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Report Highlights:

Turkiye's food and beverage sector depends on domestic and imported ingredients, a large portion of which are sourced from Europe. European ingredients enjoy zero or low import duties under preferential trade agreements, as well as lower freight costs. The sector, which boasts nearly 58,000 businesses, continues to grow in response to steady consumer demand for processed food products. The southeastern region of Turkiye is recovering from the impact of devastating earthquakes that occurred on February 6, 2023. Although economic activity slowed sharply in the immediate aftermath of the disaster, there is not expected to be a major effect on the real GDP growth forecast or the food processing ingredients sector for 2023.

MARKET FACT SHEET: TURKIYE

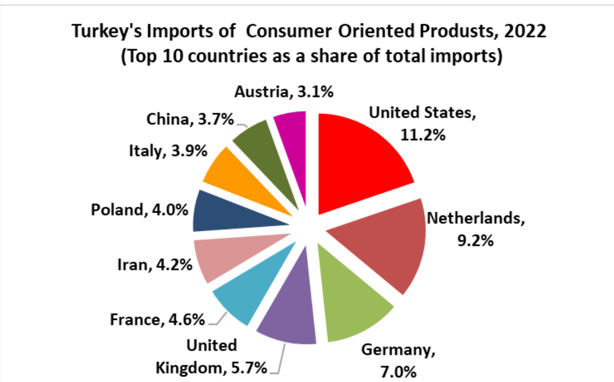
Executive Summary

Turkiye is an emerging, largely free economy and a leading producer of agricultural products, textiles, and construction materials. Turkiye's economy is ranked 19th in the world, with a GDP of $905.5 billion in 2022. About 13 percent of total manufacturing comes from food and beverage production. Turkiye has a population of 85 million.

The economy's growth rate was 5.1 percent in 2022 and expected to grow at a modest 3.1 percent in 2023. The country continues to struggle with rising inflation and a weakened currency, which will continue influencing food consumption patterns. Middle class consumers, many of whom are relatively young, are increasingly interested in convenient, healthy, and affordable food products.

Imports of Consumer-Oriented Agricultural Products

EU countries are the major suppliers of consumer-oriented agricultural products, with the advantage of proximity and preferential duties under the Turkiye-EU Customs Union. After the EU, the United States is the largest supplier.



Food Processing Industry

Turkiye has a large and sophisticated food and beverage manufacturing sector, which relies on domestic and imported ingredients. As of 2022, there were nearly 58,000 food and beverage manufacturers in Turkiye. The industry, which supplies both domestic and export markets, continues to grow in response to strong consumer demand for increased convenience.

Food Retail Industry

Grocery sales were $76 billion as of the end of 2021. Despite the recent political and economic challenges, the food retail industry has been growing due to a young, dynamic population with 77 percent urbanization rates and a growing middle class.

Quick Facts on Turkiye's Food Sector

Imports of Processed Foods, 2021
USD 7.8 billion*

Top Growth Products in Turkiye (Imported Processed Food Ingredients) 2019-2021

1. Malt, Roasted
2. Flour
3. Starch, Potato
4. Protein Concentrate
5. Vegetable Saps and Extracts
6. Agar Agar
7. Yeast, Active
8. Starch, Wheat
9. Gum Arabic
10. Malt Not Roasted

Top 10 Retailers (by Market Share in 2021)

1. Bim
2. A 101
3. Migros
4. Şok
5. CarrefourSA
6. Ekomini
7. Hakmar
8. Sec
9. Onur
10. File

GDP/Population
Population: 85 million (TurkStat, 2022)
GDP: USD 905.5 billion (TurkStat, 2022)
GDP Per Capita: USD 10,655
*Turkiye changed its statistical reporting system for foreign trade date in 2020; therefore numbers are not comparable to previous years.
Sources: CIA World Fact Book; Euromonitor International (EMI); Turkish Statistical Institute (TurkStat); Trade Data Monitor (TDM); Economist Intelligence Unit (EIU)

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Long term GDP and disposable income growth, despite the recent downturn	Domestic and international political challenges
Large population base: young and growing	Economic instabilities such as exchange rate fluctuations and increasing inflation
Opportunities	**Threats**
Unsaturated market, open for new items	Complex and time- consuming import procedures
Growing demand for high value packaged food; ready to-eat/cook meals	Resistance to foods made with new technologies

