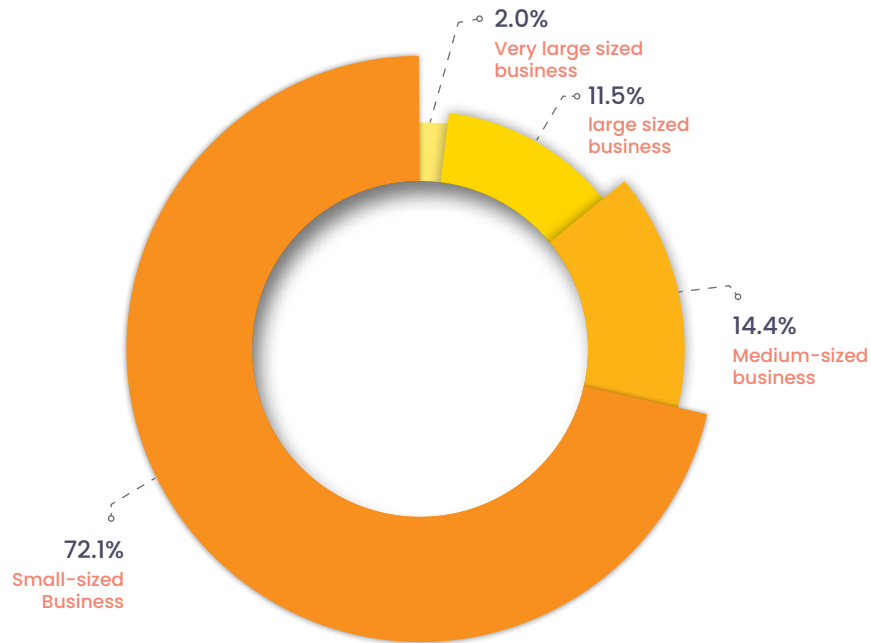
Graph 23. Distribution of E-Commerce Businesses by Annual Total Transaction Volume (%, 2024)

Chart 23 shows e-commerce enterprises grouped according to their total annual transaction volume and the distribution of enterprises in each group.

There are a total of **600.800** e-commerce businesses in Türkiye. Small-sized enterprises, the most concentrated group, constitute **72.1%** of the total number of enterprises. This suggests that a large number of micro-level businesses with small transaction volumes are active in the system.

Medium- sized enterprises are in second place, constituting **14.4%** of total enterprises.

High-sized enterprises account for **11.5%** of the total number of enterprises. This group refers to enterprises that systematically carry out e-commerce activities, have reached a certain sized and have developed operational capacity.

The top group, very large-sized enterprises, constitute **2%** of total enterprises. The contribution of these businesses to the e-commerce system in terms of transaction volume is quite high.

Distribution of Businesses by Sector
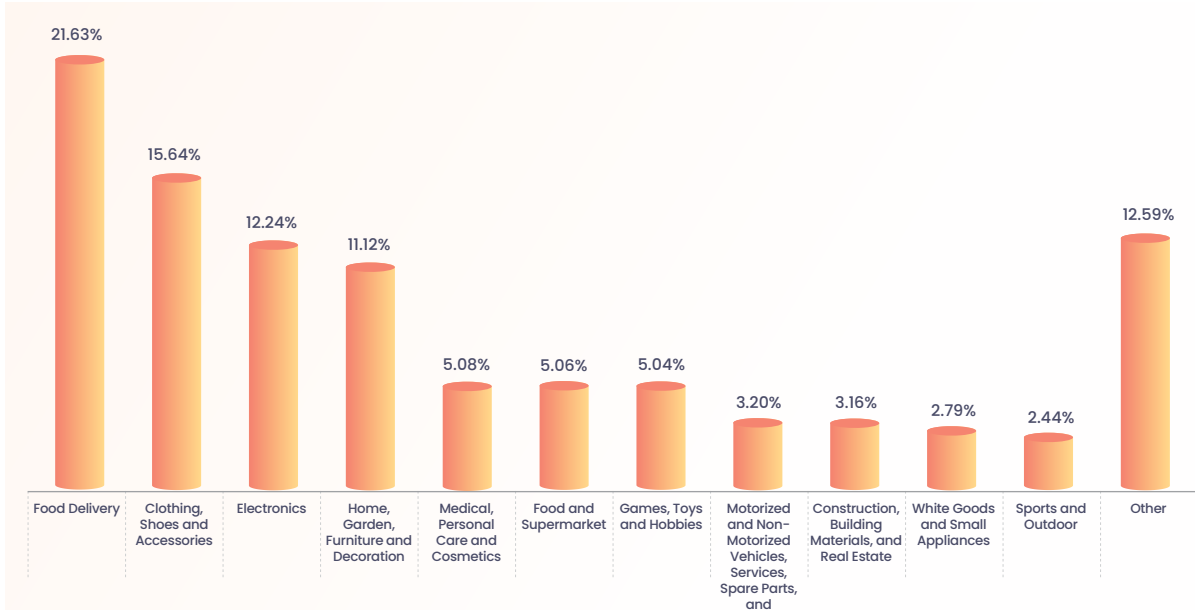
Graph 24. Distribution of E-Commerce Businesses by Sector (%, 2024)

Graph 24 shows the distribution of enterprises operating in the e-commerce ecosystem by sectors. When this distribution is analyzed, it is seen that the catering sector has the highest rate with **21.63%**. The clothing, footwear and accessories sector ranked second with **15.64%**. This sector is followed by electronics with **12.24%** and home, garden, furniture and decoration with **11.12%**. These sectors stand out as sectors with both high consumer demand and high accessibility for entrepreneurs in e-commerce.

The medical, personal care and cosmetics, food and supermarket, and games, toys and hobbies sectors at **5%** levels can be considered as groups with more niche or specialized businesses in terms of product range.

A smaller share of enterprises operate in the motorized and non-motorized vehicles, services, spare parts and accessories, construction, building materials and real estate, white goods and small household appliances, and sports and outdoor sectors.

This distribution shows that sectors such as food delivery, clothing, footwear and accessories, and electronics are at the forefront of e-commerce in terms of both number of enterprises and market potential, while more technical or capital-intensive sectors have a more limited number of enterprises.

Top 5 Industries with the Highest Number of Businesses by Group

Small-Sized Businesses
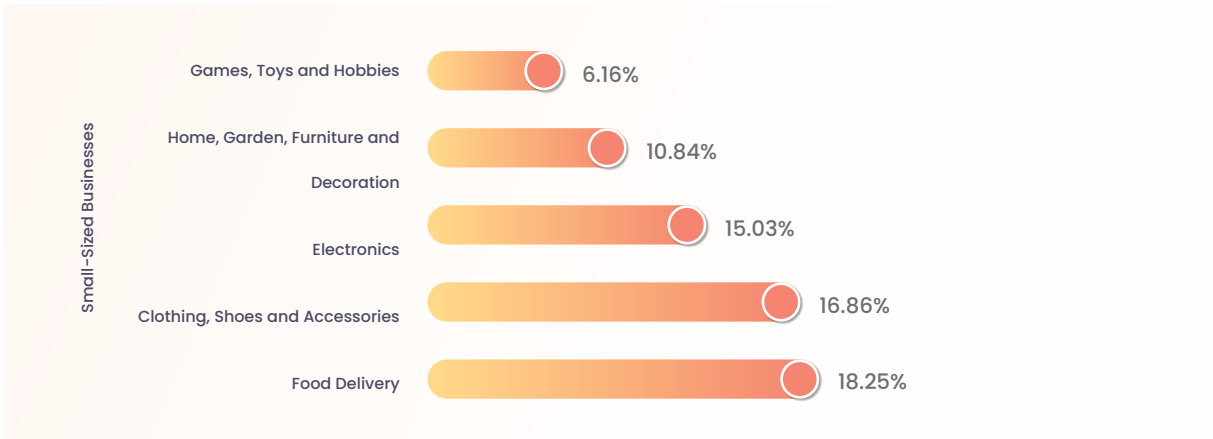
Graph 25. Industrial Distribution of Small-Sized Businesses (%, 2024)

The sector with the highest concentration of Small-Sized Businesses is the food delivery sector with **18.25%.** This sector is followed by clothing, footwear and accessories with **16.86%,** electronics with **15.03%,** home, garden, furniture and decoration with **10.84%,** games, toys and hobbies with **6.16%.** This distribution shows that the most represented sectors in the low-transaction volume segment are concentrated in food, fashion and technology.

Medium-Sized Businesses
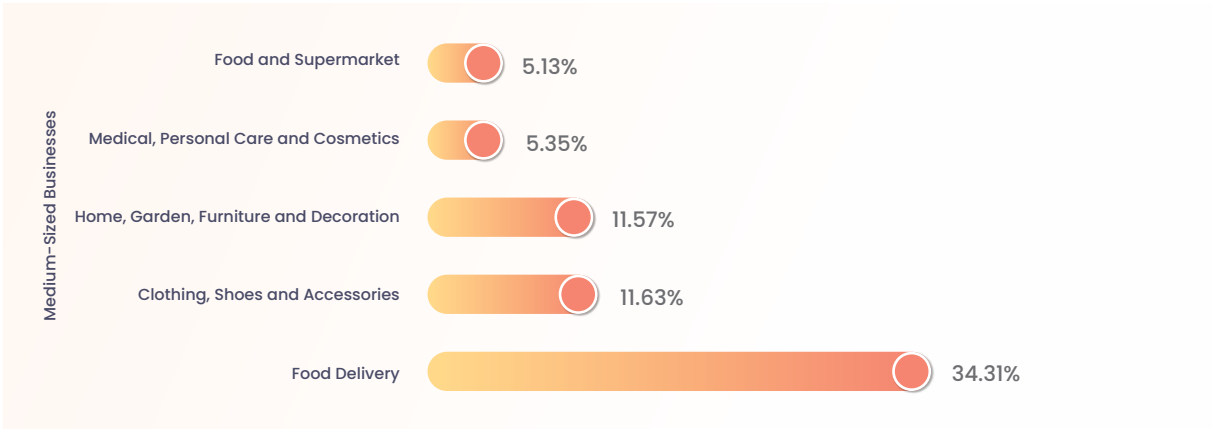
Graph 26. Industrial Distribution of Medium Sized Businesses (%, 2024)

The sector with the highest concentration of medium-sized businesses is the food delivery sector with **34.31%.** This sector is followed by clothing, footwear and accessories with **11.63%,** home, garden, furniture and decoration with **11.57%,** medical, personal care and cosmetics with **5.35%,** food and supermarkets with 5.13%.

Large Sized Businesses

Medical, Personal Care and Cosmetics — 5.32%
Electronics — 5.47%
Home, Garden, Furniture and Decoration — 11.97%
Clothing, Shoes and Accessories — 12.99%
Food Delivery — 29.16%
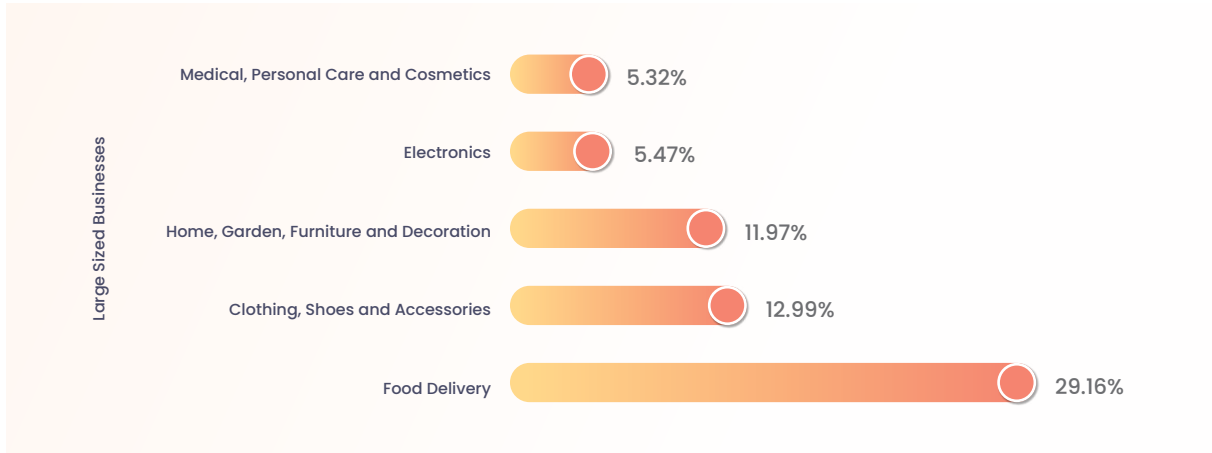
Graph 27. Industrial Distribution of Large Sized Businesses (%, 2024)

The food delivery sector also has the largest share in large sized businesses, at **29.16%.** This sector is followed by clothing, footwear, and accessories with **12.99%,** home, garden, furniture, and decoration with **11.97%,** electronics with **5.47%,** and medical, personal care, and cosmetics with **5.32%.**

Very Large Businesses

White Goods and Small Appliances — 8.31%
Food Delivery — 9.08%
Electronics — 9.77%
Home, Garden, Furniture and Decoration — 13.20%
Clothing, Footwear, and Accessories — 16.05%
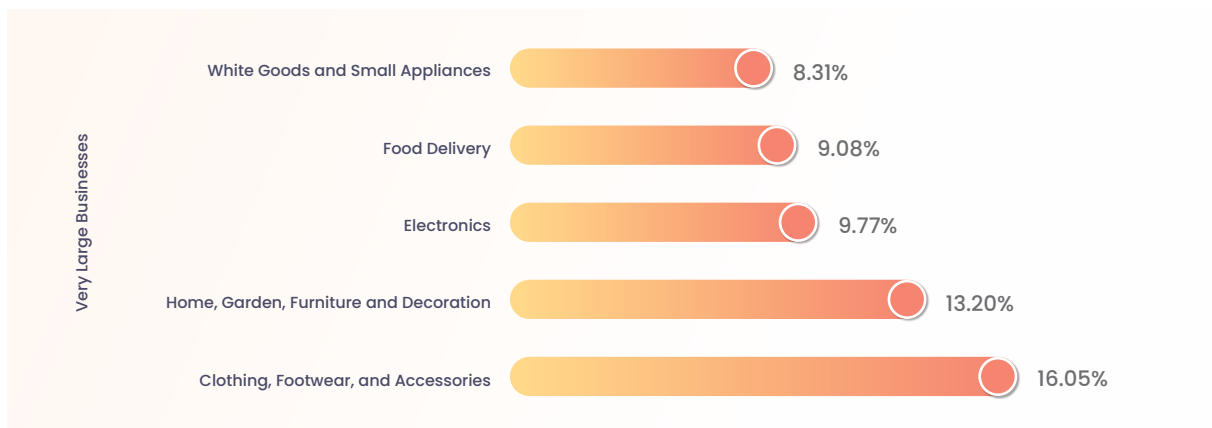
Graph 28. Industrial Distribution of Very Large Sized Businesses (%, 2024)

Very large businesses account for **16.05%** of the total, with the highest concentration in the clothing, footwear, and accessories sector. Other sectors with significant activity include home, garden, furniture, and decoration **(13.20%),** electronics **(9.77%),** food delivery **(9.08%),** and white goods and small appliances **(8.31%).**

Distribution of Businesses by Number of Marketplaces in Which They Operate (Excluding the Food Delivery Sector)

1.5%
Working with
4 marketplaces

0.5%
Working with
5 marketplaces

4.8%
Working with
4 marketplaces

15.1%
Working with
2 marketplaces

Businesses Operating in
Marketplaces
(Excluding the Food Delivery
Sector)

78.1%
Working with
1 marketplaces
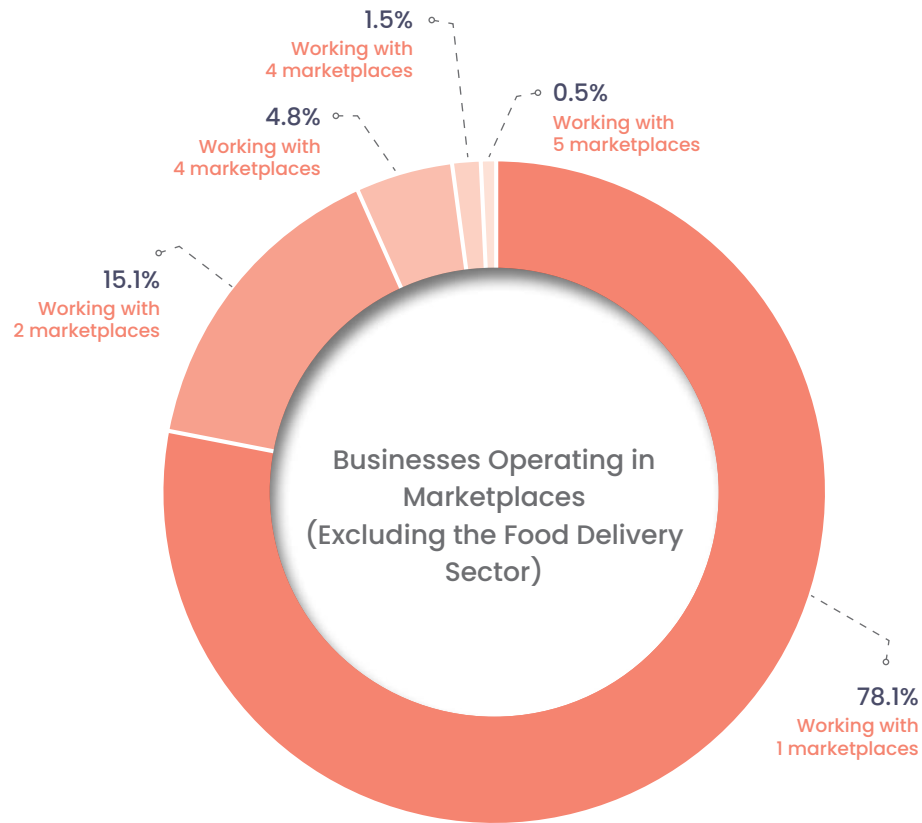
Graph 29. Distribution of Businesses Operating in Marketplaces (Excluding the Food Delivery Sector, %)

Graph 29 shows that **78.1%** of businesses engaged in e-commerce in the marketplace operate in a single marketplace, representing a large majority. It is believed that sellers' behavior is influenced by their desire to focus on the marketplace with the highest traffic (network effect) in their respective sectors and to work with a single marketplace whose rules they are familiar with.

