



# 1st International Congress on Food Technology Antalya- 2010

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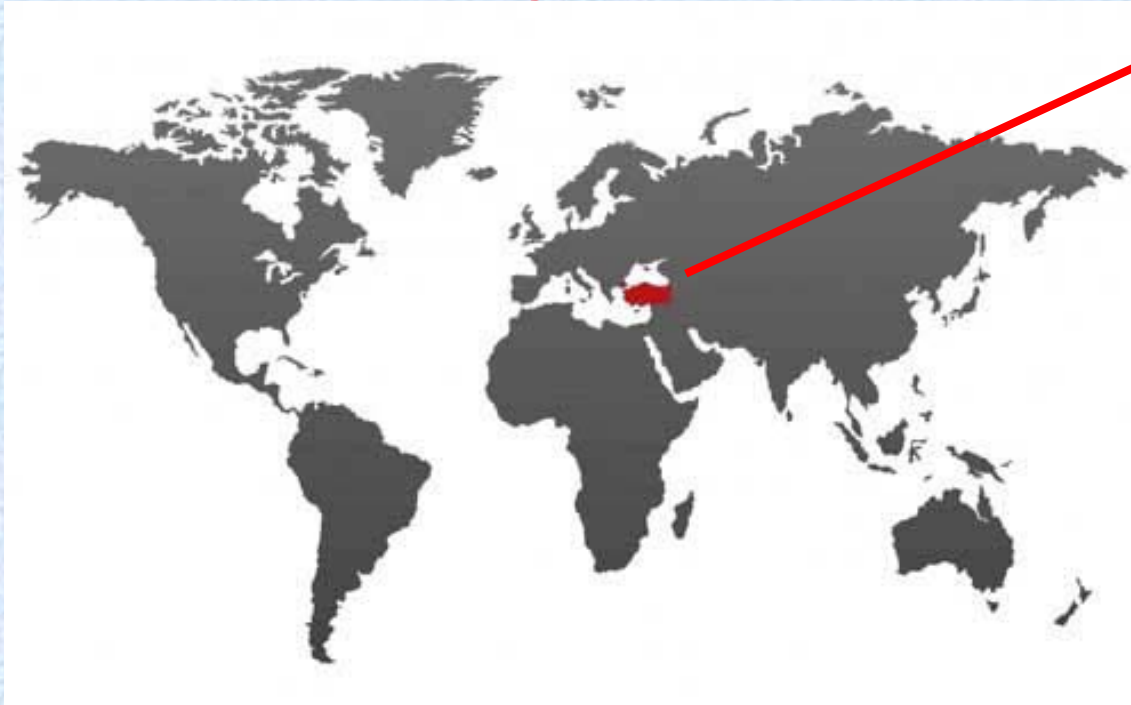


# Fruit 'full' Turkey



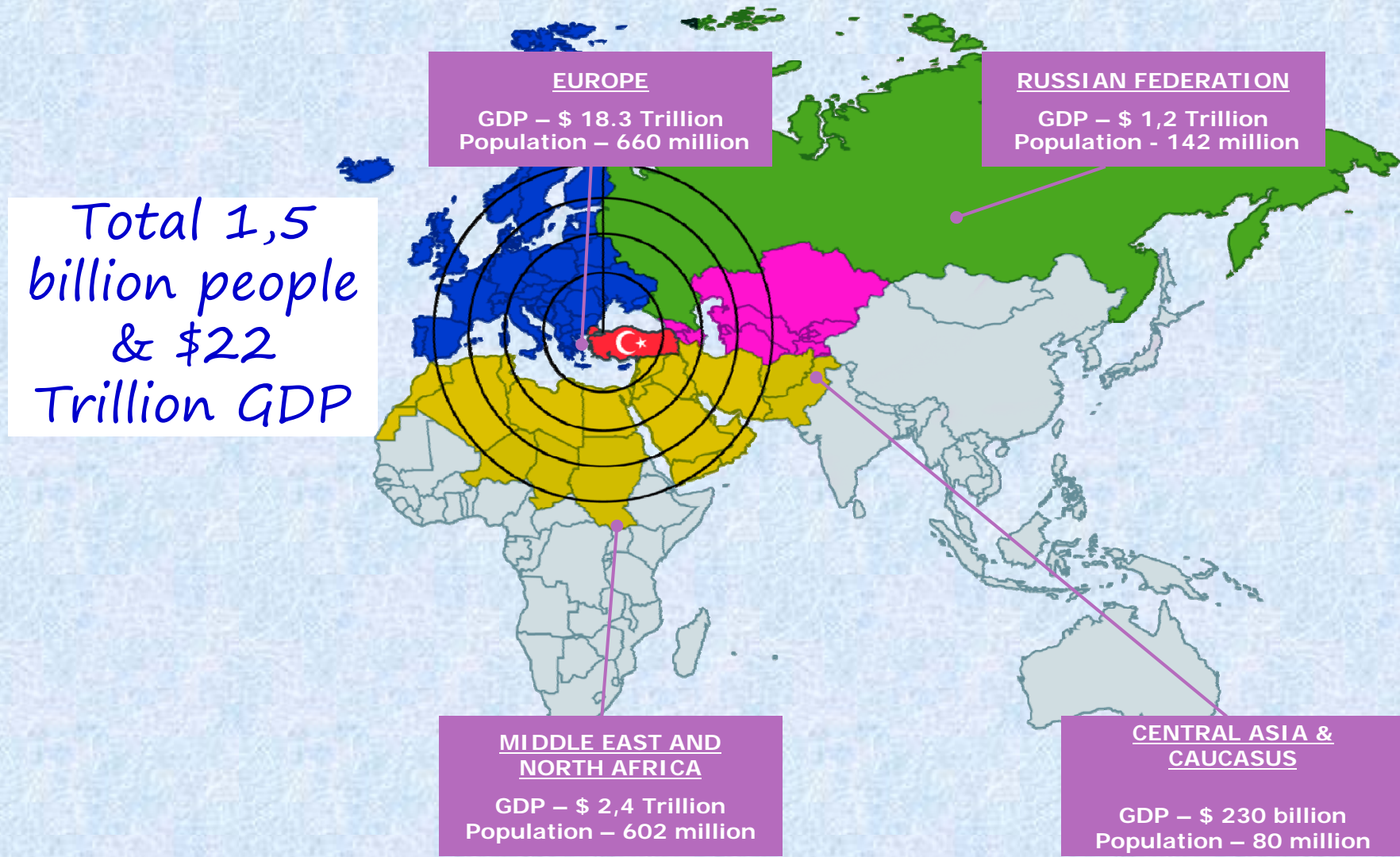
*1) Some Key Figures  
about Turkey*

# Turkey at a Glance



<i>Official Name of Country</i>	<i>Republic of Turkey</i>
<i>Capital City</i>	<i>Ankara</i>
<i>Population</i>	<i>73 million</i>
<i>Area</i>	<i>783,562 km</i>
<i>Financial Center</i>	<i>Istanbul</i>

