

# Horticulture and Agri-food Business Development in Turkey



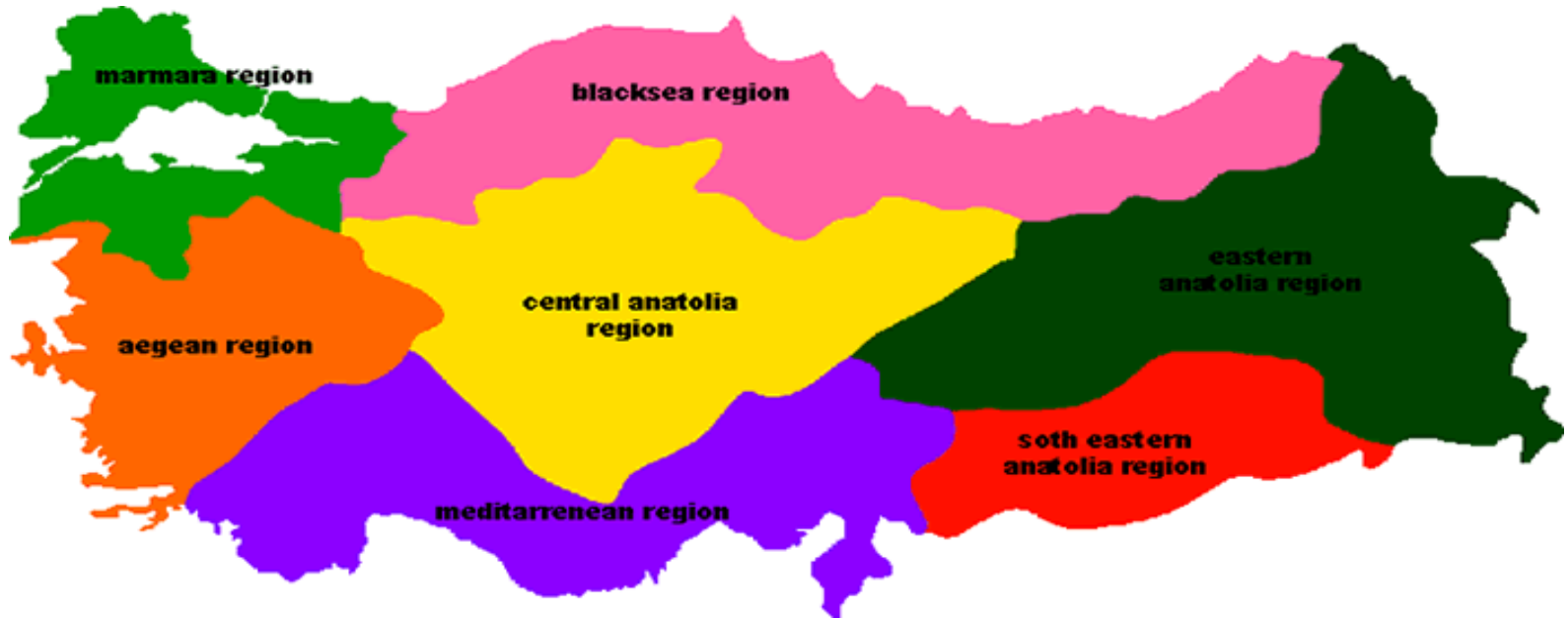
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**Located on two  
continents, Europe  
and Asia.**



# Regional Map of Turkey



**Turkey is 1600 km in length and 650 km in width**

- **Great climatic diversity**
- **Rich crop diversity**
- **Rich genetic resource**

**Population : 80 Million**  
**Area : 780.000 km<sup>2</sup>**  
**Number of provinces : 81**

# Turkish Agri-food Industry Outlook

**Turkey is sufficient country in terms of food and**

- 1<sup>st</sup> → Largest country in Europe in terms of agricultural economy**
- 2<sup>nd</sup> → Largest agricultural economy among OECD countries (World Bank)**
- 9<sup>th</sup> → Largest country in the world in terms of agricultural economy**

