



PRESIDENCY OF  
THE REPUBLIC OF TÜRKİYE  
**INVESTMENT &  
FINANCE OFFICE**

 **Frankfurt School**  
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# AGRICULTURE AND FOOD SECTORS IN TÜRKİYE: PROSPECTS AND OPPORTUNITIES



Executive  
Summary

Agri-Food  
System in  
Türkiye

Agriculture -  
Food Value  
Chain of  
Türkiye

Competitiveness  
Potential and  
Priority  
Investment  
Areas



# General View

Türkiye's agriculture and food sector plays a strategic role both in terms of ensuring domestic food security and supporting rural development. According to 2023 data, Türkiye's agricultural value added is USD 68.5 billion, the sector's share in GDP is 6.2% and its share in total employment is 14.8%. In the last 20 years, the sector has grown by 400%, making Türkiye the leading agricultural producer in Europe.



According to 2023 Data;

**Agricultural Value Added: \$68.5 Billion**

**Share of Agriculture in GDP: 6.2%**

**Share in Total Employment: 14.8 %**

**Growth rate in the last 20 years: 400%**





### Input Supply

Türkiye has access to modern inputs thanks to favorable climatic conditions and large arable land.

Producers are rapidly integrating digitalization and mechanization processes.



### Agricultural Production

Crop production is the dominant segment of the sector, but the share of animal production has increased in recent years. Productivity has increased especially in basic crops such as wheat, corn, sunflower and cotton.



### Agricultural Industry

The agricultural sector is Türkiye's second largest industry, accounting for 6.2% of value added and 14.8% of employment. Product groups such as fresh fruits and vegetables and olive oil are particularly competitive.



### Foreign Trade

Türkiye is a net exporter of agricultural and food products and its main markets are the European Union, the Middle East and Africa. In recent years, growth has been observed in the African and Central Asian markets.





“ There are **ten key drivers of domestic and external demand** in Türkiye’s agriculture and food sector. ”

	Advanced Logistics Network and Proximity to European, Central Asian and Caucasus Markets	Developed Tourism Sector and Steadily Increasing Number of Tourists Every Year	
	Sustained Economic Growth	Increasing Urbanization and Increase in the Number of High-Income Households	
	Young and High Level of Education Population	Established Value Chain Structure	
	Rich and Innovative Nutrition Culture	Increasing Demand for Convenience and Processed Food	
	Geographical Diversity and Wide Product Range	Rapidly Growing Retail Sector and Developing Food Industry	



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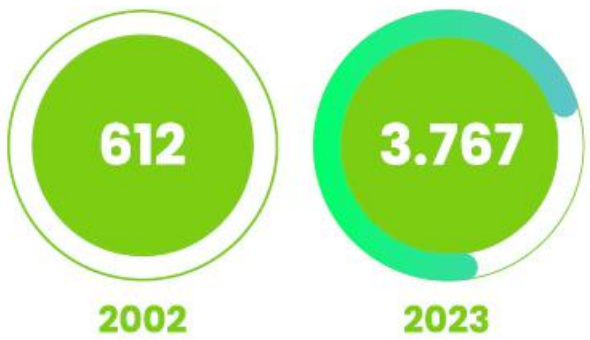
# Growth and Agricultural Value Added

66 Türkiye has grown by 400% in the last two decades and is among the most important economies thanks to its developing trade structure.



99

## GDP (Million USD PPP)



Türkiye's Gross Domestic Product increased by 400% compared to 2002 and reached USD 3,767 billion according to purchasing power parity.

## GDP (USD PPP) (Per capita)



Gross Domestic Product per capita similarly increased by more than 400% to USD 44,151.

## Agricultural Value Added (Billion USD PPP)



Agricultural value added has increased by 90% in the last 20 years, reaching USD 68.5 billion.



## Importance of Agriculture Sector in Economy



**The agriculture and food sector** ensures the country's food security and plays an important role in rural development.

### According to 2023 Data:

#### Share in Gross Domestic Product:

Over the last two decades, thanks to stable growth and Türkiye's favorable climatic conditions, the importance of the agricultural sector in the economy has continued.

**6.2 %**

#### Share in Employment:

A significant share of the country's population still depends on agriculture for their livelihoods and agriculture plays a major role in rural development.

**14.8 %**

#### Share in Exports:











Türkiye is an important agricultural country and a food production center for other countries in the region.

**12.1 %**



## Türkiye's Agricultural Production on the Global Stage

Global agricultural value added: Türkiye's place in the top 10 in 2023

N.	Country	Agricultural Value Added (Constant 2015 USD billion)	Agricultural Added Value / GDP %	Share of Global Agricultural Value Added %
1	 China	1,272	7.1	32.1
2	 India	482	16.0	12.2
3	 USA	214	0.7	5.4
4	 Indonesia	144	12.5	3.6
5	 Nigeria	123	22.7	3.1
6	 Brasil	102	6.2	2.6
7	 Pakistan	86	23.4	2.2
8	 Türkiye	68.5	6.2	1.7
9	 Russia	61	3.3	1.5
10	 Egypt	49	10.6	1.2

On a global scale, Türkiye is among the top 10 countries in terms of agricultural value added and ranks first in Europe.



**TÜRKİYE**



**First in  
Europe**

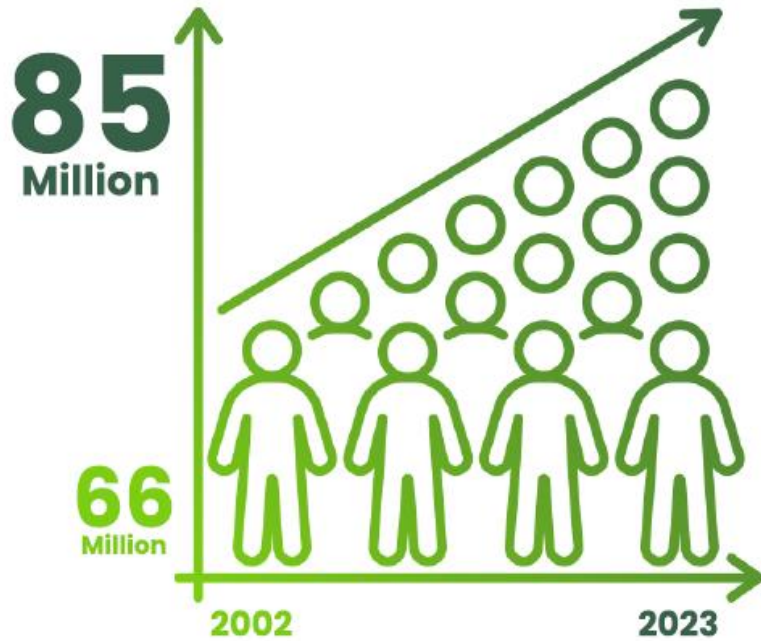


**World's  
eighth  
agricultural  
economy**

# Growing Population and Food Demand



## Population



“ Türkiye’s population has grown by 30% in the last 20 years and will exceed 85 million in 2023.



According to the United Nations projection, the population will reach 96.3 million in 2054.

## Food Consumption

2002  
**3607**  
KCAL/Person



2022  
**3825**  
KCAL/Person

“ Türkiye has shown a significant increase in both population and **per capita food consumption in the last decade**, and the demand for food in our country is increasing day by day.



93% of Türkiye’s population lives in cities.

Alongside population growth, the amount of food consumed per capita increased by 6% to 3825 kcal/capita.





## Increasing Urbanization in Türkiye

**Total population by 2023 85.4 Million**

**We have 24 cities with a population of over 1 million**

<b>İstanbul</b>	<b>15.7 Million</b>	<b>Muğla</b>	<b>1.1 Million</b>
<b>Ankara</b>	<b>5.8 Million</b>	<b>Denizli</b>	<b>1.1 Million</b>
<b>İzmir</b>	<b>4.5 Million</b>	<b>Eskişehir</b>	<b>0.9 Million</b>
<b>Bursa</b>	<b>3.2 Million</b>	<b>Mardin</b>	<b>0.9 Million</b>
<b>Antalya</b>	<b>2.7 Million</b>	<b>Trabzon</b>	<b>0.8 Million</b>
<b>Konya</b>	<b>2.3 Million</b>	<b>Ordu</b>	<b>0.8 Million</b>
<b>Adana</b>	<b>2.3 Million</b>	<b>Afyonkarahisar</b>	<b>0.8 Million</b>
<b>Şanlıurfa</b>	<b>2.2 Million</b>	<b>Erzurum</b>	<b>0.7 Million</b>
<b>Gaziantep</b>	<b>2.2 Million</b>	<b>Malatya</b>	<b>0.7 Million</b>
<b>Kocaeli</b>	<b>2.1 Million</b>	<b>Sivas</b>	<b>0.7 Million</b>
<b>Mersin</b>	<b>1.9 Million</b>	<b>Batman</b>	<b>0.6 Million</b>
<b>Diyarbakır</b>	<b>1.8 Million</b>	<b>Tokat</b>	<b>0.6 Million</b>
<b>Hatay</b>	<b>1.5 Million</b>	<b>Adıyaman</b>	<b>0.6 Million</b>
<b>Manisa</b>	<b>1.5 Million</b>	<b>Elazığ</b>	<b>0.6 Million</b>
<b>Kayseri</b>	<b>1.4 Million</b>	<b>Zonguldak</b>	<b>0.6 Million</b>
<b>Samsun</b>	<b>1.4 Million</b>	<b>Kütahya</b>	<b>0.6 Million</b>
<b>Balıkesir</b>	<b>1.3 Million</b>	<b>Şırnak</b>	<b>0.6 Million</b>
<b>Tekirdağ</b>	<b>1.2 Million</b>	<b>Çanakkale</b>	<b>0.6 Million</b>
<b>Aydın</b>	<b>1.2 Million</b>	<b>Osmaniye</b>	<b>0.6 Million</b>
<b>Van</b>	<b>1.1 Million</b>	<b>Çorum</b>	<b>0.5 Million</b>
<b>Kahramanmaraş</b>	<b>1.1 Million</b>		
<b>Sakarya</b>	<b>1.1 Million</b>		

