

# A Comprehensive Review of the Rise and Growth Potential of the Turkish Medical Tourism Industry

By Aiden Wasserman

## Abstract

Turkey has rapidly emerged as a leading destination for medical tourism, offering a combination of affordability, quality, and accessibility. Backed by extensive government reforms since 2011—including investment in public hospitals, large tax incentives, and a strong legal framework for patient safety—Turkey now attracts over 1.5 million medical tourists annually.<sup>1</sup> Patients are drawn by procedures that cost a fraction of Western prices, highly trained professionals, internationally accredited facilities, and streamlined e-visa and travel access. The sector spans cosmetic surgery, dental care, ophthalmology, and increasingly, advanced cancer treatment. While challenges persist with risky unlicensed clinics, uneven post-procedure care, and potentially inadequate cultural accommodations, the Turkish government is actively combating these issues. With projected revenues of \$5 billion in 2025 and a double-digit compound annual growth rate through 2030, Turkey’s medical tourism sector presents significant opportunities for investment, innovation, and international collaboration.<sup>2</sup> This report assesses the sector’s history, attractions, key drivers, challenges, and long-term prospects of Turkey’s medical tourism sector, while providing recommendations to enhance its global competitiveness.

## Historical Foundations

Turkey has been a destination for medical tourism since the beginning of the 21st century. However, Turkey’s current prominence in the medical tourism sector would not have been attainable without the government’s deep involvement in developing the sector. In 2011, the AK Party, led by Recep Erdoğan, pledged to develop Turkey’s medical tourism sector significantly. In 2013, Turkey established a publicly funded and organized healthcare system, along with

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<sup>1</sup> Christopher Elliott, “How Medical Tourists in Turkey Balance Travel and Treatment,” *Forbes*, March 8, 2025.

<sup>2</sup> William Sellars, “Healthy Prognosis for Turkish Medical Tourism,” *Arabian Gulf Business Insight*, June 9, 2025; “Top Trends in Turkey Medical Tourism: Why It’s Becoming a Global Health Hub,” *Lerra Clinic*, April 13, 2025; “Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030),” *Mordor Intelligence*, December 13, 2024.

publicly funded city hospitals dedicated to medical tourism. These new public hospitals were held to rigorous quality standards by the Ministry of Health. In 2014, the Ministry of Health began granting accreditation to private medical providers for their medical tourism services and established programs to support them in developing translation services, patient transportation services, and international marketing.<sup>3</sup> A 50% tax reduction was also granted to healthcare institutions that provide healthcare to foreigners, as well as an exemption from VAT.<sup>4</sup> In recent years, the Turkish government increased reimbursement prices for medical devices to 85% to support healthcare providers.<sup>5</sup>

### **Turkey's Competitive Edge**

Global medical tourism is a \$55 billion industry, of which Turkey accounts for about 5%. Although not holding a significant market share, Turkey dominates the market in specific procedures, specifically cosmetic and dental procedures, as well as among younger age groups.<sup>6</sup> In 2024, the industry generated approximately \$3 billion in revenue, accounting for 5% of Turkey's overall tourism revenue.<sup>7</sup> In 2024, 1,506,442 visitors traveled to Turkey for medical tourism, a ~100% increase from the 756,926 visitors in 2019. Of these, 50% came for hair transplants, 18% for ophthalmology, 15% for cosmetic surgeries (primarily rhinoplasty and liposuction), 15% for dental treatments, and 2% for other procedures.<sup>8 9</sup> Several factors have contributed to Turkey's rapid rise in medical tourism, including cost advantages, high-quality care, ease of travel, and attractive tourist attractions.

The low costs of procedures in Turkey are a significant draw for medical tourists. Medical procedures in the West are expensive, often not covered by insurance if they are considered cosmetic, and are frequently subject to long wait times.<sup>10</sup> Procedures in Turkey are, on average, 50-70% lower than their equivalents in Western nations.<sup>11</sup> For example, the average cost of a hair

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<sup>3</sup> Nefes Pirzada, "The Expansion of Turkey's Medical Tourism Industry," *Voices in Bioethics* 8 (June 15, 2022), accessed July 2, 2025.