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I. MARKET SUMMARY

Turkiye has a large and sophisticated food and beverage manufacturing sector. The sector, which boasts nearly 58,000 businesses, continues to grow in response to steady consumer demand for processed food products. Continued high inflation and the devaluation of the Turkish lira (TL) in 2022, resulted in important changes in consumer purchasing behavior in Turkiye. There is a noticeable shift from branded products to economy priced or private label. With the declining purchasing power, people have been eating out less and cooking more at home, causing an increase in sales of cooking ingredients and meals.

The southeastern region of Turkiye is recovering from the impact of devastating earthquakes that occurred on February 6, 2023. The ten provinces affected by the earthquakes account for 14.5 percent of Turkiye's agricultural GDP, 11 percent of industrial production, and about nine percent of overall GDP. Although economic activity slowed sharply in the immediate aftermath of the disaster, there is not expected to be a major impact on the real GDP growth forecast for 2023. In the processed food industry, approximately 100 flour factories out of 550 are in the earthquake provinces, but all the main producers did not sustain major damage. Other food processing factories, mainly centered in the regional hub of Gaziantep, suffered minor or no damage. The biggest challenge for the producers, is the displacement of the labor force in the region due to lack of sound residential structures. Initially, the industry experienced some cancellations of orders but were able to recover and are now operating normally.

Turkiye's food and beverage sector is facing rising input costs, a weakened currency, and supply chain uncertainties. To keep costs down, businesses are looking to diversify ingredient sources or switch to alternatives. The Government of Turkiye (GoT) cut the value added tax (VAT) on basic food products from eight percent to one percent on February 14, 2022. The cut applies to staples such as flour, rice, pasta, meat, fish, tea, coffee, water, milk and dairy products, cheese, eggs, oils, sugar, fruits, vegetables, nuts, and legumes. However, as inflation continues climbing higher, consumers will become increasingly price conscious in making food purchase decisions. About 23 percent of household consumption is spent on food.

Table 1: Advantages & Challenges facing U.S. Food Processing Ingredients in Turkiye

ADVANTAGES	CHALLENGES
A large and developed food processing industry requires a wide range of ingredients.	Importing can be complex. Rules and regulations are opaque, import procedures are time consuming, and there is a zero tolerance for genetically engineered products or ingredients in food.
A growing number of dual-income households drives new demand for processed, frozen, prepared food, and ingredients.	Artisanal food products, such as bakery items and cheese, utilize domestic ingredients and have strong existing relationships with ingredient suppliers.
For U.S. companies already exporting to Europe, entering the Turkish market may be less complicated since many Turkish regulations are similar to those in the EU.	The depreciation of the local currency means that imported food ingredients are relatively more expensive than domestic ingredients. Many EU products benefit from preferential duties under the Customs Union and freight advantages due to proximity.
The food processing industry has a positive perception of innovative new food processing ingredients from the United States.	There is misinformation among higher end consumers about processed food ingredients and additives.
Growing demand for high value packaged food, ready to-eat/cook meals.	The Turkish food industry produces many western style products, such as packaged confectionery products and ready-to-eat meals.

Source: FAS-Turkiye

II. ROAD MAP FOR MARKET ENTRY

a. ENTRY STRATEGY

After conducting market research determining that there is a potential market in Turkiye for a specific food ingredient, it is important to develop a good strategy for market entry. Turkiye straddles southern European and Middle Eastern cultures, and personal relationships are very important for business.

Finding a local agent is a safe approach for entry into the market, especially for medium and small enterprises. Agents in Turkiye are sometimes an importer, distributor, wholesaler, a commission-based trader, or some combination thereof. Local representatives will have experience in market development and contact information of potential buyers, such as the food processors that are likely to use your products. A good representative can guide you in the market, including on import rules and regulations, which ports to utilize, local business practices, conducting market intelligence formally or informally, starting sales calls, etc. Before selecting any local agent, personally visiting them in Turkiye is highly recommended. One should do meetings with several of them before selecting one. For larger companies with more resources, it might be an option to establish a company in Turkiye and hire some local personnel.