# Access to Multiple Markets



# Further Facts

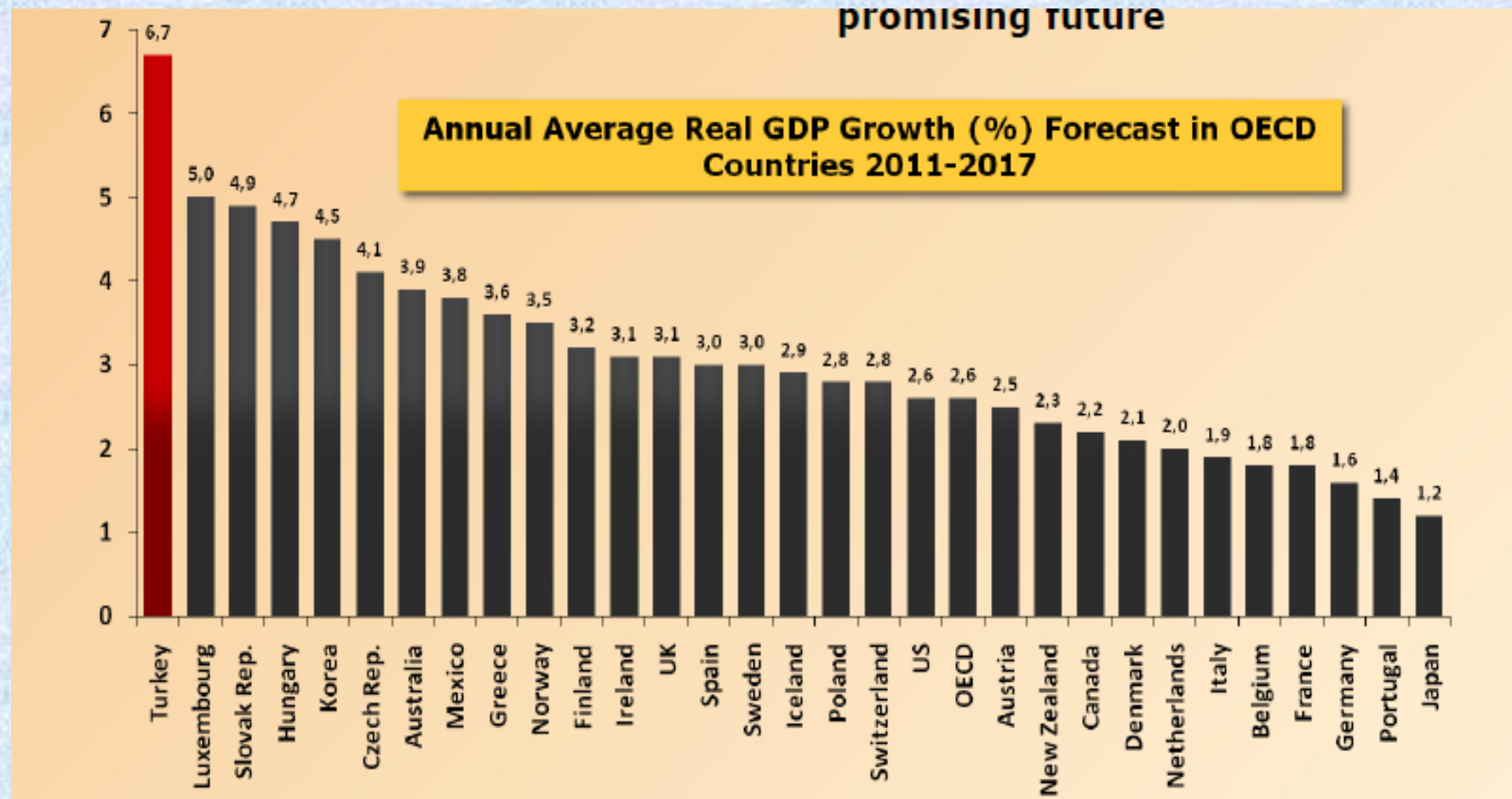
- 16th largest economy in the world and 6th when compared to the EU Countries in 2009 (IMF)
- The largest youth population when compared to the EU countries
- Turkey is the 7th most visited holiday destination in the world (27.3 million visitors in 2009)

International Tourist Arrivals	
Country	2009 (million)
1. France	74.2
2. USA	54.9
3. Spain	52.2
4. China	50.9
5. Italy	43.2
6. UK	28.0
<b>7. Turkey*</b>	<b>27.3</b>
8. Germany	24.2
9. Malaysia	23.6
10. Mexico	21.5
<i>Source: UNWTO ;*Ministry of Culture and Tourism</i>	