<sup>4</sup> "Health Tourism and Tax Incentives in Türkiye," *Turkish Tax News*, November 20, 2023.

<sup>5</sup> "Top Trends in Turkey Medical Tourism: Why It's Becoming a Global Health Hub" *Lerra Clinic*.

<sup>6</sup> Elliott, "How Medical Tourists in Turkey Balance Travel and Treatment,"

<sup>7</sup> *Tourism Statistics, Quarter I: January–March 2025*, Turkish Statistical Institute (TÜİK), April 22, 2025

<sup>8</sup> Elliott, "How Medical Tourists in Turkey Balance Travel and Treatment."

<sup>9</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

<sup>10</sup> "Top Trends in Turkey Medical Tourism: Why It's Becoming a Global Health Hub" *Lerra Clinic*.

<sup>11</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

transplant at a Turkish hospital with international accreditation is \$2,675, while in the US it is \$13,610. The average cost of LASIK eye surgery in Turkey is \$1,265, while in the US, it is \$4,400. Lastly, dental implants are on average \$570 in Turkey compared to \$12,500 in the US.<sup>12</sup> With a highly fragmented market, prices are driven down, and quality and innovation are prioritized to gain a competitive edge.<sup>13</sup>

These affordable prices are far more impressive when coupled with the exceptional quality of care available in Turkey. Forty-two hospitals in Turkey have earned Joint Commission International (JCI) accreditation, which recognizes organizations that have met rigorous international standards for high-quality healthcare.<sup>14</sup> Turkey's healthcare system rivals that of the West, boasting highly trained professionals, modern medical facilities, and competitive medical schools.<sup>15</sup> To ensure a high quality of care, Turkey has established a robust legal framework that outlines safety standards, quality benchmarks, and patient rights. Facilities that meet these standards are accredited by the Turkish Health Ministry. Furthermore, all Turkish doctors are required to have malpractice insurance, giving practitioners a financial incentive to ensure quality in all procedures by holding them responsible for the damages of any malpractice. Notwithstanding this, malpractice lawsuits in Turkey are less frequent than in other developed countries, which highlights the exceptional quality of care. When malpractice lawsuits arise, damages are paid either by the government for public hospitals or by malpractice insurance firms for private hospitals, ensuring that patients receive compensation.<sup>16</sup> Turkey is also at the forefront of medical advancement; for example, the World Eye Hospital in Istanbul is renowned for its cutting-edge ophthalmology services.<sup>17</sup>

One of the key advantages of Turkish medical tourism is the simplicity of accessing healthcare services, from finding a reputable clinic and obtaining a visa to traveling to Turkey, as well as the streamlined process throughout the country. Central websites like HealthTurkiye.com enable users to easily select their desired procedure and explore all available hospitals offering that

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<sup>12</sup> "Top Trends in Turkey Medical Tourism: Why It's Becoming a Global Health Hub" *Lerra Clinic*.

<sup>13</sup> Mordor Intelligence, Turkey Medical Tourism Market.

<sup>14</sup> *JCI-Accredited Organizations in Turkey*, Joint Commission International, accessed July 27, 2025.

<sup>15</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

<sup>16</sup> "Top Trends in Turkey Medical Tourism: Why It's Becoming a Global Health Hub" *Lerra Clinic*.