Large food processors in Turkiye are often capable of accessing the ingredient suppliers themselves and importing directly. Therefore, one might approach them directly or try and meet them in a large trade show such as Anuga in Germany, Sial in France, or Gulf Food in Dubai. Food trade shows in Turkiye can be helpful to visit before deciding to enter the market. Anfas Food Product, World Food Istanbul, IbaTech , CNR Food Istanbul, and Food Ingredients Fi Istanbul are good shows to visit and meet importers.

Entering the Turkish market often needs a long-term perspective and persistence, as building trust is important. Thorough market analysis must be done before entry. Please review other FAS reports and contact the FAS Turkiye offices in Ankara and Istanbul, as needed.

b. IMPORT PROCEDURES

Import procedures are complicated and burdensome in Turkiye. This makes a local business ally more essential. For details on the requirements, please refer to our Exporters Guide to Turkiye and FAS Turkiye reports on Food and Agricultural Import Regulations and Standards and Required Certificates. The U.S. Foreign Commercial Service also provides some general information on Turkiye's import procedures, and on doing business in Turkiye.

Turkiye's import processes and regulations can be difficult to navigate; in most cases some counseling with a customs broker/consultant in Turkiye is useful as these brokers/consultants often understand the complex import processes better than a new, lesser-experienced company. Contacts include Istanbul, Izmir , Mersin, or Ankara Customs Brokers Association, depending on needs.

Many laws and regulations are harmonized with those in the European Union. Companies that have exported to the EU before are often better prepared for navigating Turkish regulations, though exporters should not assume all requirements are the same. Labeling requirements should also be taken into consideration.

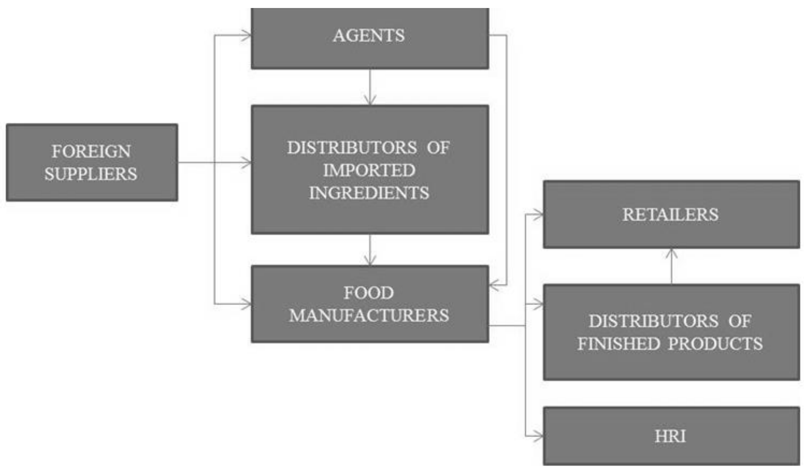
Please visit our country page for other FAS exporter assistance reports.

c. DISTRIBUTION CHANNELS

Food processing ingredients reach processors in Turkiye either through a local importer, agent, distributor, or broker, or are imported directly by the processor. Large processors prefer to buy directly from the producer in the exporting country but also buy from agents as well. Other small and medium sized processors will buy ingredients from importers or wholesalers to reduce risk and complications.

Imported processed food is distributed mostly through premium organized retailers in the country. The penetration of organized retailers is approximately 50 percent, with the rest being traditional, small, family-owned corner grocery stores. These smaller stores have little or no imported packaged food, but more domestically produced processed products such as cheese, bakery items, confectionary items, and snacks.