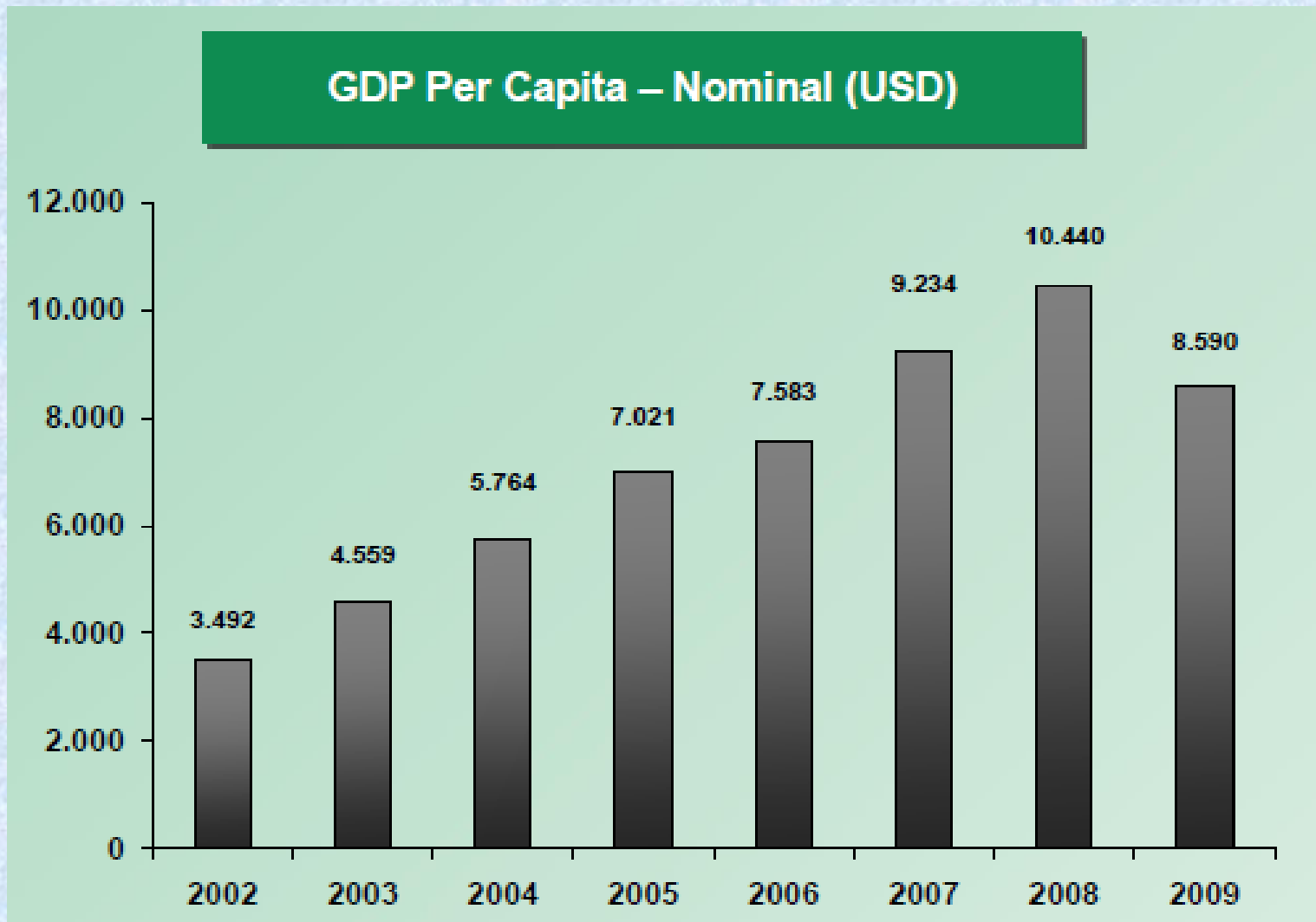
# Annual Average Real GDP Growth

The Fastest Growing Economy Among OECD Countries



Source: OECD Economic Outlook No.86

# Potential of Turkish Economy



Source: TURKSTAT



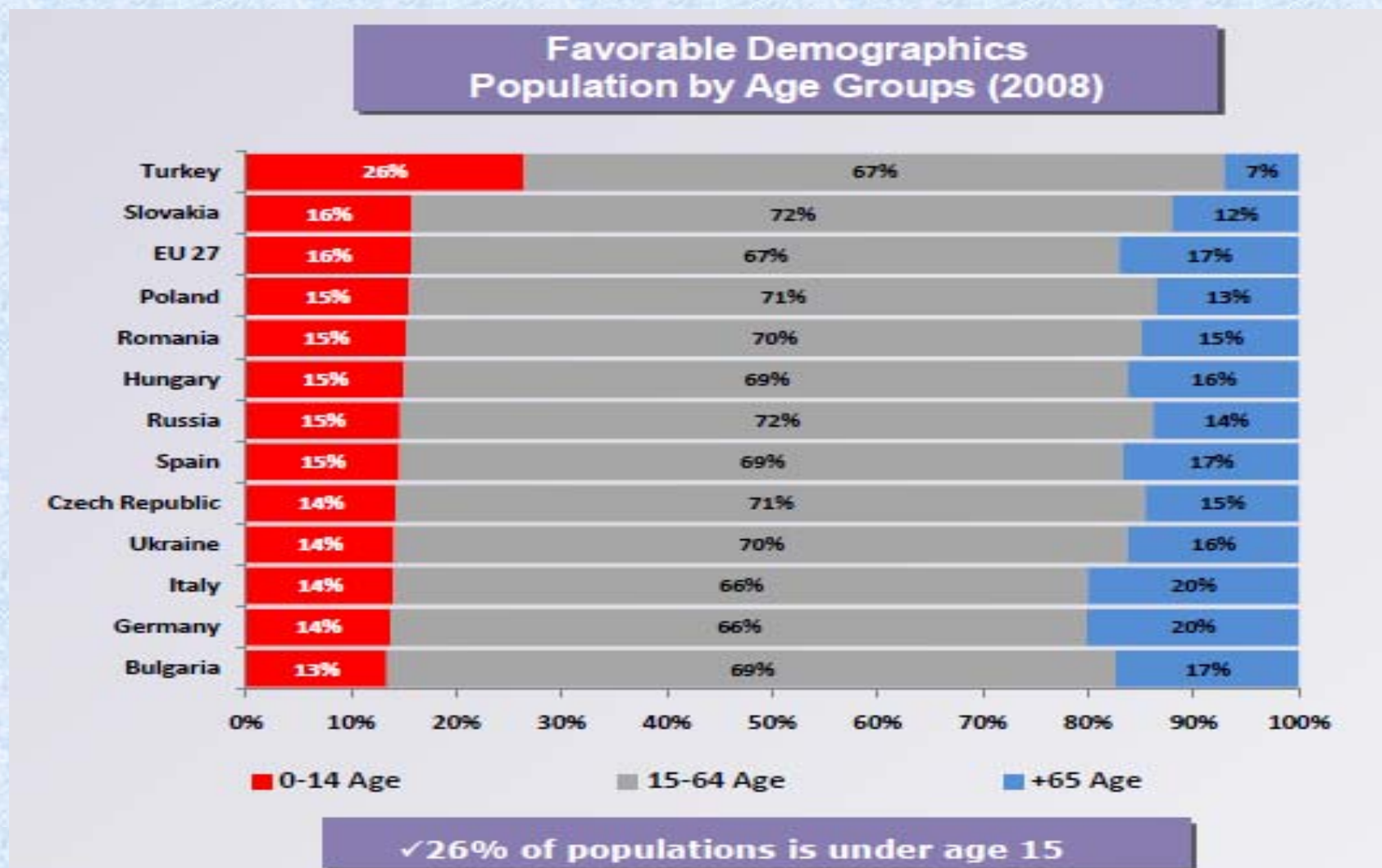
# Potential of Young Population

## Population Pyramid



In Turkey 50 % of the population is under age 29

# Potential of Young Population



# Turkish Fruit Juice Industry Association - MEYED

- Founded in 1993 & center in Istanbul
- Sole representative of Turkish Juice Industry
- 42 member companies – almost all companies
- Cooperation agreement with SGF since 2004
- Member of
  - AIJN since 2005 (European Fruit Juice Association)
  - IFU since 1997 (International Federation of Fruit Juice Producers)
  - Selected as a Board member on May 2010



2) Which Fruits are abundant  
in Turkey ?