The percentage of businesses selling at two marketplaces is **15.1%,** the percentage of businesses selling at three marketplaces is **4.8%,** and the percentage of businesses selling at four marketplaces is **1.5%.**

In The Food Delivery Sector Marketplace Usage Habits

6.1%
Working with
3 marketplaces

27.3%
Working with
2 marketplaces

Businesses operating in
the Food Delivery sector
and active in marketplaces

66.6%
Working with
1 marketplace
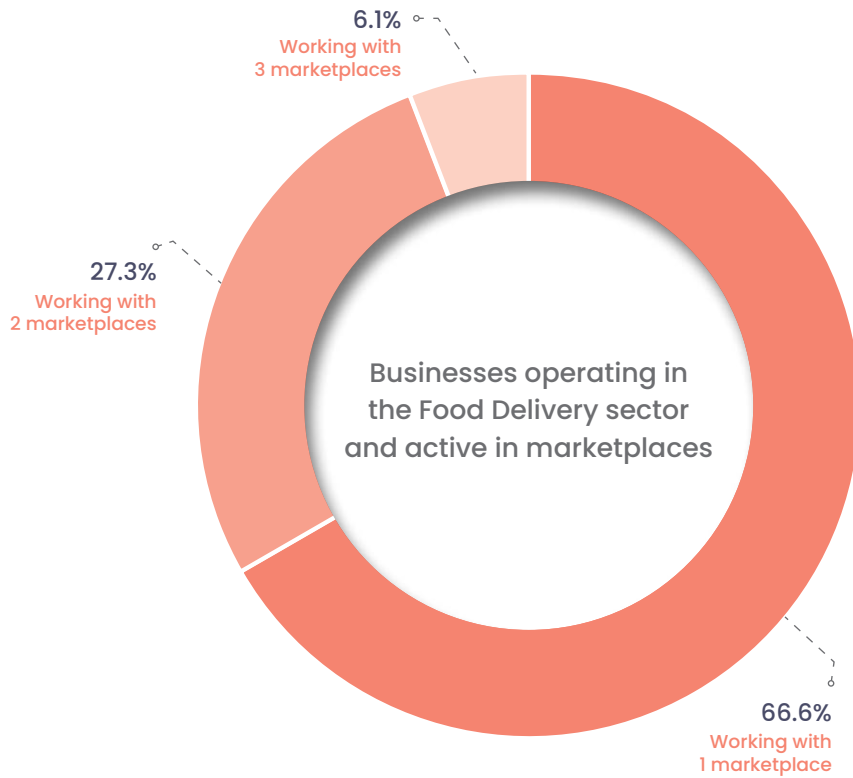
Graph 30 shows that, although not as much as businesses operating in other sectors, the majority of businesses operating in the food delivery sector also sell through a single marketplace.

Businesses operating in a market place account for **66.6%** of the total number of businesses. Businesses operating in two markets account for 27.3% of the total number of businesses, while those operating in three markets account for **6.1%**.

27.3% of the total number of businesses, while those operating in three markets account for **6.1%**.

Graph 30. Distribution of Businesses Operating in Marketplaces (Food Delivery Sector, %)

Sectors with the Highest Concentration of Businesses by Province
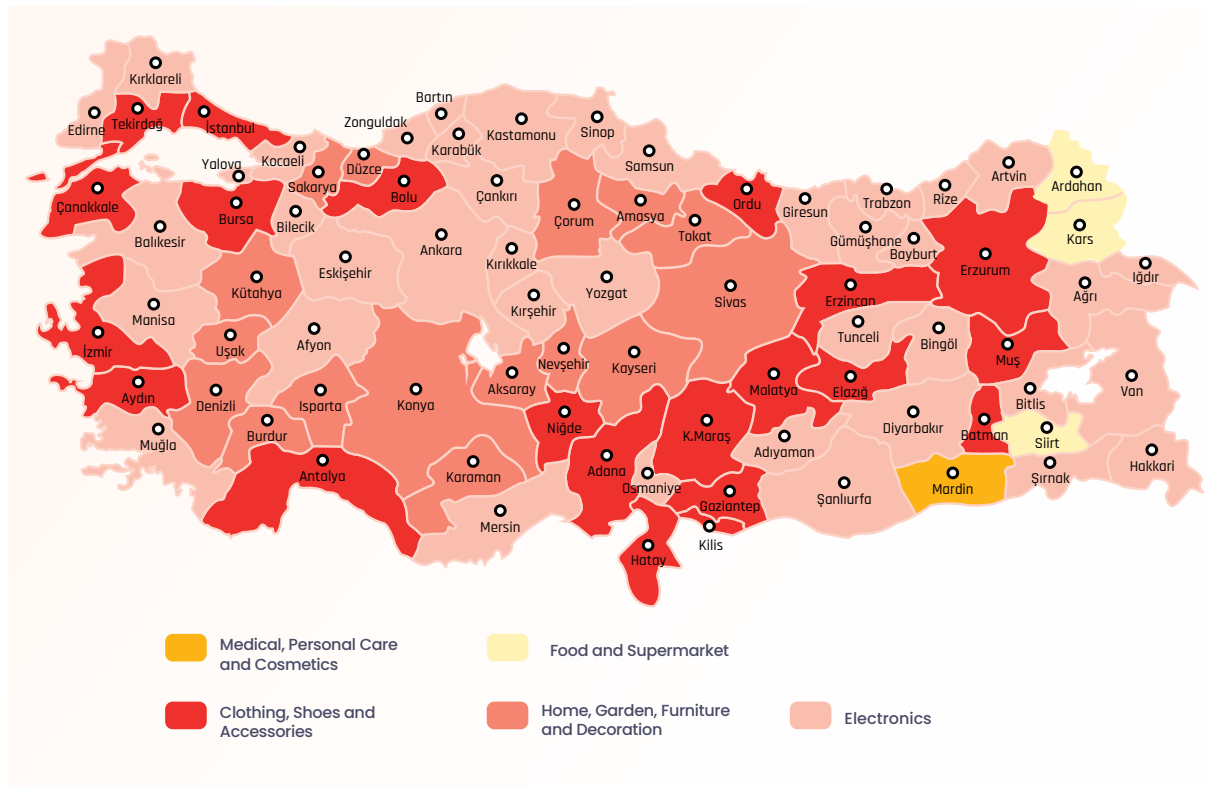
Map 1. Industries with the Highest Concentration of Businesses by Province (2024)

Although the industrial concentration of businesses engaged in e-commerce activities varies across provinces in Türkiye, the electronics sector and the clothing, footwear, and accessories sector are the leading industries in most provinces.[1]

The home, garden, furniture, and decoration sector stands out in regions with high production capacity. In provinces where this sector is a leader, there are generally small and medium-sized businesses engaged in home textiles and furniture production.

Food products are the leading industries in the provinces of Ardahan, Kars, and Siirt. The digital marketing of geographically indicated products in these provinces has contributed to the development of the food sector.

In Mardin province, there are more businesses operating in niche product groups such as personal care and cosmetics. The shift of these businesses, which specialize in specific product categories, toward digital sales channels has been instrumental in raising the profile of the relevant sector throughout the province.

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1   The map shows the sectors with the highest concentration of e-commerce businesses in Türkiye. The map shows only the sector with the highest number of businesses for each province; this does not mean that other sectors are at a low level in that province. In some provinces, there are also a large number of businesses operating in the second or third ranked sectors. E-commerce businesses operating in the food delivery sector have not been included in this analysis.

04.

MONTHLY AND DAILY STATISTICS

CHAPTER

Monthly and Daily
Statistics
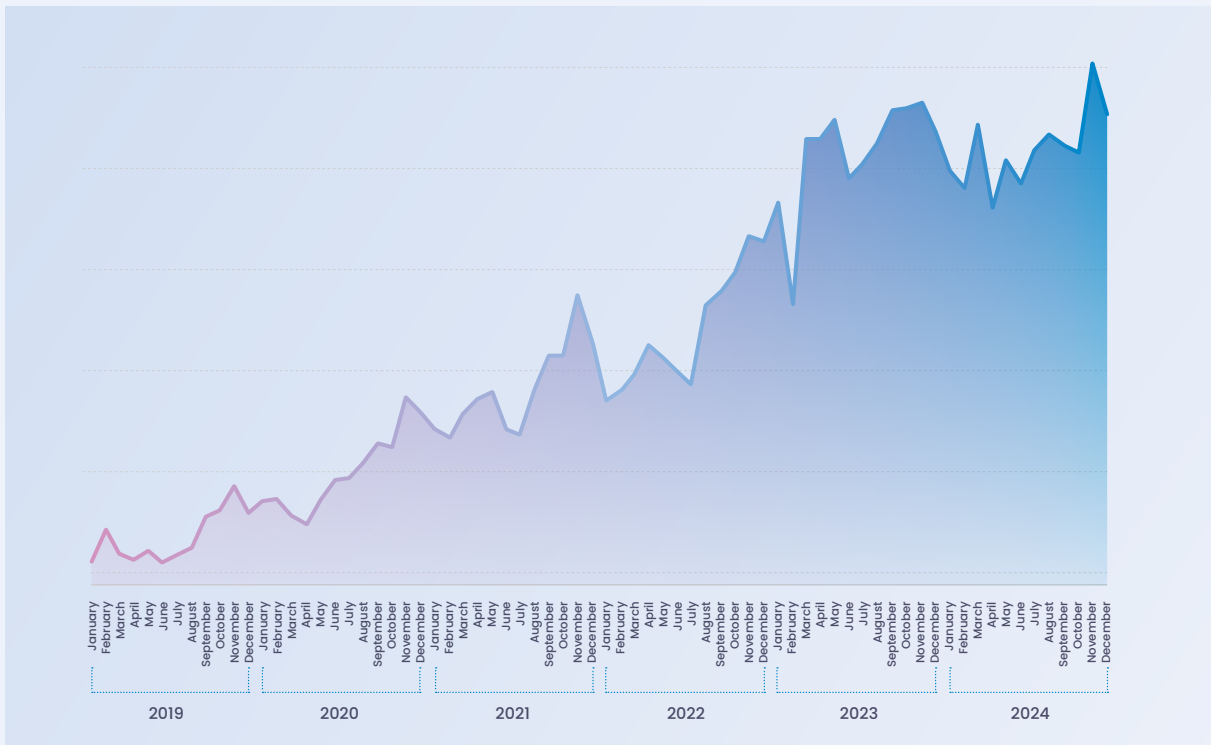
Graph 31. Monthly Trend of Real E-Commerce Volume

Graph 31 shows the trend in real e-commerce volume in Türkiye by month. As can be seen from the graph, the overall e-commerce volume has been on a steady upward trend since 2019.
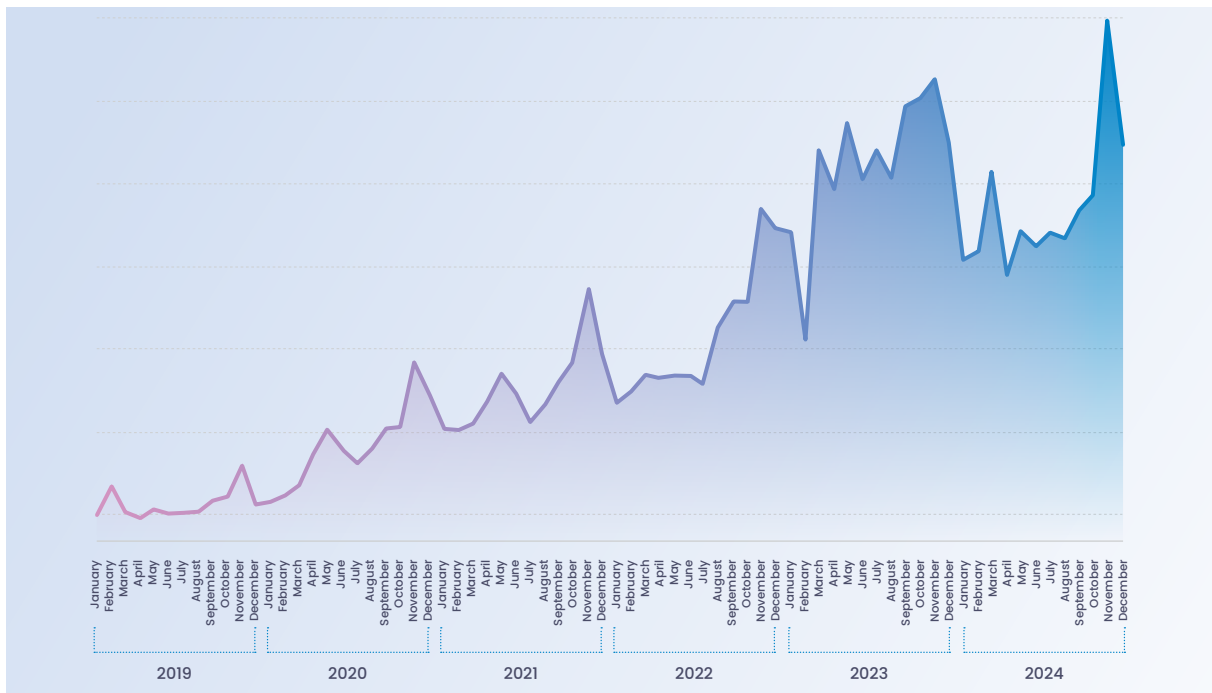
Graph 32. Monthly Trend of Real Retail E-Commerce Volume

Graph 32 shows the trend in real retail e-commerce volume in Türkiye by month. **The upward trend in overall e-commerce volume is also evident in retail e-commerce.** The graph shows that retail e-commerce has experienced significant growth over time.

Daily E-Commerce Volume

If an equal number of e-commerce transactions were made on all days of the year, the daily rate would be 1/365 = 0.274%. The deviation size from the daily e-commerce rate of 0.274% in Graph 33 shows the extent to which the number of transactions on the relevant days is greater or smaller than the average number of transactions.
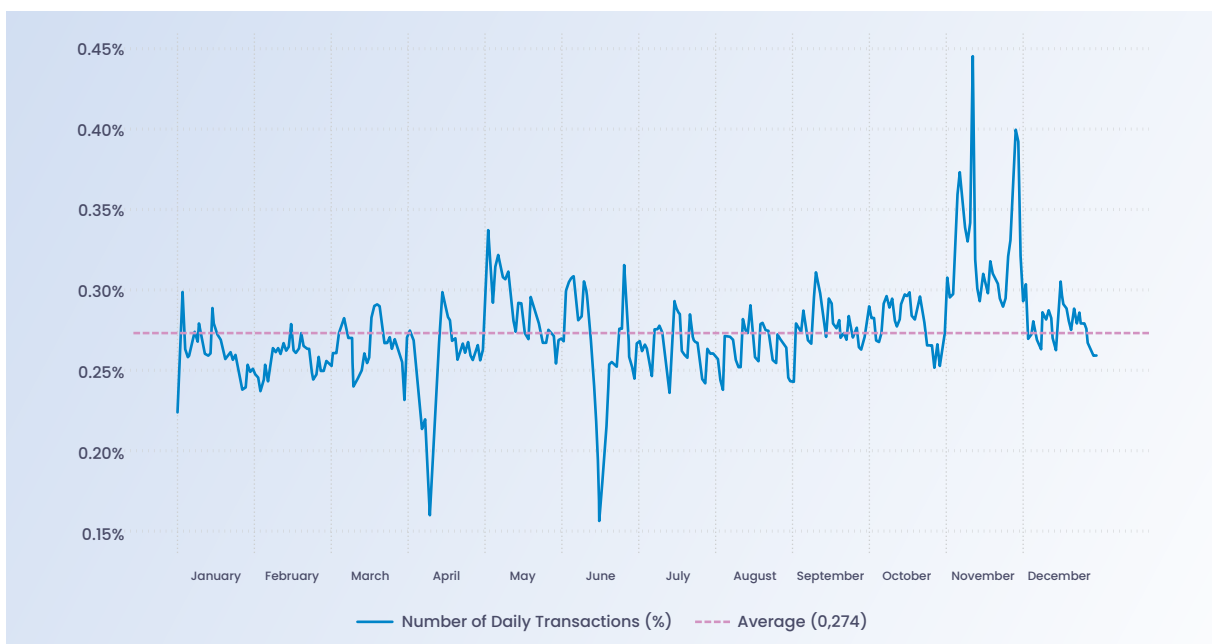
Graph 33. Daily Number and Average Number of Transactions (%, 2024; Marketplaces)

When examining the graph, it can be observed that the number of daily transactions fluctuates throughout the year, but generally remains around the average. On certain dates, there has been a noticeable increase or decrease in the number of transactions; **particularly in May and November, there have been significant spikes in transaction numbers.** These peaks are the result of special days and major campaign periods. On the other hand, there were significant decreases in the number of transactions, particularly in April and June. These low points are due to a decrease in consumer demand for e-commerce during religious holidays.