Figure 1. Food and Beverages Distribution Channels of Turkiye



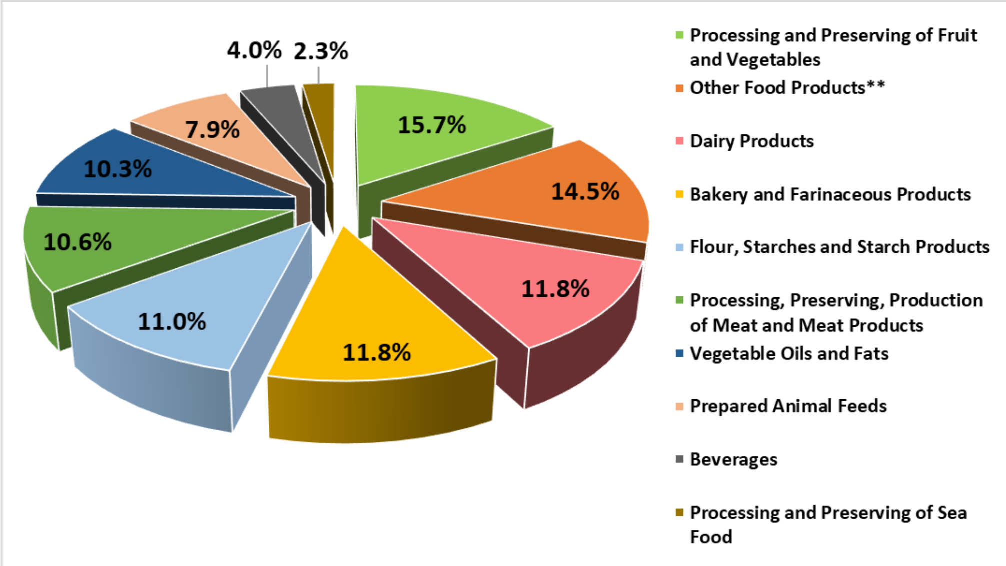
Source: FAS-Turkiye

Please review our Turkish Food Retail Sector Report to better understand the retail market structure and distribution channels and opportunities.

Food service is another way of reaching consumers. High end restaurants that are generally in large metropolitan areas or coastal resort towns are potential users of imported processed food and ingredients. Please review our Food Service - Hotel, Restaurant, Institutional Report for more information.

d. SHARE OF MAJOR SEGMENTS in the FOOD PROCESSING INDUSTRY in 2022

Figure 2. Share Of Major Segments in the Food Processing Industry -Turkiye (2022)



*The above chart is for 2022 which is the latest year that TurkStat reported data.
** Other food products include manufacturing of sugar, manufacturing of cocoa, chocolate and sugar confectionery, processing of tea and coffee, manufacturing of other food products
*** Percentages are calculated on the basis of turnover created by the respective industry. See actual data.

e. COMPANY PROFILES

Turkiye is home to more than 58,000 food and beverage manufacturers. The leading companies from each sub-sector are included below with links to their individual websites. There are 35 food and beverage companies listed among Turkiye's Fortune 500 for 2020.

Dairy Companies

1. SEK Sut Urunleri
2. Pinar Sut Mamulleri
3. Sutas Sut Urunleri
4. Yorsan Sut Urunleri
5. Danone Turkiye
6. Ak Gida / Ulker Icim Sut
7. Eker Sut Urunleri
8. Torku Gida

Meat and Poultry Processing

1. Pinar Et
2. Namet Et
3. Maret Et (Owned by Namet since 2014)
4. Trakya Et
5. Polonez Et Urunleri
6. Sahin Melek Et ve Mamulleri
7. Besler Et ve Gida Sanayi
8. Coskun Et Mamulleri
9. Banvit Poultry
10. Keskinoglu Poultry
11. Beypilic Poultry
12. Akpilic Poultry
13. CP Turkiye Poultry
14. Has Poultry

Confectionary, Chocolate, Snack

1. Eti Gida
2. Ulker Gida
3. Nestle Turkiye
4. Frito Lay Turkiye
5. Mondolez International Turkiye
6. Torku Gida
7. Dogus

8. Ferrero Turkiye
9. Saray Biscuits
10. Haribo Turkiye
11. Bifa Gida

Processed Seafood

1. Dardanel Gida
2. Kerevitas
3. Leroy Turkiye
4. Kocaman
5. Kilic Deniz
6. Marines Sea Food

Nuts and Dried Fruits

1. Malatya Pazari
2. Tadim
3. Papagan
4. Peyman
5. Pinar Kuruyemis
6. Milhans Kuruyemis
7. Seyran Gida

Beverages

1. Dimes Gida (Fruit Juices)
2. Aroma (Fruit Juices, Carbonated Drinks, Water)
3. Tamek (Fruit Juices)
4. PepsiCo Turkiye (Carbonated drinks, chips)
5. Coca Cola Turkiye (Carbonated drinks, fruit juices, water)
6. Anadolu Efes (Beer)
7. Turk Tuborg (Beer)
8. Mey Icki (Hard liquor, wine)
9. Doluca Wine
10. Kavaklidere Wine

