

From Supermarkets to Online Shops: How did the Modern Food Retail Geography Change in Istanbul?

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Abstract

Since the 1980s, Turkey has undergone a process of internationalized capital, foreign capital entering the Turkish market and consumption becoming a lifestyle, under the impact of neoliberal policies. This process had a great effect on the retail sector, which has a dynamic structure. In order to survive in the climate of tough competition they found themselves in, retailers became organized, which included entry to new markets, growth through mergers and acquisitions and the formation of new channels. In this article, this process of change is explained using the conceptual framework of the “New” Retail Geography, which sees the relationship between space and retail as bilateral and mutually determinant. This article intends to answer the question, ‘How has the spatial structure of modern food retail^a changed in Istanbul since the 1980s?’ and it focuses on the metropolis of Istanbul which accounts for a large proportion of total retail sales and where the greatest change is observed. In this context, a spatial diffusion process of change from supermarkets to large scale food retailers, to discount stores and finally to e-commerce, which has become more important with the effect of Covid-19.

Keywords: Discount stores; e-commerce; Istanbul retail market; Large scale food retailers; Modern food retail geography; New retail geography.

1. Introduction

Neoliberal restructuring that emerged from the economic restructuring of the 1980s set off a process of transformation of urban space and the city became the space for the reproduction of capital, the emphasis shifted from production to consumption and all social and economic relationships were re-established based on a consumption-centric discourse. The self-restructuring of the capitalist economy over relations of consumption led to the transformation of the social structure in the same direction. Relations that were formerly described over practices of social production came to be described over relations of consumption and social and cultural changes came to be understood and evaluated through the lens of forms of consumption. This transformation in the economic field has changed and diversified the role and form of impact of the geographical space in which it takes place since the year 1990. Today the spatial dimension of economic activity is not problematized through the transport and logistical costs arising from physical distance. On the contrary, the spatial dimension is investigated using the form and level of cultural, institutional and social structures at national, regional, urban, local multi-scalar levels and their connections with other geographies, foreseeing development based on the new economic structure and the flexible regime of savings. The new approaches and changes in economic geography are referred to as the “new economic geography” [1, 2].

Economic geography is a discipline that tries to answer the questions why economic activity becomes concentrated in certain regions and is organized there. The new economic geography, which emerged in the late 1990s under the leadership of Krugman considers the models of rising earnings and under-competition and the spatial characteristics of the economy. The main argument of the new economic geography is that geography continues to be an important factor even under the present economies in which trade barriers have been lifted to a great extent [3, 4].

This article, which analyses the spatial distribution of food retail stores, makes use of the concept of “the new retail geography” which emerged in response to the changes to consumption culture in the 1990s as a subfield of the new economic geography. The “New” Retail Geography, which is influenced by political-economic perspectives, views the relationship between space and retail as bilateral and mutually determinant. This approach, which takes as its basis the relationship between the position of retail, the spatial pattern of its

^a Modern food retail or organized food retail can be used.

organization and the geography of consumer behavior also moves from the underlying argument that the economic movement of shopping is also cultural and social. The perspective argues “We are what we buy”, that is our consumer preferences are immutably related to our identities [5, 6].

The characteristics of the new retail geography may be summarized as follows [7].

- Principles that emphasize the role of consumer decisions are dominant.
- The influence of the central place theory is seen.
- A spatial focus (inner city and the regional scale) is adopted.
- Consumer behaviors and the geography of retail organization are defined.
- The most developed sub-field is the “geography of retail consumption”. The subject of consumption that is of great importance in the "New" Retail Geography, which attaches significance to the economic and cultural geography of retail. It is especially interested in “spaces of consumption” such as large shopping centers.

Since the 1990s, urban space has become an object of consumption rather than a place of production. Metropolises are the field of new urban space, where capital has reorganized space in line with its own needs and defined the difference of space from other geographic regions on the basis of profitability and economic criteria. Cities, which began to compete to become “world cities” in this process have in essence begun to compete as centers of finance, consumption, and entertainment, marginalized their manufacturing and highlighted their services sector. In the new lifestyle, consumption centers have become the foci for the new forms of consumer life and the intense interest in the different lifestyles of consumer life have been directed towards centers of consumption [8, 9].

During this period, new retail spaces emerged in line with the changing culture of consumption. These spaces emerged first in North America and then in Europe. Shopping centers, hypermarkets, large retail stores, discount stores, factory outlet stores and marketplaces where people gather to sell their household goods are examples of these new spaces. New forms of retail which emerged during this period are call centers, TV shopping networks and virtual stores.

There are many geography field studies that show the determining relationship between space and retail habits. On the one end of the scale are car-boot sale marketplaces, where people gather to sell their household goods and at the other end is the West Edmonton Mall which was the leader in focusing on entertainment in addition to shopping and marked the opening of the largest suburban shopping center in North America. Hypermarkets became spaces where capital is intensified and its impacts on space and time are clearly observed. Just as a factory is a tool for organizing and monitoring production, shopping centers and hypermarkets have become tools of organizing and monitoring consumption [10, 11].