Table 2. Top 15 Days with the Most Transactions (2024)

Date	Number of Daily Transactions (Percent)	Special Day
11.11.2024	0.44	November Campaigns
28.11.2024	0.4	
29.11.2024	0.39	
06.11.2024	0.37	
05.11.2024	0.36	
07.11.2024	0.36	
27.11.2024	0.35	
10.11.2024	0.34	
08.11.2024	0.34	
03.05.2024	0.34	Before Mother's Day
26.11.2024	0.33	November Campaigns
09.11.2024	0.33	
04.05.2024	0.32	Before Mother's Day
12.11.2024	0.32	November Campaigns
07.05.2024	0.32	Before Mother's Day

Table 3. Top 15 Days with the Least Transactions (2024)

Date	Number of Daily Transactions (Percent)	Special Day
01.01.2024	0.22	The First Day of The Year
31.03.2024	0.23	
06.04.2024	0.23	Before Eid al-Fitr
07.04.2024	0.21	
08.04.2024	0.22	
09.04.2024	0.2	
10.04.2024	0.16	Eid al-Fitr
11.04.2024	0.19	
12.04.2024	0.21	
15.06.2024	0.22	Eid al-Adha
16.06.2024	0.16	
17.06.2024	0.18	
18.06.2024	0.2	
19.06.2024	0.22	
31.12.2024	0.24	New Year's Eve

Tables 2 and 3 show the days with the most and least transactions. **According to the tables, while the highest number of e-commerce transactions was reached during the November campaigns, fewer transactions occurred on the days of religious holidays compared to other days.**
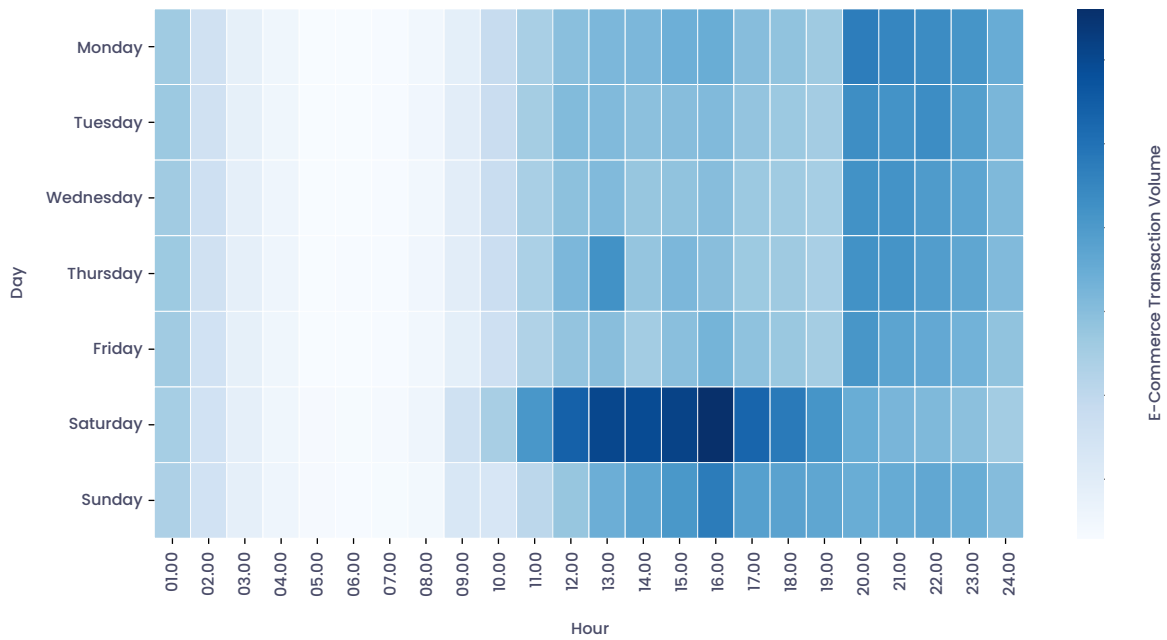
Graph 34. Daily and Hourly E-Commerce Transaction Volume (2024; Marketplaces)

Graph 34 presents the distribution of transaction intensity in Turkish e-commerce sector on the basis of days of the week and time intervals. When the graph is analyzed, it is observed that there is an increase in e-commerce transactions after **20.00 compared to other hours of the day**. However, shopping hours between 10:00 and 19:00, especially on Saturdays, were the busiest days and hours of the week.

1,357.72

855.96

05.

PAYMENT AND SPENDING
TYPE STATISTICS

CHAPTER

Payment and Spending
Type Statistics
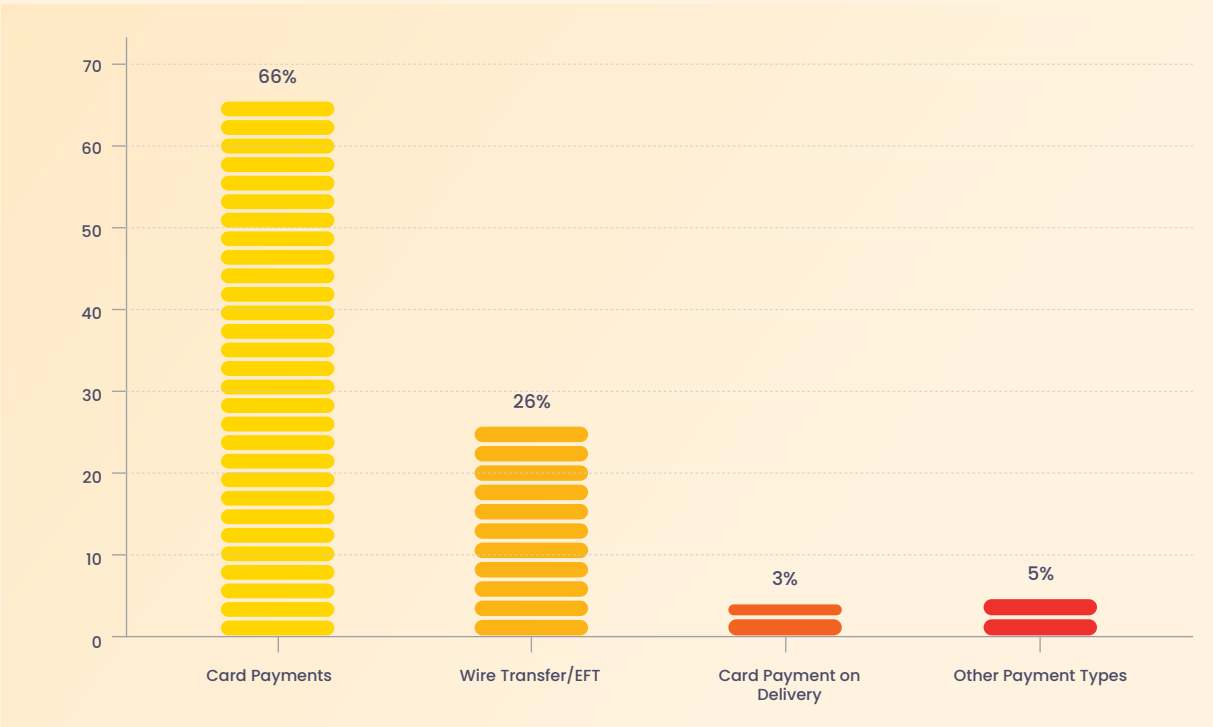
Graph 35. Distribution of Payment Methods in E-Commerce Volume (%, 2024)

Graph 35 shows the distribution of e-commerce volume by payment methods. When the payment methods used in e-commerce are analyzed card payments are in the first place with **66%**. This shows that the majority of e-commerce users prefer debit and credit cards for payment transactions. Wire transfer/EFT payments ranked second with **26%,** followed by card payment on delivery with **3%** and other payment types[1] with **5%**.

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1   The category "Other Payment Types" includes the following payment methods: Prepaid Card, Current Payment / Check / Direct Debit, Digital or Mobile Wallet, Virtual Money, Shopping Credit, On-site Payment / Cash, Promotion / Excess Merchandise, Swift, Multiple Payment.

This distribution shows that digital payment systems are more widespread in the e-commerce sector in Türkiye and that the use of credit and debit cards is much more preferred than traditional payment methods. However, as seen in Graph 36, **65%** of card payments were made with the 3D secure method.

3D Secure Usage

35%
No

65%
Yes
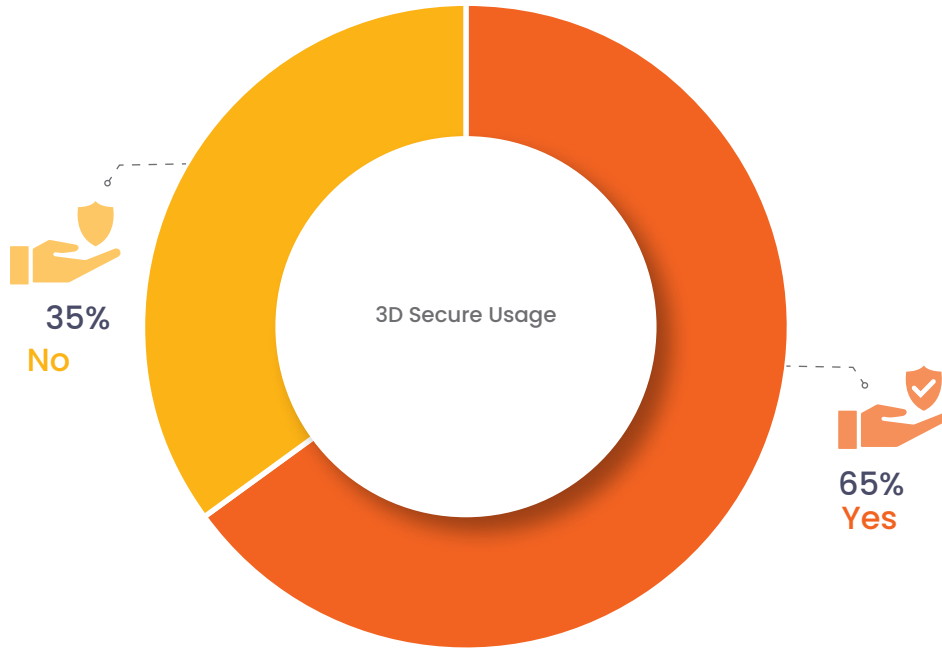
Graph 36. 3D Secure Usage Rate in Card-Based Purchases (2024)

6.2%
Purchases of Other
Countries from Turkey

6.1%
Turkiye's
Purchases from
Other Countries

Graph 37 shows the distribution of e-commerce volume by spending type. In 2024, the share of domestic spendings was **87.7%**, while the share of spending made by other countries through e-commerce websites of Türkiye was **6.2%** and the share of purchases made by Turkish citizens from abroad was **6.1%.**

**Distribution of
E-Commerce Volume
by Spending Type**

- Domestic Spending
- Turkiye's Purchases from Other Countries
- Purchases of Other Countries from Türkiye

87.7%
Domestic
Spending
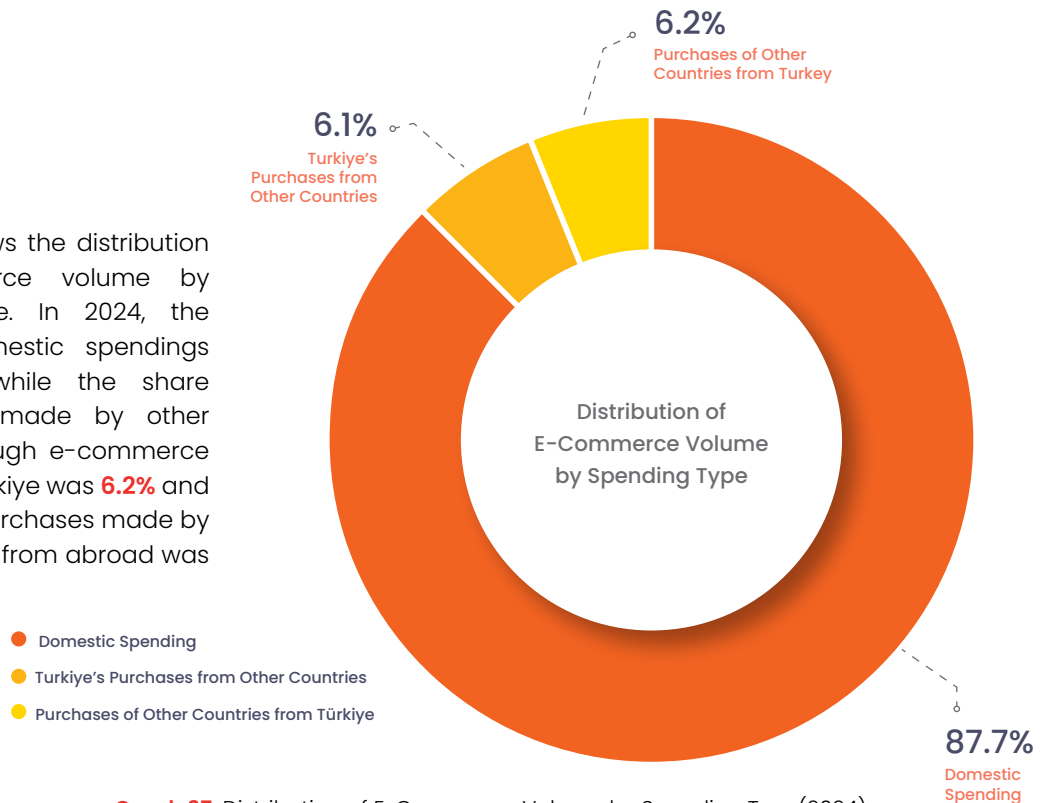
Graph 37. Distribution of E-Commerce Volume by Spending Type(2024)

06.

E-COMMERCE ADAPTATION
INDEX AND PROVINCIAL
STATISTICS

CHAPTER

E-Commerce Adaptation Index and
Provincial Statistics

E-Commerce Adaptation Index

Table 4. E-Commerce Compliance Index of Provinces (2024)

| Rank	Province	Domestic E-Commerce / GDP	E-Commerce Businesses / Number of Businesses	Ratio of Sales to Purchases in the Province Volume (Million TL)	E-Commerce Per Business Volume (Million TL)	E-Commerce Adaptation Index
1	İstanbul	14.38%	18.06%	264.97%	8.93	93.3
2	Kayseri	5.34%	15.47%	123.11%	2.86	68.39
3	İzmir	4.50%	15.82%	86.73%	2.61	65.79
4	Kocaeli	3.86%	15.60%	117.26%	4.21	64.67
5	Çorum	3.20%	8.04%	141.00%	4.68	63.11
6	Ankara	4.18%	15.09%	91.72%	3.29	62.95
7	Bursa	3.88%	15.57%	82.31%	2.31	60.18
8	Eskişehir	3.68%	15.86%	75.79%	2.43	59.62
9	Aydın	4.73%	9.47%	71.02%	2.9	56.17
10	Denizli	3.58%	12.10%	73.47%	1.87	54.03
11	Gaziantep	3.45%	9.74%	84.41%	2.98	53.79
12	Antalya	3.45%	10.24%	67.29%	2.53	52.32
13	Adana	3.17%	11.47%	66.59%	2.26	52.28
14	Bolu	5.33%	11.54%	143.98%	5.29	51.87
15	Niğde	3.28%	8.47%	79.98%	2.76	51.18
16	Trabzon	3.58%	10.18%	54.48%	2.12	50.95
17	Aksaray	2.84%	8.25%	85.89%	2.78	50.1
18	Batman	2.68%	12.09%	48.25%	1.91	49.54
19	Konya	2.61%	11.92%	60.20%	1.6	49.48
20	Isparta	2.67%	12.22%	53.94%	1.56	49.46
21	Elazığ	2.90%	7.87%	62.29%	2.74	48.05
22	Muğla	3.04%	9.04%	49.28%	2.24	47.9
23	Samsun	2.46%	11.87%	47.30%	1.5	47.84
24	Çankırı	2.37%	8.48%	63.64%	3.01	47.71
25	Zonguldak	2.49%	9.50%	51.39%	2.25	46.95
26	Sivas	2.26%	10.46%	52.59%	1.77	46.58
27	Diyarbakır	2.80%	7.49%	45.09%	2.98	46.49
28	Tokat	2.81%	8.26%	53.46%	1.89	46.06