# Turkey; one of the main producers

- Great variety of fruits & vegetables (apple, citrus, peach, apricot, pomegranate, grape, cherries, strawberry, pear, quince, banana, carrot ...)



## Ranking in world production

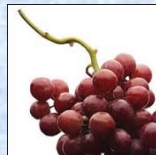
○ 1st in apricot



○ 3rd in pomegranate



○ 6th in peach & grape



○ 2nd in sour cherry



○ 4th in apple

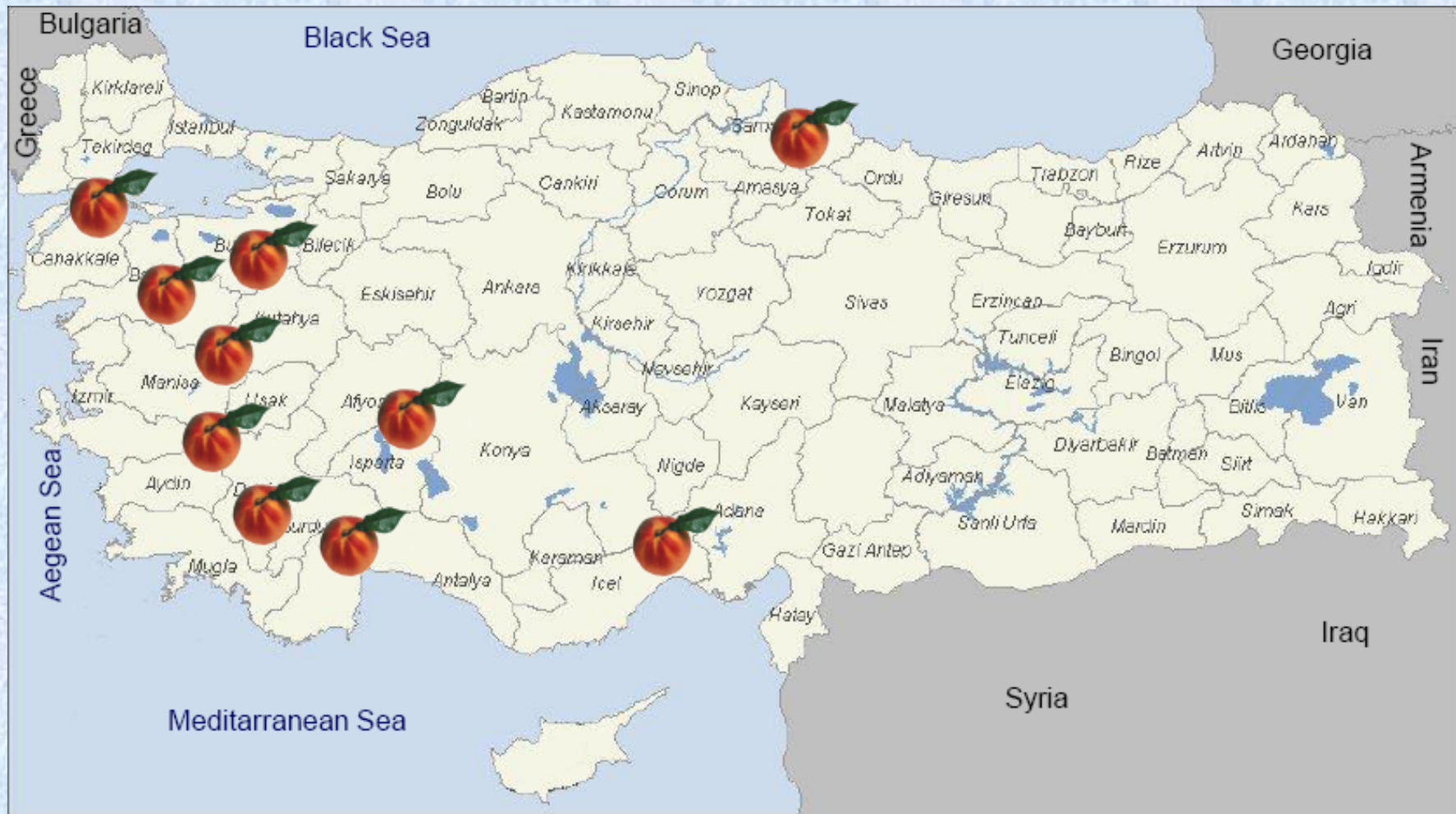






# Peach Growing Regions in Turkey

Total production: 552.000 tons (2008)



