Turkey Cards and Payments Market - Size, Share, Development, Growth and Forecast to 2020

Description:

Report coverage

Historical market size for the period 2012-2014 and forecast for the period 2015-2020.
Number of cards in circulation, and value and volume of transactions.
Number of terminal, and value and volume of transactions.
Industry trends, drivers, and opportunities.
Competitive landscape of card issuers for both, debit cards and credit cards.
Major schemes, debit and credit cards by customer segments.

Research Methodologies

The study is based on extensive secondary and primary research. The various sources studied during the secondary research include websites of payment/banking/industry associations, industry regulatory bodies, banks, and card issuers. The primary research included in-depth interviews with industry experts and key opinion leaders.

Turkey cards and payments market overview

In number of payment cards in circulation in Turkey grew at a CAGR of 7.2% during the period 2012 -2014. The growth in e-commerce, increase in internet and mobile penetration, and higher disposable income per capita supported the growth of the number of cards in circulation.

In Turkey, debit cards dominate the payment card market in terms of number of cards in circulation. By scheme, the number of debit cards in circulation was dominated by Visa. Average debit card transaction value increased from TRY 237.9 in 2012 to TRY 244.9 in 2014, at a CAGR of 1.4%.

The credit card transactions were encouraged by growth in payment infrastructure, such as POS and ATM terminals; advanced card features such as EMV technology; and promotional strategies such as cashback offers and reward programs. The credit cards in Turkey are primarily used by customers at POS terminals for retail purchases, rather than for cash withdrawals at ATMs.

The credit card market in Turkey has intense competition among credit card issuers, to encourage card usage and spend. Credit card issuing banks implement various marketing strategies and offered numerous campaigns to attract consumers. In credit card segment, Yapi Kredi was the leading card issuer in terms of the number of cards in circulation in 2014.

In September 2015, InterBank Card Center (BKM) announced the launch of a new electronic card payment clearing system "TROY" and it is expected to be operational in 2016. As part of the TROY system, customers' card payments will be processed by the merchant and then completed through a clearing network supported by the BKM. Visa and MasterCard were previously the companies of choice for this operation. Customers will be charged a fee for using the TROY payment system, but as per BKM it will be lower than the fees charged by international card networks such as MasterCard and Visa.

Key players in the Turkey cards and payments market:

Ziraat
VakifBank
Yapi Kredi
Garanti
Finansbank

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