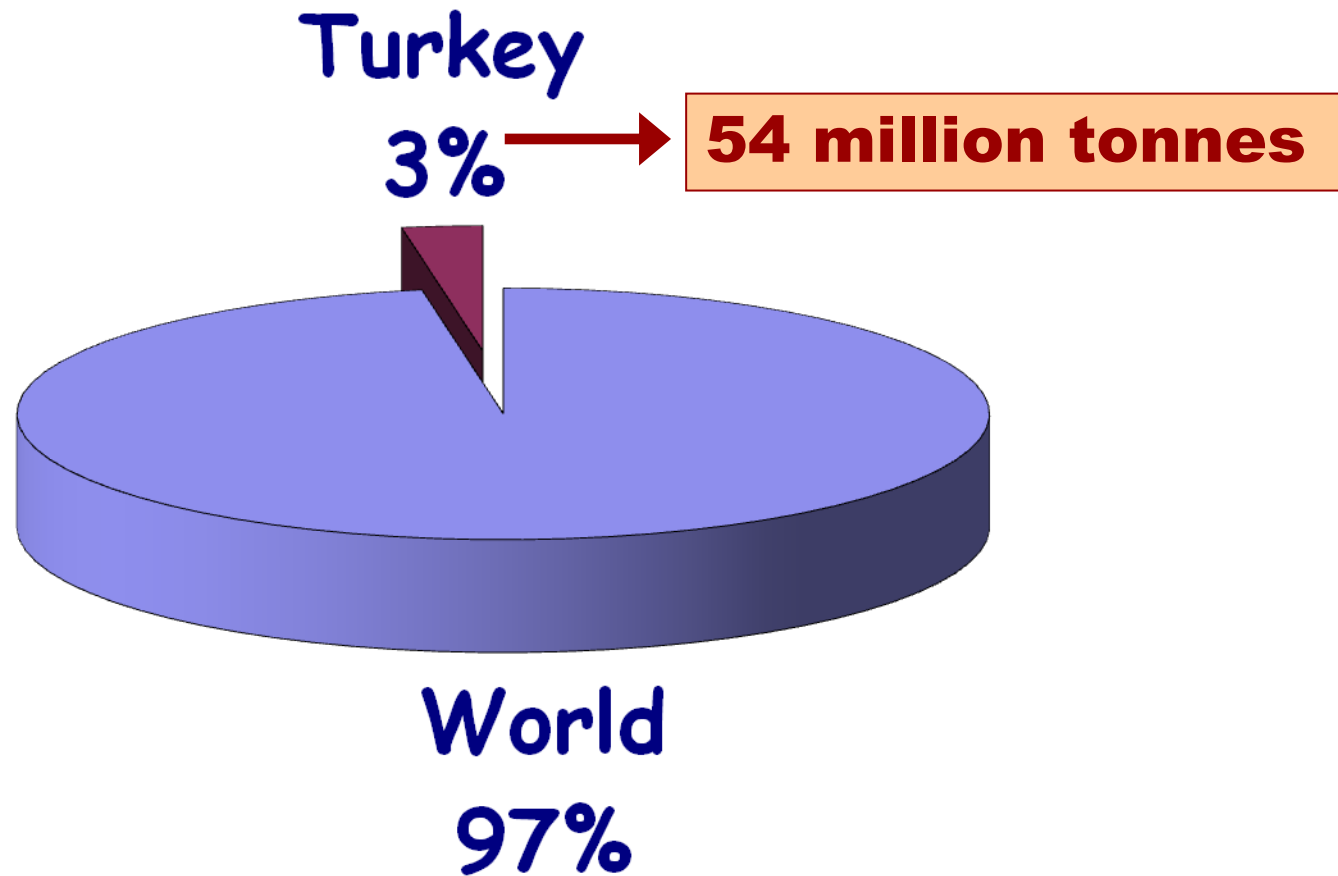
***Source: Ministry of Food, Agriculture and Livestock (2016)***

	Basic economic indicators in agricultural sector
Agricultural land	25 million ha
Number of agricultural enterprises	3,076 million
Total agricultural trade volume	62 billion USD
Arable land	5.1 million ha
Average enterprise size	6 ha
Employment in agriculture	5.3 million people
Total exportation of agricultural products	USD 16.9 billion
Total importation of agricultural products	USD 15.6 billion
Agricultural GDP	USD 53.4 billion
<i>Source: TurkStat, Trademap and Eurostat (2016)</i>	

- **Turkey's female labour in agriculture is the 3<sup>th</sup> largest in the world.**



# Total fruits and vegetables production in the world



Source: FAO (2016)

**PRODUCTION OF  
FRUITS &  
VEGETABLES**

**Turkey is world's 4<sup>th</sup> largest producer of fresh vegetables and 7<sup>th</sup> largest producer of fruits, with a yearly total production of 53 million tons and a trade volume of 2.5 billion USD.**