During the process under discussion in which the impact of the neoliberal period began to be felt on urban spaces, the structure of the retail sector in Turkey exhibited great change. First the market shares and spatial spread of large-scale retailers rose rapidly, then new retail spaces emerged. This was to the detriment of traditional retail (grocery stores) which had been dominant for decades. In the period following the economic crisis in early 2000s, there was a great increase in the number of discount stores and the organized retail sector experienced a lot of competition in inner cities among hypermarkets, supermarkets, discount stores etc. Since 2010, the rate of online shopping has increased, and companies have started to focus on multiple channels in order to stay in the competitive market. The Covid-19 pandemic has been the accelerator of this process. This article intends to answer the question "How has the spatial structure of modern food retail in Istanbul changed since the 1980s”.

2. Methodology

This article describes the food retailer’s distribution according to their geographical locations in Istanbul. For each sub-period that affects the retail process in Turkey, the facts and reasons in the country are explained briefly with focusing on Istanbul Metropolitan Area. The study is based on literature review and quantitative data analysis. Quantitative data were collected from annual reports and websites of food retailers and face to face inquiries, and a database of food retailers in Istanbul has been prepared. The address information of each retailer was found on Istanbul City map one by one, and their coordinates were transferred to the GIS. This database has been mapped using the ArcGIS program. A selection from the database was made according to the total size of the sales areas covered by the food retailers in the city and a database of 4517 food retailers was prepared for 10 companies with a total sales area of 50,000 m² and above. The database template is shown in table below.

Table 1: Data base headlines

No	Firm	Brand	Format	District	Neighborhood	Street	X Coord.	Y Coord.	Sales Area (m ²)	Opening Y.	Closing Y.
1											
2											
3											
4											
.....											
451											
7											

This study universe covers the 39 districts and 937 neighborhoods of Istanbul. After the election according to the total sales area of the retailers, sample included 39 districts and 683 neighborhoods.

Table 2. Implementation Field of the Current Study

	Number of districts	Number of neighborhoods
Universe	39	937
Sample	39	683

The Phases of the Food Retail Geography in Istanbul

The change of the modern food retail geography in Istanbul can be summarized into 4 phases, which will be presented in a historical process in Turkey and analyzed periodically. From the 1980s, with the influence of globalization and neo-liberal policies, consumption focused retail developments started. In the 1990s, with the rise of transnational corporations, modern food retail began to increase rapidly. In 2000s, discount stores became widespread. Finally, today, while the diffusion of physical stores continues, modern food retail is now experiencing the digitalization process.

