

TURKISH AGRI – FOOD INDUSTRY

TURKISH FOOD EMPLOYERS ASSOCIATION (TÜGİS)

POPULATION
80,8 M

GROSS DOMESTIC
PRODUCT
(GDP)
USD 851,5B

AVERAGE GROWTH IN
GDP
(2002 – 2017)
5,7%

EMPLOYMENT
POPULATION
28,2M

GDP PER CAPITA
USD 10.600

TOTAL IMPORT
USD 234B

SHARE OF AGRICULTURE
IN GDP
6,1%

TOTAL EXPORT
USD 157B

AGRICULTURAL LAND
23,4M Ha

TOTAL AGRICULTURAL
TRADE VOLUME
32,5B USD

TOTAL EXPORT OF
AGRICULTURAL
PRODUCT
17 B USD

AGRICULTURAL GDP
USD 53,4B

2ND BIGGEST
AGRICULTURE
ECONOMY IN OECD

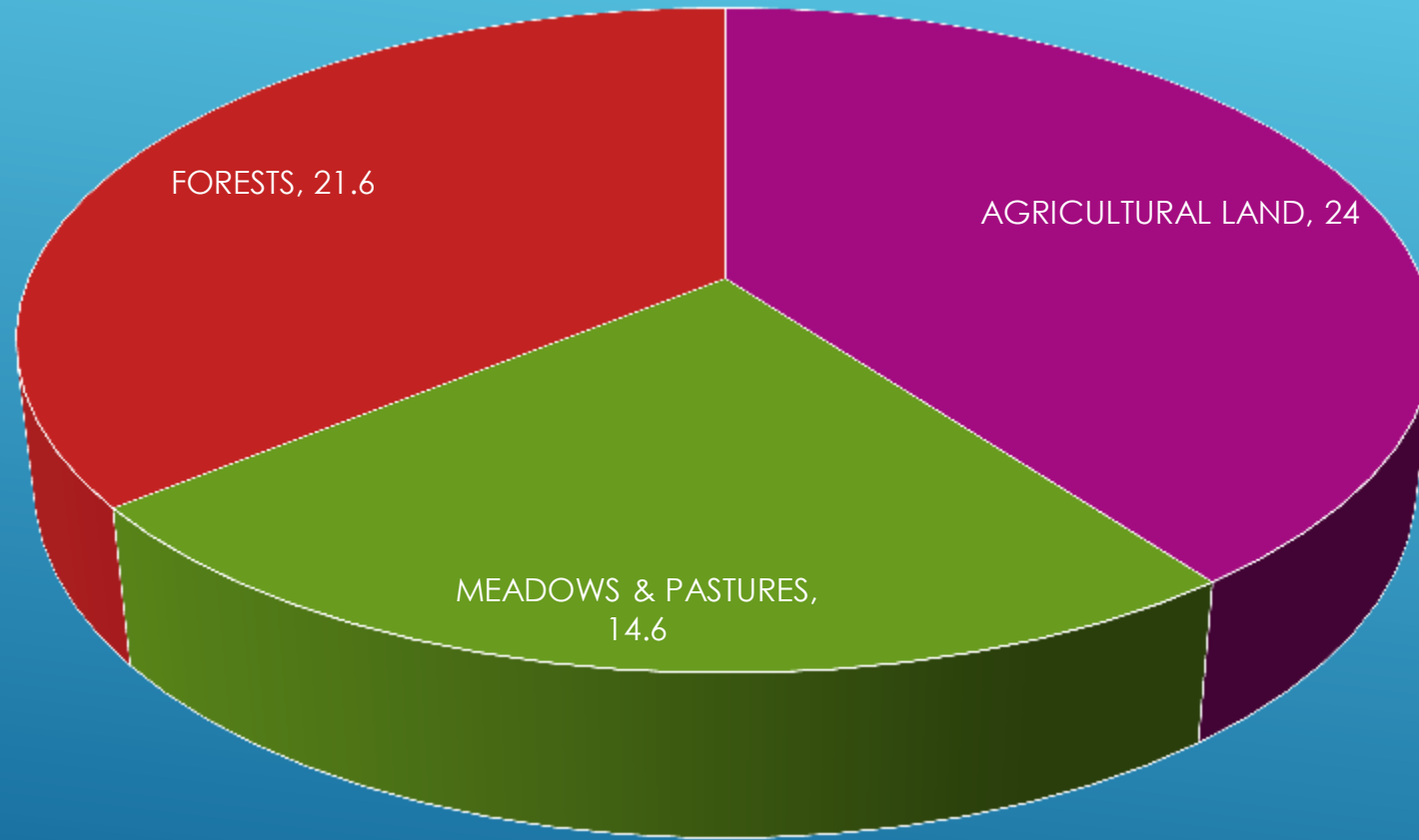
EMPLOYMENT IN
AGRICULTURE
5.17M PERSON

FRUIT
3,4M Ha

FIELD CROP
15,5M Ha

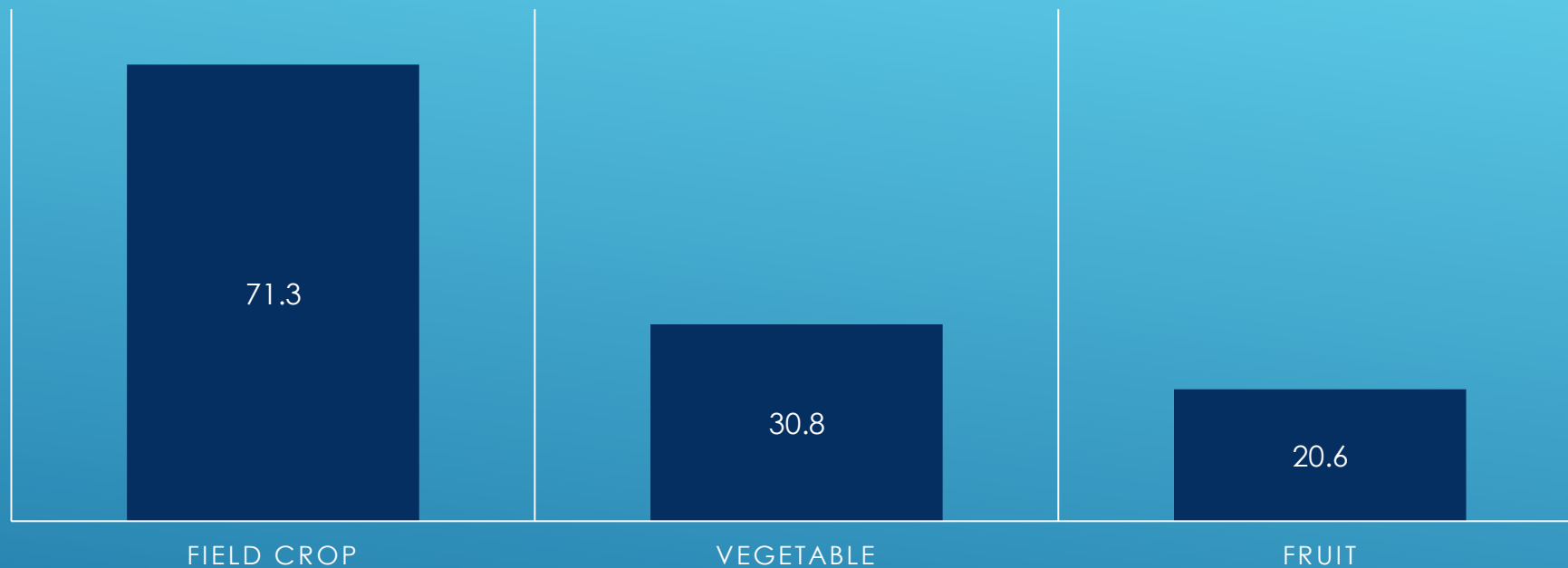
VEGETABLE
0,8M Ha

BREAKDOWN OF AGRICULTURAL LAND (M Ha)