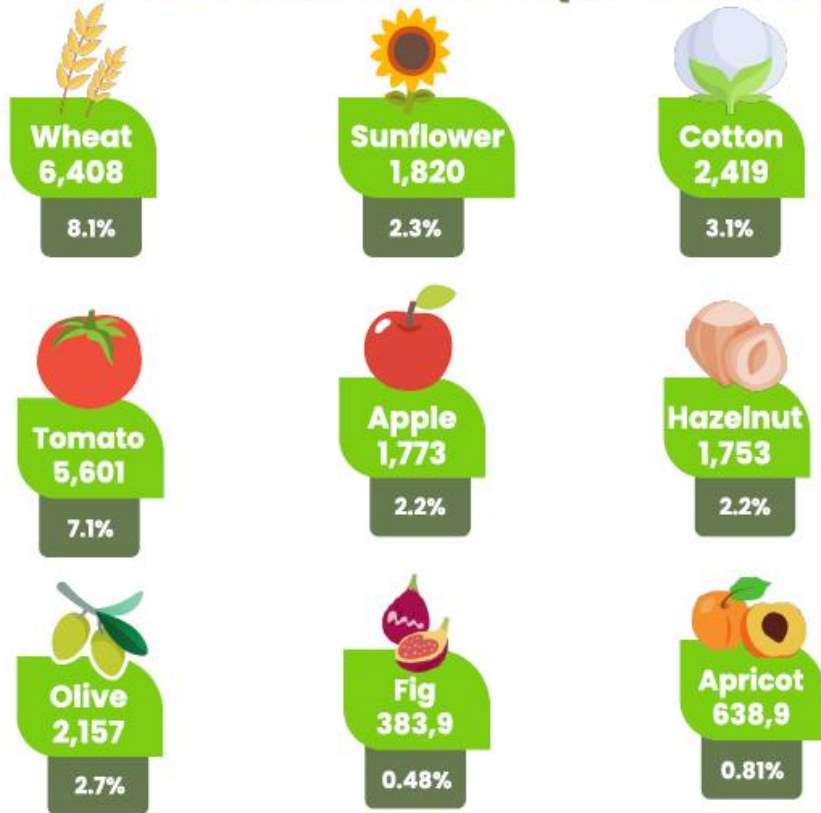


# Agricultural Production Value Components (2022)



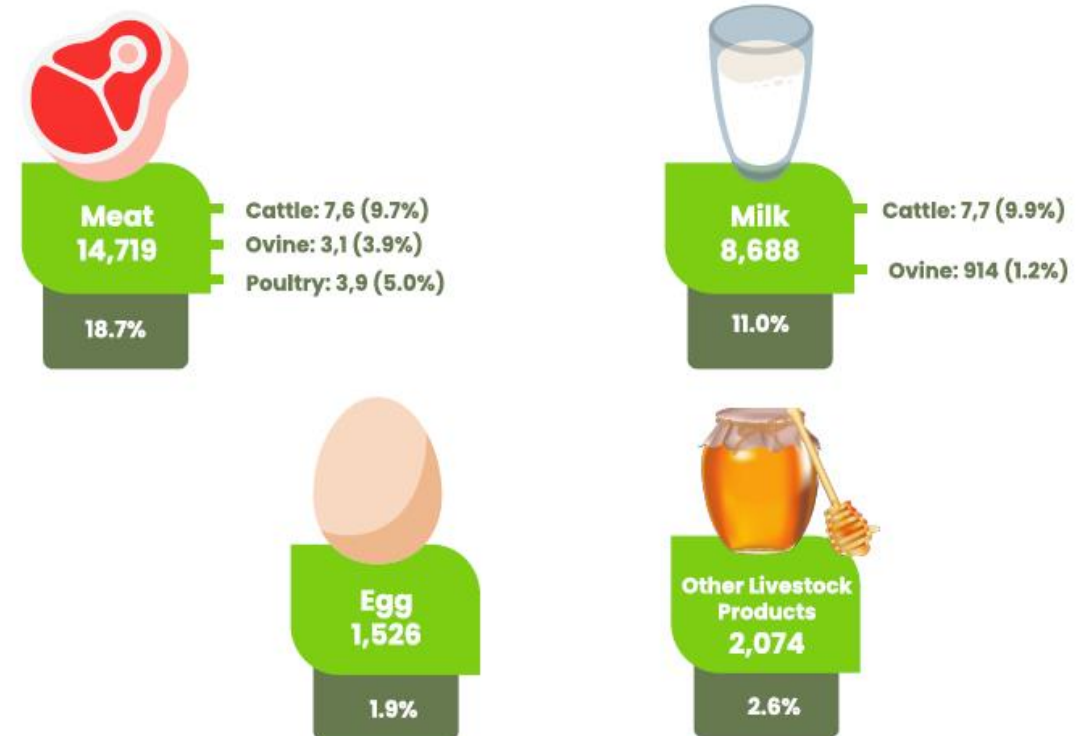
## Plant Production

Value of Production (Million USD)



## Livestock and Poultry Products

Value of Production (Million USD)



**65.8%**  **34.2%**

Plant production is dominant in Turkish agriculture. Plant value added corresponds to USD 68.5 billion, the total size of agriculture.



# Türkiye's Global Ranking in Fruit Production



Türkiye is the world leader in **apricot**, **cherry**, **hazelnut** and **fig** production.

## Ranking of Türkiye, 2022















 <b>Apricot</b> 1st	 <b>Cherry</b> 1st	 <b>Shelled Hazelnut</b> 1st	 <b>Fig</b> 1st
 <b>Apple</b> 2nd	 <b>Olive</b> 2nd	 <b>Citrus Fruits</b> 2nd	 <b>Peach</b> 3rd
 <b>Shelled Walnut</b> 4th	 <b>Shelled Almond</b> 4th	 <b>Tea</b> 5th	 <b>Lemon</b> 6th
			 <b>Grape</b> 6th

# Türkiye's Global Ranking in Vegetable Production



As a pioneer in field crops and vegetables, Türkiye is the **production center of its geography**.

## Ranking of Türkiye, 2022

 <b>Watermelon</b> 2nd	 <b>Melon</b> 2nd	 <b>Cucumber</b> 2nd			
 <b>Chickpea</b> 3rd	 <b>Tomato</b> 3rd	 <b>Lentil</b> 4th	 <b>Green Pepper</b> 4th	 <b>Eggplant</b> 4th	
 <b>Sunflower</b> 5th	 <b>Sugar Beet</b> 5th	 <b>Barley</b> 6th	 <b>Onion</b> 6th	 <b>Cotton</b> 7th	 <b>Wheat</b> 12th





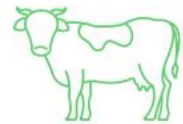
# Türkiye's Global Ranking in Animal Production

As for animal products, Türkiye stands out in **ovine production** and is a pioneer in its geography in all production categories.

## Ranking of Türkiye, 2022

 <b>2nd</b> Raw Sheep Milk	 <b>3rd</b> Mutton - Sheep Meat	 <b>8.</b> Beef
 <b>9th</b> Chicken	 <b>10th</b> Raw Cow Milk	 <b>2nd</b> Chicken Egg

**16 Million**



**2.**

Türkiye's position in Europe in terms of cattle inventory

**52 Million**



**1.**

Türkiye has the largest inventory of goats and sheep in Europe.

**19 Million Tons**



**10.**

Türkiye is the tenth largest producer of cow's milk worldwide.

**1.1 Million**



**2.**

Türkiye is the second largest producer of sheep milk worldwide.



**144**

Number of countries to which Türkiye exports dairy products



**4.**

Türkiye's position in the ranking of the largest cheese producing countries worldwide

*Number of cattle farms: 1.1 million*

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## Input Supply

- Turkish fertilizer consumption per hectare has increased over years to 130 kg while world average is 140 kg
- Türkiye's demand for fertilizers is 10th highest in the world
- Türkiye lack local raw material supply in all three raw material categories (Nitrate, Phosphorus and Potassium)
- Organic and organomineral fertilizer production and consumption is on a rising trend.
- The Agriculture Strategic Plan aims to increase organomineral fertilizer production in Türkiye from 0.5 million tons to 4.3 million tons in 2028.
- 788 certified seed producers in Türkiye & a significant proportion is multinational brands & producing 1.3 million tons of seeds

## Agricultural Production

- 2.2 million enterprises
- 14k associations & cooperatives
- 4.6 million employments: 15% of national employment
- Agricultural land: 38.5 million ha & average unit size: 7 ha
- 67% of total enterprises are below 5 ha size, realizing 22% of total planting
- 78% of planting activities are carried out by remaining medium and large companies.

## Agricultural Industry

- 51k food companies with 514k employment
- Out of the ISO 500 companies, 100 are in the food processing sector.
- Food manufacturing industry turnover: USD 54bn – most contributing sector to total manufacturing sector turnover
- A large number of major multinationals active in processing business: Mondelēz, PepsiCo, The Coca-Cola Company, Mars, Nestle, Unilever, Corteva, Dr. Oetker, Cargill, Ferrero, Danone, among others.

## Retail Trade

- Türkiye's grocery retail market has experienced rapid expansion in parallel with the shift to modern Western-style grocery retail formats.
- Strong presence of Turkish retailers such as BİM, A101, Şok and Migros, while foreign retailers including CarrefourSA (JV) and Metro are also performing well.
- Total sales of grocery retailers: USD 69Bn (Modern grocery retailers: USD 43bn – Traditional grocery retailers: USD 27bn)
- Imports of consumer-oriented agrofood products: USD 3.5bn

## Foreign Trade

- A domestic market of 85 million with increasing per capita food consumption each year
- Türkiye is well-positioned to easily reach Europe, MENA, and Central Asia markets.
- Agrofood exports: USD 30.9bn  
Agrofood imports: USD 24bn



**Agricultural  
Production Area  
Size:**

**38.5  
Million Hectares**



**Arable  
Land:**

**23.9  
Million Hectares**



**Grassland  
and Pasture  
Area:**

**14.6  
Million Hectares**

**Agricultural Production Area Size:**



Morocco: 30.2 Million Hectares



Poland 14.4 Million Hectares



Romania 12.7 million hectares



Egypt: 4.3 Million Hectares



Serbia: 3.47 million hectares



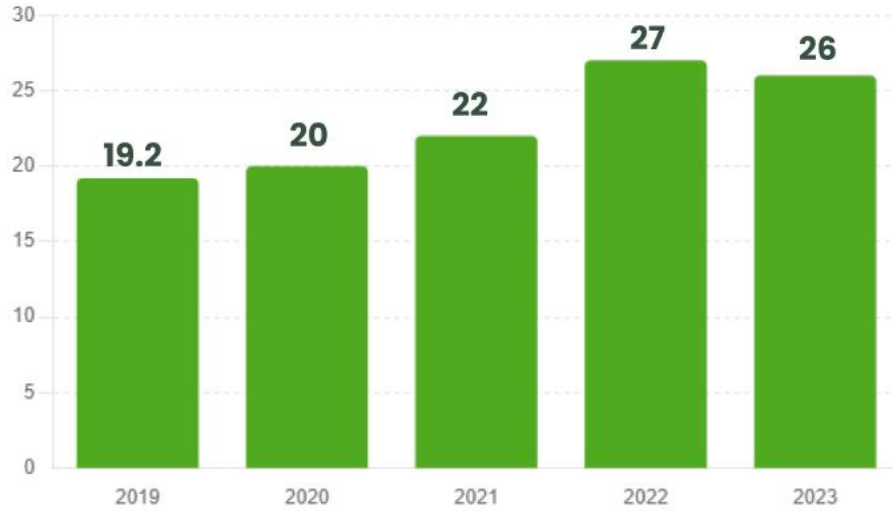
# Land Use and Agricultural Production Composition in Türkiye



According to official statistics, Türkiye's average farm size is 7.6 hectares (2016), which is lower than comparator countries such as Mexico and Italy.