Canned Food, Ready to Eat Food, Frozen Food, Processed Vegetables & Fruits

1. Tat (canned, glass bottle conserved)
2. Tamek (canned, glass bottle conserved)
3. Yurt Konserve (canned)
4. Superfresh (frozen)
5. Pinar (Frozen)
6. Feast (Frozen)
7. Tukas Gida (canned, glass bottle conserved)
8. Penguen Gida (glass bottle conserved)

f. SECTOR TRENDS

Turkiye's food manufacturing industry has not only benefitted from sustained economic growth in the country but has also been a major driver of growth for over a decade. Production of food and beverages is one of the major components of Turkiye's economy, accounting for nearly 13 percent of total manufacturing production, with turnover of $74 billion in 2020. See table 2. The food and beverage producing sector is the second largest industry in Turkiye.

Table 2: Number of Enterprises and Turnover Values of Food Manufacturing Industry Turkiye

	Number of Enterprises					Turnover in Millons of USD*				
FOOD MANUFACTURING INDUSTRY in TURKEY	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Manufacture of food products	47,617	49,025	51,338	52,869	57,573	66,256	61,273	63,396	63,580	73,886
Processing and preserving of meat and production of meat products	1,259	1,282	1,357	1,422	1,505	8,639	7,483	7,122	6,412	7,924
Processing and preserving of fish, crustaceans and molluscs	245	254	283	305	329	1,060	1,178	1,328	1,463	1,792
Processing and preserving of fruit and vegetables	2,547	2,615	2,791	3,061	3,553	10,865	10,000	10,577	10,956	12,098
Manufacture of vegetable oils and fats	1,305	1,353	1,404	1,451	1,600	6,374	5,497	5,843	6,211	8,178
Manufature of dairy products	2,248	2,304	2,409	2,542	2,837	8,613	8,243	8,511	8,423	9,102
Manufature of grain mill products, starches and starch products	3,319	3,141	3,132	3,062	3,216	7,690	6,890	7,484	7,360	8,461
Manufacture of bakery and farinaceous products	32,740	33,897	35,511	36,217	38,896	8,229	7,708	8,243	7,774	9,084
Manufature of other food products	3,363	3,591	3,832	4,133	4,875	10,424	9,864	9,834	10,211	11,169
Manufacture of prepared animal feeds	591	588	619	676	762	4,362	4,409	4,455	4,771	6,077
Manufacture of beverages	595	628	649	657	654	3,262	3,112	3,205	2,759	3,096
TRL/USD*						3.65	4.83	5.68	7.02	8.88

Source: Turkish Statistical Institute, 2021 is latest available year as of March 2023.
* The values are calculated using the average TL-USD rate for that year.

Despite current economic headwinds, the processed food industry is expected to continue growing in the coming years. Much of this growth will be fueled by several demographic trends, including continued urbanization, a large young population, an increase in the number women in the workforce, a rising number of college students, and an increasing number of single-person households, especially in larger cities. Many of these consumers, most of whom are part of a growing middle class, are increasingly interested in the convenience of prepared, ready-to-eat foods.

Ready meals are the best performing category in 2022, with a growth of 96 percent in retail sales. Sales of frozen pizza from grocery retails instead of eating out have become popular. New shelf-stable ready meal focusing on "healthier ingredients" are expected to expand in the market.

Retail sales of baked good and frozen baked goods increased rapidly in 2022. The category covers traditional Turkish baked goods such as borek rolls, sophisticated items that are complex to prepare at home, which has made packaged frozen formats increasingly popular in recent years. Packaged leavened bread and packaged flat bread continued to gain ground during 2022 as consumers continued to favor packaged products due to the better hygiene standards that these products represent.