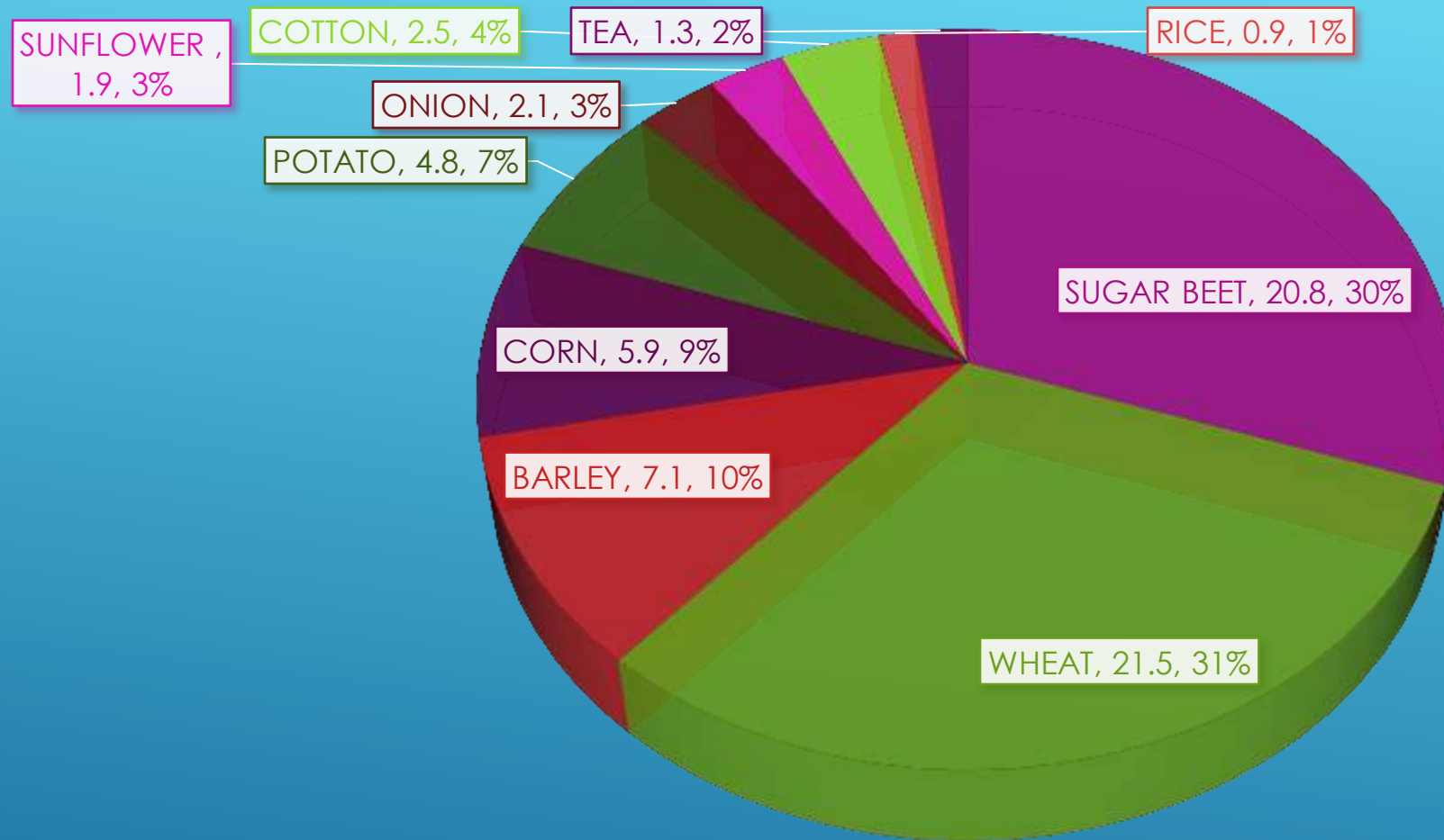


■ AGRICULTURAL LAND ■ MEADOWS & PASTURES ■ FORESTS