However, in different surveys, especially with commercially active agricultural enterprises, the average land size was reported to be 26 hectares.

## ● Average size of commercial enterprises in Türkiye according to KKB Agricultural Field Survey

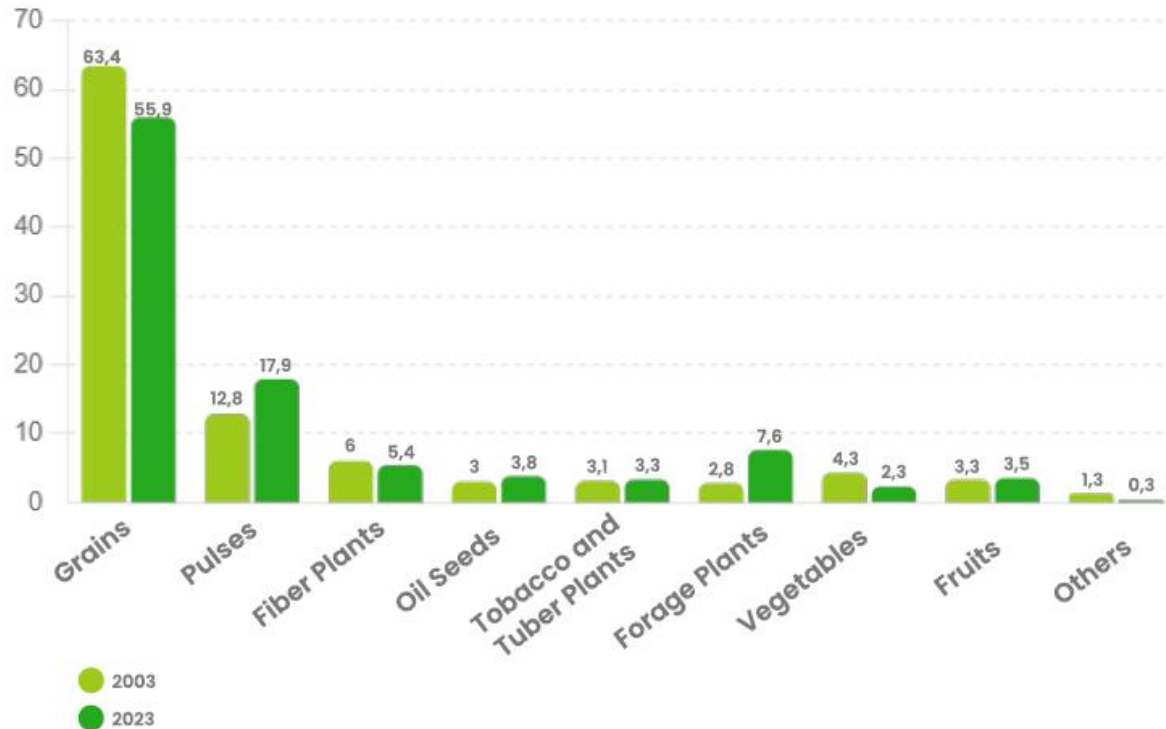


## ● Average Land Size in Some Countries (Decare)

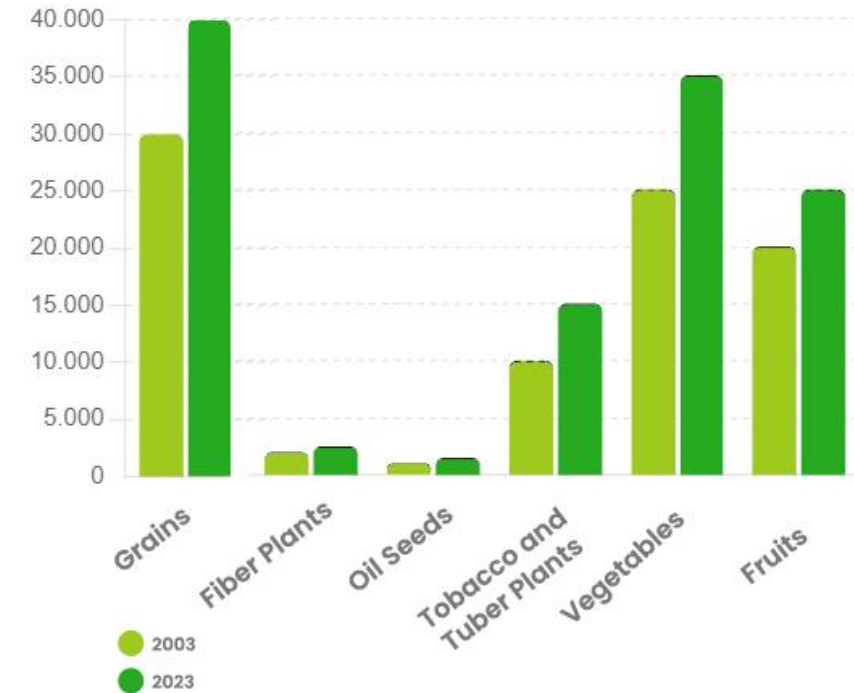
\*Average sizes according to official statistics

Source: KKB Agricultural Field Outlook Survey 2023  
TurkStat, 2024, EuroStat, 2024

## Agricultural Land Distribution (%) 2003–2023



## Production Amounts of Main Plant Groups (Thousand Tons) 2003–2023



66 The most important field plants in terms of production are **wheat, sugar beet, barley, maize, potatoes and cotton**. For most cereals, Türkiye is fully or almost self-sufficient. Moreover, despite the decline in agricultural area, **production volumes have increased** substantially with significant **productivity gains**.

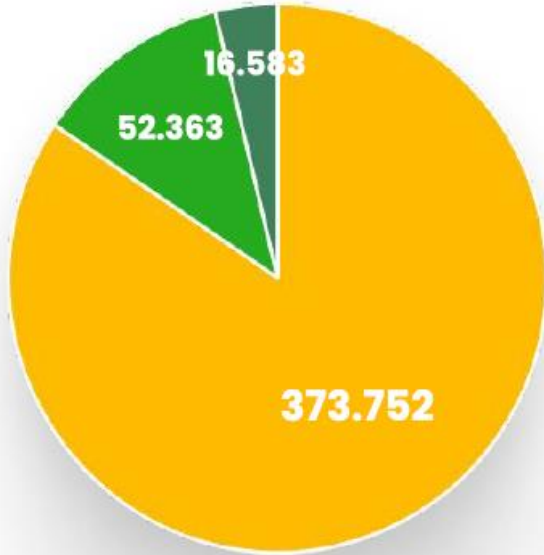


## Composition of Animal Production in Türkiye



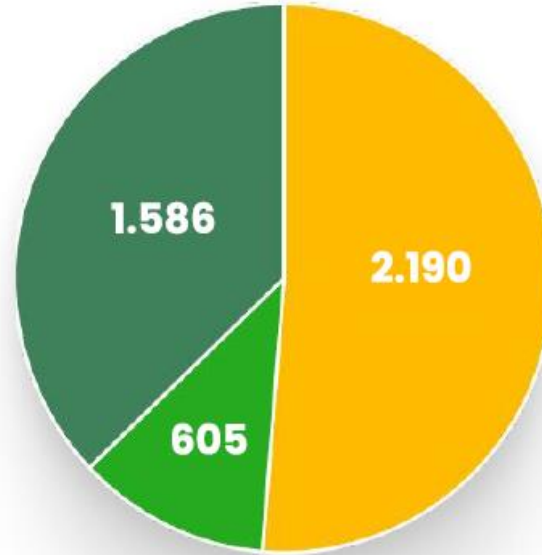
66 The number of livestock in Türkiye has increased significantly in the last two decades in all categories. The production rates of animal products have been higher than the increase in the number of animals, indicating increased productivity. 29