Source : Prof. M Pala, Yildiz Tech. Univ



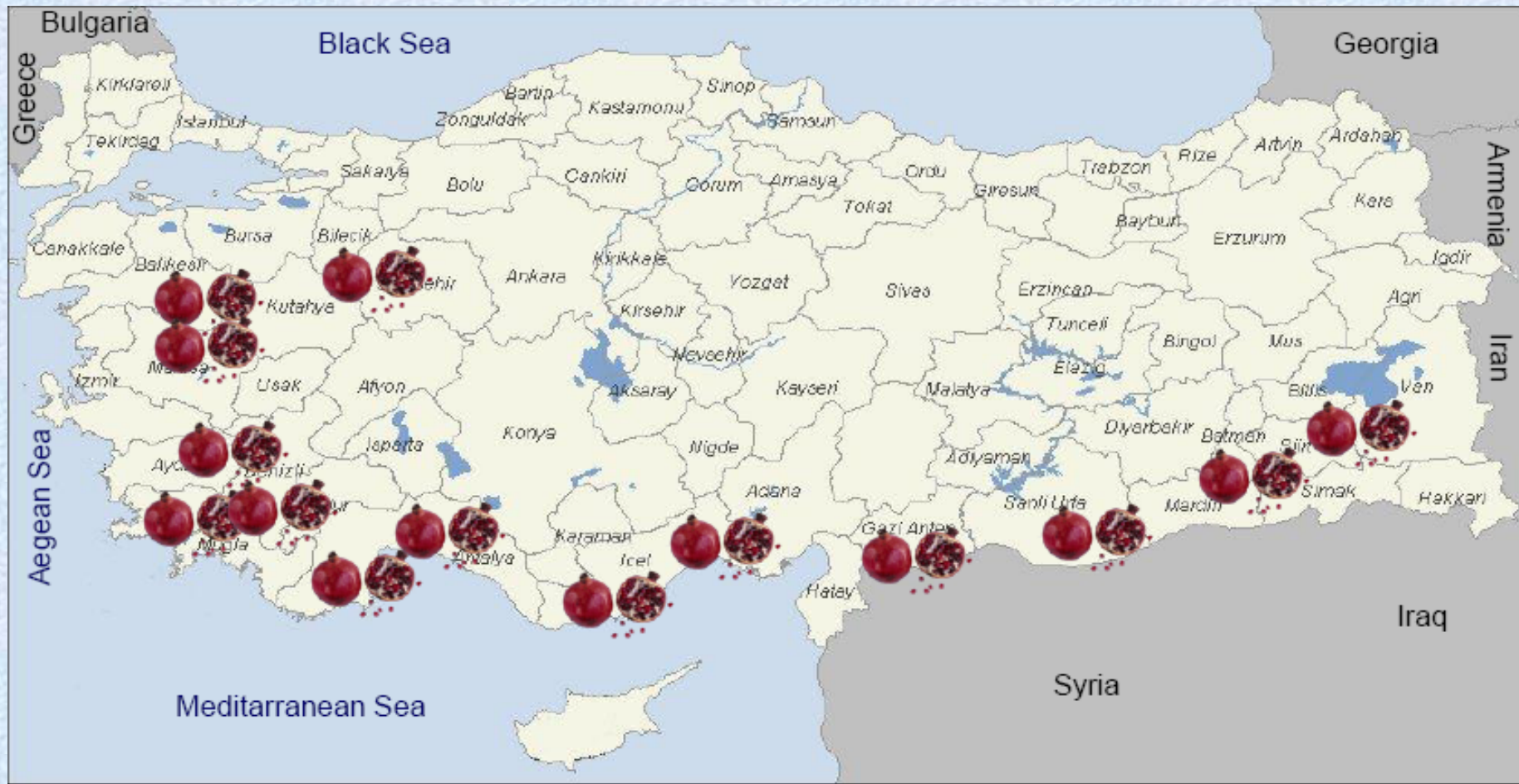






# Pomegranate Growing Regions in Turkey

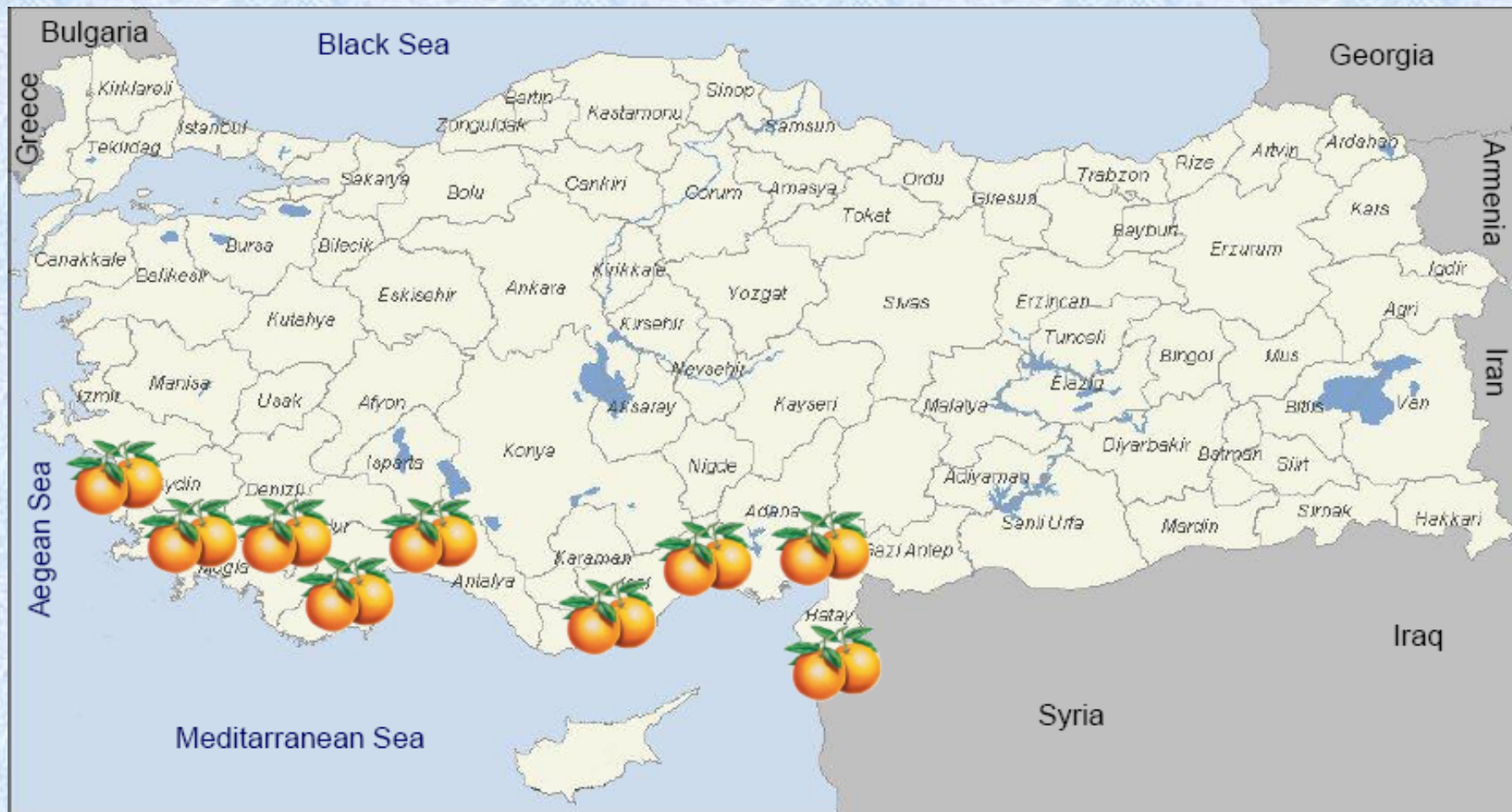
## Total Production 128.000 tons (2008)



Source : Prof. M Pala, Yildiz Tech. Univ

# Orange Growing Region in Turkey

Total Production : 1.427.000 tons (2008)



Source : Prof. M Pala, Yildiz Tech. Univ



# Fruit & Vegetable Processing Plants in Turkey



- 1-KONFRUT (Denizli & Hatay)
- 2-ANADOLU ETAP (Mersin)
- 3-TARÇID (Mersin)
- 4 -ASYA (Eğirdir/Isparta)
- 5-DIMES (Tokat & Izmir)
- 6-AROMA (Bursa & Karaman)
- 7-TAMEK (Bursa)
- 8 -GÖKNUR (Nigde)
- 9-PENKON (Çivril/Denizli)