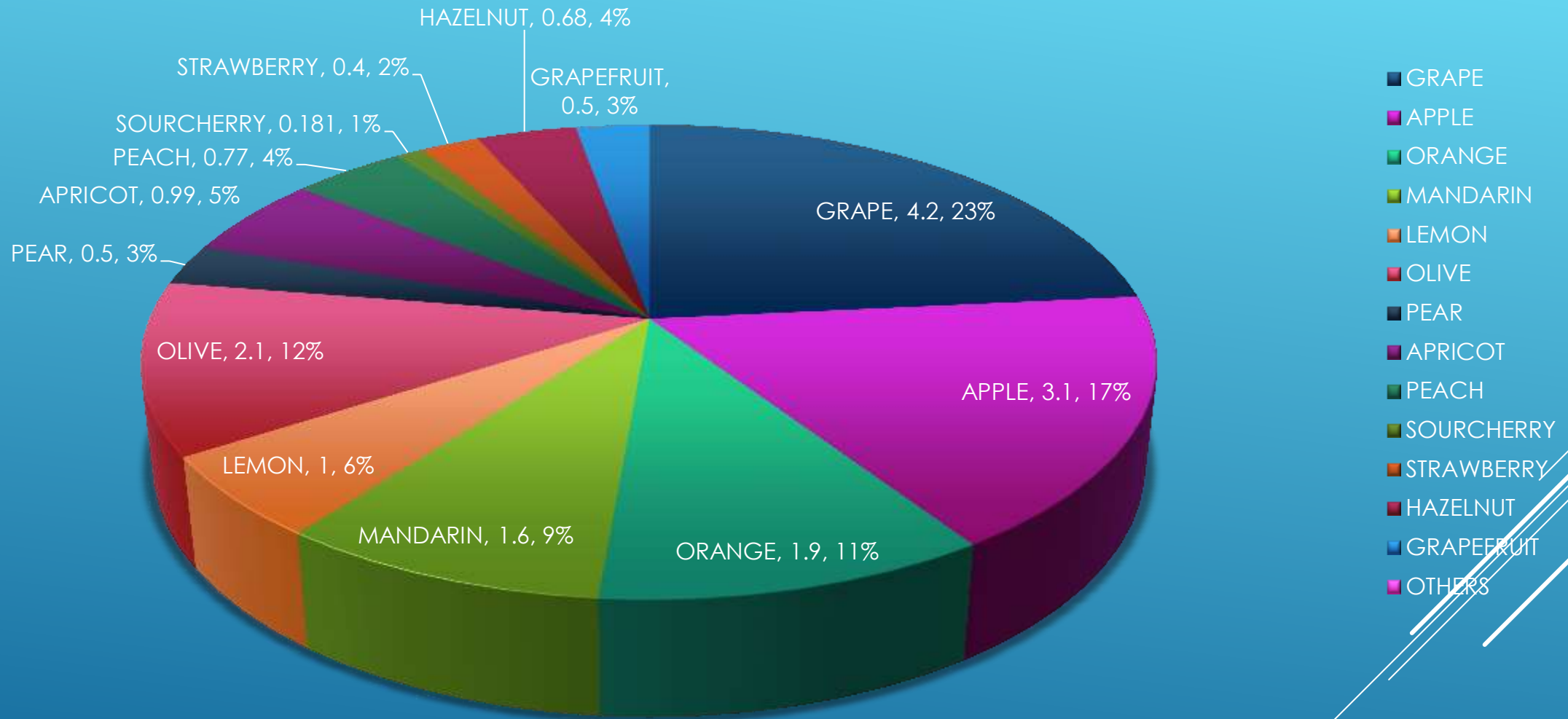
2017



CROP QUANTITIES (M TON)



FIELD CROP PRODUCTION (M TON)



FRUIT PRODUCTION (M TON)