Rank	Province	Domestic E-Commerce / GDP	E-Commerce Businesses / Number of Businesses	Ratio of Sales to Purchases in the Province Volume (Million TL)	E-Commerce Per Business Volume (Million TL)	E-Commerce Adaptation Index
29	Mardin	2.13%	9.46%	51.13%	2.15	45.65
30	Düzce	1.86%	11.95%	44.01%	1.35	45.63
31	Sakarya	1.81%	12.43%	39.04%	1.27	45.51
32	Uşak	2.32%	9.22%	54.91%	1.62	45.3
33	Çanakkale	2.07%	10.62%	42.15%	1.52	44.98
34	Mersin	2.04%	9.43%	49.52%	1.88	44.75
35	Karabük	2.14%	10.70%	37.29%	1.38	44.65
36	Kütahya	1.88%	10.55%	46.28%	1.47	44.55
37	Yalova	1.38%	13.20%	32.05%	1.05	44.2
38	Rize	2.14%	10.86%	32.69%	1.21	44.19
39	Balıkesir	1.91%	10.05%	39.58%	1.43	43.52
40	Burdur	2.07%	7.84%	47.32%	1.68	42.58
41	Edirne	2.02%	8.79%	35.77%	1.6	42.48
42	Tekirdağ	1.24%	11.27%	33.70%	1.39	42.35
43	Erzurum	1.76%	9.21%	37.05%	1.62	42.29
44	Kırklareli	1.52%	9.07%	36.73%	1.67	41.5
45	Nevşehir	2.04%	7.89%	37.55%	1.42	41.34
46	Şanlıurfa	2.08%	5.19%	48.75%	2.5	41.23
47	Adıyaman	1.99%	4.60%	48.90%	2.96	41.12
48	Bartın	1.65%	9.63%	28.26%	1.17	40.98
49	Van	2.03%	6.43%	35.89%	2.15	40.88
50	Osmaniye	1.73%	7.13%	45.12%	1.78	40.79
51	Manisa	1.42%	8.49%	39.24%	1.5	40.43
52	Sinop	1.82%	7.58%	33.65%	1.54	40.29
53	Amasya	1.61%	8.35%	34.84%	1.26	40.1
54	Ordu	1.79%	7.85%	32.42%	1.28	39.95
55	Kırıkkale	1.13%	9.88%	30.90%	1.17	39.92
56	Hatay	1.66%	6.27%	40.94%	2.09	39.88
57	Erzincan	1.21%	9.37%	30.68%	1.31	39.8
58	Afyonkarahisar	1.55%	7.67%	40.14%	1.38	39.79
59	Bayburt	1.66%	7.88%	28.39%	1.42	39.55
60	Siirt	1.18%	8.74%	28.18%	1.62	39.39
61	Bilecik	0.87%	10.02%	25.90%	1.19	38.95
62	Kahramanmaraş	1.42%	6.40%	40.61%	1.9	38.94
63	Giresun	1.52%	7.88%	26.43%	1.09	38.4
64	Karaman	1.03%	8.74%	32.16%	1.11	38.35
65	Kastamonu	1.36%	6.85%	36.08%	1.47	38.18
66	Bingöl	1.42%	5.72%	30.73%	2.03	37.69
67	Şırnak	1.00%	5.38%	31.66%	2.77	37.44
68	Malatya	1.18%	7.44%	27.93%	1.19	37.19
69	Kars	1.19%	6.88%	23.65%	1.49	36.8
70	Kilis	1.05%	7.08%	25.75%	1.21	36.27

Rank	Province	Domestic E-Commerce / GDP	E-Commerce Businesses / Number of Businesses	Ratio of Sales to Purchases in the Province Volume (Million TL)	E-Commerce Per Business Volume (Million TL)	E-Commerce Adaptation Index
71	Gümüşhane	1.14%	6.57%	22.75%	1.2	35.72
72	Ağrı	0.97%	5.80%	20.60%	1.44	34.65
73	Kırşehir	0.84%	6.45%	21.17%	1.06	34.35
74	Iğdır	0.83%	6.39%	17.21%	1.15	34.1
75	Yozgat	0.97%	5.75%	21.98%	1.03	33.99
76	Artvin	0.96%	5.57%	20.26%	1.09	33.73
77	Muş	0.78%	5.13%	21.59%	1.45	33.43
78	Ardahan	0.55%	4.17%	15.78%	1.29	30.98
79	Bitlis	0.57%	4.70%	12.55%	0.85	30.6
80	Tunceli	0.44%	4.06%	10.77%	1.12	29.87
81	Hakkari	0.37%	3.57%	10.14%	1.13	29.08

In the table above, an e-commerce adaptation index has been created on a province basis. The e-commerce adaptation index is calculated using the weighted average of four basic variables to measure the level of e-commerce adaptation of provinces in Türkiye. The criteria in this index consist of the ratio of sales to purchases, e-GDP, e-commerce volume per enterprise and the ratio of the number of e-commerce enterprises to the total number of enterprises on a province basis. **According to the index scores, the top 5 provinces with the highest scores and thus the highest e-commerce adaptation are Istanbul, Kayseri, Izmir, Kocaeli and Çorum, while the 5 provinces with the lowest scores are Hakkari, Tunceli, Bitlis, Ardahan and Muş.**
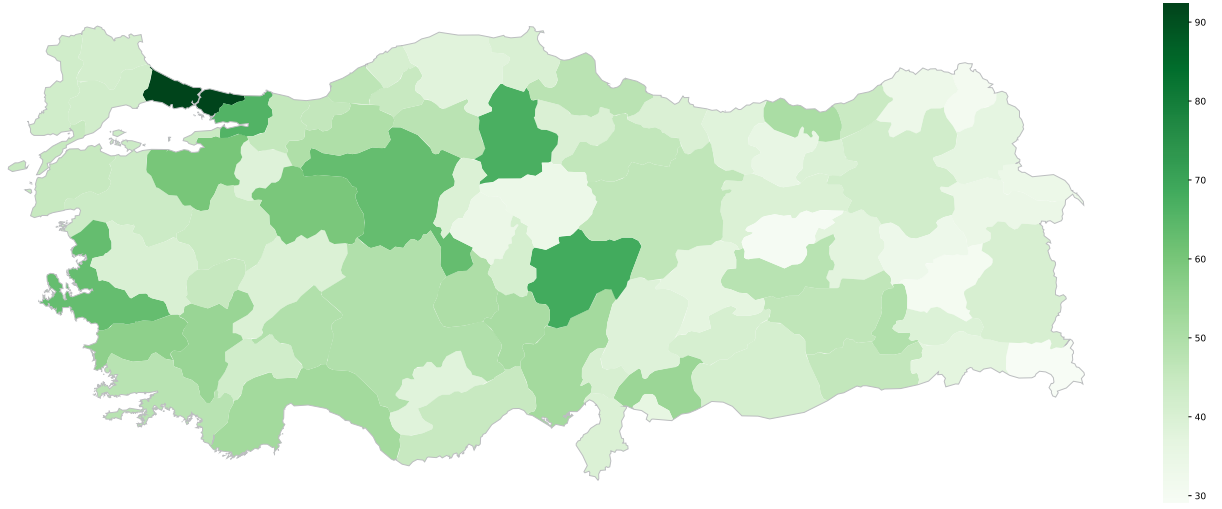
Map 2. E-Commerce Adaptation Index of Provinces (2024)

Table 5. Distribution of Purchase and Sales Amounts and E-Commerce Businesses by Province (2024)

Province	Sales (billion TL)	Purchase (billion TL)	Number of E-Commerce Businesses
Adana	28.44	42.70	12583
Adıyaman	3.11	6.35	1051
Afyonkarahisar	3.86	9.61	2786
Ağrı	0.89	4.33	619
Amasya	1.74	5.01	1389
Ankara	173.48	189.15	52770
Antalya	52.97	78.72	20903
Artvin	0.61	3.00	559
Aydın	19.93	28.06	6880
Balıkesir	10.30	26.02	7222
Bilecik	1.15	4.42	966
Bingöl	0.96	3.11	471
Bitlis	0.43	3.44	509
Bolu	9.20	6.39	1738
Burdur	2.27	4.79	1347
Bursa	66.52	80.82	28828
Çanakkale	5.81	13.79	3813
Çankırı	1.89	2.97	628
Çorum	9.80	6.95	2093
Denizli	15.72	21.39	8384
Diyarbakır	11.23	24.90	3766

Province	Sales (billion TL)	Purchase (billion TL)	Number of E-Commerce Businesses
Edirne	3.46	9.68	2168
Elazığ	5.55	8.92	2027
Erzincan	1.18	3.84	901
Erzurum	3.73	10.08	2302
Eskişehir	17.64	23.27	7267
Gaziantep	28.26	33.47	9496
Giresun	1.79	6.76	1641
Gümüşhane	0.41	1.80	343
Hakkâri	0.27	2.69	241
Hatay	9.13	22.29	4358
Isparta	4.52	8.38	2895
Mersin	18.16	36.68	9654
İstanbul	1894.88	715.13	212140
İzmir	118.87	137.05	45566
Kars	0.83	3.50	557
Kastamonu	1.96	5.43	1329
Kayseri	32.56	26.45	11383
Kırklareli	3.13	8.52	1878
Kırşehir	0.72	3.42	681
Kocaeli	68.13	58.10	16192
Konya	23.85	39.63	14913
Kütahya	4.14	8.94	2816
Malatya	2.76	9.87	2321
Manisa	9.76	24.88	6518
Kahramanmaraş	5.34	13.15	2806
Mardin	5.21	10.20	2426
Muğla	17.17	34.84	7670
Muş	0.67	3.11	463
Nevşehir	2.23	5.95	1575
Niğde	4.01	5.01	1454
Ordu	3.53	10.88	2752
Rize	2.29	7.00	1884
Sakarya	9.17	23.48	7207
Samsun	11.91	25.18	7939

Province	Sales (billion TL)	Purchase (billion TL)	Number of E-Commerce Businesses
Siirt	1.03	3.66	637
Sinop	1.23	3.67	803
Sivas	4.67	8.89	2636
Tekirdağ	9.38	27.83	6747
Tokat	3.96	7.41	2092
Trabzon	9.14	16.77	4305
Tunceli	0.16	1.47	141
Şanlıurfa	8.69	17.81	3470
Uşak	3.25	5.92	2001
Van	4.05	11.28	1882
Yozgat	1.14	5.18	1102
Zonguldak	5.60	10.90	2489
Aksaray	5.02	5.84	1805
Bayburt	0.36	1.27	254
Karaman	1.24	3.85	1111
Kırıkkale	1.37	4.43	1170
Batman	3.87	8.03	2032
Şırnak	1.64	5.17	592
Bartın	1.02	3.61	875
Ardahan	0.17	1.10	135
Iğdır	0.43	2.50	375
Yalova	2.37	7.40	2251
Karabük	1.87	5.01	1357
Kilis	0.55	2.12	451
Osmaniye	2.92	6.47	1638
Düzce	3.35	7.60	2479

In Table 5, the **top 5 provinces with the highest e-commerce sales are Istanbul, Ankara, Izmir, Kocaeli and Bursa**. The provinces with the lowest e-commerce sales are Tunceli, Ardahan, Hakkari, Bayburt and Gümüşhane.

The top 5 cities with the highest e-commerce purchases are **Istanbul, Ankara, Izmir, Bursa and Antalya**. The provinces with the lowest e-commerce purchases are Ardahan, Bayburt, Tunceli, Gümüşhane and Kilis, respectively.

The top 5 provinces with the highest number of businesses engaged in e-commerce activities are **Istanbul, Ankara, Izmir, Bursa and Antalya**, respectively. On the other hand, the provinces with the least number of e-commerce enterprises are Ardahan, Tunceli, Hakkari, Bayburt and Gümüşhane. .
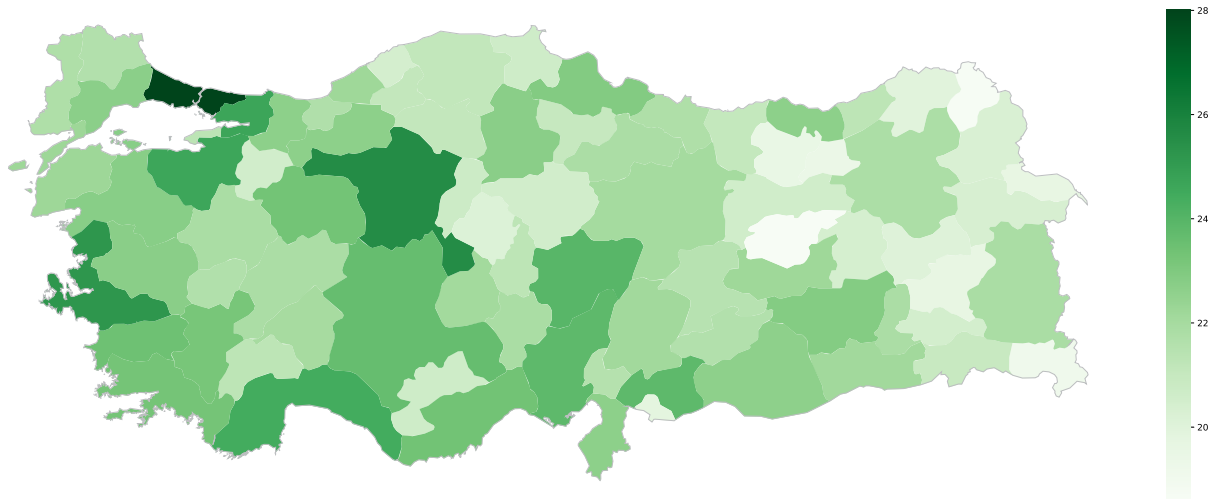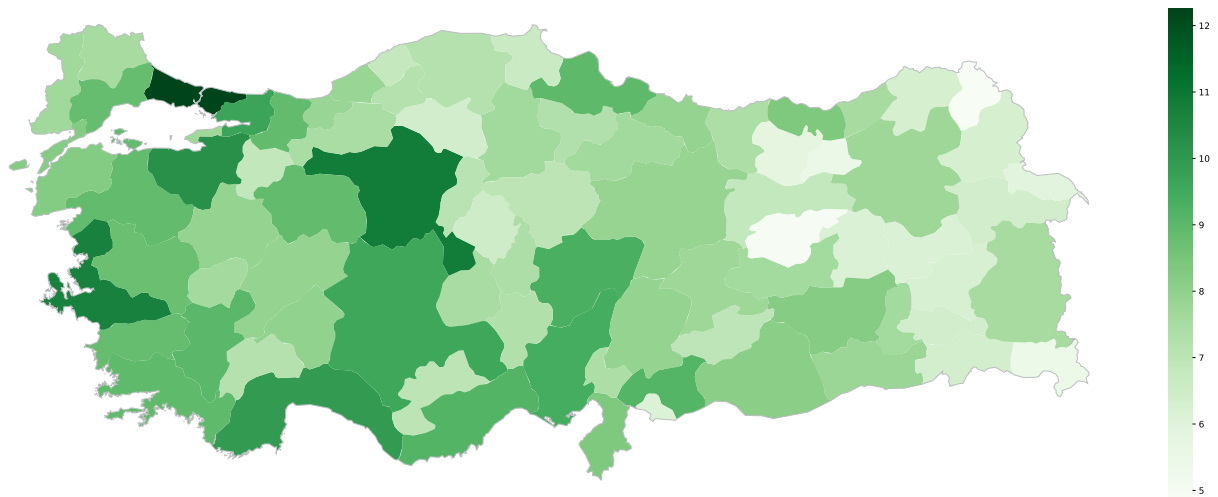
Map 3. Distribution of E-Commerce Sales by Province (billion TL, 2024)
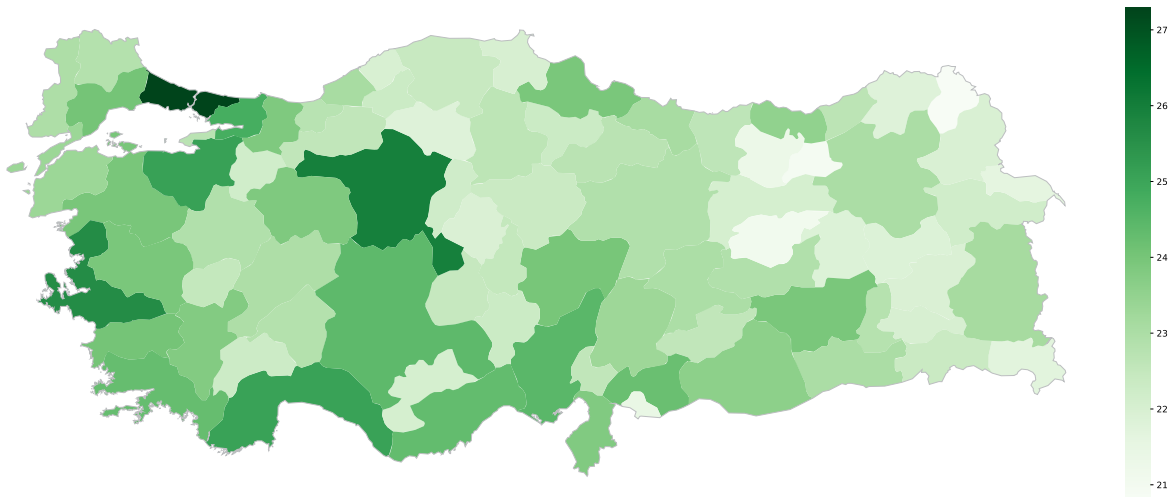
Map 4. Distribution of E-Commerce Purchases by Province (billion TL, 2024)


Map 5. Distribution of Businesses Engaged in E-Commerce by Province (number, 2024)