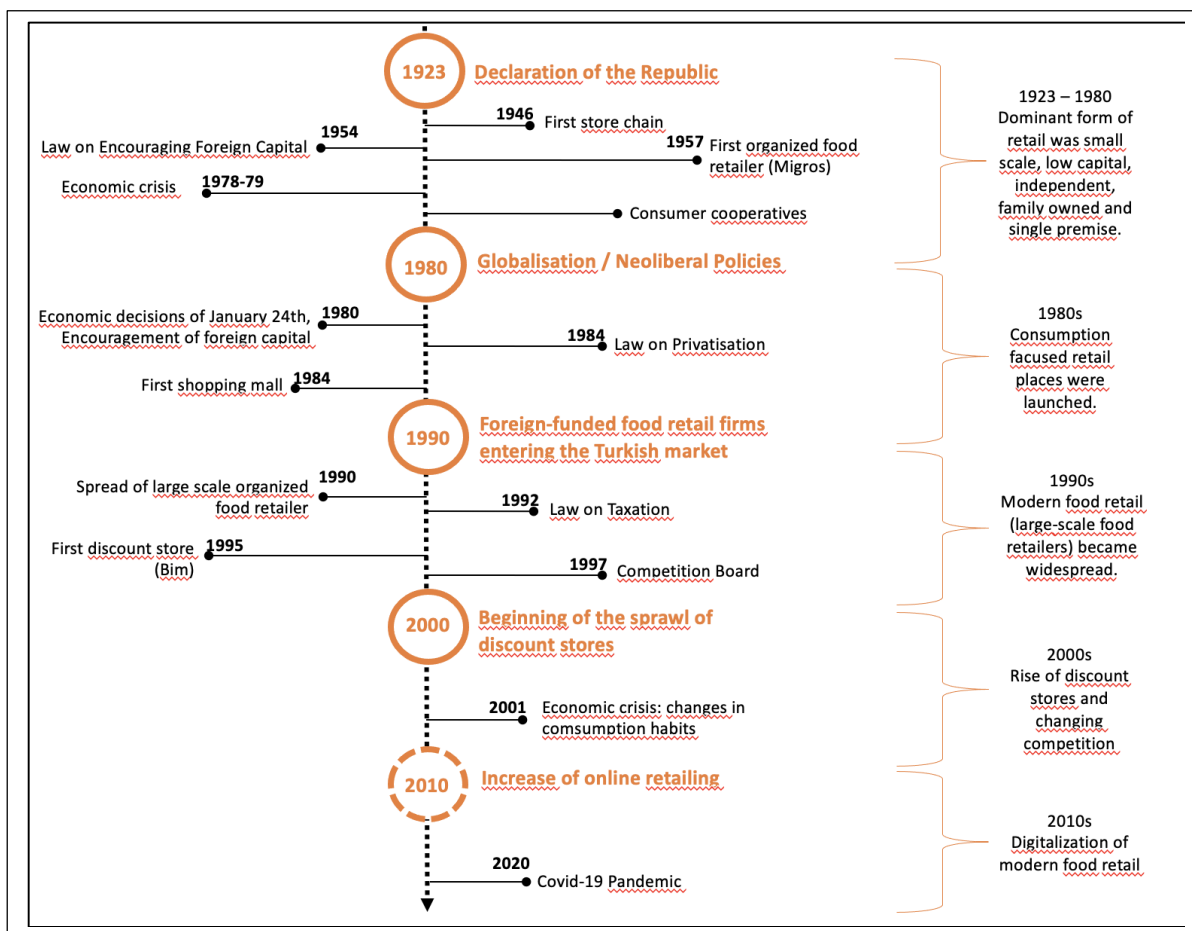


Figure 1: The process of change of modern food retail in Turkey

2.1. Until 1980s: A brief introduction

From the year 1923, in which the Republic was declared in Turkey, to the 1980s, when globalization began to have an impact, the state acted to protect and support the domestic market, the economy was protected by high tariffs, developing industry within the country was protected from external competition and foreign investments were not supported. With imports controlled strictly, only the minimum exit of foreign currency was allowed. These factors caused the Turkish economy in this period to develop with a focus on producers. The state was involved directly in the retail sector until the 1940s in order to ensure the distribution of basic need items and the protection of the social and political order. Despite support for the establishment of consumer cooperatives such as municipality owned supermarkets for the urban population and *Ordu Pazarları* (Army Markets) for civil servants, these enterprises were not adopted by consumers as main food retailers and their spread remained limited [12].

The steps taken by the state to improve distribution chains between 1940-1950 are significant in terms of the development of modern food retail in the following years. These steps are the inception of self-service chain stores with establishment of Sümerbank¹, the Law on Encouraging Foreign Capital (1954) to take advantage of foreign capital in distribution channels and as part of the said law to develop the distribution system and to create a competitive environment, founding of Migros, the first actor of modern food retail in Turkey, through the initiatives of Swiss Migros Cooperatives Union and Istanbul Municipality [13].

The opening of the first modern food retail company (Migros) brought the following innovations to the Turkish market [14].

- Establishment of the mobile sales trucks and first stationary self-service store,
- Introduction of the practices such as receipts, packed food and shopping bags,
- Development in supply chain management (opening of a buying office in a city in Anatolia and involvement in the food processing),
- Knowledge-transfer (training of Turkish employees in Switzerland and individuals' effort to imitate Migros by renewing their shops).



The economic crisis at the time led to a shortage of basic consumer goods and a reliance on the black-market. Local initiatives to overcome the bottleneck of basic need items through mobile markets played an important role in improving access and municipalities began to

regulate even the most basic goods. These items were often procured from the black market by municipalities to bypass government controls as well as sell them directly. These initiatives played a significant role in making mobile markets become fashionable and municipalities began to regulate, protect consumers and ensure cash flow.

Despite these developments, the dominant retail form in Turkey remained small scale, low capital, independent, family owned and single premise businesses until the 1980s [15].

2.2. 1980s: The onset of consumption focused retail developments

The 1980s saw radical transformation in Turkey in almost every field. These changes first occurred in the economic and political structure under the influence of globalization, followed by social changes which were then reflected on physical space. The economic decisions of January 24th, 1980, which were taken before the September 12th, 1980, military coup that was a major turning point in the history of Turkey, changed the economic structure of the country. As part of the "exports-based development strategy" adopted with the economic decisions, the first steps were taken for the integration of Turkey to the outside world and foreign capital entries were encouraged. Policies implemented after the adoption of an outward looking economic development model in keeping with the conditions of global competition brought about economic growth based visibly on foreign trade and along with many economic conditions, production and consumption patterns changed too. The retail sector was affected directly and indirectly by the new economic policies and changes in urban areas, developments in infrastructure, increase in product diversity and high-income groups concentrated in cities presented an attractive field of economic activity for large scale retail investments.