TOP
PRODUCER

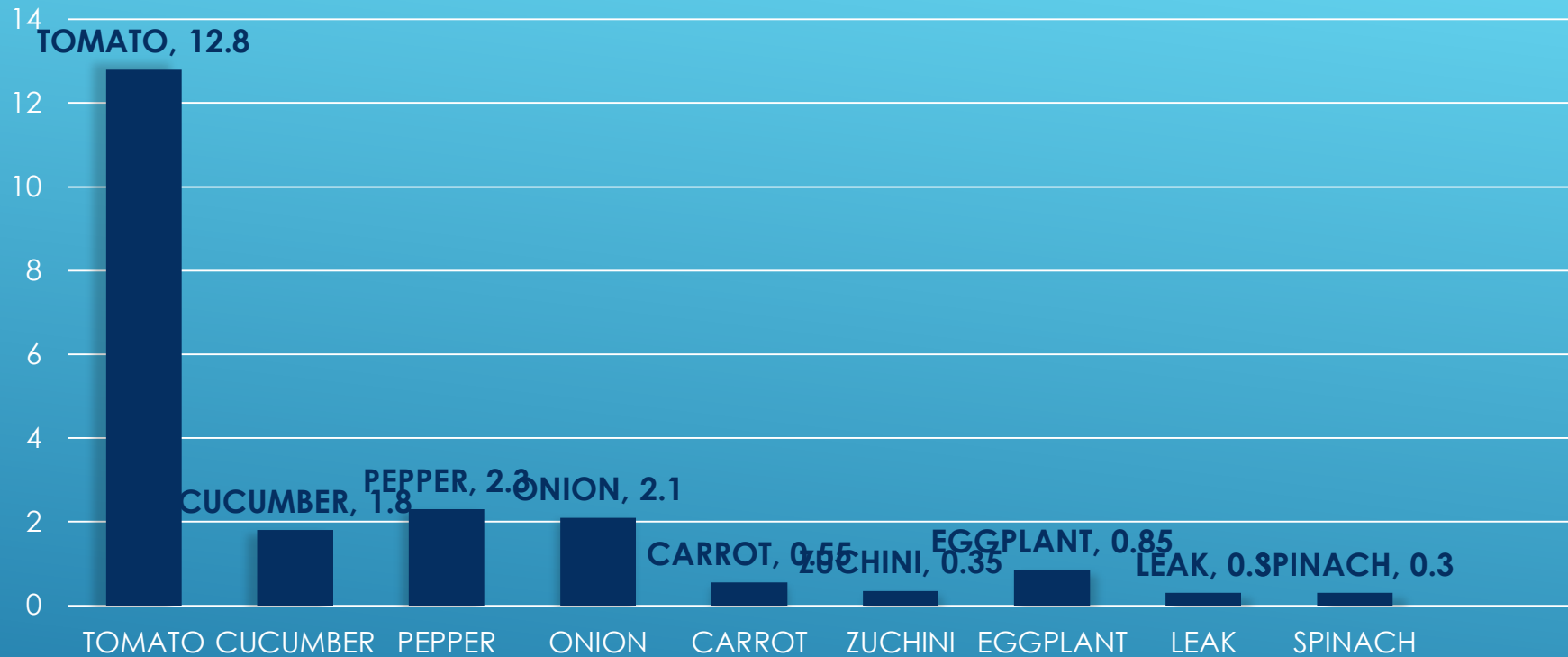
HAZELNUT, APRICOT, FIG, DRIED RAISIN, CHERRY

ONE OF THE
TOP 5
PRODUCERS

MELON, WATERMELON, CUCUMBER, LENTIL,
PISTACHIO, QUINCE, SOUR CHERRY, CHESNUT,
PEPPER, HONEY, GREEN BEANS

APPLE, COTTON, WHEAT, BARLEY, ALMOND,
SUNFLOWER, TOBACCO

ONE OF THE
TOP 10
PRODUCERS



VEGETABLE PRODUCTION (M TON)

- ▶ THERE ARE **68.000** FARMERS IN ORGANIC AGRICULTURE.
- ▶ APPROXIMATELY **225** DIFFERENT PRODUCT
- ▶ THE TOTAL ORGANIC PRODUCTION IS **2.473.000** TONS