### Animal Numbers 2023 (thousand heads)



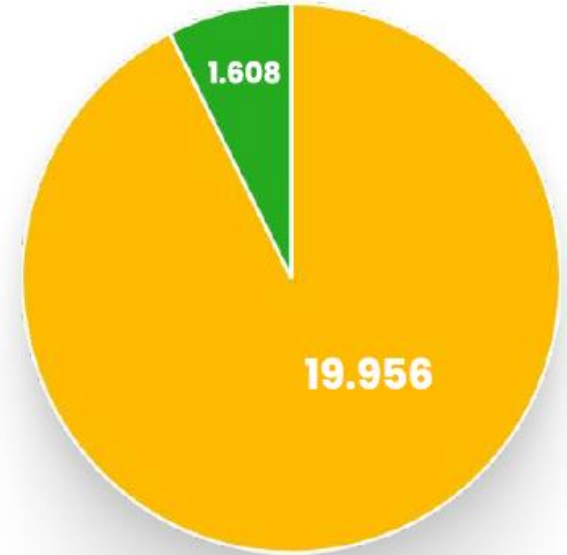
■ Cattle ■ Ovine  
■ Poultry

### Meat Production 2023 (thousand tons)



■ Cattle ■ Ovine  
■ Poultry

### Milk Production 2023 (thousand tons)

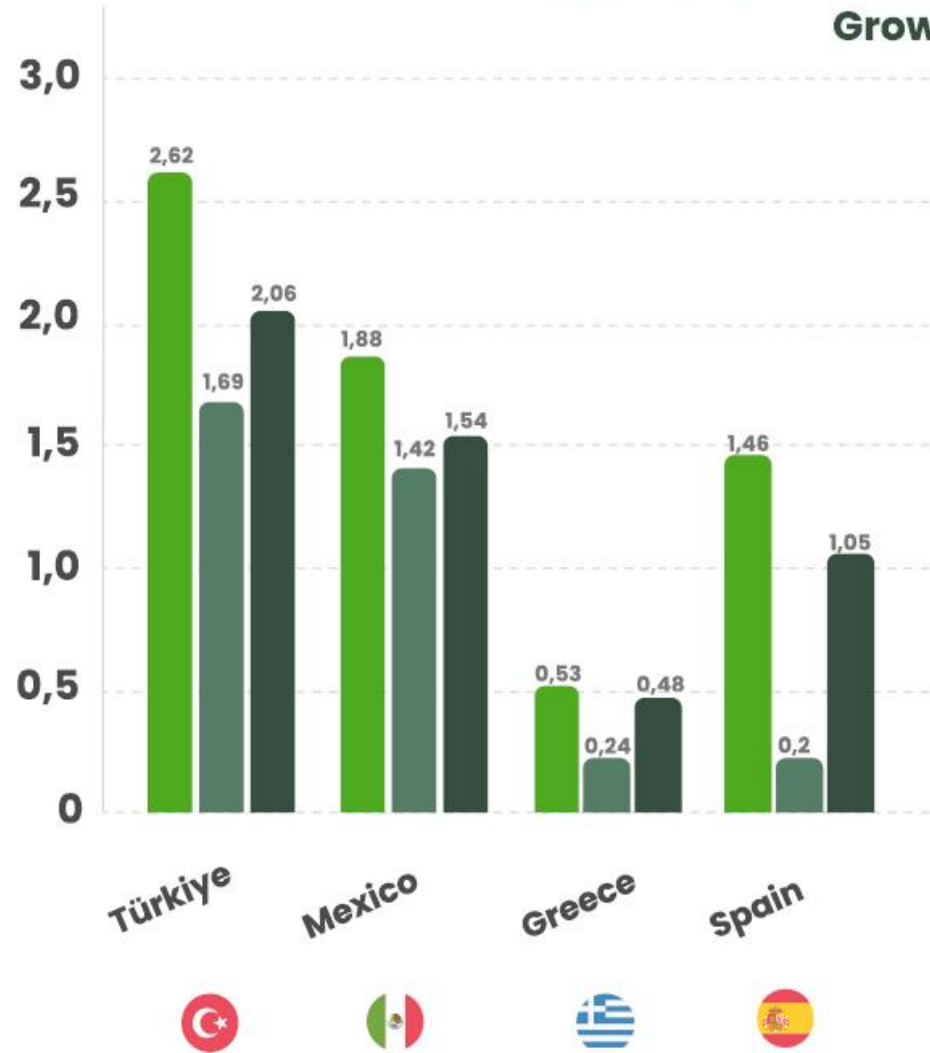


■ Cattle ■ Ovine

# Total Factor Productivity in Agricultural Production



Total Factor Productivity for Selected Countries\*  
Growth Rates (%)



“Türkiye's factor productivity growth rates in all periods are well above the world and EU averages. Finally, Türkiye achieved a growth rate of over 1.5% in the 2011-2021 period, while the EU average remained at 1%.”

2000-2010

2011-2021

2000-2021

\*Total Factor Productivity = Value of Production / Inputs

Source: TurkStat, 2024, EuroStat, 2024



### CONTRIBUTION OF FOOD AND BEVERAGE MANUFACTURING TO GDP AND EMPLOYMENT, 2023 (%)



#### Share of Manufacturing Sector in Türkiye

Value Added Share

**38.5%**

Employment Share

**26.5%**

#### Share of Food & Beverage Sectors in Manufacturing Sector

Value Added Share

**11.58%**

Employment Share

**12.05%**

#### Share of Food and Beverage Sectors in Türkiye

Value Added Share

**4.45%**

Employment Share

**3.19%**

66

The turnover of food and beverage manufacturing is **USD 85 billion in 2023**. Food and beverage manufacturing accounts for 14% of total manufacturing volume. It provides 12% of employment in the manufacturing sector.

99



Number of Companies in Food and Beverage Manufacturing: **19,375 companies**



Number in employment: **610.7 thousand (2023)**



## Composition of the Food Manufacturing Sector

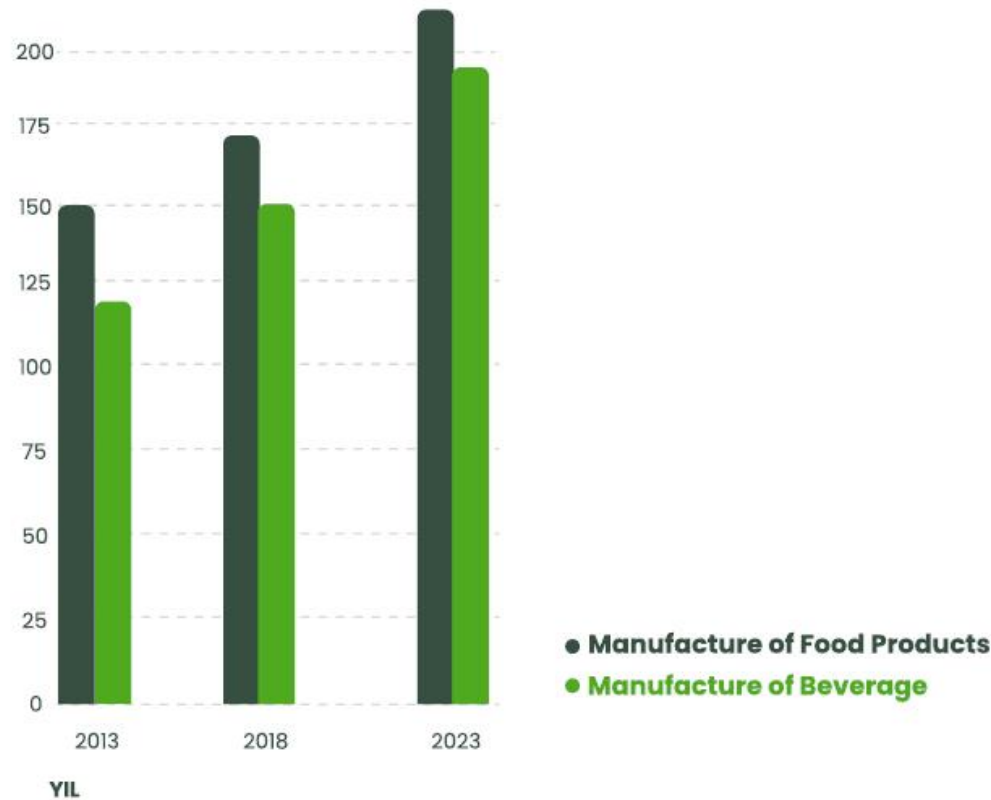
66

Production in the food and beverage manufacturing industry has doubled since 2008 thanks to **improved technology, increased productivity and new investments**. In the food manufacturing industry, the **sugar and chocolate industry** is at the forefront, followed by other industrial items and **fresh fruit and vegetable** processing industry.

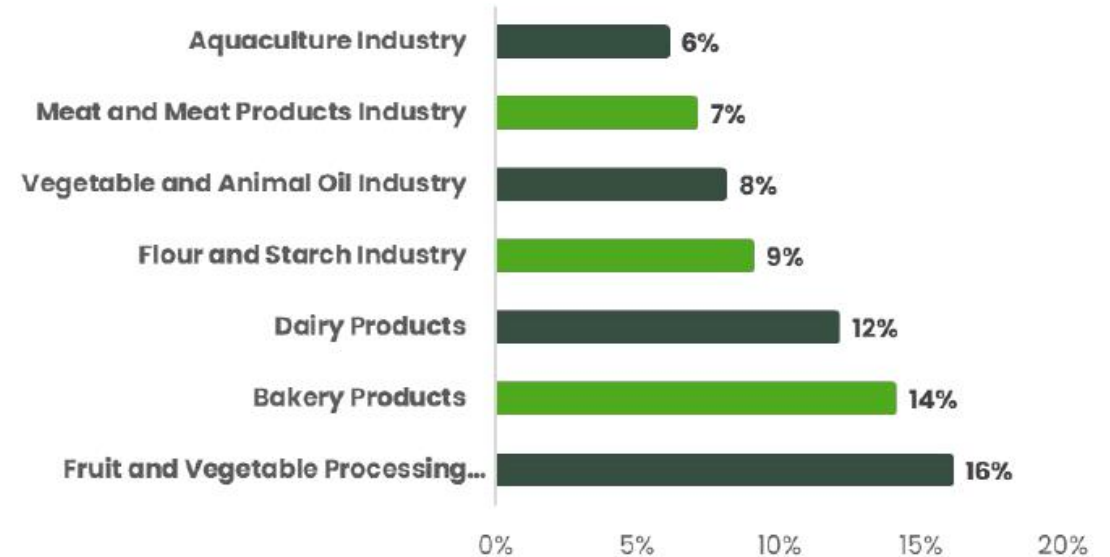


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Food and Beverage Industrial Production Index  
(2008=100)



Composition of Food Manufacturing Industry Sub-Sectors





## Some Food Companies in Türkiye Forbes 500

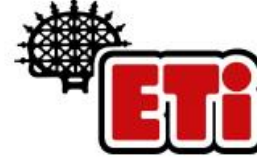


### Milk and Dairy Products





Snack Chocolates, Nuts and Fruits





## Some Food Companies in Türkiye Forbes 500



### Convenience and Processed Food



### Beverages



PEPSICO

aroma®



### Processed Seafood

DARDANEL

KEREVİTAŞ



Kocaman



## International Investments in Agriculture



### International investments made in Türkiye by industry leaders in recent years



Animal Feed Investment in  
2022  
**80 Million Dollars**



Acquisition of  
Assan Foods  
in 2021  
**70 Million Dollars**



Agricultural Products and  
Beverages Investment in  
2021 - 2022  
**115 Million Dollars**