Noodles are becoming more popular in Turkiye with each passing year, largely is due to the changing preferences of young generation and affordability of instant noodles. Whereas sales growth in pasta is slowing, noodles has emerged as one category of non-Turkish food that has been able to attract increasing investment from key companies with the aim of making these products more widely available.

Sugar confectionery overall sales saw solid improvement in 2022, benefiting generally lower cost products compared to other areas in snacks. Bigger exporters are handling economic fluctuations better than smaller competitors due to their export markets. Major player Haribo is continuing to invest in new launches and continued to grow in 2022. However, consumers are consuming less chocolate and they shift toward consuming home-made cakes, low-cost dried fruits or sugar confectionary.

The online retail segment is one of the fastest-growing segments and will continue to gain popularity despite the high inflation rates due to Turkiye's young demographic and rising credit-card use. Online sales of groceries have also increased. Websites such as Hepsiburada, Trendyol started to have ventured into grocery sales. Spending on food and non-alcoholic beverages is expected to rise in 2023 and 2024 on account of the high cost of the food. High prices will require households to allocate more of their incomes to food expenditures.

Additives/Flavorings

Turkish companies still tend to import food additives, such as artificial colorings and sweeteners. There is one prominent Turkish company that is producing aromas and natural-identical flavors called Aromsa. Three large companies produce yeast for the baking sector: Turkish-owned Pakmaya, French-owned Lesaffre, and British-owned Mauri. All three are also exporting to other countries.

Most enzymes used as food processing aids are imported from various countries with a small amount of local production. There are currently two local enzyme producers in Turkiye and, with Lvzym, established in 2014, being the biggest. Turkiye is currently consuming 20,000 metric tons of enzymes, with 25 percent used in the food industry. With a new operation facility, Lvzym is planning to supply most of the enzymes needed for the domestic food production industry.

For gelatin, there is demand for non-pork based, halal gelatin since Turkiye is a Muslim country; domestic halal gelatin producers use only beef products. Most vitamins and mineral additives are imported, though there is some local production, such as calcium carbonate. Food additives are primarily imported from the Netherlands, Germany, and the United States.

III. COMPETITION

While Turkiye's food manufacturing and retail sectors are robust, there is still considerable room for international brands to grab a slice of the market. Major competition for U.S. processed food and food processing ingredients mostly comes from local companies and European suppliers which benefit from preferential duties under trade agreements.

Many processed food products from Europe have zero or low import duties under the Turkiye-EU Customs Union. EU-origin processed food ingredients also benefit from lower freight costs, aligned regulatory structures, and familiarity among Turkish consumers. Turkiye also has a free trade agreement with European Free Trade Association (EFTA) countries. For example, Norway sells seafood to Turkiye, some of which goes into food processing and Switzerland sells additives, processing aids, and cocoa to Turkiye. Turkiye has Free Trade Agreements (FTA) with 22 other countries, with many including preferential tariff rates on food and agriculture products.

Turkiye depends on imported vegetable oil for some of its food processing needs. Malaysia and Indonesia are the leading suppliers of palm oil to Turkiye. Russia and Ukraine supply sunflower oil.

The United States is mainly exporting food additives, aids, and ingredients, most of which fall under the "Food Preparations nesoi" category (HTS 2106.90). Imports of U.S. products under this HTS face a 10 percent retaliatory duty, which Turkiye imposed in 2018 in response to U.S. Section 232 tariffs on Turkish steel and aluminum.

Table 3. Processed Products and Ingredients Imports to Turkiye by Country

Processed Food Import and Share of Turkiye 2020-2022 (Thousand dollars)							
Country	**Imports 2020**	**Imports 2021**	**Imports 2022**	**Share (%) 2020**	**Share (%) 2021**	**Share (%) 2022**	**FTA Status**
Russia	632,033	1,144,892	1,378,373	15.03	20.87	17.58	No
Malaysia	583,297	875,015	1,175,803	13.87	15.95	15.00	Yes
Ukraine	96,780	95,119	1,001,813	2.30	1.73	12.78	No
Indonesia	208,249	281,126	509,649	4.95	5.13	6.50	No
Netherlands	281,896	328,931	342,907	6.70	6.00	4.37	EU
Germany	260,783	288,491	331,318	6.20	5.26	4.23	EU
United Kingdom	155,306	168,587	230,025	3.69	3.07	2.93	Yes
France	142,875	193,282	219,036	3.40	3.52	2.79	EU
Italy	126,536	154,129	179,386	3.01	2.81	2.29	EU
Bulgaria	108,261	154,480	178,350	2.57	2.82	2.28	EU
World Total	4,204,605	5,485,269	7,839,028	100	100	100	