Provinces Ranking High in the E-Commerce Adaptation Index

In this section, statistics of Istanbul, Kayseri and Izmir provinces, which rank first according to the e-commerce index, are given. The data for these provinces, together with the analysis of the seller and buyer sides, provide important information on how the volume in the e-commerce sector is shaped.
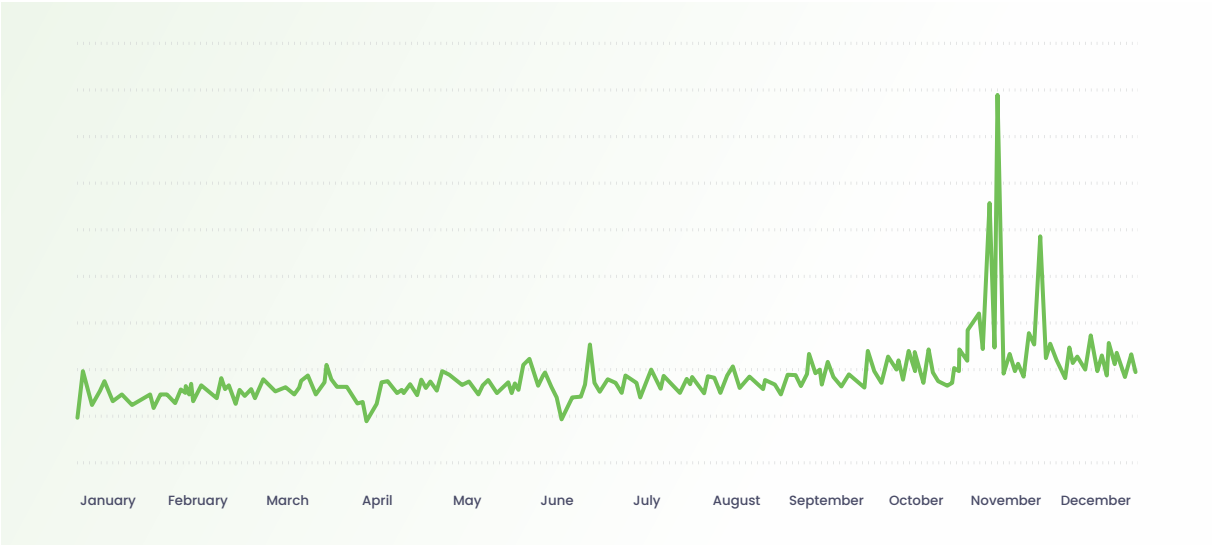
İstanbul
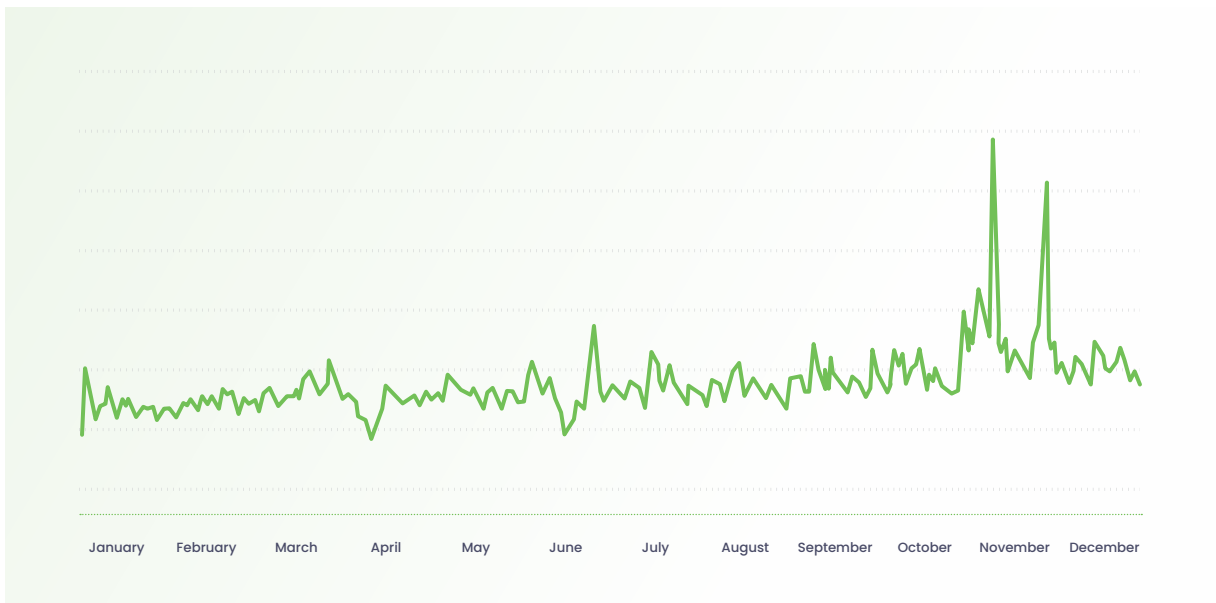
Graph 38. Daily Trend of Sales Volume from Istanbul

An analysis of the graph reveals that sales in Istanbul followed a steady course throughout the year, with two strong increases in November, which is known as the campaign month.

Graph 39. Daily Trend of Purchase Volume from Istanbul

The graph shows that the volume of purchases from Istanbul remained stable throughout the year, while the volume of purchases peaked in November.

Table 6. Top-Selling Industries in Istanbul (billion TL, 2024)

Istanbul Top Selling Sectors		
240.58 Clothing, Shoes and Accessories		
195.35 Airlines		
142.55 Electronics		
127.41 White Goods and Small Appliances		
98.10 Travel, Transportation and Storage		
88.21 Food and Supermarket		
84.25 Food Delivery		

According to the table, the sector with the highest volume in Istanbul, like the rest of the country, is clothing, footwear and accessories, followed by airlines, electronics, white goods and small household appliances.

The most sold and purchased products from Istanbul are shown in the word cloud figures below:

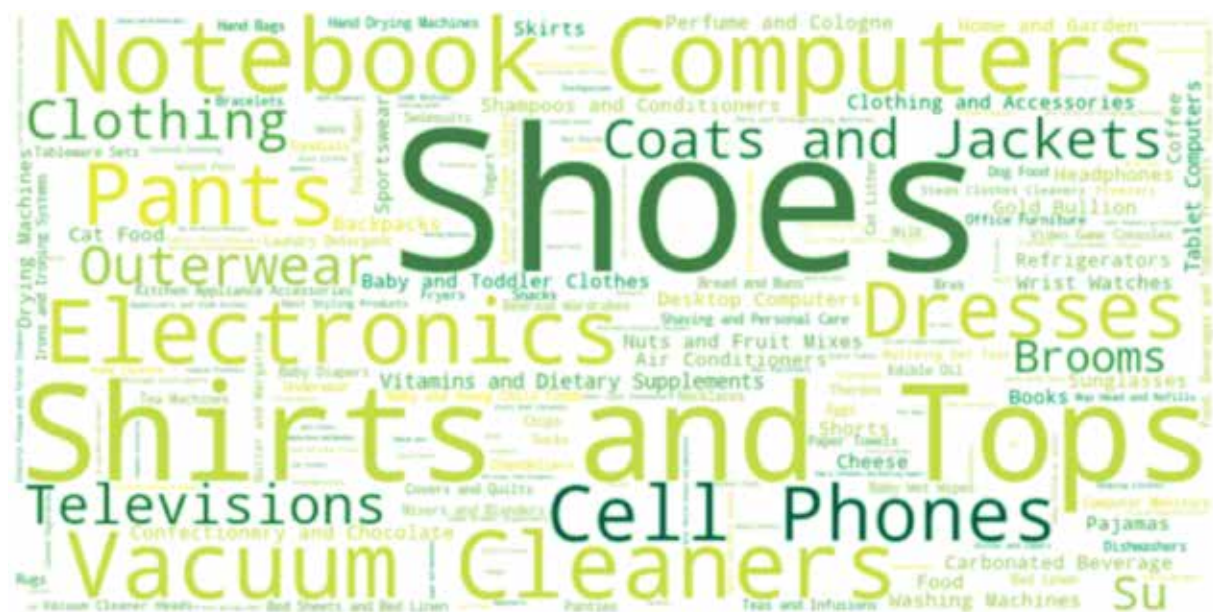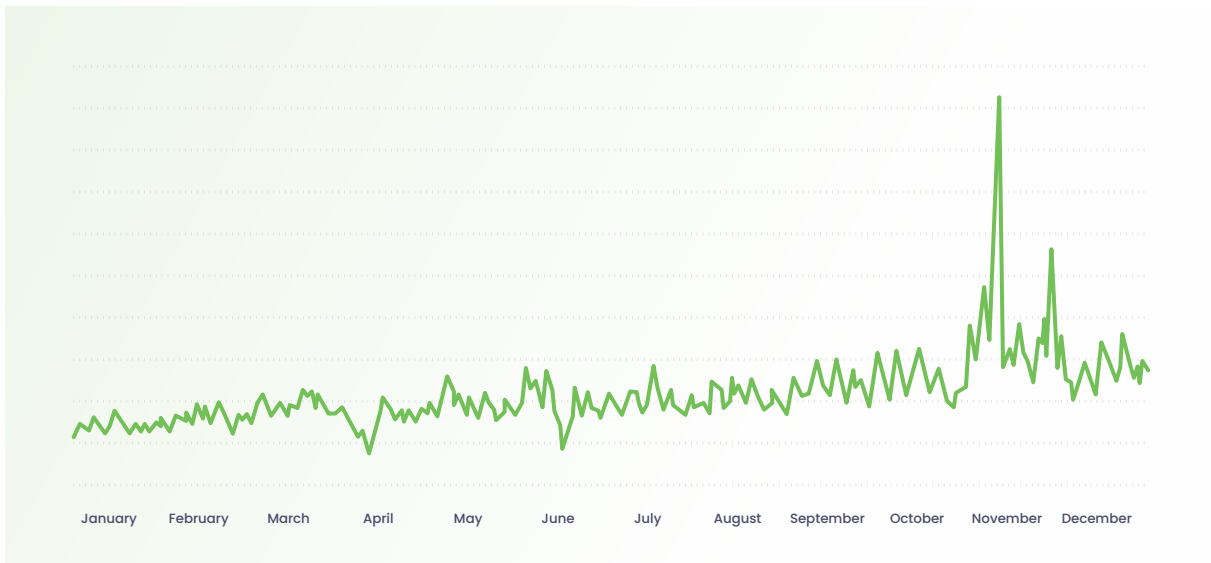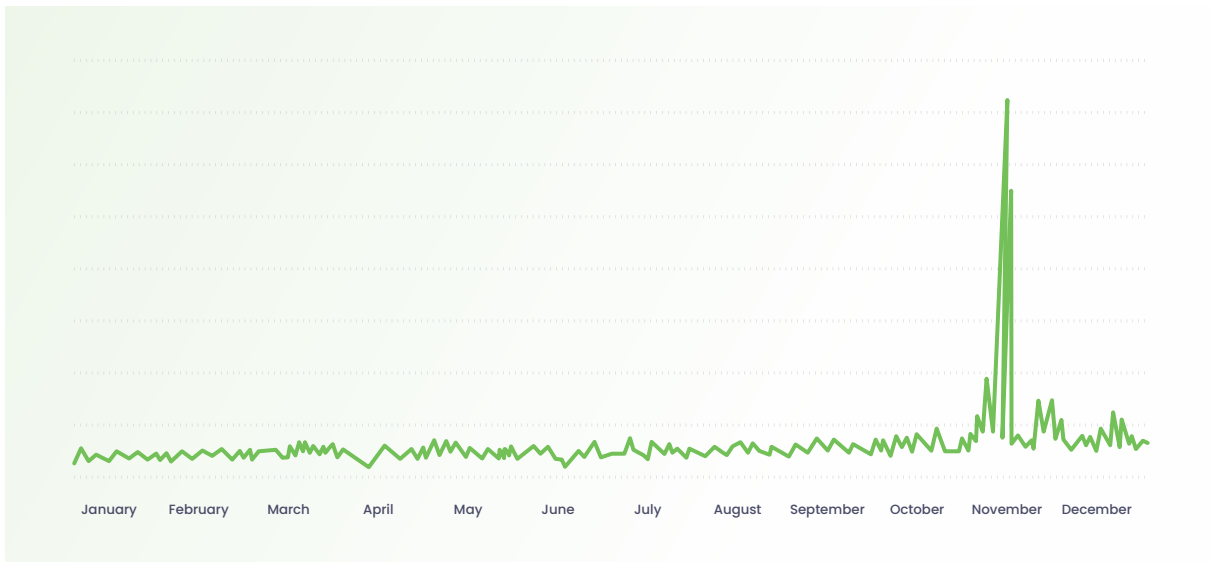**Figure 1.** Overview of the Best-Selling Products in Istanbul

Figure 2. Overview of the Best-Purchased Products in Istanbul

Kayseri

Graph 40. Daily Trend of Sales Volume from Kayseri

According to the graph, sales from Kayseri increased slightly until the last quarter of the year. Sales increased in the last quarter of the year and peaked in November.

Graph 41. Daily Trend of Purchase Volume from Kayseri

As can be seen from the graph, only in November did purchases from Kayseri increase significantly in volume terms.

Table 7. Top-Selling Sectors in Kayseri (billion TL, 2024)

Kayseri Top Selling Sectors

12.32 Home, Garden, Furniture and Decoration

2.66 Electronics

2.02 White Goods and Small Appliances

1.24 Food Delivery

1.04 Food and Supermarket

1.02 Clothing, Shoes and Accessories

0.78 Mother and Baby

According to the table, the sector with the highest sales is home, garden, furniture and decoration, followed by electronics, white goods and small household appliances, and food delivery.

The most sold and purchased products from Kayseri are shown in the word cloud figures below:

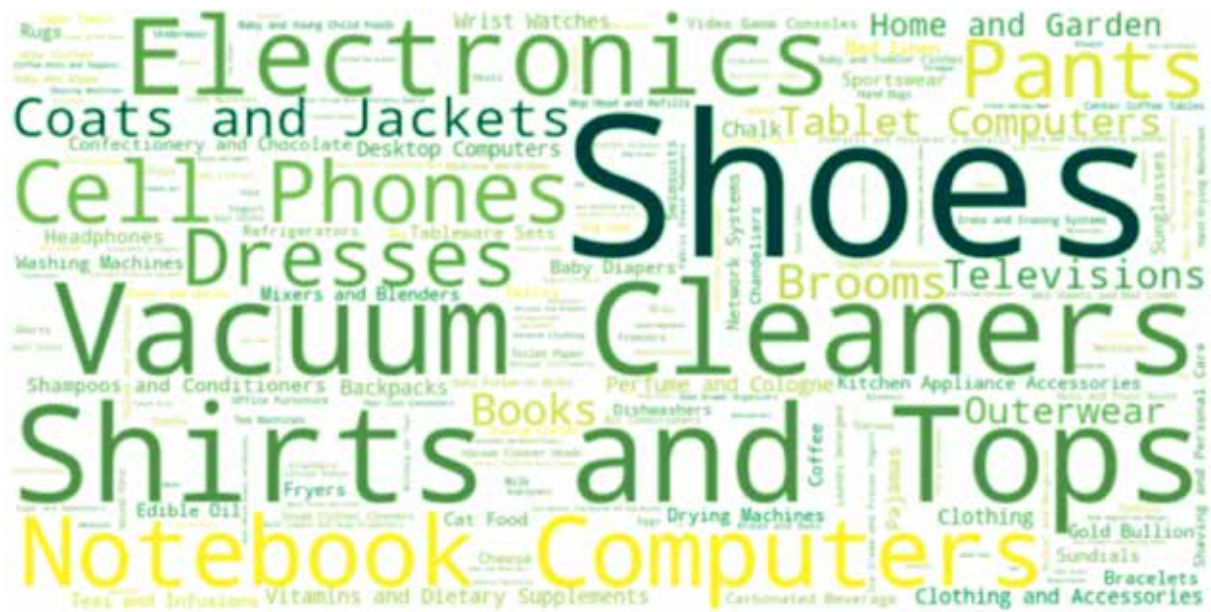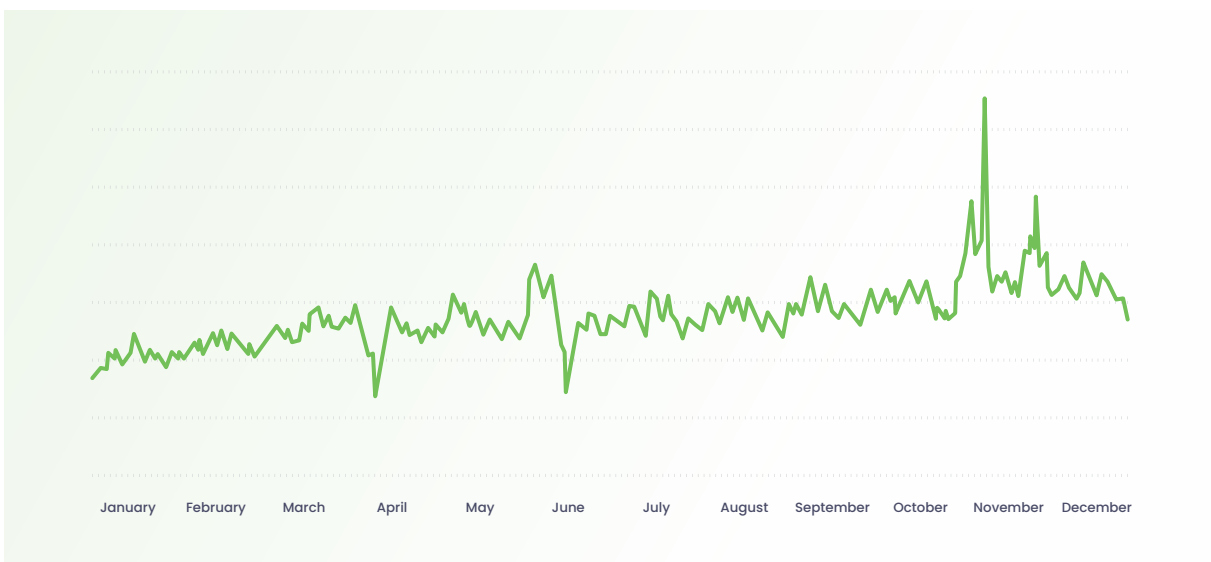**Figure 3.** Overview of the Best-Selling Products in Kayseri