ORGANIC AGRICULTURE

- ▶ OLIVE, OLIVE OIL
- ▶ GRAPE (RAISIN)
- ▶ SPICE VARIETIES
- ▶ POMEGRANATE
- ▶ APPLE
- ▶ HAZELNUT
- ▶ CHICKPEA

MOST COMPETITIVE ORGANIC PRODUCTS

- ▶ 752.000 HA ; BIGGEST IN EUROPE
- ▶ 7,8M TONS OF PRODUCTION PER YEAR
- ▶ 95% IS VEGETABLES
- ▶ 4% FRUIT
- ▶ 1% FLOWERS

GREENHOUSE

- ▶ 16,1M HEAD BOVINE(15,9 M CATTLE; 0,16M WATER BUFFALO)
- ▶ 44,3M HEAD OVINE(33,7SHEEP, 10,6 GOAT)
- ▶ SLAUGHTERED CATTLE - 3,6M HEAD / 987.000TONS MEAT
- ▶ SLAUGHTERED SHEEP - 5M HEAD/ 100.000TONS MEAT PRODUCED

LIVESTOCK & MEAT



- ▶ **2.136.000TONS** OF CHICKEN MEAT IS PRODUCED IN 2017
- ▶ THERE ARE **72** HATCHERY, **64** SLAUGHTERHOUSE
- ▶ **19.281M** EGG IS PRODUCED A YEAR (2017)
- ▶ **206%** INCREASE ON CHICKEN MEAT, **67%** ON EGG PRODUCTION IN THE LAST 15 YEARS
- ▶ TURKEY IS AN EXPORTER ON BOTH OF THESE PRODUCTS

POULTRY

MILK PRODUCTION

- **18,76M** TONS COW MILK (2017)
- **1,16M** TONS SHEEP MILK (2017)
- **0,479M** TONS GOAT MILK (2017)
- **0,07M** TONS WATER BUFFALO MILK
- TOTAL MILK PRODUCTION WAS **20,7M** TONS IN 2017...
- HALF THIS AMOUNT IS PROCESSED IN THE MED- OR BIG SIZE FACTORIES.

MEAT PRODUCTION

- ▶ SLAUGHTERED CATTLE – 987.000TONS MEAT
- ▶ SHEEP - 100.000TONS MEAT
(2017)



- ▶ **631.000TONS** OF SEAFOOD PRODUCTS PRODUCED
- ▶ THIS INCLUDES BOTH FISHING AND AQUACULTURE
- ▶ **156.000TONS** OF THE TOTAL PRODUCTION IS EXPORTED IN 2017...



SEAFOOD PRODUCTION

- ▶ There are **42.560** enterprises in food & beverage business
- ▶ **95%** of the food industry is small/ medium size enterprises
- ▶ They employee around **564.000** people
- ▶ The total GDP for the sector is **USD 370.722M**
- ▶ Food industry exports **USD10,7B**
- ▶ Food and beverage import is USD **4,9B**



FOOD & BEVERAGE INDUSTRIES

- ▶ There are 563 multinational companies which 18% German, 8,5 % Netherland, 5,9% France...
- ▶ 20% of the biggest 500 companies in Turkey are Food manufacturers. (ISO 500)
- ▶ Multinational food companies which invested in Turkey are;
- ▶ Bunge, Unilever, Cargill, Mondelez, Perfetti Van Melle, Nestle, Barry Callebout, Barilla, Lactalis, BRF Poultry, Hero Baby, Ajinomoto, Dohler, Ferrero, Pepsico, Coca Cola, Dr. Oetker, Basf, Cadbury, Carlsberg, Schweppes, Tuborg

FOOD & BEVERAGE INDUSTRIES

BREAKDOWN OF FOOD & BEVERAGE INDUSTRY ENTERPRISES & EMPLOYMENT

	ENTERPRISES	EMPLOYEE
Meat & Meat Product Processing	523	564.000
Fruit & Vegetable Processing	1.005	
Dairy Processing	2.055	
Bakery & Bakehouses	30.673	
Cereal Processing	29.700	
Pet Feed	457	
Beverage	509	15.000

- ▶ Meat consumption is mostly based on fresh meat rather than processed.
- ▶ More than 500 companies operating
- ▶ Döner and köfte are the biggest market for meat consumption after fresh meat