The impact of the liberal economic policies of the 1980s on urban space was first felt in the 1990s. With consumers leading increasingly busy lives, having less time they could devote to food shopping and increasing urbanization made the accessibility of retailers even more important and the lifestyle of the urban consumer began to include the demand to be able to shop "anywhere, anytime". Rapid urbanization, migration to large cities, women's rising participation in working life, rise in household incomes, changes in consumer behavior, spread of the use of credit cards, increase in the ownership of cars and refrigerators, stronger media, technological developments, and the entry of large international firms to the market were factors that changed the structure of the retail trade sector [16].

From the 1980s onwards, the state promoted business relations with Europe through direct foreign investments and establishing European-Turkish unions. In addition, the search for international markets ongoing at the global level, as well as maturing conditions in Turkey attracted foreign capital to Turkey with many large, new national and multi-national actors entering the sector. Domestic firms with large capital accumulation (such as Koc, Sabanci and Cukurova) entered the attractive retail sector in order to consolidate their strength in this new field. The privatization of Migros and Gima, tax breaks, expanding scope of support and the easy credit extended led to increased interest in retail investments [17, 12].

With the liberalization of the economy, it became easier for foreign brand goods to enter Turkey and with cuts to tariffs, there grew interest in foreign consumer goods in the market. Easy access to branded consumer products and consumers adapting to the logic of the marketplace brought about the rise of the "shopping center", which had not been widespread in Turkey until then. The first shopping center, Galleria, opened in Istanbul in 1987 and attracted a lot of attention, leading to increased interest by foreign investors and the increase in investment in shopping centers in large cities [18].

There is a strong connection between the rapid rise of organized food retail and investment in shopping centers. In this process, the anchor stores of new shopping centers were to a great extent large scale food retail stores. These supermarkets were generally established by European firms that had partnerships with the main Turkish

companies in the market. Thus, the “marketization” process began in keeping with the change to the traditional form of retail trade and the form of use of space. The process of marketization was soon followed by the process of hyper-marketization (the rise of large-scale food retail) and the retail market in Turkey thereby entered a new period.

1990s: Invasion of large-scale food retailers with the rise of transnational companies

The 1980s brought new actors and innovations to Turkey but had little spatial range. The wave in 1990s brought not only new actors (transnational and Turkish corporations) and innovations (new formats and organizational innovations), but also a growing spatial range [14].

The effects of liberal economic policies in the 1980s, began to be seen on urban space in the 1990s. Rapid urbanization, migration to big cities, developments in the transportation systems, women's participation in working life, increase in household income, increase in credit card use, increase in automobile ownership, technological developments, entry of transnational companies and changes in consumer behavior are such the factors that change structure of retail trade sector.

With the passing of the Law on Taxation in 1992, the founding of the Competition Board in 1997 and the formation of real estate partnerships in 1998, the central government began to exert control large scale investors through protection and competition. That large scale retailers could sell many goods cheaper because of their large bulk purchases and offered many and diverse goods and services under one roof attracted different income groups to consumption. “Going to a shopping center” became an increasingly popular urban activity.

During this period, many food retail firms, most of which were owned by foreigners, started entering the Turkish market. Metro Group, Carrefour and TESCO were among the first firms to invest in Turkey. Carrefour is significant in terms of being the first retail firm in Europe to adopt the hypermarket and a multi-national and multi-format strategy [19]. The Germany-based Metro Group introduced a new retail format to Turkey, the cash&carry, by opening Metro and Real hypermarkets in Turkey.



Figure 3: Metro Cash&Carry Store in Istanbul

2000s: The diffusion of discount stores

Coming after the effects of the neoliberal period beginning in 1980, the 2001 economic crisis was another important development that affected the transformation of the retail sector in Turkey. One of the most important changes in behavior during this period was the declining rate of eating out. With eating at home becoming more common, there was a fall in the number of customers visiting shopping centers and retailers who were stuck between changing consumption habits and increasing competition had to seek various ways of recourse to meet the demands and expectations of customers during the period of crisis. The concern to

protect their existing customer base and to draw in new customers led large supermarkets and hypermarkets to run ever more sales campaigns and customer loyalty programmes. As a result of the changing preferences of customers with the crisis, the importance of offering store-brand goods, using smaller store formats and of discount stores increased, it became imperative for retailers to follow correct pricing policies and retailers' need for good promotion campaigns by suppliers increased [16]. As a result, food retailers began to form new retail spaces and multi-store formats, include smaller sized neighborhood markets alongside large formats in their portfolios and try to make access to healthy and fresh food easy and cheap.