Source: Trade Data Monitor, 2023

Turkiye's imports of processed food products and ingredients continue to increase. Imports in 2022 reached $7.8 billion, an increase of 42 percent year-over-year by value. The U.S. market share fell below 5 percent in 2022 due to the weakening of the TL against the dollar and the additional tariffs on U.S. products. Trying to grow the U.S. market share in the future will be a challenge due to local and foreign competition.

Germany is the top supplier of food processing ingredients to Turkiye, mostly exporting food preparations, malt, thickener, and flavoring (Table 4). Italy and The Netherlands are the other two EU countries from which Turkiye imports similar food processing ingredients. The United States is the fifth biggest supplier of food processing ingredients with the sales of $47 million in 2022.

Table 4. Food Preparations and Ingredients Imports to Turkiye by Country

Food Preparations and Ingredients Import of Turkiye 2018-2022 (Thousand dollars)						
Country	**2018**	**2019**	**2020**	**2021**	**2022**	**FTA Status**
Germany	130,107	115,629	122,383	134,782	124,545	EU
Italy	74,474	51,523	52,001	53,929	69,936	EU
Netherlands	127,949	118,530	152,272	169,071	55,879	EU
Russia	11,434	10,574	18,323	13,576	48,162	No
United States	40,232	26,521	43,805	48,817	47,597	No
Poland	21,104	21,392	23,977	27,284	47,457	No
United Kingdom	38,630	36,793	44,657	45,982	45,274	Yes
France	46,096	41,262	193,282	52,470	41,949	EU
Malaysia	7,869	10,297	13,195	15,831	40,490	Yes
Thailand	16,014	11,659	13,990	178,350	25,832	No
World Total	675,856	599,950	685,736	780,643	814,794	-

Source: Trade Data Monitor, 2023

IV. BEST PRODUCT CATEGORIES

Turkiye is a highly competitive and very price sensitive market for many items. A thorough analysis should be done before prospective exporters consider Turkiye as a long-term market investment.

a. PRODUCTS PRESENT in the MARKET WHICH HAVE GOOD SALES POTENTIAL

1. Food additives, food processing aids, especially innovative ones
2. All kinds of coffee products, coffee additives, coffee aromas etc., coffee innovations
3. Tree nuts and certain dried fruits (e.g., cranberries, prunes)
4. Vegetable oil
5. Sauces
6. Gourmet and ethnic food ingredients, as well as certain spices

b. PRODUCTS NOT PRESENT in the MARKET BUT WHICH HAVE GOOD SALES POTENTIAL

1. Ingredients for healthy, natural, or functional foods
2. Ingredients for organic processed food

c. PRODUCTS NOT PRESENT in the MARKET BECAUSE THEY FACE SIGNIFICANT BARRIERS

1. Ingredients and additives derived from biotechnology (Agricultural Biotechnology Report -Turkiye)
2. Organic sugar
3. Beef and beef products

V. KEY CONTACTS AND FURTHER INFORMATION

Republic of Turkiye, Ministry of Agriculture and Forestry (MinAF)

Turkish Statistics Institute (TurkStat)

Union of Chambers and Commodity Exchanges of Turkiye (TOBB)

Foreign Economic Relations Board of Turkiye (DEIK)

Investment Support and Promotion Agency of Turkiye (ISPAT)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

Association of Food Additives and Ingredients Manufacturers (GIDABIL)

All Foods Foreign Trade Association (TUGIDER)

For other agricultural industry reports on Turkiye and other countries in the world, please visit the Foreign Agricultural Service (FAS) Global Agricultural Information Network (GAIN) webpage. Contact the FAS-Turkiye offices via the information below:

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Attachments:

No Attachments