MEAT PROCESSING INDUSTRY

- ▶ It is processed and sold whole or part; raw, advanced processed and frozen...
- ▶ Turkey is a poultry exporter; **443.021tons** (2017)
- ▶ 2nd biggest producer in Europe (**2.136.734Tons**)
- ▶ Biggest egg producer in Europe (**19.281.000.000**)

POULTRY PROCESSING INDUSTRY

- ▶ 18,7M tons cow's milk is produced which is the 90% of the total
- ▶ 50% of the total collected milk is processed in mid- and big size dairy factories (2017)
- ▶ **600.000tons/year** of cheese produced
- ▶ **1,6M** tons milk for drink (uht and pasteurized)
- ▶ **1,2m** tons processed to yoghurt
- ▶ **717.000tons** of milk is processed to ayran (drinking yoghurt)
- ▶ **132.000tons** processed to Skimmed Milk Powder (SMP)
- ▶ **60.000tons** butter manufactured
- ▶ Middle east, Russia and EU are the main market for exporting

DAIRY INDUSTRY

- ▶ Aquaculture (40%) and hunting (60%) are both practiced in Turkey.
- ▶ Both open sea and inland waters used for seafood production.
- ▶ Aegean Sea is mostly the base for aquaculture

SEA FOOD

- ▶ Fruit juice concentrate , puree and NFC products are produced
- ▶ Apple, peach, apricot, sourcherry, grape, pomagrenate, orange are the base products in consantrate
- ▶ 34 companies operating
- ▶ Fruit juice bottling – fruit juice, nectar and drinks - 58 companies operating
- ▶ 40 companies operating in fresh fruit pakaging
- ▶ 50 companies operating in canning and frozen food (IQF)
- ▶ More than 30 factories producing tomato paste and Turkey is among the top 5 countries...

FRUIT & VEGETABLE PROCESSING

- ▶ Turkey is the home country for olive fruit
- ▶ **1.730.000tons** of olive production a year which is appx. 10% of the world total
- ▶ 1.300.000tons of total used in olive oil production; **170.000tons** of Olive Oil produced (2017)
- ▶ **30.000tons** of olive oil is exported which makes Turkey the 5th in the world
- ▶ **430.000tons** of olive is processed for table
- ▶ 1/4 of the world
- ▶ **80.000tons** is exported as table olive

OLIVE OIL



- ▶ Turkey is the home for hazelnut
- ▶ **675.000tons** of produced; **70%** of the world is produced
- ▶ 110.000tons for domestic market
- ▶ **565.000tons** for exporting (with shell)
- ▶ Italy is the second with 10%
- ▶ 80% of the hazelnut is used in chocolate, biscuit, cake production



HAZELNUT

- ▶ 4,2m tons grape harvested in 2017
- ▶ 1,6m tons is sundried for sultana production; it is mostly for export (250.000tons of dried product)
- ▶ 72.000 tons sundried fig
- ▶ 240.000tons sundried apricot



SULTANA/ FIG / APRICOT

- ▶ Only sugar beet is used for crystal sugar production in Turkey.
- ▶ 33 factories operating; 22 of them is belong to private sector.
- ▶ 3,1m tons of capacity; 2,7M tons is the total production.
- ▶ HFCS is also produced in Turkey.
- ▶ There are 5 factories and 1M tons of total capacity which realise to 265.000tons a year

SUGAR PRODUCTION

- ▶ Turkey is the part of the Customs Union with the EU since 1996 and has signed free trade agreements with 27 countries
- ▶ Railway, sea and road transport opportunities are present throughout the country
- ▶ There are Organized Industrial Zones in each of the cities
- ▶ 23% of the working population is university graduated
- ▶ Labor cost is lower than EU countries

CONCLUSION

- ▶ Meat, dairy and fruit juice
- ▶ Animal husbandary
- ▶ Licenced warehousing
- ▶ Aquaculture
- ▶ Cold storage may be considered as attracting investment opportunities

CONCLUSION

THANK YOU