<sup>17</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

procedure, along with details about pricing, contact information, and the doctors involved.<sup>18</sup> The process of scheduling a procedure and consultation is straightforward, with Turkish agents available to provide support throughout each stage. Once an appointment is scheduled, a medical visa can be obtained online by providing proof of the medical procedure to be performed and demonstrating that there are sufficient funds to cover the costs.<sup>19</sup> Turkish Airlines offers affordable, fixed-rate, direct flights between major airport hubs in the US, Canada, Europe, and the Middle East for passengers traveling for medical reasons. Furthermore, passengers traveling to Turkey for medical tourism are eligible for discounts of up to 20% on flight tickets.<sup>20</sup> When organizing their visits, medical tourists typically book all-inclusive travel packages, which include airport pickups and drop-offs, stays in luxury hotels, and translators at affordable prices, streamlining their experience.<sup>21</sup>

Lastly, medical tourists in Turkey often take the opportunity to explore the country and its various attractions. Turkey is the 4th most visited country in the world, with 60.6 million visitors in 2024.<sup>22</sup> Travel packages for medical tourists in Turkey often include experiences to explore the nation's rich cultural heritage, picturesque landscapes, and vibrant cities.<sup>23</sup>

### **Challenges to Future Growth**

Despite the Turkish medical tourism sector experiencing significant growth, it grapples with several systemic challenges that hinder its potential to capture a larger share of the global market. Factors such as the prevalence of unlicensed clinics, insufficient post-procedure follow-up, and the overwhelming dominance of private hospitals over public ones contribute to these obstacles. Addressing these issues is essential for the continued advancement and international competitiveness of Turkey's medical tourism industry.

While most clinics serving medical tourists are accredited by the Turkish Ministry of Health, indicating that they meet rigorous quality standards, several unlicensed or illegal clinics also

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<sup>18</sup> *HealthTürkiye Portal*, Joint Commission International affiliate International Health Services Inc. (USHAŞ), accessed July 27, 2025.

<sup>19</sup> "Top Trends in Turkey Medical Tourism: Why It's Becoming a Global Health Hub" *Lerra Clinic*.

<sup>20</sup> *USHAŞ and Turkish Airlines Cooperation, HealthTürkiye*, accessed July 27, 2025.

<sup>21</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

<sup>22</sup> *UN Tourism Data Dashboard*, United Nations World Tourism Organization (UN Tourism), accessed July 27, 2025.

<sup>23</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

serve medical tourists. These clinics offer much lower prices. While the average cost of a hair transplant at a clinic accredited by the Ministry of Health is \$2,000, it is on average \$800 at an unlicensed clinic. These clinics are able to offer such low prices because they typically have nurses conducting procedures under the supervision of doctors, and they do not pay taxes to the Turkish government. While cheap, the rate of malpractice and subpar work is much higher, giving Turkish medical tourism a bad reputation. Furthermore, the Turkish government misses out on generating any revenue from these operations.<sup>24</sup> However, in April 2025, the Ministry of Health announced new regulations requiring full accreditation from the ministry for any healthcare or physician offering services to foreigners by the end of 2025, or the practice will be shut down.<sup>25</sup>

Although Turkish medical tourism is highly organized in terms of logistics, patients occasionally express concerns about cultural differences and challenges in post-procedure follow-up. A report published in 2020 detailed cases where international patients complained of inadequate human resources, including insensitivity to tourists' cultural features and habits, as well as a lack of facilitators in hospital systems.<sup>26</sup> However, in recent years, Turkey has prioritized cultural education among individuals involved in medical tourism through government-led training. Medical tourists also report that there tends to be a lack of patient follow-up after the procedure. In rare cases of post-procedure complications, if the patient has departed the country, it becomes increasingly challenging to address the issue.<sup>27</sup> These two issues are not easy to remedy, but through constant post-procedure care while the patient is in-country and virtual check-ups, recovery and complications can be managed better. To achieve this, further investment in the Turkish medical tourism industry and the training of additional nurses to support patient recovery are necessary.

Lastly, the Turkish medical tourism market is dominated by private hospitals, which account for 83% of the market.<sup>28</sup> The Turkish Ministry of Health operates numerous public hospitals, which, if further developed, could offer lower prices, comparable wages, and generate additional

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<sup>24</sup> Ibid.