- 10-OĞUZ (Adana)
- 11-YUMMY (Adana)
- 12-GOLDEN (Antalya)
- 13-MORELLO (Afyon)
- 14-AKSU (Nigde)
- 15-ERSU (Ereğli/Konya)
- 16 -TUNAYLAR(Erzincan)
- 17-GÜLSAN-MEYSU (Kayseri)
- 18-MEYKON (Elmalı/Antalya)

- 19-ELMASU (Isparta)
- 20-KIZIKLI (Nigde)
- 21-ARISU (Çivril/Denizli)
- 22-LIMKON (Adana)
- 23-MAVIDENİZ (Isparta)
- 24 -ANADOLU GIDA(Kayseri)
- 25-UNIT (Iğdir)
- 26-ASLANOBA (Bursa)

Source : Prof. M Pala, Yildiz Tech. Univ



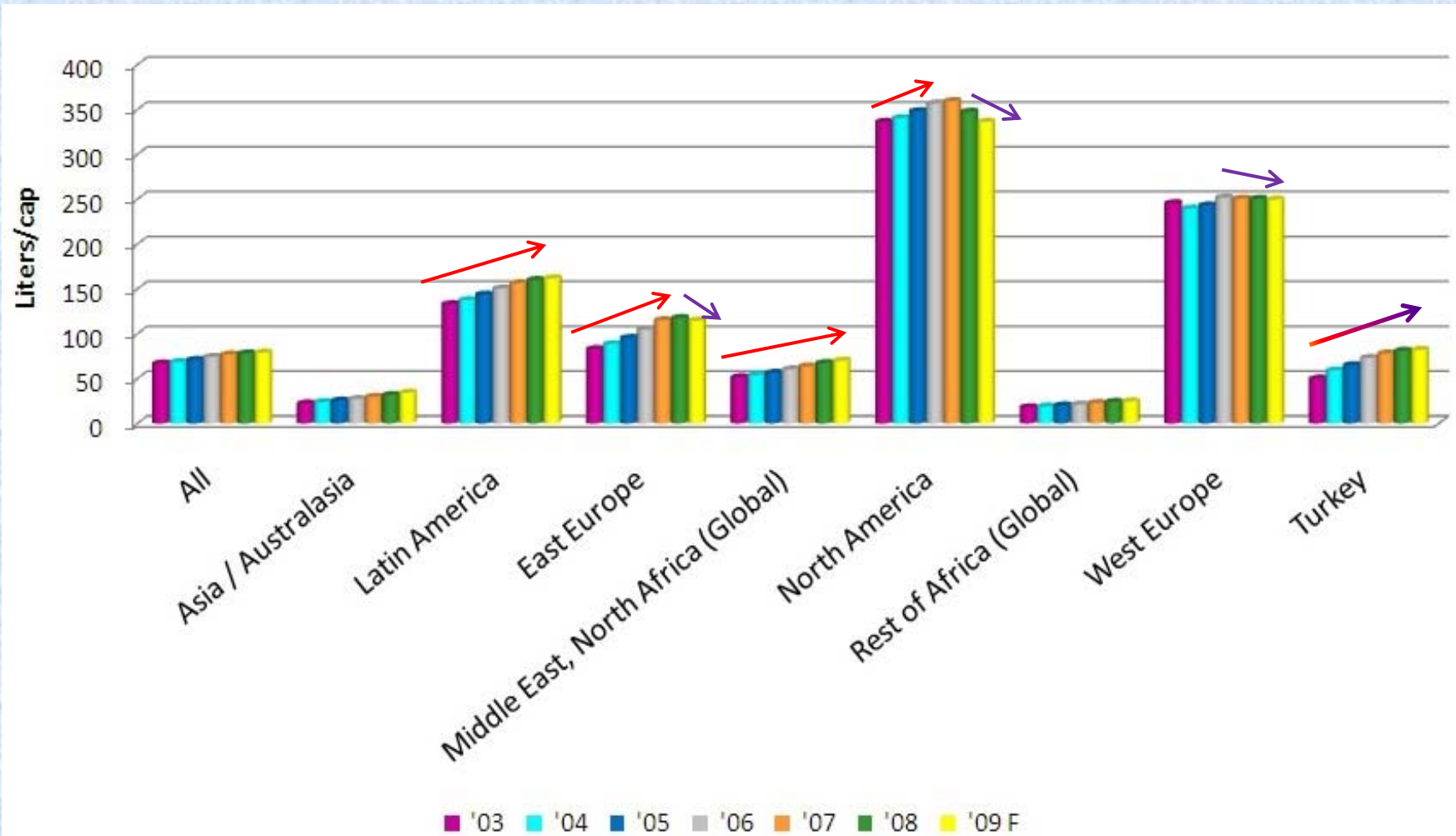
## Total Capacity of Fruit Processing Plants in Turkey

Raw Material	Processing Capacity (Tons/Day)
Apple	10.400
Sour Cherry	4.500
Apricot	3.500
Peach	3.500
Pomegranate	2.900
Grape	2.600
Black Carrot	1.600
Quince	1.400
Orange	1.000
Lemon	800