Figure 4. Overview of the Best-Purchased Products in Kayseri

İzmir

Graph 42. Daily Trend of Sales Volume from Izmir

According to the graph, there is a decline in sales in certain periods of the year in Izmir. Similar to the countrywide e-commerce sales, sales volume increased significantly in the last quarter of the year.
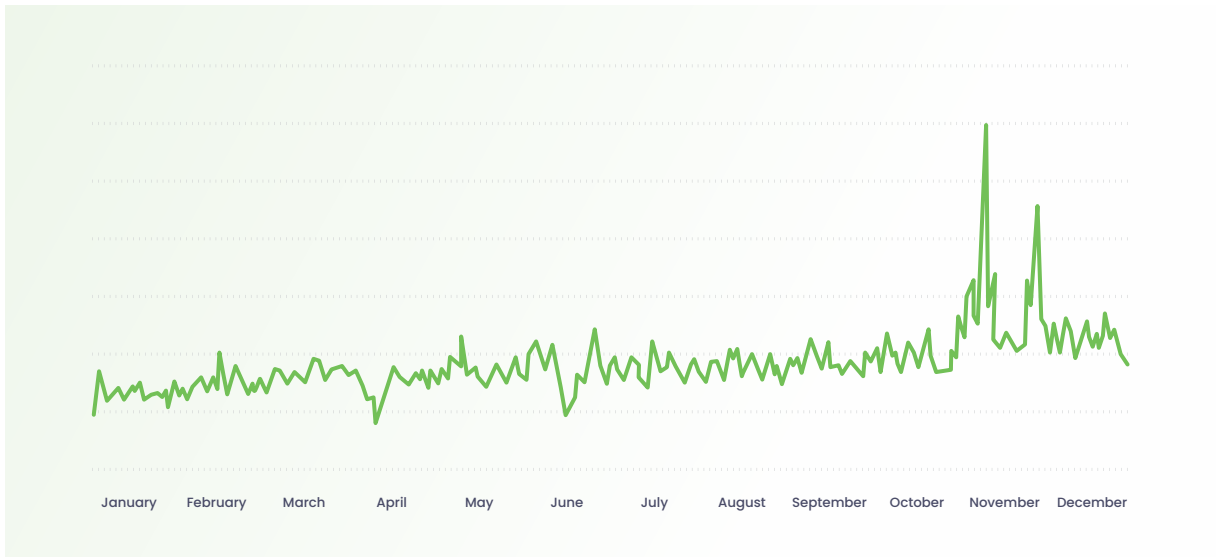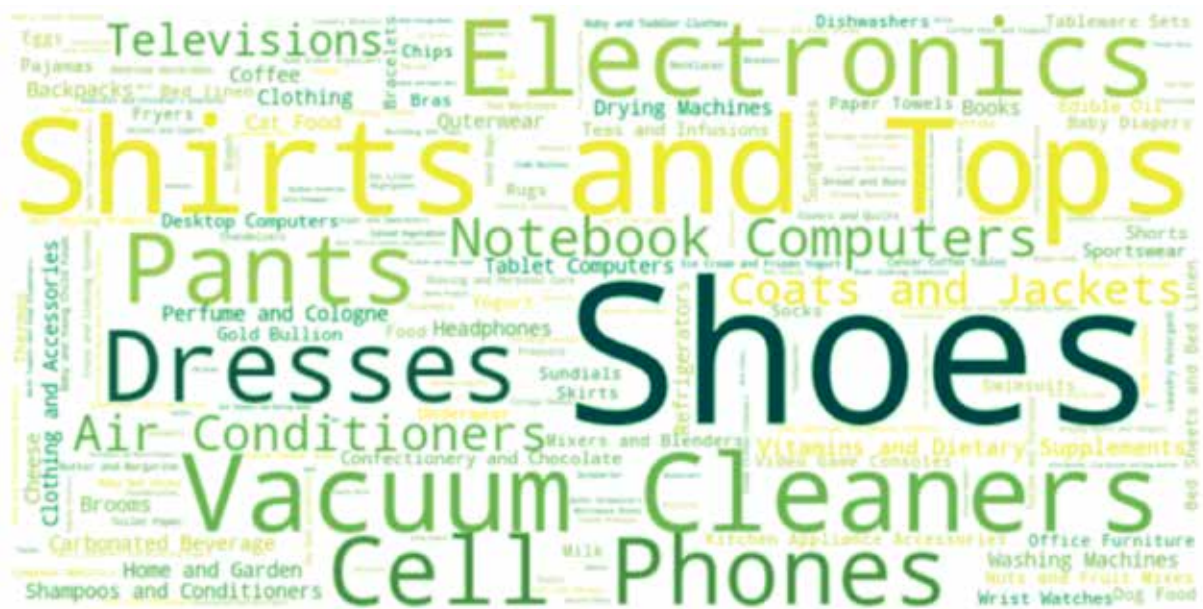
Graph 43. Daily Trend of Purchase Volume from Izmir

In Izmir, the volume of purchases followed a stable course throughout the year. In November, buying volume reached its highest level.

Table 8: Top-Selling Sectors in Izmir (billion TL, 2024)

Top Selling Sectors from Izmir	Value	Sector
	13.82	Food Delivery
	13.11	Clothing, Shoes and Accessories
	11.77	Home, Garden, Furniture and Decoration
	7.57	Food and Supermarket
	4.83	White Goods and Small Appliances
	3.57	Electronics
	3.53	Medical, Personal Care and Cosmetics

According to the table, the food delivery sector is one of the industries with the highest number of sales from Izmir. This sector is followed by clothing, footwear and accessories, home, garden, furniture and decoration, food and supermarkets, white goods and small household appliances.

The most sold and purchased products from Izmir are shown in the word cloud figures below:

Figure 5. Overview of the Best-Selling Products in Izmir

Figure 6. Overview of the Best-Purchased Products in Izmir
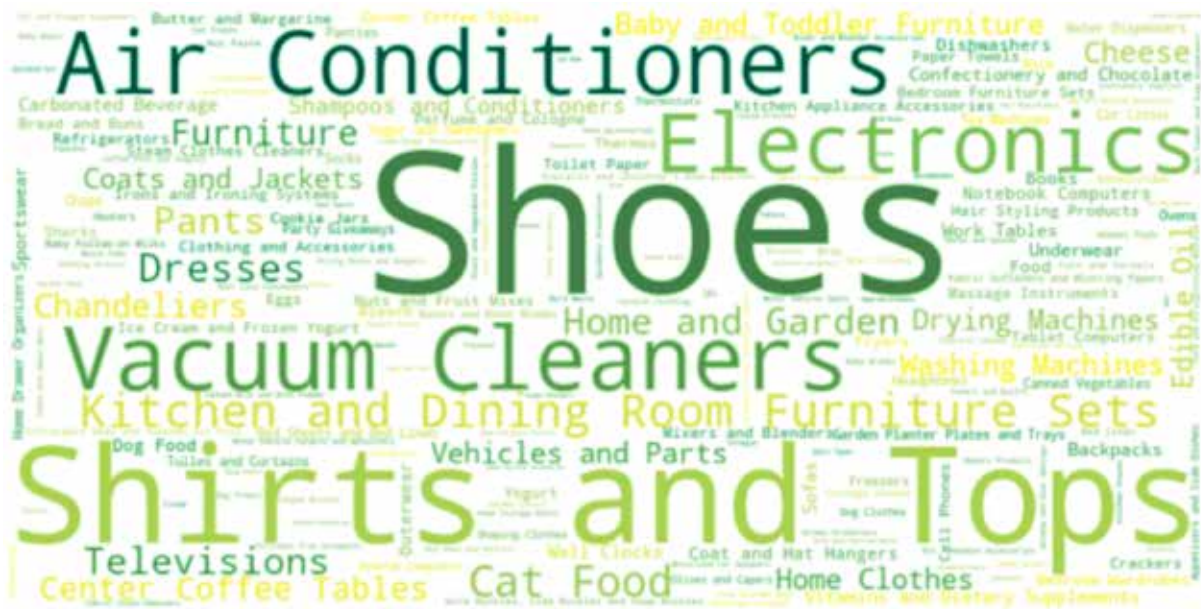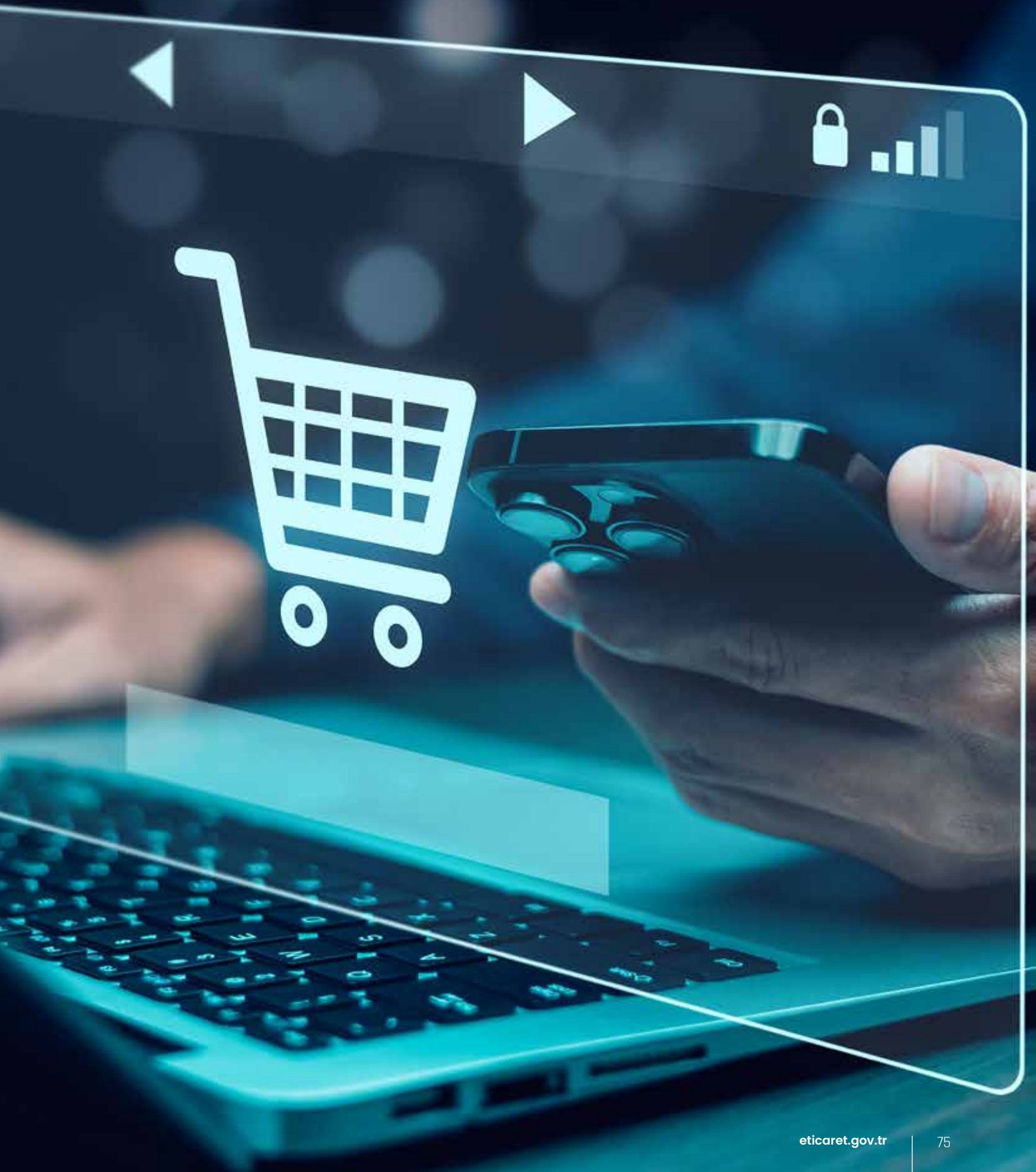
07.

Q-COMMERCE

CHAPTER

Q-Commerce

Q-Commerce is a speed-oriented e-commerce model where consumers can access the products they need within minutes. In particular, this model goes beyond traditional e-commerce by enabling fast procurement of groceries and food delivery. Q-commerce, mobile applications and advanced logistics infrastructure make it possible for users to have a faster and more efficient shopping experience.

This model, which is in great demand especially in big cities and densely populated areas, meets the expectations of consumers by offering delivery within an hour. This section of the report will analyze the place and impact of Q-commerce in the sector and draw strategic conclusions about the development and future of this model.

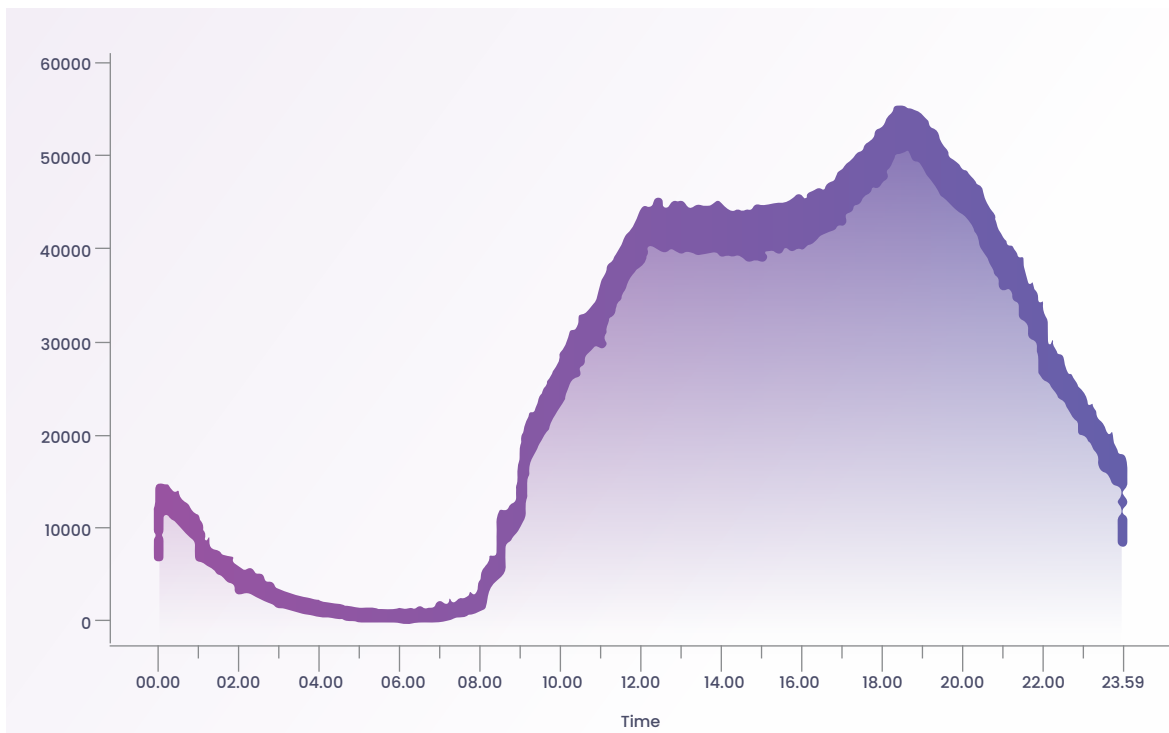**Graph 44.** Distribution of Quick Commerce Volume by Year (billion TL)

Q-commerce increased by **98.1%** in 2024 compared to the previous year. However, in the same year, the share of q-commerce volume in the general e-commerce volume was **8.32%.**

2.4 pcs

Average number
of products in the
cart

351 TL

Average cart
amount in
Q-commerce

Figure 7. Average Basket Value and Average Number of Items per Basket in Quick Commerce

The average cart amount of Q-commerce transactions was **351 TL** in 2024. The average number of products in a basket was **2.4.**

Graph 45. Distribution of Quick Commerce Transaction Numbers by Hourly Intervals (2024)

As can be seen in Graph 45, the number of q-commerce transactions, which started to intensify in the morning hours, continues to increase until 12.30. The number of q-commerce transactions. continues at the same intensity from 18.30 until 18.30, peaks between 18.30 and 19.00, and starts to decline after 19.00.