**OPPORTUNITIES**

- **Agricultural sector is growing very rapidly thanks to developed regional trade**
- **The sectoral advantages of Turkey are:**
  - **Ecological conditions, contracted production, easy marketing and export opportunities for food processing sector.**
  - **Rapidly increasing domestic demand and the proximity to major markets,**
  - **Significant investment opportunities with high-tech fruit and vegetable processing industries.**

# Vegetable production in Turkey

<b>Vegetables</b>	<b>Production (Tonnes)</b>
<b>Tomato</b>	<b>12.150.000</b>
<b>Water melon</b>	<b>4.031.174</b>
<b>Potato</b>	<b>4.550.493</b>
<b>Pepper</b>	<b>2.554.974</b>
<b>Onion (dry)</b>	<b>2.073.549</b>
<b>Cucumber</b>	<b>1.848.273</b>
<b>Sweet melon</b>	<b>1.753.942</b>
<b>Eggplant</b>	<b>836.284</b>
<b>Cabbage</b>	<b>765.276</b>
<b>Carrot</b>	<b>642.837</b>
<b>Squash</b>	<b>616.777</b>
<b>Green bean</b>	<b>580.949</b>
<b>Lettuce</b>	<b>487.543</b>
<b>Leek</b>	<b>252.958</b>
<b>Cauliflower</b>	<b>225.151</b>
<b>Spinach</b>	<b>225.174</b>
<b>TOTAL</b>	<b>32.583.320</b>

# **Fruit production in Turkey**

<b>Fruits</b>	<b>Production (Tonnes)</b>
<b>Grape</b>	<b>3.933.000</b>
<b>Apple</b>	<b>3.625.960</b>
<b>Orange</b>	<b>1.900.000</b>
<b>Mandarin</b>	<b>1.650.000</b>
<b>Olive</b>	<b>1.500.467</b>
<b>Tea</b>	<b>1.500.000</b>
<b>Lemon</b>	<b>1.100.000</b>
<b>Apricot</b>	<b>750.000</b>
<b>Peach</b>	<b>667.982</b>
<b>Sweet cherry</b>	<b>639.564</b>
<b>Pomegranate</b>	<b>537.847</b>
<b>Pear</b>	<b>519.451</b>
<b>Banana</b>	<b>498.888</b>
<b>Strawberry</b>	<b>440.968</b>
<b>TOTAL</b>	<b>21.994.028</b>

**Global player in plant  
production and exports**

**Turkey exports 1,690  
kinds of agricultural  
products to more than  
185 countries**

## **IN EXPORTS**

### **TOP EXPORTER**

**Hazelnut, dried raisin,  
dried apricot, fig, dried fig  
and chickpea**

### **ONE OF TOP 5 EXPORTERS**

**Cherry, lemon, lentil,  
tobacco, olive oil,  
chestnut**

### **ONE OF TOP 10 EXPORTERS**

**Pepper, olive, pistachio,  
orange, tomato,  
cucumber, peach, grape**

***Source: TurkStat (2016)***

## World Fresh Apricot Production – Top Five Countries (Tons)

<b>1</b>	<b>Turkey</b>	<b>600.000</b>
<b>2</b>	<b>Iran</b>	<b>230.000</b>
<b>3</b>	<b>Italy</b>	<b>204.500</b>
<b>4</b>	<b>France</b>	<b>145.978</b>
<b>5</b>	<b>Spain</b>	<b>128.000</b>
	<b>TOTAL</b>	<b>2.712.322</b>

**Turkey's share: %22,1**



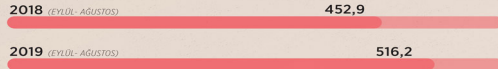
# Top Raisin Producing Countries

## Kuru üzümde ihracat, ilk kez yarım milyar doları aştı

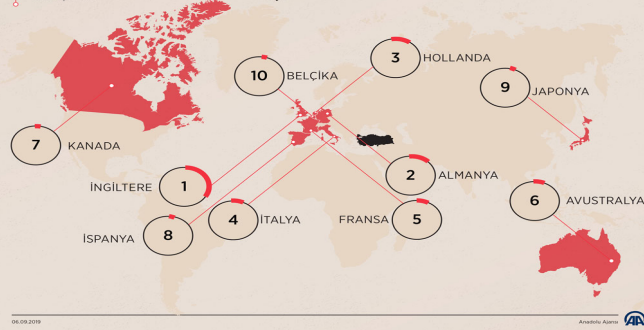
Geleneksel Türk ihracat ürünlerinden çekirdeksiz kuru üzümde dış satım, bu sezon, bir önceki döneme göre yüzde 14 arttı