In the late 1990s, discount stores grew and expanded rapidly in Europe. Aldi, the 1st hard discounter in the world not only has it expanded, but it has also brought a new format and been a source of inspiration for others. With its 'everyday low pricing strategy', Aldi aims to supply its customers with the products they regularly purchase at the highest possible quality and at the lowest price possible. The 'no frills' approach explains both the in-store features and the overall sales strategy of Aldi markets. The features of this approach are there are no decoration in the store, there is no extra labor is employed for jobs (The average store has only four or five employees.) and few branded products are sold (approximately 700 product types, 95% of which are their own brands.). As of logistics and distribution, Aldi is divided into small regional companies. When 60 to 80 stores are reached as a sufficient majority, they are divided into smaller companies with 30 to 40 stores. In this way, the distance between the warehouse and the stores never exceeds 50 kilometers [20].

This trend in Europe affected Turkey and investment in discount stores in Turkey rose simultaneously. That the discount stores' rapid spread throughout the inner city coincided with the 2001 crisis was a trigger on its own. BIM, which entered the market in 1995 saw the crisis of 2001 as an opportunity and borrowing from the growth strategy of Aldi, the largest discount store in Europe at the time, tried to change the consumers' perception that if something is cheap, it is not good. BIM soon became competitive within the sector, established regional offices to spread throughout the country and buying goods from local producers at affordable prices, put out its own store-brand goods on the market. This soon made BIM the leader of the market and led to other firms starting discount market chains. Şok, Diosa and A101 were founded later than BIM and spread out rapidly, beginning with large cities.

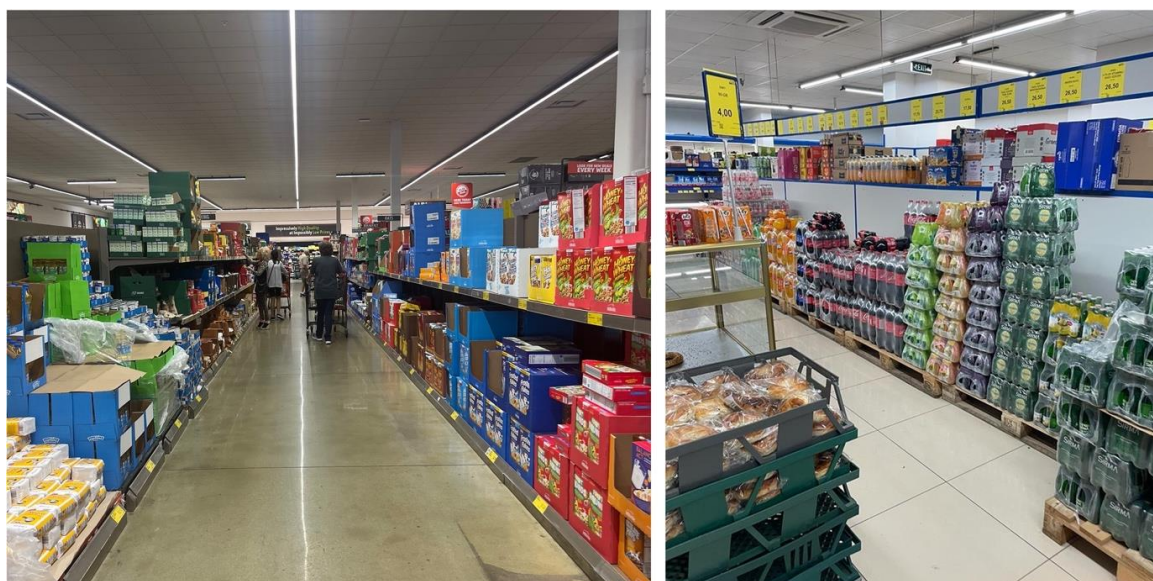


Figure 4: Hard discount Stores (German Aldi on the left and Turkish Bim on the right)

During this period, mergers and acquisitions became an attractive type of investment within the retail sector, as, in addition to the organic growth of chains retailers, they bought up smaller chains, the process of liberalization in the services sector continued and firms followed strategies of international growth. The factors that influenced the retailers' decision to become internationalized were low growth potential with market saturation, the need to lower risky investments, legal barriers to further expansion in their domestic markets, specific line of business, heavy domestic competition, the contraction trend of the national economy and the desire to be the first to enter target markets to reap the advantages of being the first [21].

For these reasons, transnational corporations began to enter the Turkish retail market from the year 2000 onwards and the market share of these corporations rose rapidly through mergers and acquisitions. As of 2000,

60% of transnational companies active in the services sector in Istanbul were retail, 16 are manufacturing and 9 are transportation companies [22].

Having reached a population of 16 million in 2022, Istanbul is the biggest metropolitan area in Turkey where all these processes experienced intensely. Figure 4 shows that the distribution pattern of food retailers in Istanbul between 1990 to 2014 reflects the unchecked spread-out Istanbul where underwent with rapid industrialization and urbanization, especially after 1980. In keeping with the unplanned and fragmented growth Istanbul exhibited on the east-west axis, as well as to the north, and modern food retail firms picked locations along the axes of the sprawl. Before 1980, there are just 3 food retailers (all of them are Migros) in Istanbul. In 1990, the organized food retail sector in Istanbul exploded into growth. The spread of organized food retailers that were included in the study within the city from 2001 onwards is striking, even with a brief glance at the image. While the number of retailers continued to rise in the central districts during this period, there was also a leap towards the periphery. The total number of stores increased from 14 in 1990 to more than 2500 in 2012. As of 2022, even the number of just one discount store (BIM) reached to 1900 across Istanbul.