2022 - 2023  
**25 Million Dollars  
Investment**



Investment in Beverage  
Production Expansion  
in 2023  
**25 Million Dollars**



2022  
**27 Million Dollars  
Investment**



















## Selected Acquisitions in the Food and Beverage Sector



Purchaser		Target Company	Year	Deal Value (Million USD)	Purchaser		Target Company	Year	Deal Value (Million USD)
<b>DIAGEO</b>	→	Mey İçki	2011	2,100	<b>Bridgepoint</b>	→	Peyman Kuruyemiş	2016	-
<b>SAB MILLER</b>	→	Anadolu Efes	2012	1,900	<b>AJINOMOTO</b>	→	Bizim Mutfak	2016	66.6
<b>ABRAAJ</b> ابراج INVESTING IN FORESIGHT	→	Yörsan	2013	-	<b>MARTIN BRAUN GRUPPE</b>	→	Polen Gıda	2016	-
<b>INVESTCORP</b>	→	Namet	2013	-	<b>BÜNGE</b>	→	Ana Gıda	2016	15.9
<b>vedanta</b> transforming for good	→	UNO	2013	-	<b>brf</b> <b>QIA</b>	→	Banvit	2016	229
<b>FERRERO</b>	→	Oltan Gıda	2014	-	<b>THE ABRAAJ GROUP</b>	→	KFC Türkiye	2017	-
<b>LESAFFRE</b>	→	Desu Maya	2014	220	<b>AJINOMOTO</b>	→	Kemal Kükrer	2017	52
<b>Cargill</b>	→	Ekol Gıda	2015	-	<b>DyDo</b>	→	Merpez Gıda	2017	6
<b>GRUPE LACTALIS</b>	→	Ak Gıda	2015	-	<b>VENTURE CAPITAL BANK</b> <b>AL SRAIYA</b> HOLDING GROUP	→	Mado	2017	150
<b>Goldman Sachs</b>	→	TAB Gıda	2015	150					

## Selected Acquisitions in the Food and Beverage Sector



Purchaser	Target Company	Year	Deal Value (Million USD)	Purchaser	Target Company	Year	Deal Value (Million USD)
 	Oba Makarna	2018	-		İz Hayvancılık Tarım Gıda Sanayi	2020	5.6
	Agromed Tarım İlaçları ve Tohum	2018	2		Assan Foods	2020	70
	I.C.O.N Gıda	2018	-		EGE-TAV Ege Tarım Hayvancılık	2021	-
	Ekol Gıda	2018	-		Arolez Gıda	2021	-
	Beta Tarım	2018	-		Della Gıda/Bahar Su	2021	10.2
	Glutensiz Ada	2018	-		Kito	2021	-
	Bonfilet Et Sanayi ve Tic A.Ş.	2019	-		Lucy Fish-Uğurlu B.	2022	-
	Trakya Et ve Süt Ürünleri	2019	19				



## Selected Acquisitions in the Food and Beverage Sector



In 2013, Ferrero opened its factory in Manisa with an investment of 300 million dollars and this factory became one of the most important production facilities of the group. In 2014, Ferrero established Ferrero Hazelnut by acquiring Oltan Gıda, one of the most important buyers of Turkish hazelnuts. This strategic move enabled Ferrero to assume an important role in processing Turkish hazelnuts into finished and semi-finished products. Today, the Manisa Factory produces the group's major brands, especially NUTELLA®, and exports to 100 countries in addition to the domestic market. Ferrero has 7 production facilities in Türkiye, 6 of which are hazelnut factories. These investments show that Ferrero has strengthened its commitment and integration to the Turkish market.



In 2016, US-based agricultural products company Bunge acquired Ana Gıda, a Turkish seed and olive oil producer owned by Anadolu Endüstri Holding and SEEF Foods. With the acquisition, Bunge acquired famous olive oil brands such as Komili, Madra and Kırlangıç. Operating in Türkiye since 2000, Bunge is an important supplier in the country's edible oil, grain and animal feed sectors with its facilities in the Aegean and Marmara regions.



# Retail Food Sales Channels in Türkiye



## Sales of Food Retailers by Channel 2023 (Million USD)



**Total**  
**75,414**



“ The turnover of all grocery retailers reached **USD 75 billion in 2023**. The share of organized retailers is just over **64%**. ”

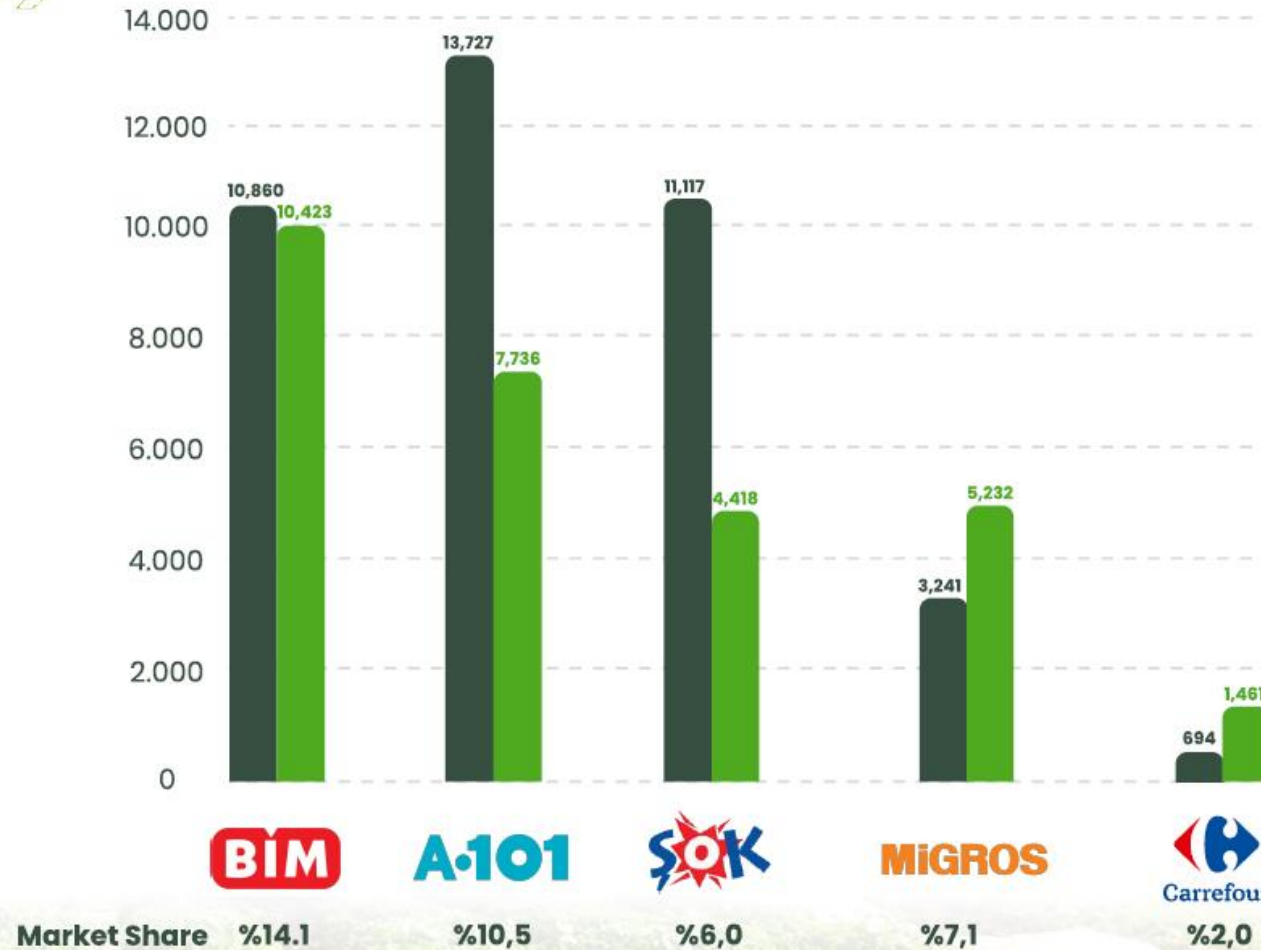


## Retail Food Sales Channels in Türkiye



Among the food retailers in Türkiye, **<<Discount Grocery Stores>>** market share is high and these markets increase their market share every year.

● Number of Stores  
● Sales (Million USD)



## Net Food Exporter

Agri-food products account for **12%** of all exports and **7%** of all imports in 2023.

More than **70%** of exports are processed food products.

### Average Annual Growth Rates between 2003 and 2023:

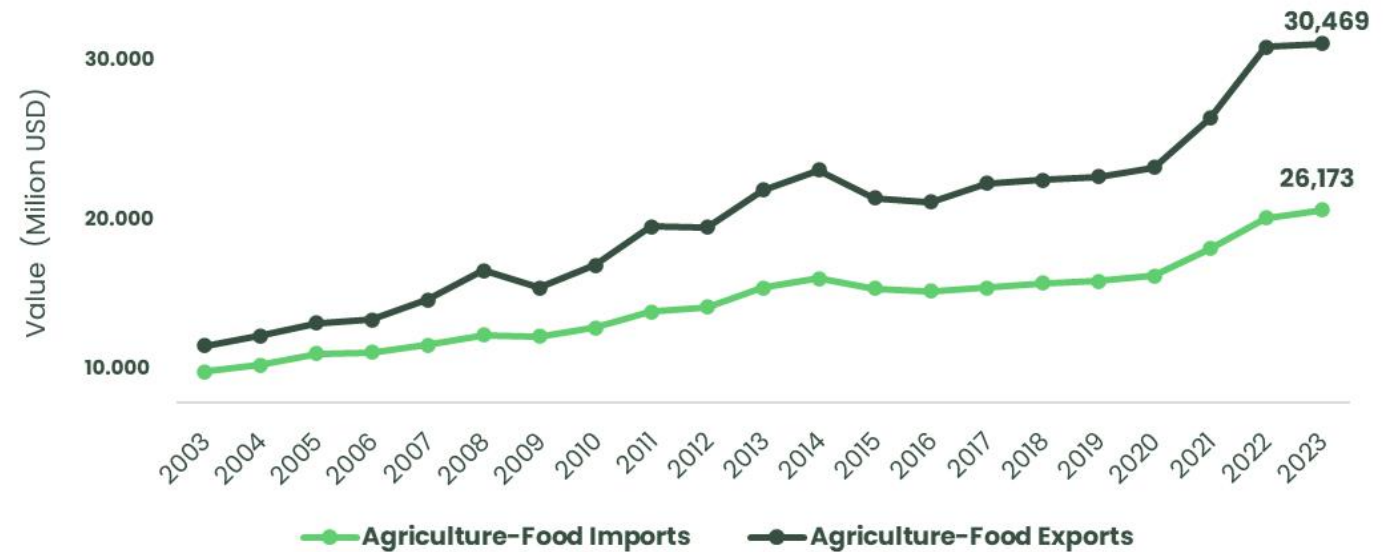
Agriculture-Food Exports  **%9,52**

Total Exports  **%8,81**

Agriculture-Food Imports  **%9,63**

Total Imports  **%8,61**

### Türkiye's Agri-Food Exports 2003-2023





# Main Export Routes in Agriculture and Food Sector



## Top Five Export Countries

1	Iraq	3,5 billion dollar
2	Russian Federation	1,9 billion dollar
3	Unites States of America	1,4 billion dollar
4	Germany	1,2 billion dollar
5	Italy	1 billion dollar