3) *Soft Drink consumption*

*Domestic / Worldwide*

# Regional Per Capita Consumptions Soft Drinks (\*)

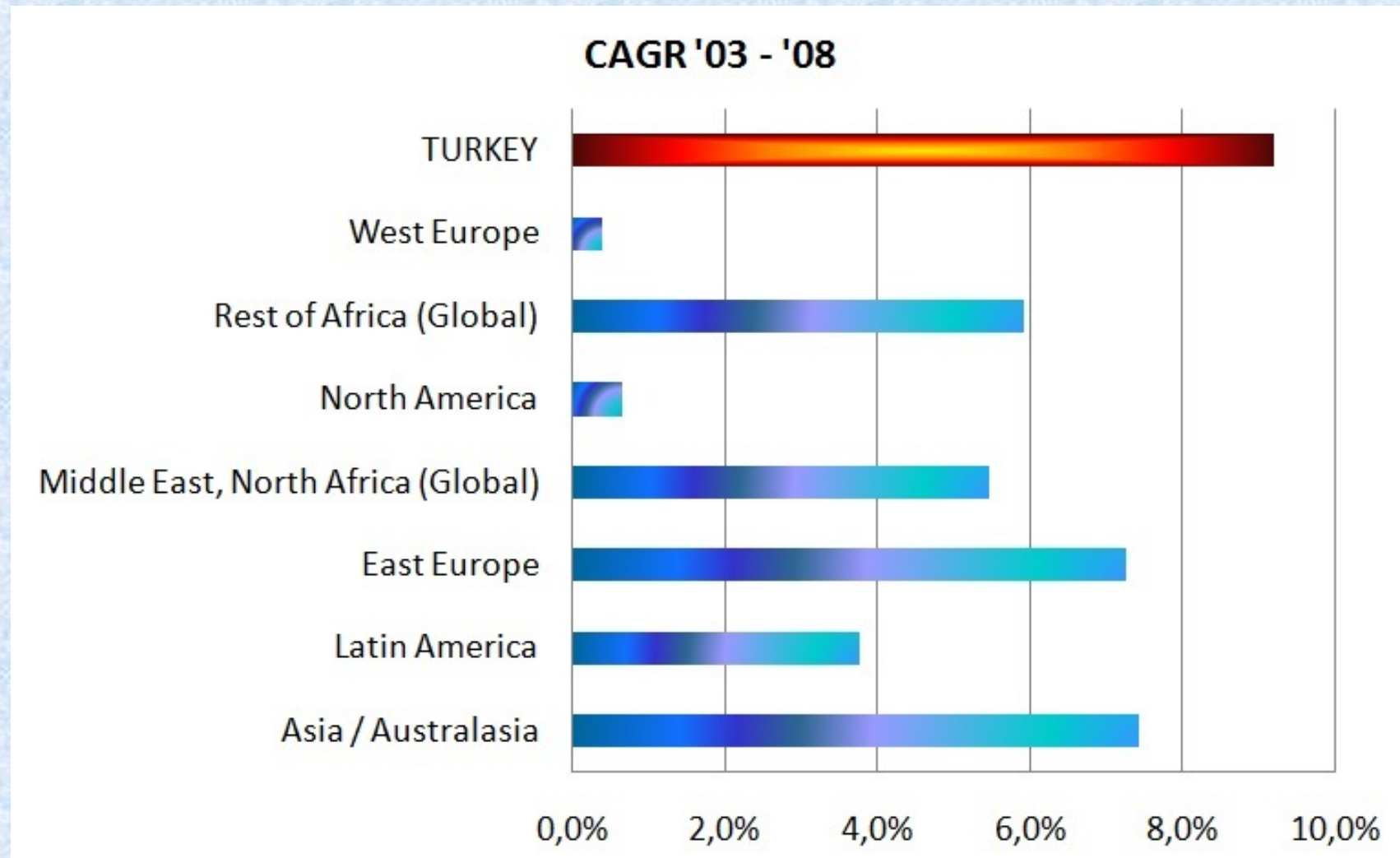


Source: Canadian Wisdom

\* Excluding bulk/HOD water cooler volume



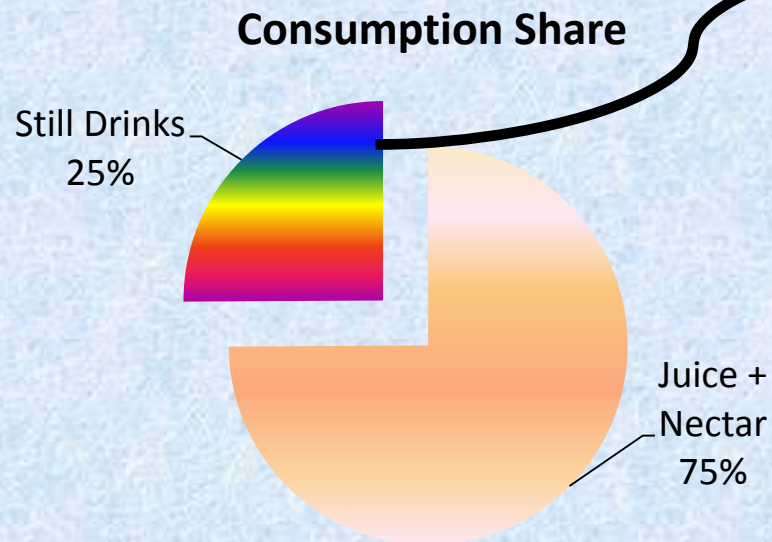
# Regional Growth Rates (Soft Drinks)



Source: Canadean Wisdom

# JNSD Consumption

- Consumption doubled in 5 years ('04 – '09)
- Expected to double in the next 5 years
- JNSD consumption per capita: 11 l/cap
- Juice + Nectar consumption : 8 l/cap



The share of lemonade increased from 0.1 % to 33% in 5 years

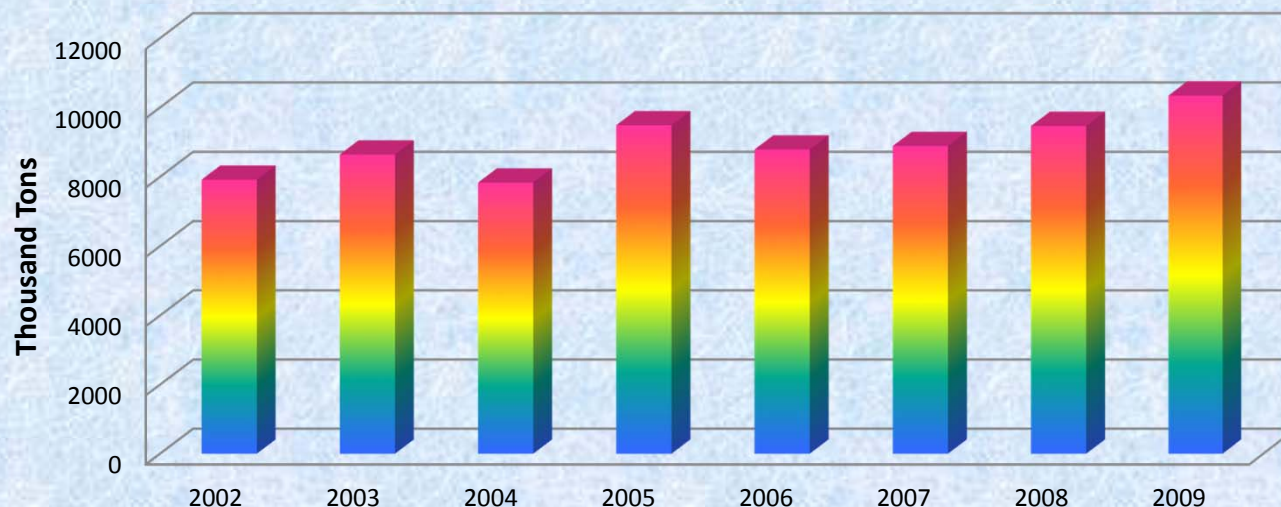
Source: Akdag E, Statistical Evaluation for Turkish Fruit Juice Industry, Istanbul, 2009 & CANADEAN