Figure 5: Modern food retail premises by year of establishment

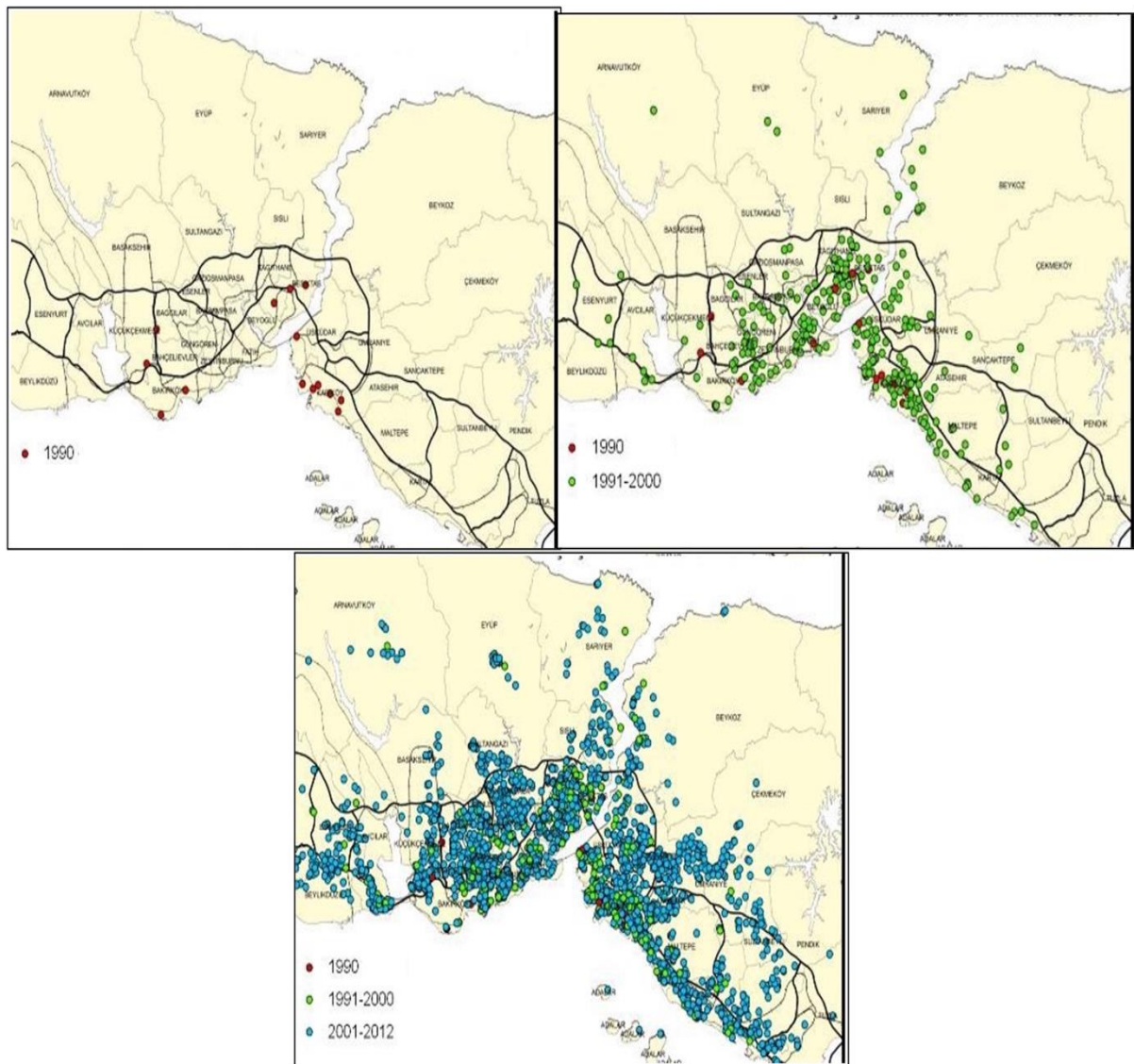


Table 3. Numbers of modern food retail premises by year opened

Year opened	Number of districts covered	Number of stores	Proportion of the total (%)
Before 1990	7	14	0.5
1991-2000	33	266	9.9
2001-2012	39	2,416	89.6
Total	39	2,696	100

In 2000, there were Şok (est. 1995), BİM (est. 1995) and DiaSa (est. 1999) in Istanbul (A101 was established in 2008). While in 2000, soon after they were first established discount stores had begun a process of rapid expansion, the difference between the numbers of different supermarket types is not great. The most conspicuous difference is in terms of location selection strategy. Supermarkets are generally seen to pick locations that lie along or are around main transport routes, while discount stores are seen to pick their locations in clusters that are not evenly distributed.