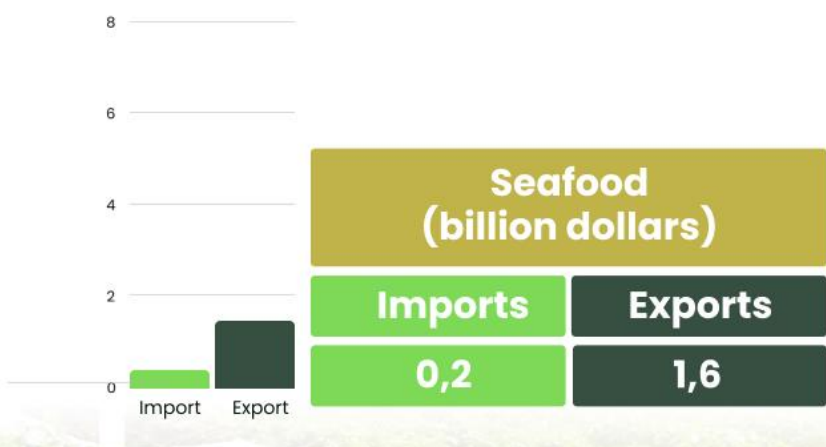
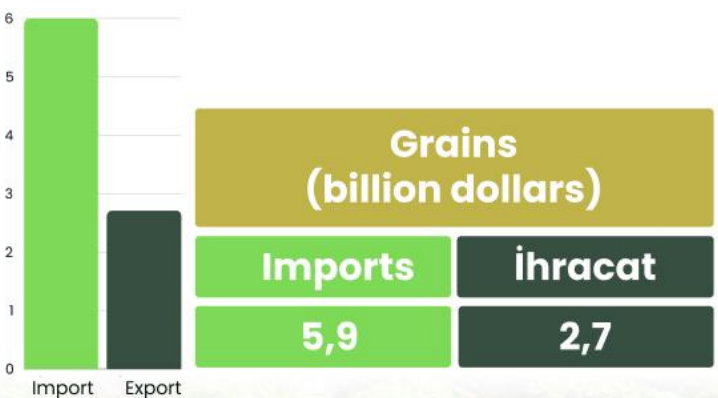
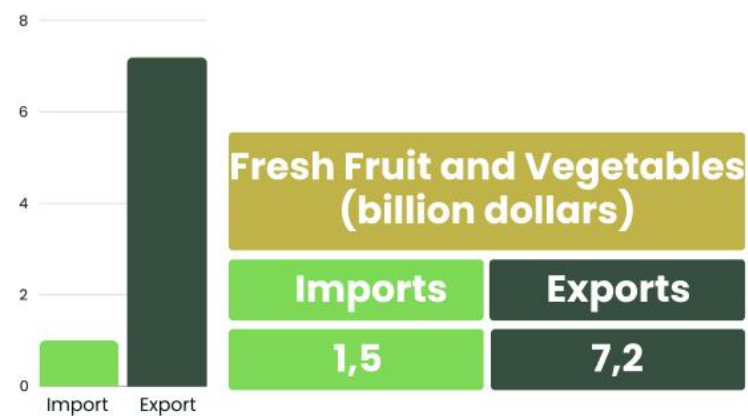
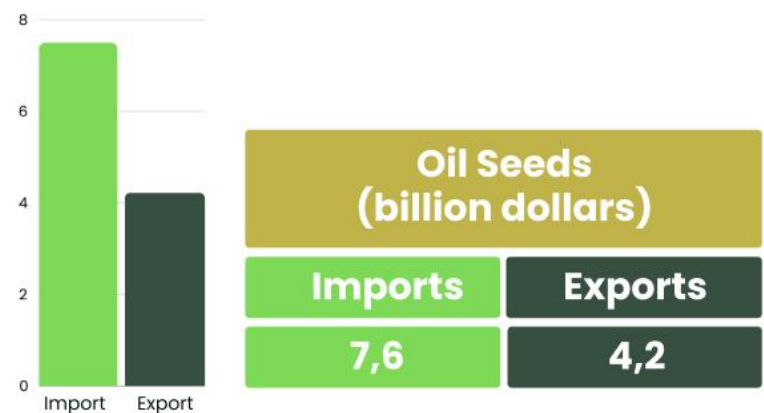
## The Fastest Growing Market (2017-22)

1	Djibouti	+53%
2	Yemen	+48%
3	Pakistan	+40%
4	India	+39%
5	Ethiopia	+37%

# Product Composition of Foreign Trade in Agriculture and Food

## Most Imported and Exported Agricultural Products

2023



















# Product Composition of Foreign Trade in Agriculture and Food

2017 - 2022 Timeframe

## Products with the Fastest Increase in Imports

	1 - Sugar		+%25
	2 - Grains		+%19
	3 - Oil Seeds		+%17
	4 - Rubber		+%10
	5 - Fish and Water Resources		+%9,4

## Products with the Fastest Export Growth

	1 - Live Animals		+%30
	2 - Oil Seeds		+%24
	3 - Fish and Water Resources		+%15
	4 - Meat		+%15
	5 - Pulses		+%14





## Support from the Ministry of Agriculture is offered in two phases.

While investment supports are provided in the first phase, additional supports for production are in the second phase after the investment is completed.

### 1st PHASE

#### Ministry of Agriculture and Forestry

Support for Facility Construction  
or Capacity Expansion

European Union Instrument for  
Pre-Accession Assistance Rural  
Development Program (IPARD III)

Rural Development  
Support Program

Subsidized Loans

After the  
investment is  
completed;



### 2nd PHASE

#### Ministry of Agriculture and Forestry

Production Supports

Area Based Supports

Agriculture Insurance

Biological and Biotechnical  
Control

Other Supports

Difference Payment Supports

Livestock Supports



T.C. SANAYİ VE  
TEKNOLOJİ BAKANLIĞI





# Agricultural Support and Incentives

www.yatirimadestek.gov.tr



The Ministry of Industry offers the first group of investment supports during the establishment phase and additional supports by the Ministry of Trade during the second phase.



## 1st PHASE

Ministry of Industry and Technology

### Investment Incentives

VAT Exemption

Customs Duty Exemption

Investment Location Allocation

SSI Supports

Tax Reduction Supports

Interest Supports

KOSGEB Entrepreneur Support Programs

## 2nd PHASE

Ministry of Trade

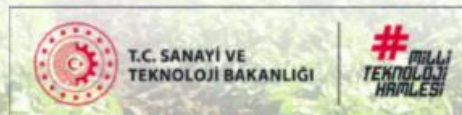
### Foreign Trade Supports

Export Supports

E-Export Supports

Foreign Technical Consultancy  
Supports

Other Supports

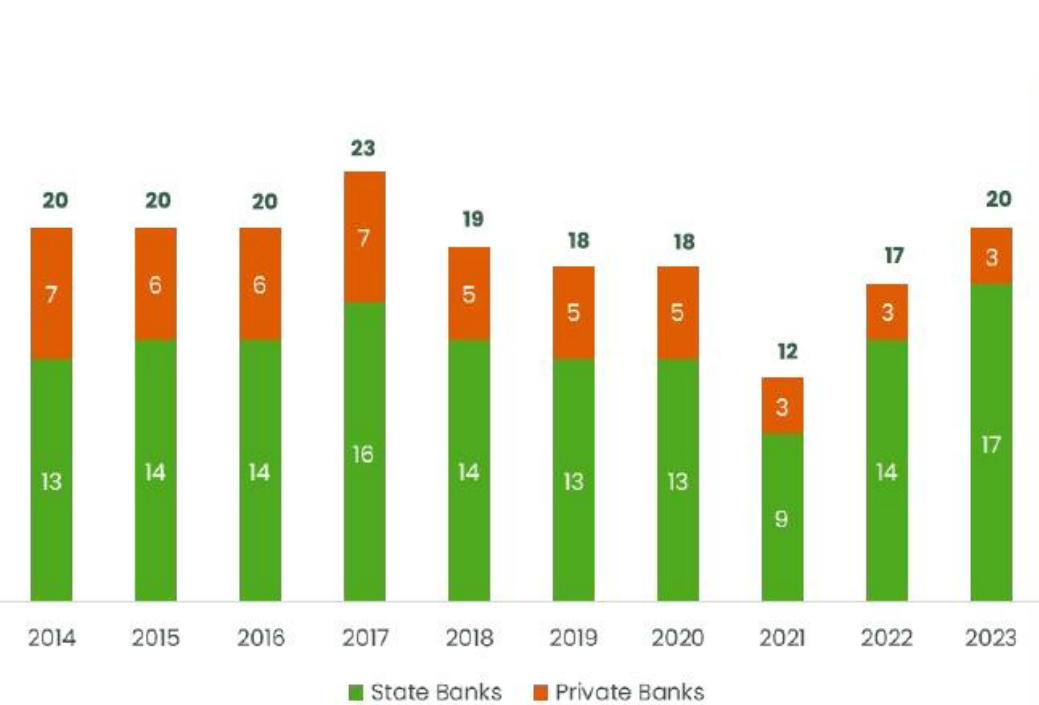


Source: Ministry of Agriculture and Forestry, Ministry of Industry and Technology