Table 9. Distribution of Industries with the Highest Volume in Quick Commerce (%, 2024)

In Q-Commerce The highest Sized Industries	
66.18% Food Delivery	
27.36% Food and beverages	
3.17% Home and Garden	
1.68% Health and Beauty	
0.72% Baby and Toddler Products	
0.53% Pet Products	

As can be seen in the table, the food delivery sector is at the top of the list with **66.18%,** with a noticeable difference compared to other sectors. This sector is followed by food and beverages with **27.36%.**
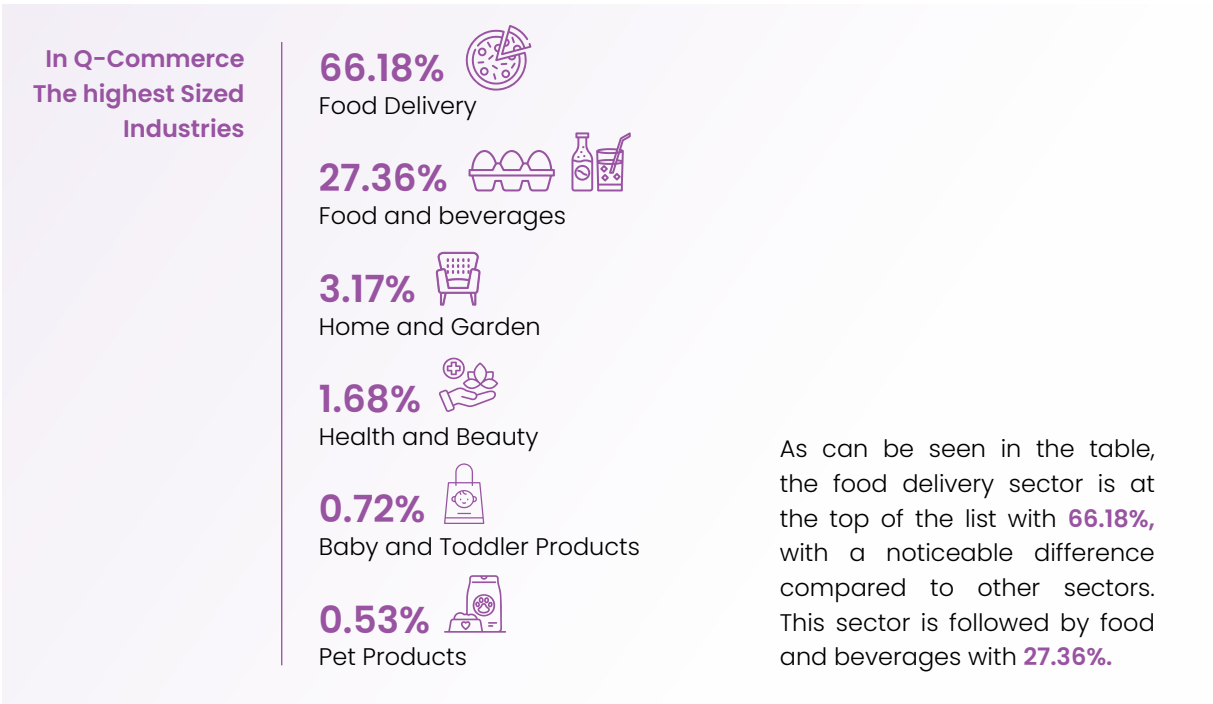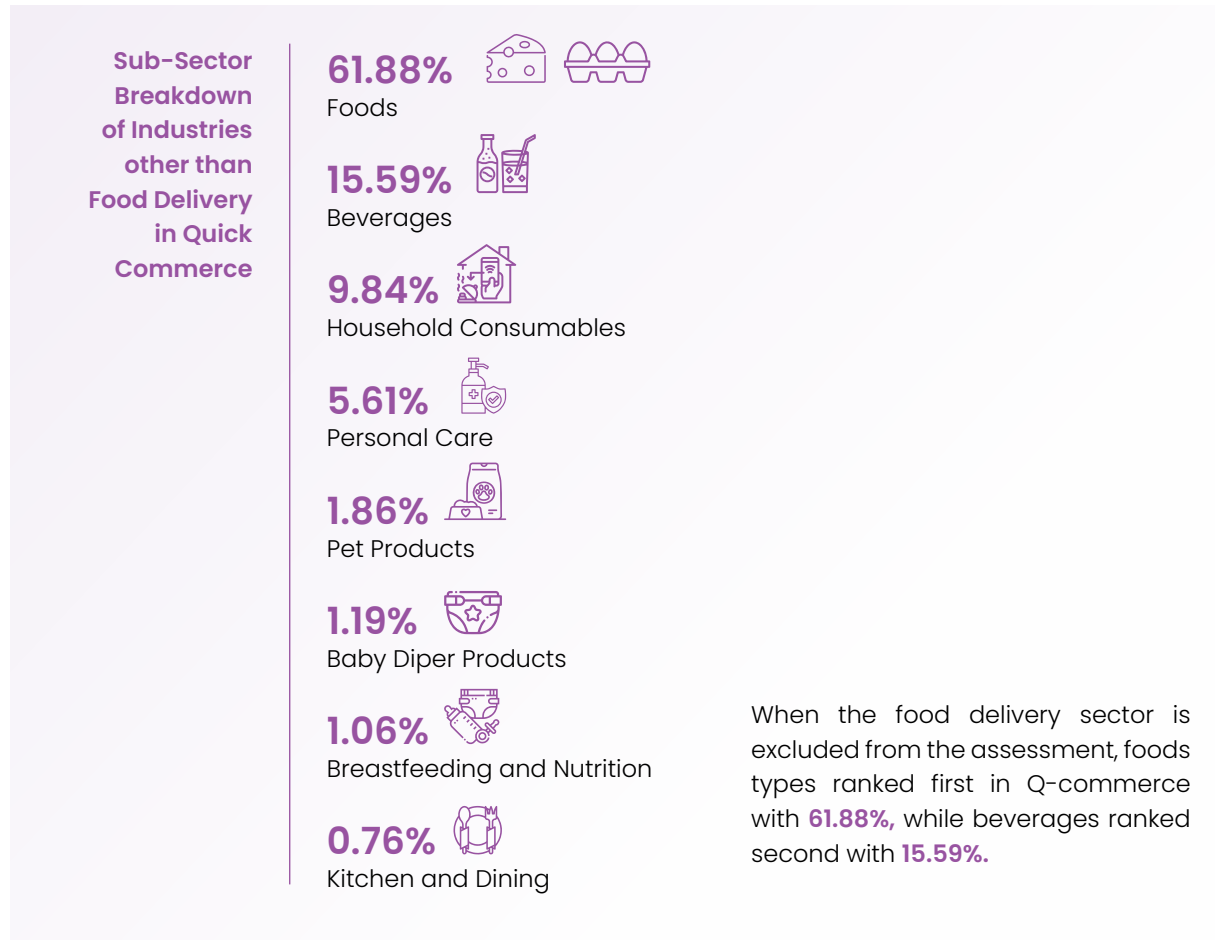
Table 10. Breakdown of Sub-Sectors in the Quick Commerce Sector Outside the Food Delivery Sector (%, 2024)

Sub-Sector Breakdown of Industries other than Food Delivery in Quick Commerce

61.88%
Foods

15.59%
Beverages

9.84%
Household Consumables

5.61%
Personal Care

1.86%
Pet Products

1.19%
Baby Diper Products

1.06%
Breastfeeding and Nutrition

0.76%
Kitchen and Dining

When the food delivery sector is excluded from the assessment, foods types ranked first in Q-commerce with **61.88%,** while beverages ranked second with **15.59%.**

Table 11. Distribution of the Top Selling Product Groups in Quick Commerce (billion TL, 2024)

Top Selling Product Groups in Quick Commerce

6.01
Carbonated Drinks

3.43
Water

2.55
Cheeses

2.23
Ice cream

1.97
Ayran

1.79
Milk

1.71
Yogurt

1.45
Egg

1.44
Chips

1.30
Laundry Detergents and Fabric Softeners

0.85
Paper Towels, Toilet Paper and Cleaning Wipes

0.77
Shampoo, Conditioner and Shower Gels

0.70
Biscuits

0.69
Butter

0.67
Liquid Oils

0.57
Wafers

0.28
Paste

0.16
Dubai Chocolate

According to the table, the most sold product group in quick commerce is soft drinks with **6 billion TL.** This product group is followed by water with **3.43 billion TL** and cheese with **2.55 billion TL.**

Table 12. Most Ordered Meals in Quick Commerce (billion TL, 2024)

Q-Commerce Most ordered meals		
20.20 Hamburger		
15.90 Döner		
14.04 Pizza		
12.64 Kebabs		
5.15 Fried Chicken		
5.04 Raw Meatball		
4.97 Turkish Pizza		
4.40 Pita Bread		
2.11 Soups		
0.95 Baklavas		
0.75 Bagel,Muffin		

According to the table, the most ordered food type in quick commerce was hamburgers with **20.2 billion TL.** Hamburger is followed by doner kebab with **15.9 billion TL,** pizza with **14 billion TL** and kebab with **12.6 billion TL. .**

08.

SUSTAINABLE
E-COMMERCE

CHAPTER

Sustainable
E-Commerce

The environmental impacts of traditional trade and e-commerce are the subject of debate in many areas such as production, logistics, packaging and waste management. However, consumer-to-consumer (C2C) e-commerce offers considerable potential for sustainability. The resale of products that were previously purchased and used by consumers extends their lifespan and prevents waste of resources. Today, encouraging the reuse of products through C2C e-commerce has become one of the most concrete examples of sustainable e-commerce.

This change in consumer behavior offers significant gains both economically and ecologically. The resale of used but still functional products in marketplaces is a digitalized form of reuse culture.

Sustainable e-commerce attracts not only environmentalists but also price/performance-oriented shoppers. This increases the accessibility of sustainability and contributes to the mass diffusion of environmental benefits. Moreover, this model creates economic value for both the seller and the buyer. While the consumers who sells the products they don't not use earns income, the buyer obtains the product he/she needs at a more affordable price.

C2C sales reached a transaction volume of **9.8 billion TL** and **17.5 million** transactions in 2024. In terms of environmental sustainability, these transactions make multidimensional contributions, not only in terms of product sharing, but also in terms of carbon emission reduction, resource efficiency and waste prevention.

Table 13. Sectoral Distribution by Volume and Number of Transactions in Sustainable E-Commerce (%, 2024)*

Industries	Volume	Number of Transactions
Clothing, Shoes and Accessories	53.25%	57.49%
Electronics	16.32%	5.41%
Mother and Baby	6.86%	12.36%
Games, Toys and Hobbies	6.24%	6.50%
Home, Garden, Furniture and Decoration	5.70%	6.69%
Medical, Personal Care and Cosmetics	3.90%	4.04%
White Goods and Small Appliances	2.43%	0.96%
Sports and Outdoor	2.02%	1.26%
Books and Magazines	1.42%	3.76%

As seen in Table 13, the clothing, footwear and accessories sector accounts for the majority of sustainable e-commerce with **53.25%.** The resale of products in this sector within the scope of sustainable e-commerce is usually not because the product is not suitable for the consumer, but because the product can be reused and the seller can earn income in this way. This not only ensures more efficient use of natural resources by extending the life cycle of the products, but also makes a great contribution to sustainability in the clothing, footwear and accessories sector, where recycling is very limited.

Products in the electronics sector are suitable for long-term and reuse due to their high value and durability. These products account for **16.32%** of the sustainable e-commerce volume and **5.41%** of the number of transactions. The difference between the number of transactions and the volume is due to the value of electronic products.

The mother and baby and games, toys and hobbies industries, where reuse is quite common, account for **6.86%** and **6.24%** of the sustainable e-commerce volume, respectively.

* Only sectors with high transaction volume are included in the table.

The word group related to the most sold products in sustainable e-commerce is given below:
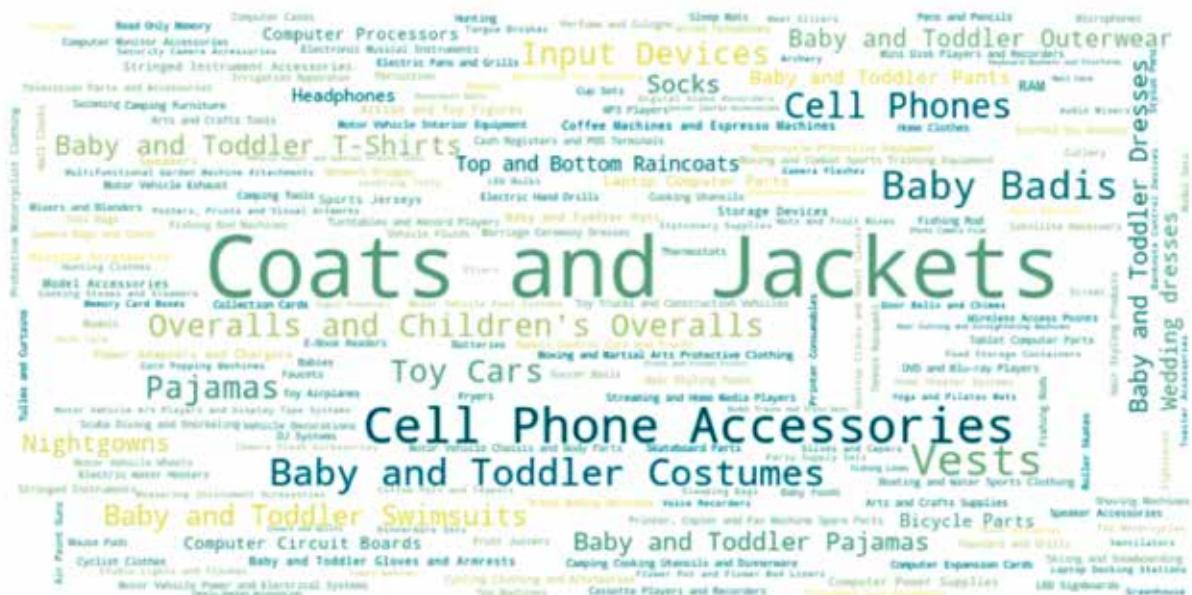

Figure 8. Overview of the Best-Selling Product Groups in Sustainable E-Commerce (2024)

Table 14. Total Return Volume and Number in Sustainable E-Commerce by Sector (%, 2024)*

Industries	Volume	Number of Transactions
Clothing, Shoes and Accessories	42.12%	53.96%
Electronics	27.71%	7.46%
Home, Garden, Furniture and Decoration	5.97%	8.17%
Mother and Baby	5.55%	11.38%
White Goods and Small Appliances	4.30%	1.60%

In sustainable E-Commerce return behavior is also important as part of the user experience.

In 2024, **3.1 million** return transactions worth **2.2 billion TL** were made in purchases made within the scope of sustainable e-commerce. The return rate in sustainable e-commerce was **17.8%.**

Returns made in the clothing, footwear and accessories sector, where the most sales are made, account for **53.96%** of the total number of return transactions. These returns accounted for **42.12%** of the total volume of returns. The electronics sector accounted for **7.46%** of the return transactions. These returns accounted for **27,71%** of the total volume of returns. The reason for this is that the prices of products in the electronics sector are much higher.

* Only sectors with high return rates are included in the table.

Sustainable e-commerce is a reuse-oriented economic and environmental transformation opportunity. 2024 data shows that interest in this model is quite high in Türkiye. Consumers also prefer reusable products, providing both economic and environmental benefits.

Sustainability in e-commerce can be achieved not only by consumers' preference for reusable products, but also by e-commerce platforms and cargo companies creating more environmentally friendly strategies in processes such as packaging, transportation and distribution.

09.

DIGITAL ENTERTAINMENT
AND CONTENT
CONSUMPTION

CHAPTER

Digital Entertainment and
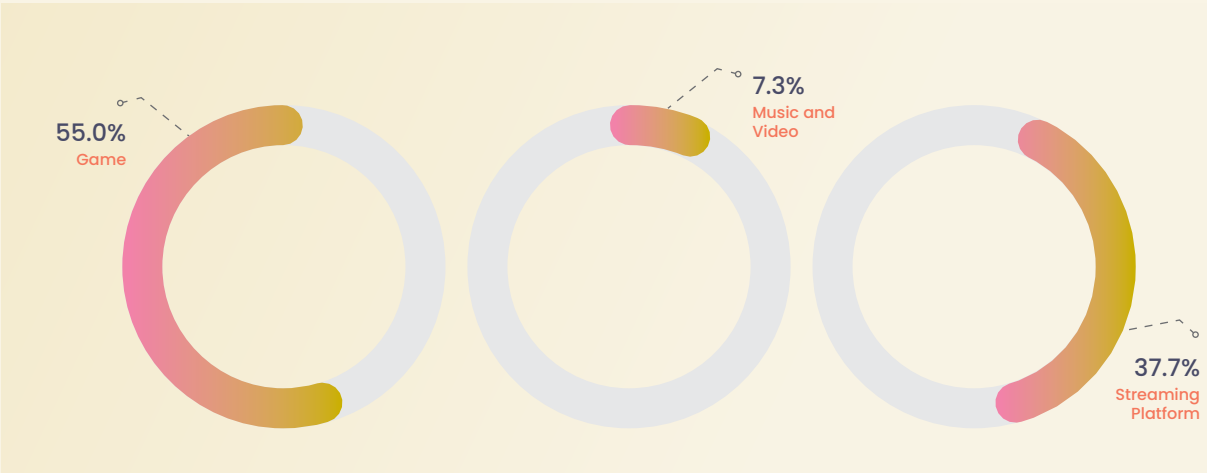# Content Consumption

Trends in Gaming, Video, and Music Services

By 2024, the digital entertainment sector has reached a remarkable volume in gaming, video and music services. In 2024, the total volume of desktop computers, game consoles, mobile games, video, music and streaming platforms purchased online reached **19.58 billion TL** and the number of transactions reached **95.7 million**. Graphs 46 and 47 show the ratios of the total volume and number of transactions of these digital platforms.