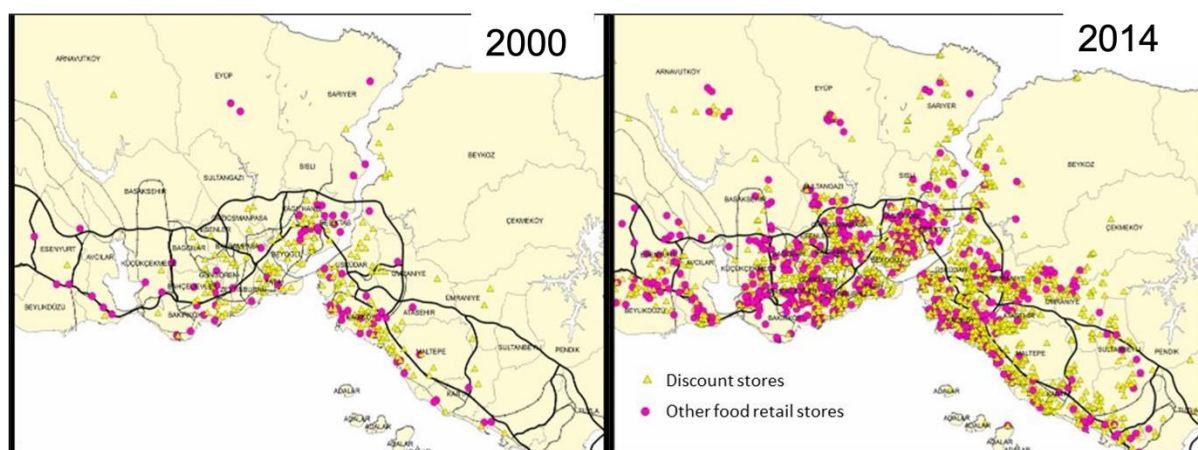


Figure 6: Sprawl of discount stores and other supermarkets

Especially after 2012, discount stores began a rapid period of expansion and their numbers reached 1866. Other supermarkets number approximately 550 for 2012.

Table 4: Modern food retail firms in Istanbul with a total sales area of 50,000 m² or more by format

Format	Total sales area (m ²)	Number of stores (Active at the end of 2014)
Discount	615,148	3,119
Other	629,672	552
Total	1,244,820	3,671

2.3. Today: Digital transition of retail formats: Online food retail platforms

In 21st century, digitalization causes rapid and critical changes not only in the world economy but also in the daily lives. While technology companies dominate the world with their incomes exceeding the national income of many countries, they also encourage consumption with new technologies-versions that are constantly changing and developing. While relations with public institutions can be made through e-government, banking transactions can be made as e-banking, travel reservations can be made online, the scope of some business lines is shrinking or disappearing. Similarly, the increase in e-commerce draws attention especially in countries and cities where young population, education level and technology literacy are higher [23].

Covid 19 caused severe social and economic restrictions but also it has created a great leap forward in digitalization. Such crisis can push innovations and their spread because of changing socio-political contexts. Really, Covid 19 pandemic has led to a sudden increase of online grocery [24]. There are two main reasons for this on the demand side that can be called as a shock. The first of these is the panic buying of consumers. When the buyers see the market shelves empty during the pandemic, they develop a short run panic buying behavior. The other one is the closure of restaurants, hotels and cafes etc. These kind of food purchases shifted to the food retailing sector [25].

In Turkey, in line with the trends in the world, online shopping, which has been developing especially since the 2010s, has experienced a big leap with the effect of the pandemic. Some important facts about e-trade are as follows [26].

- Comparing the quarterly e-commerce data of 2019 and 2020 in Turkey, the highest increase is in food retail (420%).
- Both ‘multi-channel retail’ and ‘online retail only’ is increasing (“multi-channel retail” increased by 32% and the “online retail only” group increased by 48% in 2019.) Figure is shown below.
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Figure 7: The ratio of online retail and multi-channel retail [26]

As 2020, the total number of the 4 largest modern food retailers in Turkey is over 20,000. Both discount stores and large-scale retailers continue to spread throughout the country. Due to the increase of the inflation in Turkey after 2018, people seek economical prices. Right on the same time discounters took this advantage and executed an aggressive expansion strategy. This strategy brought us the below numbers and spatial growth.