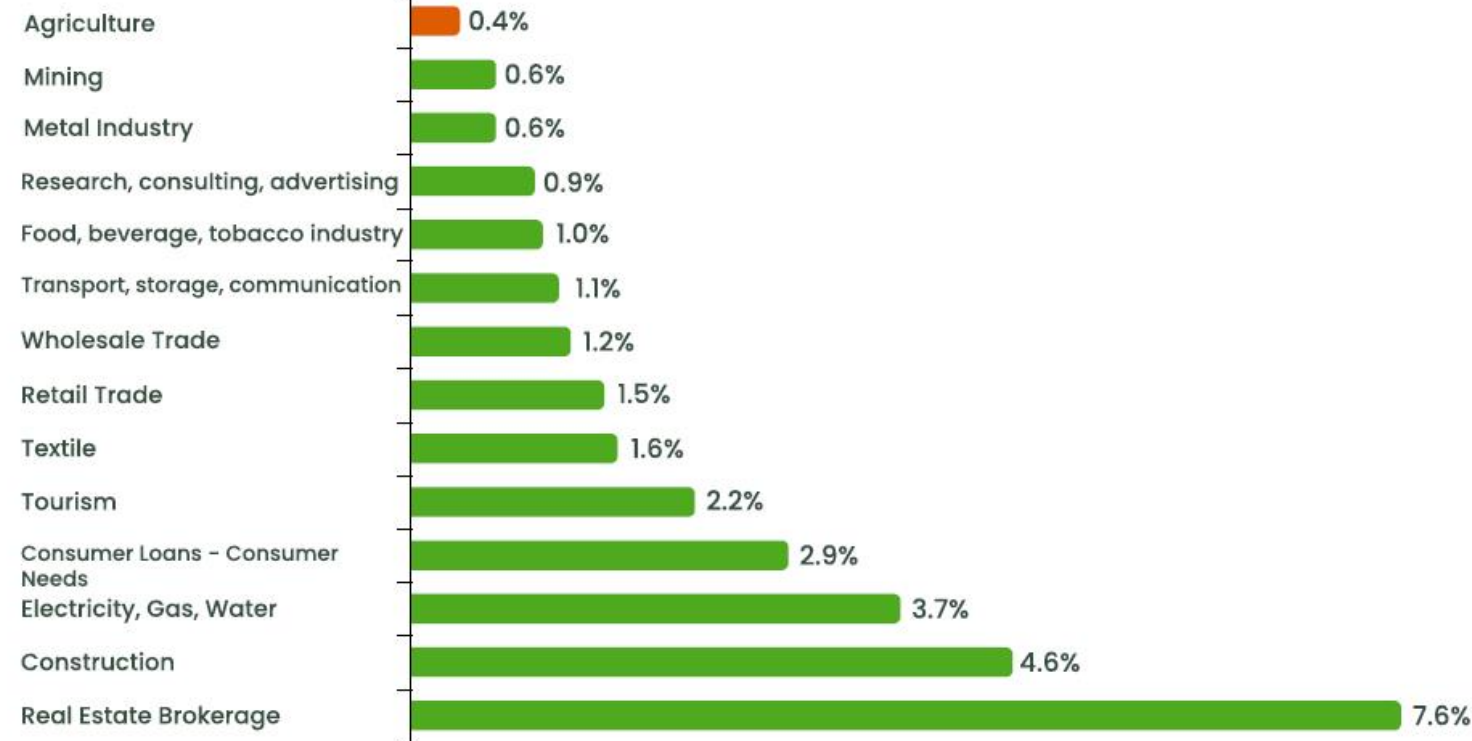
# Financing Provided to the Agriculture Sector



**Agricultural Loans – Public vs Private  
(Balance, Billion USD)**



**Non-Performing Loan Ratios (NPL) by Sector  
(December 2023)**



CC

The amount of credit provided to agricultural enterprises by the banking sector reached **USD 20 billion** by the end of 2023. In addition, the sector's loan follow-up rate is **0.4%**, the lowest among all other sectors.

CC

As a result of the **subsidized loans** provided by public banks and the resources provided by **international organizations**, both the sector's access to finance has become easier and producers have turned to sustainable investments.

CC



Executive  
Summary

Agri-Food  
System in  
Türkiye

Agriculture –  
Food Value  
Chain of  
Türkiye

**Competitiveness  
Potential and  
Priority  
Investment  
Areas**

4

# Competitiveness Potential and Priority Investment Areas



When the current conditions and current trends of the Turkish agricultural sector are analyzed, **six main axes** stand out as investment potential.



## Traditional Products

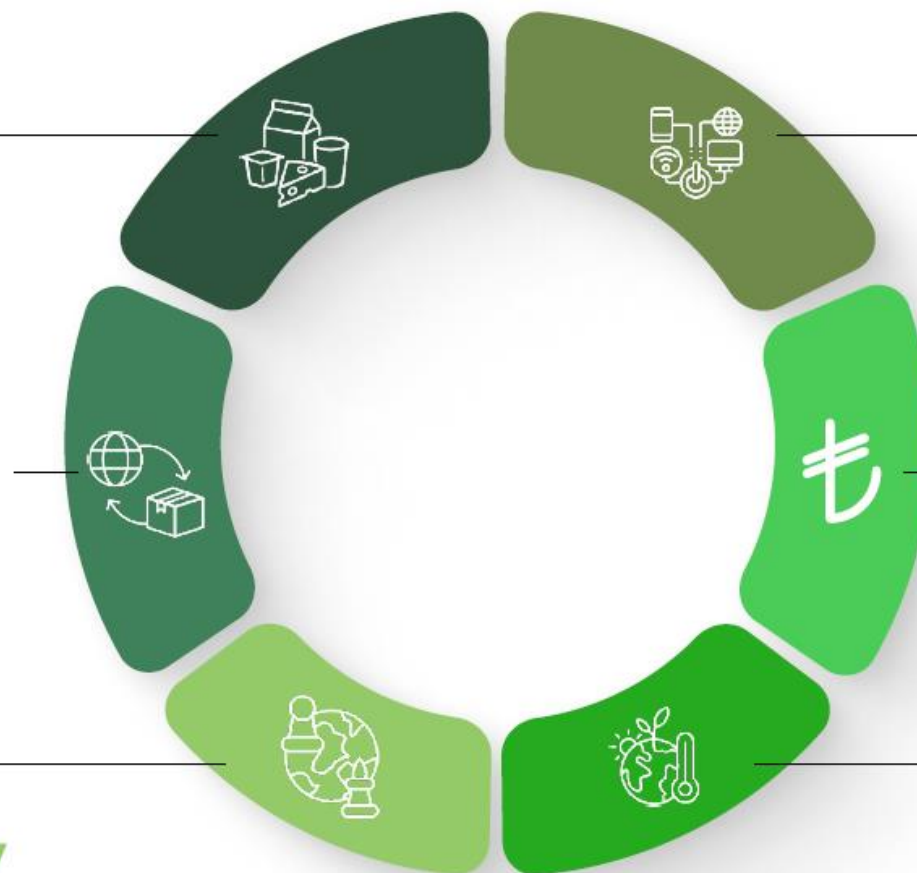
Local production techniques, geographically marked products, processing, promotion, branding and marketing investments for geographically marked products.

## Import Intensive Products and New Export Markets

Products in short supply, substitution opportunities, export potential in the Middle East, Caucasus and European markets.

## Investments to Improve Food Security

Logistics and storage investments, alternative protein sources.



## Increasing Digitalization

Investments in equipment, services and infrastructure for digitalization in production.

## Economies of Scale and Value Added in the Value Chain

Large-scale production investments, integrated value chain investments.

## Sustainability and Certified Production

Investments in climate smart technology and production techniques, tropical fruit production, use of alternative energy sources in production, good agriculture, organic agriculture, biodynamic agriculture investments.



# Traditional Products and Geographical Indication



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Türkiye has **29 geographically marked products registered** and published in the EU. These products are registered from 10 different provinces of our country.

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**Antakya Künefesi**



**Bayramiç Beyazı**



**Malatya Apricot**



**Taşköprü Garlic**



**Mesir Paste**



**Antep Baklavası**



**Edremit Körfezi Green Scratched Olives**



**Maraş Tarhanası**



**Çağlayancerit Walnut**



**Söke Cotton**



**Ayaş Tomato**



**Edremit Olive Oil**



**Milas Oil Olives**



**Araban Garlic**



**Bursa Black Fig**



**Aydın Chestnut**



**Ezine Cheese**



**Milas Olive Oil**



**Bursa Peach**



**Hüyük Strawberry**



**Aydın Memecik Olive Oil**



**Gemlik Olive**



**Safranbolu Saffron**



**Kayseri Pastrami**



**Gaziantep Menengiç Coffee**



**Aydın Fig**



**Giresun Plumpy Nut**



**Suruç Pomegranate**



**Osmaniye Peanuts**



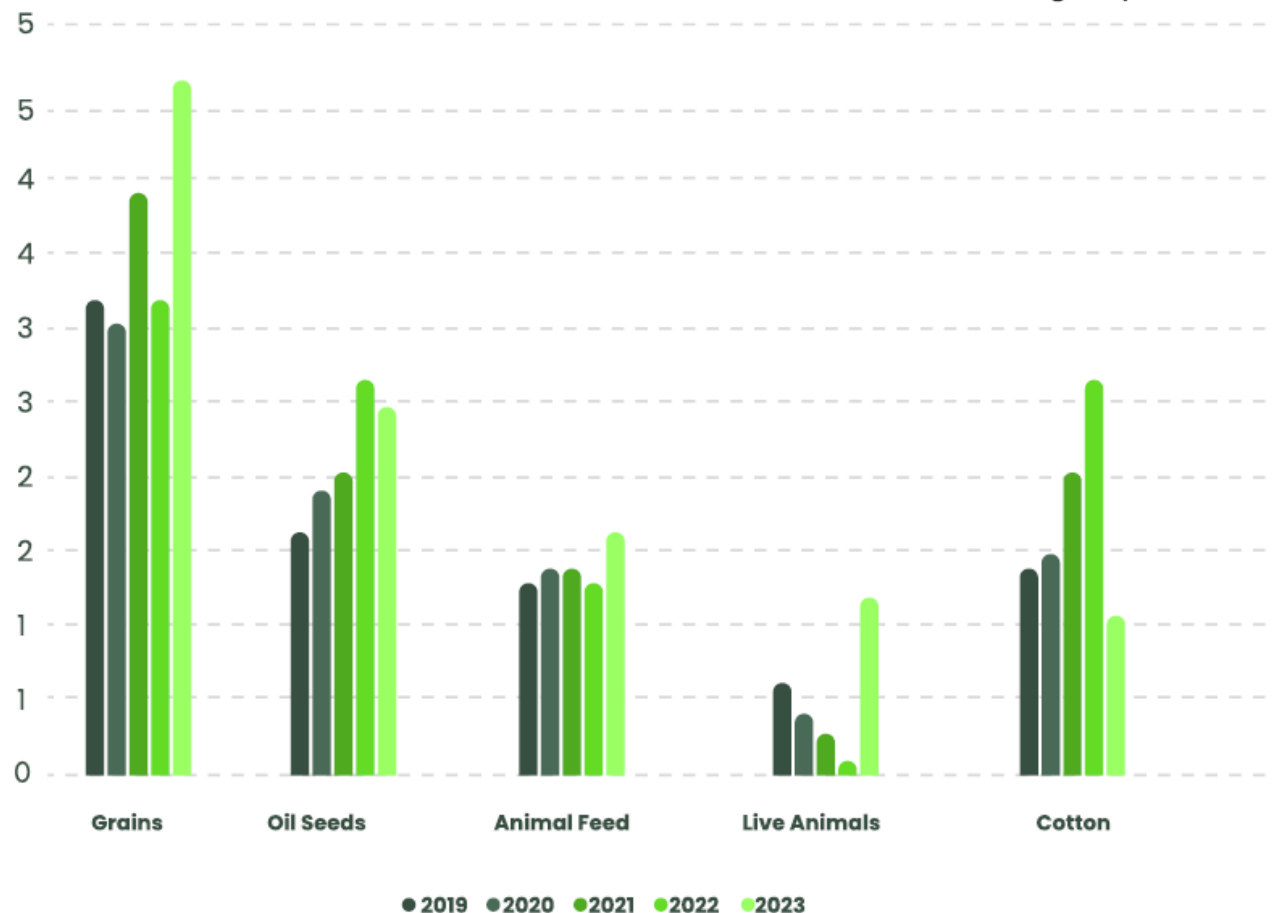
## Import Intensive Products and New Export Markets



“

The main product groups for which Türkiye is a **net importer** are **cereals, oilseeds, animal feed, livestock and cotton**.