29.8% Game
**22.3%** Music and Video
47.9% Streaming Platform
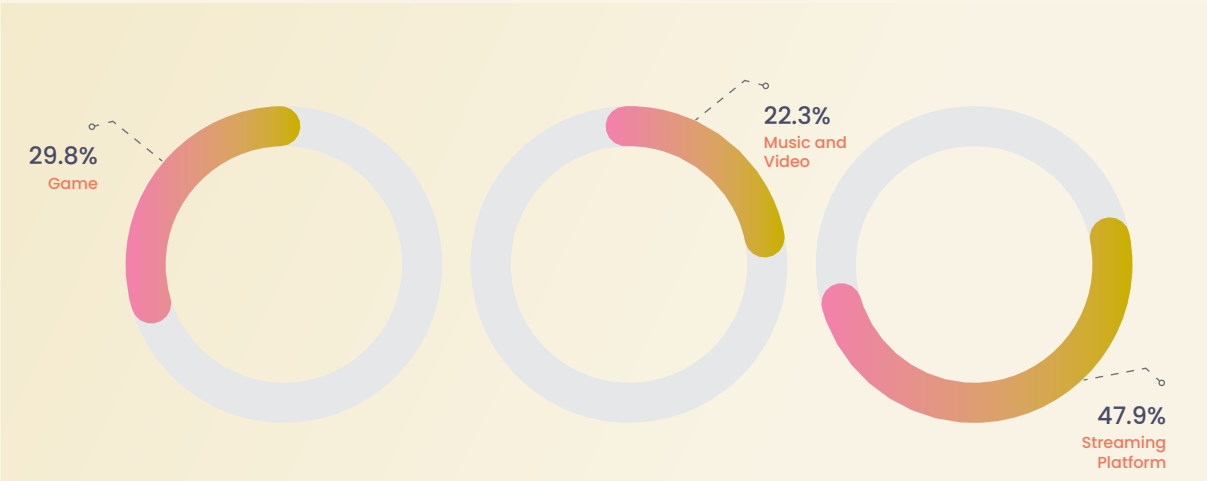
Graph 46. Ratio of Digital Transactions (%, 2024)

55.0% Game
7.3% Music and Video
37.7% Streaming Platform

Graph 47. Ratio of Digital Transaction Volume (%) (2024)

Looking at the volume and number of transactions of the three main categories of the digital entertainment sector ("Game, Streaming Platforms, Music and Video"), we see that the game sector has the largest share in digital transactions with **55%** in terms of volume and 30% in terms of number of transactions.

Streaming platforms accounted for **38%** of the market in terms of value, while the share in terms of number of transactions was **48%.** The music and video sector has a share of **7%** in terms of value and **22%** in terms of number of transactions.
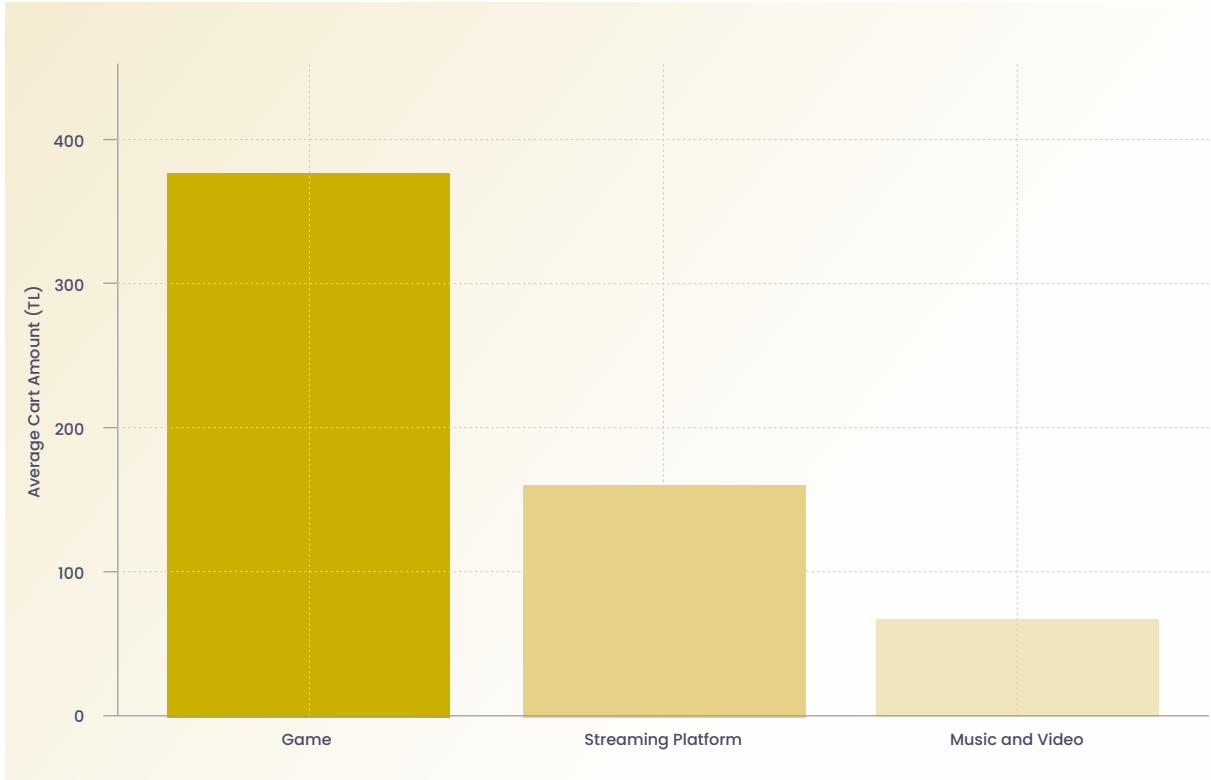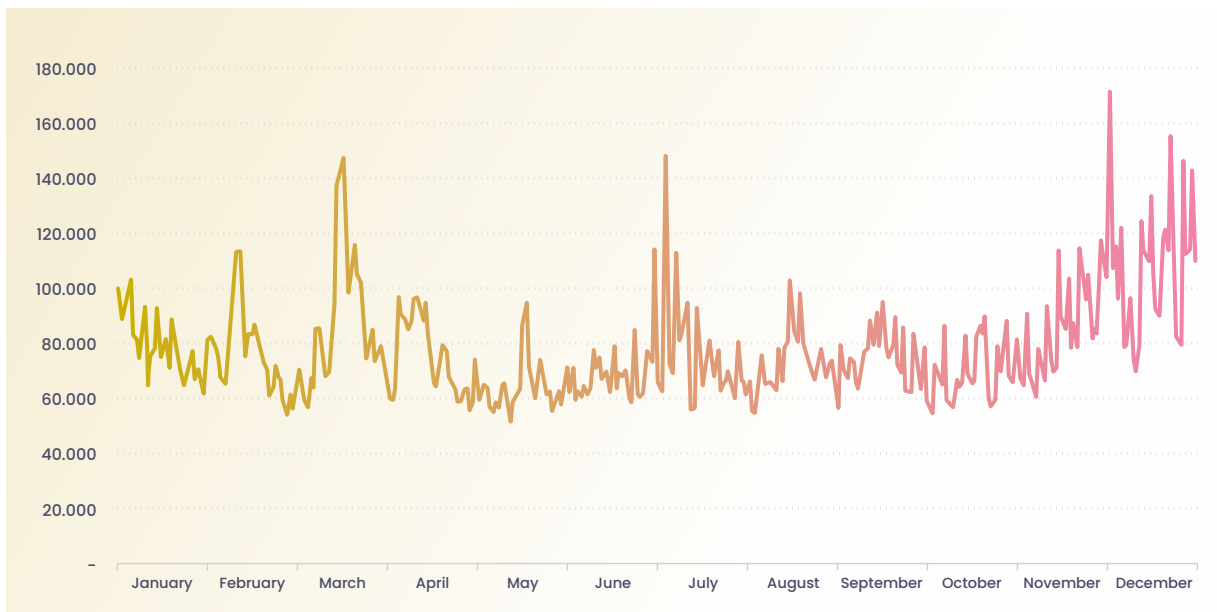

Graph 48. Basket Average of Digital Transactions (TL, 2024)

Graph 48 shows the cart averages of digital transactions. The gaming sector has the highest cart average of **377 TL,** while streaming platforms have the lowest average of **161 TL** and music and video services with **67 TL**.

Information on daily game sales is presented in Graph 49.

Graph 49. Daily Game Sales (pcs, 2024)

The graph above shows daily game sales. When the graph is analyzed, it is observed that there are significant increases in the number of transactions on certain dates. Daily game sales peaked especially on **March 17, July 5, December 2** and **December 23**. These dates coincide with the **Spring, Summer** and **Winter** sale periods of game sales platforms.

The discount periods of these platforms increase users' game purchases, leading to concentrations and high transaction numbers on digital platforms.

Graphs 50 and 51 show the number of daily transactions for streaming platforms and the number of daily transactions for music and video services in 2024.
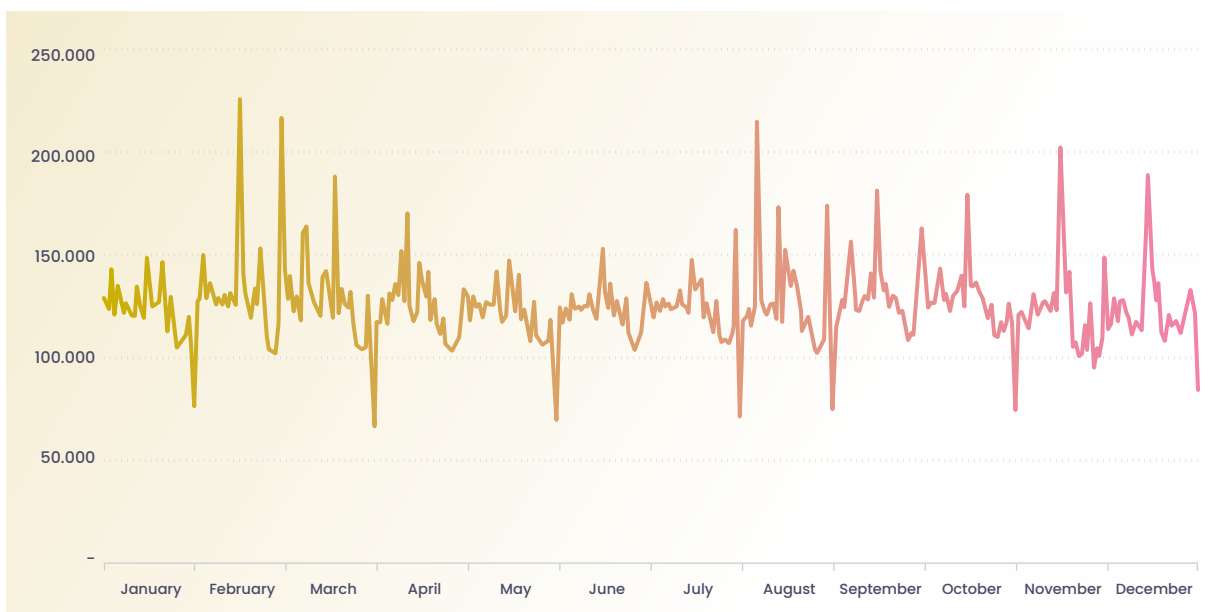
Graph 50. Daily Transaction Volume for Streaming Platforms (number, 2024)

Graph 51. Daily Number of Transactions Related to Music and Video Services (number, 2024)

10.

ECONOMETRIC
PERSPECTIVE

CHAPTER

Econometric
Perspective

The analysis of daily e-commerce transaction volumes reveals that certain days fall below the average level, while others exceed it, as illustrated in Graph 33. This pattern suggests that transaction intensity on some days may remain below its potential, raising questions about the extent to which the sales capacity is being fully utilized. On such occasions, it can be inferred that potential transactions have not been realized, with actual transaction counts falling short of expected levels. Identifying and analyzing these deviations is strategically important for understanding the untapped sales potential and the underlying factors contributing to such fluctuations.

However, estimating the potential number of transactions with precision presents a significant challenge for sellers and decision-makers. To overcome this issue, the output gap concept—widely used in macroeconomics—can be applied. The output gap denotes the difference between potential and actual output within an economy. In the literature, this gap is typically estimated using the Hodrick-Prescott (HP) filter (Backus and Kehoe, 1992; Ravn and Uhlig, 2002; De Jong and Sakarya, 2016). The HP filter is a well-established method for separating long-term trends from short-term fluctuations in macroeconomic time series data. It is frequently employed—particularly within the framework of real business cycle theory—to isolate cyclical components from raw data and determine long-term growth trends (Hodrick and Prescott, 1980; Kydland and Prescott, 1990).

In this study, the HP filter is applied to the daily e-commerce transaction series to derive the potential number of transactions. The resulting potential values are then subtracted from the actual values to compute the transaction gap. The outcome of this analysis is presented in Graph 52, which illustrates the daily e-commerce transaction gap. The formula employed for this computation is shown below:

$$\textit{E-Commerce Output Gap} = \frac{\textit{Real E-Commerce Volume - Potential E-Commerce Volume}}{\textit{Potential E-Commerce Volume}} \times 100$$
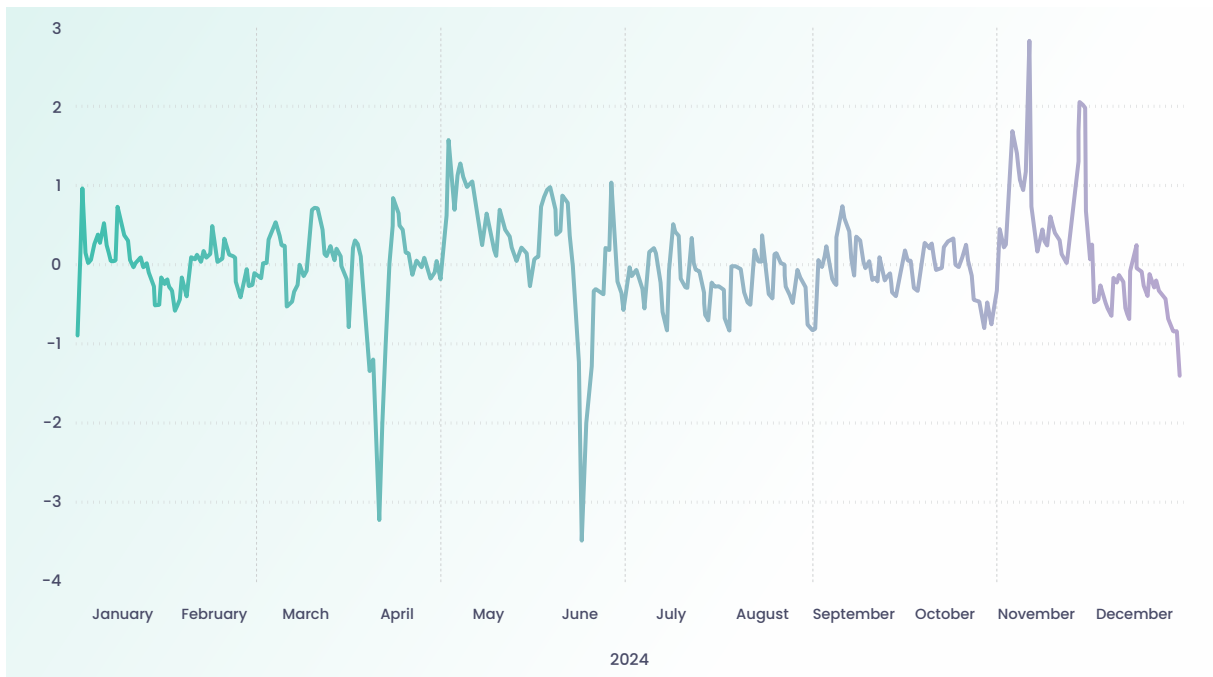
Graph 52. E-Commerce Transaction Gap

An examination of Graph 52 reveals that the largest e-commerce transaction gaps occurred on June 16, 2024 (3.52%), April 10, 2024 (3.26%), and June 17, 2024 (2.77%). These dates correspond to the beginning of Eid al-Fitr and Eid al-Adha. It is also observed that the days with the largest transaction gaps generally coincide with religious holidays.

Furthermore, the results of a linear regression model—where the e-commerce transaction gap is the dependent variable and the days of the week are the independent variables—are presented in Table 15.

Table 15. Regression Model Prediction Results*

Variable	Coefficient Prediction	Standard Error	t-statistics	p-value
Monday	0.14	0.08	1.67	0.09
Tuesday	0.06	0.08	0.68	0.49
Wednesday	0.11	0.09	1.25	0.21
Thursday	0.13	0.09	1.47	0.14
Friday	-0.03	0.09	-0.32	0.75
Saturday	-0.17	0.09	-1.96	0.05
Sunday	-0.24	0.09	-2.83	0.00

* No evidence of heteroskedasticity or autocorrelation was found in the residuals of the model.

As shown in Table 15, Monday, Saturday, and Sunday have a statistically significant effect on the e-commerce transaction gap. While Mondays are associated with a positive transaction gap (i.e., a surplus of 0.14), both Saturdays (-0.17) and Sundays (-0.24) contribute to a negative gap, indicating a shortfall in actual transactions relative to their potential.

This finding suggests that weekends are a contributing factor to the underperformance of e-commerce activity compared to its potential. To close this gap, it may be advisable for e-commerce businesses to increase marketing efforts such as discounts or advertising campaigns during weekends to stimulate demand and reach potential transaction levels.

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