KURU ÜZÜM İHRACATI (MİLYON DOLAR)



EN FAZLA KURU ÜZÜM İHRACATI YAPILAN ÜLKELER (MİLYON DOLAR)



Rank	Country	Production (MT)
1	Turkey	353,167
2	United States	332,760
3	Iran	122,595
4	Greece	72,861
5	Chile	51,128
6	South Africa	37,049
7	Uzbekistan	32,893
8	Afghanistan	30,281
9	Australia	26,041
10	Argentina	19,543

# World Dried Apricot Production By Countries (Tons)

Rank	Countries	2016	2017	Share (%) 2017
1	Turkey	103,250	145,000	68
2	Iran	15,000	15,000	7
3	Uzbekistan	9,000	10,000	5
4	China	6,000	6,000	3
5	Afghanistan	3,500	3,500	2
6	South Africa	1,500	1,500	1
7	USA	1,200	1,500	1
	Others	30,000	30,000	14
	Total	169,4	212,5	100

# World Dried Fig Production By Countries (Tons)

Rank	Countries	2016	2017	Share (%)
1	Turkey	72,000	72,000	53
2	Iran	30,000	25,000	19
3	USA	9,000	8,000	6
4	Greece	7,500	7,500	6
5	Afghanistan	7,000	9,000	7
6	Spain	5,500	6,000	4
7	Italy	3,500	4,000	3
Others		5,000	3,500	3
Total		139,5	135,0	100









# Antalya is the greenhouse centre of Turkey

## Greenhouse area (in ha/in %)

	Glasshouse	Plastichouse	Total
<b>Turkey</b>	<b>6.494</b> <b>(%100)</b>	<b>23.460</b> <b>(%100)</b>	<b>29.954</b> <b>(%100)</b>
<b>Antalya</b>	<b>5.306</b> <b>(% 82)</b>	<b>8.656</b> <b>(% 37)</b>	<b>13.962</b> <b>(%47)</b>



**Kumluca, Antalya**  
**Main vegetable**  
**production center**  
**in Turkey**

# **Finike, Antalya – main orange production center in Turkey**



# Banana production in Antalya coastal region



# Heating systems in 1970's



# Heating systems after 2000's



# Banana production in greenhouse





## Jeotermal heated greenhouse



**Turkey has 3 million tonnes of cold storage capacity and 10% of the capacity is CA storage.**



**Turkey has 400.000 tonnes of underground storage capacity mainly for lemon, potato and onion storage.**



# Packging house facilities in Turkey



# Sorting line for apples



# SWOT Analysis for Agri-Food Sector of Turkey

<b>Strenghts</b>	<ul style="list-style-type: none"><li>• <b>Having a traditional agricultural production culture,</b></li><li>• <b>The existence and diversity of agricultural raw materials,</b></li><li>• <b>Turkey's geographical position and historical identity as a strategic point of presence,</b></li><li>• <b>Technically compliant with the EU of food legislation.</b></li></ul>
<b>Weaknesses</b>	<ul style="list-style-type: none"><li>• <b>Branding is not enough,</b></li><li>• <b>Lack of inspection and control,</b></li><li>• <b>Inadequate share of R&amp;D and inadequacy of infrastructure,</b></li><li>• <b>The intensity of small and medium-sized enterprises and family businesses in the sector,</b></li><li>• <b>Inefficiencies in producers' access to the market,</b></li><li>• <b>High external dependency, especially in the use of agricultural inputs.</b></li></ul>

## **Opportunities**

- **High export potential in terms of location,**
- **Positive effects of tourism sector on food demand,**
- **The fact that Turkey has a lot of traditional products; and potential of food products with geographical indication,**
- **R&D, governmental support and encouragement for promotion and branding in foreign markets.**

## **Threats**

- **High energy costs,**
- **Political and economic instability in Middle Eastern countries where exports are intense,**
- **Technical labor force needs of the sector,**
- **Negative effects of climate change on production and markets,**
- **Due to migration from rural areas to urban, especially in some regions the risk of sustainability of agricultural production,**
- **Increase in input cost with exchange rate fluctuations.**

**THANK YOU FOR YOUR  
ATTENTION**

Antalya