Table 5: Top 4 main actors of modern food retail in Turkey

Format	Brand	Online shopping entegration	2014	2022	Increase Rate (%)
discounter	BIM	no	3714	9611	159
	A101	yes	2327	11000	372
supermarket, hipermarket	MIGROS	yes	1004	2849	184
	CARREFOUR	yes	308	643	109
Total			7353	24103	228

Along with the current digital development, the retailers are developing their multi-channel systems and support the expansion of physical stores with online retailing. In addition to the physically sprawling food retailers, now

new digital business model is emerging. 'Getir' stands out as an example of a 'dark store'^b in Turkey. Founded in 2015, Getir has been designed with a dark store business model and aimed to meet the products with the consumers in 10 minutes with the motor couriers. As such, what Getir primarily sells is time, not the product. Although it is a retail and logistics supported model, it derives its main strength from software and data analysis. In this scope, it can be summarized as a new digital business model for food retail made by the technology company. Especially during the pandemic period, it can be shown as an example that they quickly put into service contactless payment and online tipping applications. Getir now provides services to every province in Turkey and has nearly 800 warehouses throughout the country. The company, which opened abroad in 2021, is now growing in 8 countries outside of Turkey [27].

3. Conclusion

This study focuses on how the spatial structure of modern food retailing in Istanbul has changed since the 1980s. In this context, the events that shape food retail in Turkey are described in a historical order and the distribution of modern food retailers in Istanbul according to their geographical locations is examined as a field study.

The study has shown how dynamic the food retail sector is in Turkey and that even if consumption habits change depending on technological developments, socio-economic conditions, crises and epidemics, modern food retail continues to grow.

Major trends that lead to retail change in Turkey are as follows:

- From declaration of the Republic (1923) to 1980: dominant form of retail was grocery stores that is small scale, low capital, independent, family owned and single premise.
- 1980s: With the effect of globalization and neoliberal policies, consumption focused retail places were launched.
- 1990s: As transnational corporations entered to Turkish retail market, modern food retail became widespread with the new format as large scale food retailers.
- 2000s: Economic crisis changed the consumption habits and discount stores began to spread rapidly.
- 2010s to today: Digitalization process of modern food retail accelerated, and online retailing has become popular. Covid-19 pandemic has a triggering effect.

Today, food retailers continue to spread both in the city centers and in the peripheries. Food retailers that entered the market in a large-scale format in the 1990s are opening small-scale supermarkets in the neighborhoods to compete with the discount stores. With the digitalization process, the type of competition is changing, and new forms of retailing are emerging. E-commerce is now also participating in the retailing competition that used to be between large-scale markets and cheap markets. Existing food retailers develop online shopping systems as well as physical stores to survive in the competitive environment. Omni-channel retailing, which provides service to the consumer through many channels, is gaining importance. New actors are entering the market with their new formats.

From a spatial perspective, in Turkey modern food retailers' diffusion process still continues. Due to its size, Istanbul is the city where all developments are experienced first, and the effect is observed most strikingly. Spatial notes on Turkey and Istanbul are as follows:

- By 2019, according to the ranking of the 500 largest private companies in Turkey, 4 of the top 5 retail companies are food retailers [28].
- When the numbers of the 4 big food retailers in Turkey are compared, the number which was 7000 in 2014 exceeded 20,000 in 2022.
- The rapid spread of the discount stores continues. 2 Turkish discount store companies (BİM and A101) have made it to Deloitte's 2022 Global Powers of Retailing Top 250 companies and fastest growing top 50 retailers list [29].
- In addition to physical stores, the food retailers that only provide online shopping services are increasing. These retailers, grow spatially through their warehouses. Established to provide fast service to the consumer, they make the warehouse location selections at the neighborhood scale. As an

^b A dark store is a brick-and-mortar location that has been shut down and turned into a center for fulfillment operations. These distribution outlets are not open to visitors, which allows more space for store inventory and the opportunity to quickly and accurately fulfill orders (<https://www.vaimo.com/what-is-a-dark-store-a-post-pandemic-retail-model/>).

example, 'Getir', an example of a 'dark store' established in 2015, has nearly 800 warehouses across the country.

- The spatial spread of food retailers in Istanbul increases in direct proportion to the growth direction of the city. The trend that used to be the supermarket in the center and the large-scale food retailer on the periphery has changed. Discount stores are opened everywhere that can be easily reached on foot, regardless of income. There are many discount stores in both high-income and low-income neighborhoods of Istanbul. In addition, the warehouses, where locate in a size of a grocery store places, are also noteworthy.

It's seen that retail industry goes through some kind of destruction every 50 years. In the last 150 years, different types have emerged under the influence of transportation and technology and unexpectedly changed the environment and consumer expectations. The old retailers either adapted to the new situation or disappeared as the new ones took their business and left the rest unprofitable [30]. The current trend shows that digitalization of retail changes both the structure of retailing and consumer behaviors. It is predicted that food retailers will continue to grow with multiple channels, but with a shorter supply chain and they will develop e-commerce systems by following technological developments while growing with physical stores.

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