<sup>25</sup> Sellars, "Healthy Prognosis for Turkish Medical Tourism."

<sup>26</sup> D. Cavmak and S. Cavmak, "Using AHP to Prioritize Barriers in Developing Medical Tourism: Case of Turkey," *International Journal of Travel Medicine and Global Health* 8, no. 2 (2020).

<sup>27</sup> Pirzada, "The Expansion of Turkey's Medical Tourism Industry."

<sup>28</sup> Ibid.

revenue for reinvestment. Turkey should focus on making public hospitals more competitive with private hospitals. Public hospitals could be made more competitive by increasing investment, instituting subsidies, or raising taxes slightly on private hospitals. However, Turkey's current policies of keeping taxes low and maintaining high reimbursement prices on medical equipment for private hospitals seek to promote innovation, making it unlikely that they prefer to make the public hospitals more competitive.

### Future Outlook & Drivers of Continuing Growth

While the Turkish medical tourism sector generated approximately \$3 billion in revenue in 2024, accounting for 5% of total tourism revenue, Q1 of 2025 generated 6.9% of tourism revenue, and the earnings prediction for 2025 is projected at \$5 billion, representing a nearly 66% increase.<sup>29</sup> Different studies have calculated varying CAGR rates, with a more conservative study predicting a CAGR of 10.51% from 2025 to 2029 and a more liberal study predicting a CAGR of 15.64% from 2025 to 2030, generating \$8.2B in revenue.<sup>30</sup> In addition to the previously mentioned draws of medical tourism in Turkey, there are several factors that suggest that the sector will continue to expand.



<sup>29</sup> TÜİK, *Tourism Statistics, Quarter I: January–March 2025*; Sellars, “Healthy Prognosis for Turkish Medical Tourism.”

<sup>30</sup> “Top Trends in Turkey Medical Tourism: Why It’s Becoming a Global Health Hub” *Lerra Clinic*; “Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030),” *Mordor Intelligence*.

It seems likely that the numerous systemic issues with Western healthcare will persist, such as high prices, lack of insurance coverage for cosmetic procedures, and long wait times, thus driving consumers to medical tourism. The demand for cosmetic surgery remains high and is likely to continue growing as younger people continue to struggle with self-awareness of their aesthetic appeal.<sup>31</sup> When considering places for cosmetic surgery, Turkey's dominance in the field is evident on social media, with influencers sharing their experiences and generally posting extremely positive reviews with high visibility.<sup>32</sup> Firms' desire to innovate to achieve a greater market share has kept Turkey at the forefront of developing and implementing cutting-edge technology regarding cosmetic surgery. For example, in July 2024, the Vera Clinic unveiled its New Generation Hair Implementation, which revolutionizes hair transplantation surgery by integrating Stem Cell Therapy with Sapphire FUE and OxyCure Therapy, leading to a staggering 99% follicular survival rate and creating denser, thicker hair.<sup>33</sup>

Turkey also stands to continue growing its cancer treatment sector, as high cancer treatment costs and rates make Turkey an attractive destination for treatment. Turkey currently has a developed yet small sector for cancer treatment. While chemotherapy costs approximately \$13,000 in the US, it is offered for around \$6,000 in Turkey at a JCI-accredited facility. Similarly, radiation therapy costs approximately \$17,000 in the US and \$6,500 in Turkey. The Turkish government has been taking initiatives to boost cancer case diagnosis, treatment centers, and research. Turkish medical research institutes are now focusing on acquisitions, collaborations, facility expansions, and other activities to accelerate the development of oncology drugs and other medical devices necessary for treating various kinds of cancers. For example, in 2023, the government launched the Medical Biotechnology Research Center to develop oncology drugs.<sup>34</sup> With Turkey emerging as a cost-effective and high-quality destination for cancer care, the Turkish medical tourism market is poised for significant growth in the coming years.