In cereals, **wheat** and **corn** are absolutely necessary for the export demand of the industry within the framework of the **inward processing regime**, while in other product groups, the need for **investments in alternative sources of protein, fiber and oil** for import substitution comes to the fore.”



Wheat



Corn



Sunflower



Soybeans



Cattle



Cotton







## Import Intensive Products and New Export Markets

# Imports of Food and Agricultural Products of Middle East, North Africa and Caucasus Countries

### Total Import Volume

#### Most imported agricultural products

1	Grains	39.3 billion dollars
2	Oil Seeds	28 billion dollars
3	Fresh fruits and vegetables	15,4 billion dollars
4	Dairy products, eggs and honey	12.7 billion dollars
5	Meat	12,3 billion dollars

#### Products with the fastest growth in imports (2017-22)

1	Oil Seeds	+12%
2	Rubber	+7,7%
3	Other Agricultural Products	+6%
4	Grains	+5,5%
5	Pulses	+5,1%

### Exports from Türkiye

#### Most exported agricultural products

1	Oil Seeds	2,1 billion dollars
2	Grains	1,8 billion dollars
3	Fresh fruits and vegetables	914 million dollars
4	Meat	826 million dollars
5	Pulses	746 million dollars

#### Products with the fastest export growth (2017-22)

1	Live Animals	+34%
2	Oil Seeds	+22%
3	Other Agricultural Products	+16%
4	Pulses	+15%
5	Meat	+12%

66 The total annual imports of food and agricultural products of the **Middle East, Caucasus and North Africa** countries are around **USD 150 billion**. Türkiye has a share of **USD 7.9 billion** in this market.

*In the target market, the main products whose imports have increased in the last five years are **oilseeds and rubber and other agricultural products**, while **live animals and oilseeds** have shown a significant increase in exports from Türkiye.*



## Potential for Sustainable and Certified Production

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Türkiye's diverse agricultural and climatic regions allow for a rich diversity of crops. On the supply side, organic production started in the early 2000s and gained momentum in the mid-2010s. **Production of organic products is just over 1.5 million tons.**

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**Organic Production Area**  
224 thousand hectares

**Good Agriculture Production Area**  
372 thousand hectares

**Increase in Twenty Years** 3450%

**Increase in Twenty Years** 7000%

**Number of Farmers** 34700

**Number of Farmers** 8045

**Production Amount** 1.6 mil. tons

**Production Amount** 6.1 mil. tons

**Wide Product Range**

**Rich Biodiversity**

**Advanced Certification Infrastructure**

**Increased Consumption Awareness of Healthy Products**

**24 Billion Euro Market Potential in the European Union**

**Türkiye's Current Share in the EU Market: 0.12**



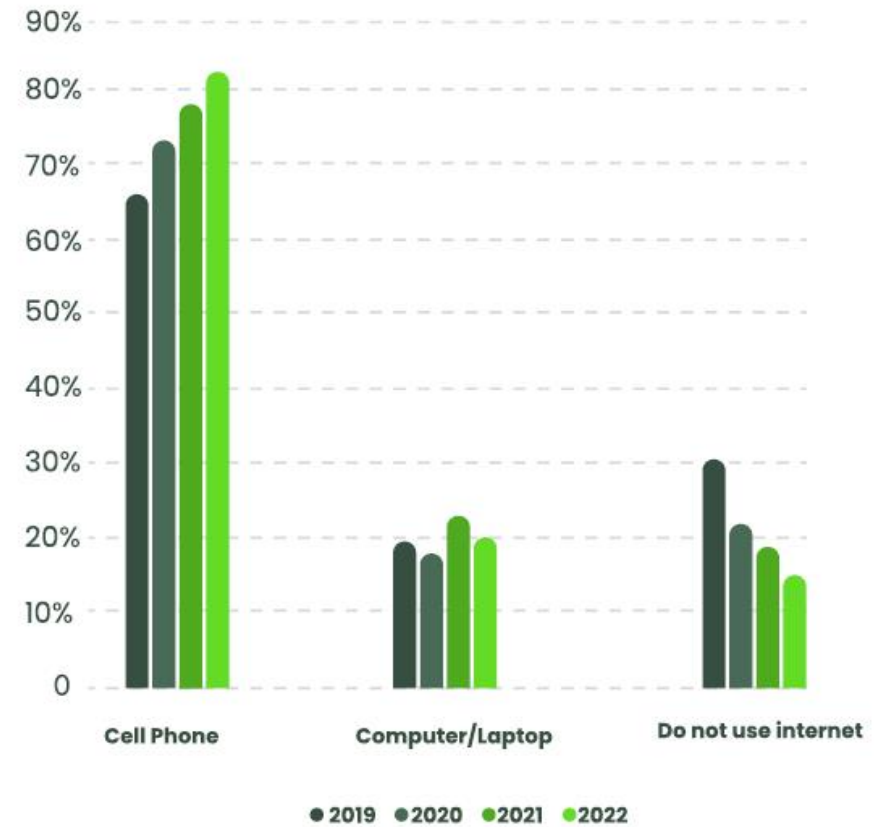
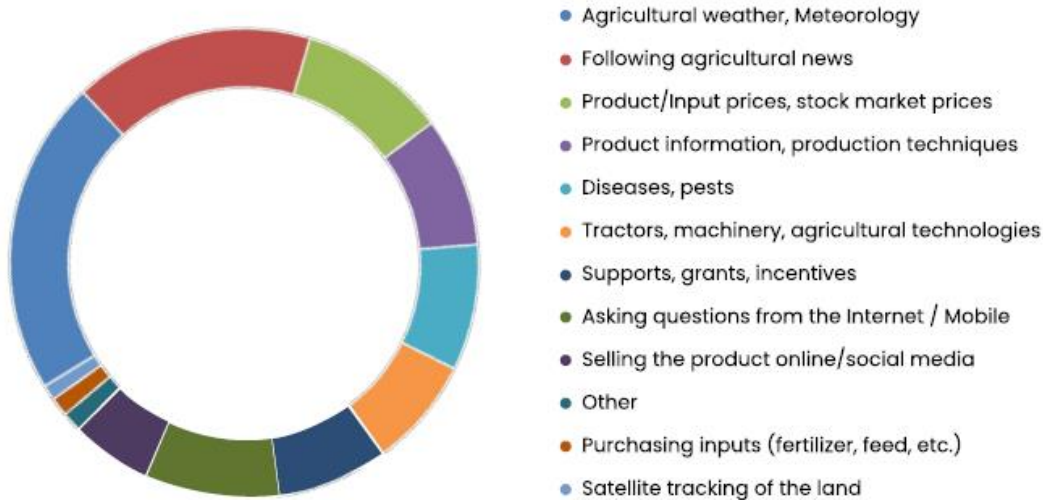


## Increasing Level of Digitalization

The level of digitalization of agricultural producers in Türkiye has been increasing significantly in recent years.

Producers mainly use digital channels to access **agricultural weather, agricultural news, product prices and agricultural production information.**

**The number of start-ups addressing the digital needs of manufacturers is also increasing day by day.**



# Priority Investment Areas in Türkiye's Agriculture and Food Sector



Build-Operate-Transfer Investments for the Conversion of Open Canal Agricultural Irrigation Systems to Closed, Pressurized and Climate Controlled Systems	Solar/Wind Powered Nitrogen Production	Plant Extraction Investments
Integrated Dried Fig Production	Dried Persimmons	Obtaining Oil from Apricot and Bitter Almond Kernels for Cosmetic Industry (Malatya, Elazığ)
Integrated Dried Apricot Production	Rarely Produced Cut Flower Ornamental Plants with High Export Capacity	Tropical Fruit Greenhouse (Mango, Passion Fruit etc.) (Mediterranean Region)
Production of Organo-Mineral Fertilizer with Increased Climate Resistance and Water Retention Capacity (with Perlite, Pumice, etc.)	Establishment of a Digital Marketplace for Retail Sale of Agricultural Products	Large Scale Combined (1000+ Head) Dairy Cow Farming
The Earliest Stone Fruit Greenhouse (Climate and Soil Controlled) (Mediterranean Region)	Organic Dairy and Meat Production	Large Scale Combined (1000+ Head) Beef Cattle Breeding
Geothermal Fruit and Vegetable Greenhouse (Large Scale)	Valuable Honeys (Glandular Honey, Chestnut, Rhododendron)	Rare Medicinal Aromatic Plants (Digitalis, Atropa, Black Thyme, Laurel)
Organic Olive and Olive Oil	Urban Vertical Farming (Fresh Plants)	Aquaculture
Solar Powered Fruit and Vegetable Drying and Chips Production Plant	Berries (Asparagus, Capers, Blueberries, Wolfberries)	Natural Insecticide Production from Medicinal Aromatic Plants (Pyrethrum, Anabasis, Neem Tree etc.)
Production of Climate-Smart, Combined Tillage and Seeding Machines	Agricultural Drone Production and Contracting Service (Imaging, Monitoring, Spraying-Fertilization)	Organic Integrated Ice Cream Production
Agricultural Production Planning Systems and Software (Climate-Smart, Supply-Demand Market Oriented)	Obtaining Soilless Agriculture Material from Tea Powder and Fiber Wastes (Rize, Trabzon)	Frozen [FreezeConcentration] Pure Fruit Juice (Pomegranate, Orange, Lemon, Apple, etc.)
Cold Chain and Storage Frigo Distribution Service Investment	Farm Tourism Investments in Metropolitan Areas	Rare Mushroom Varieties (Enoki, Reishi, Shiitake, Maitake, Porcini, Shimeji)



# INVEST IN TÜRKİYE

**Thank you**