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<sup>31</sup> "Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030)," *Mordor Intelligence*.

<sup>32</sup> Faith Katunga, "Why Social Media Is Buzzing About Traveling to Turkey for Affordable Full-Body Health Scans," *Travel Noire*, October 21, 2024.

<sup>33</sup> "Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030)," *Mordor Intelligence*.

<sup>34</sup> "Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030)," *Mordor Intelligence*.



**Recommendations:**

To facilitate even greater growth in the Turkish medical tourism sector beyond the current projections, several recommendations should be considered.

While Arab tourists naturally feel more at ease choosing Turkey as the destination for medical tourism, marketing to American and European tourists should focus more on addressing the possibility that they may feel nervous about cultural differences or that their cultural needs may not be met.<sup>35</sup> More effort could be directed toward training medical staff to be more culturally aware and creating a more culturally welcoming environment in hospitals, thereby improving patient satisfaction and driving more tourism. For example, this could be achieved by diversifying food choices at hospitals, ensuring that more signs in areas around hospitals are in English, or having translators available to tourists at every step of the process, starting at the airport.

Turkey should aim to diversify its healthcare offerings to become a dominant player in specialized fields such as sports medicine, geriatrics, and disability care, which are currently dominated by expensive Western nations. By focusing on these areas, Turkey can attract more medical tourists and establish itself as a competitive and affordable alternative in the global healthcare market.<sup>36</sup> Specifically, Turkey should aim to enhance its capabilities in cancer treatment further. By developing specialized cancer treatment centers focused on long-term care, Turkey would ensure visitors stay longer, generating more revenue while still being more affordable than Western care.<sup>37</sup>

Lastly, by increasing marketing and outreach efforts in Western cities, a wider audience of citizens who may have been unaware of Turkish medical tourism offerings can be engaged as potential consumers. Currently, the vast majority of medical tourists in Turkey are members of younger age groups. This is explained by the bulk of publicity related to the sector being on social media apps. The lack of other forms of advertisement and representation manifests in the rightward-skewed ages of medical tourists. Marketing strategies should extend beyond social

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<sup>35</sup> Pirzada, “The Expansion of Turkey’s Medical Tourism Industry.”

<sup>36</sup> Sellars, “Healthy Prognosis for Turkish Medical Tourism.”

<sup>37</sup> “Turkey Medical Tourism Market Size & Share Analysis - Growth, Trends, And Forecasts (2025 - 2030),” *Mordor Intelligence*.



media platforms, such as television, newspapers, and social media platforms geared toward older audiences, ensuring broader outreach to older citizens. Additionally, Turkey could consider adding medical tourism representatives to its consulates or establishing liaison offices in key metropolitan areas. This initiative would offer a space for individuals who may feel hesitant about traveling abroad to seek consultations and learn about the high standards of Turkish medical services. Furthermore, these offices would streamline the process of scheduling treatments, obtaining visas, and arranging travel plans, making it easier for less technologically adept citizens to navigate the necessary logistics.

## **Conclusion**

Turkey's medical tourism sector's growth can be attributed to strategic state planning, market-driven innovation, and growing global demand for healthcare. With a foundation built on high-quality facilities and cost competitiveness, Turkey has rapidly become a leader in procedures such as hair transplants and cosmetic surgery, while also making promising advances in oncology. The sector's trajectory –from \$3 billion in 2024 to a projected \$8.2 billion by 2030– reflects not only growing global demand, but also Turkey's potential to adapt and scale its offerings.

However, for Turkey to fully capitalize on its potential and become a dominant force in global healthcare, key challenges must be addressed. These include cracking down on unlicensed clinics, improving post-operative care, greater cultural sensitivity in patient services, and increasing the competitiveness of public hospitals. With deliberate policy interventions and targeted marketing to Western audiences, Turkey can diversify its medical offerings, attract higher-value treatments, and increase its international credibility.

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