# Main Fruits of Juice Industry-Production

- 7 main fruits:
  - grape, orange, peach, apricot, sour cherry, apple, pomegranate
  - Production amount in '09; 10 million tons
- In '02 - '09 period %31 increase



Production Amount of 7 Fruits

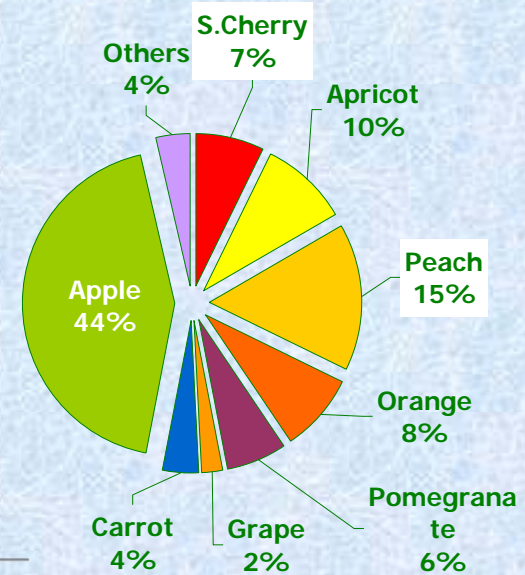


Source: TurIcStat

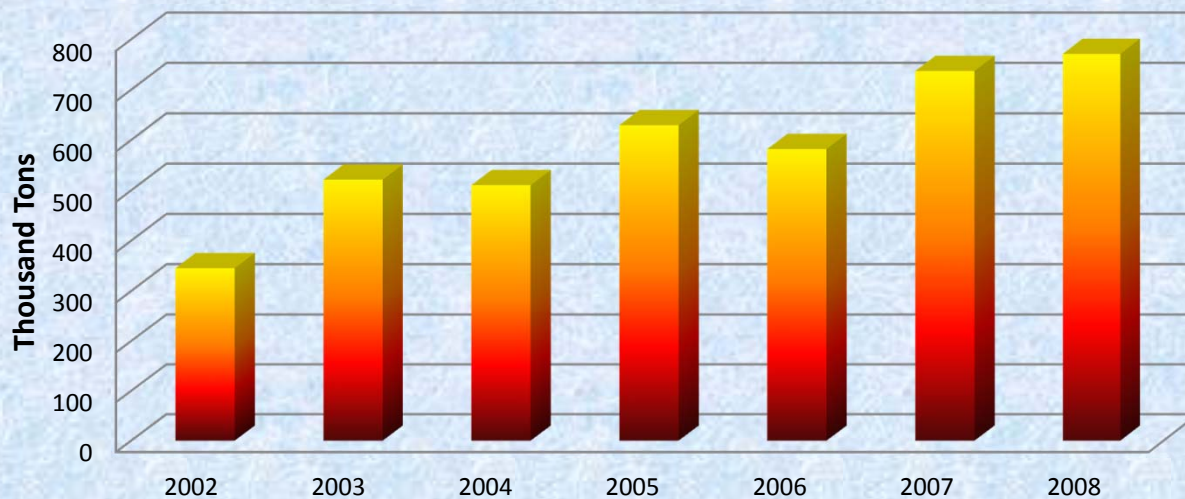


# Main Fruits of Juice Industry-Processed

- 123 % increase from '02 to '08
- 5 % increase in '08 vs '07
- POM: %39 processed, %26 exported fresh
- 60 % increase in production (05 - 08)
- 180 % increase in processed (05 - 08)



**Amount of Processed Fruits in Juice Industry**

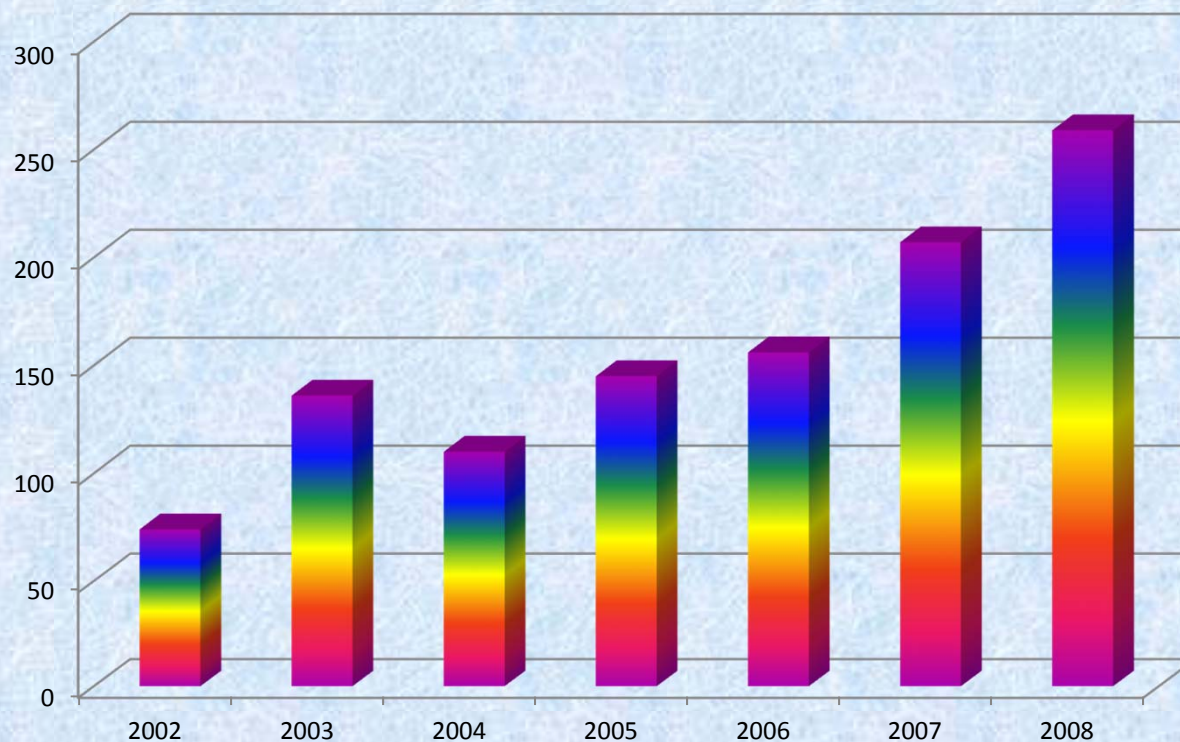


Source: Akdag E, Statistical Evaluation for Turkish Fruit Juice Industry, Istanbul, 2009

# Concentrate & Puree Production '08

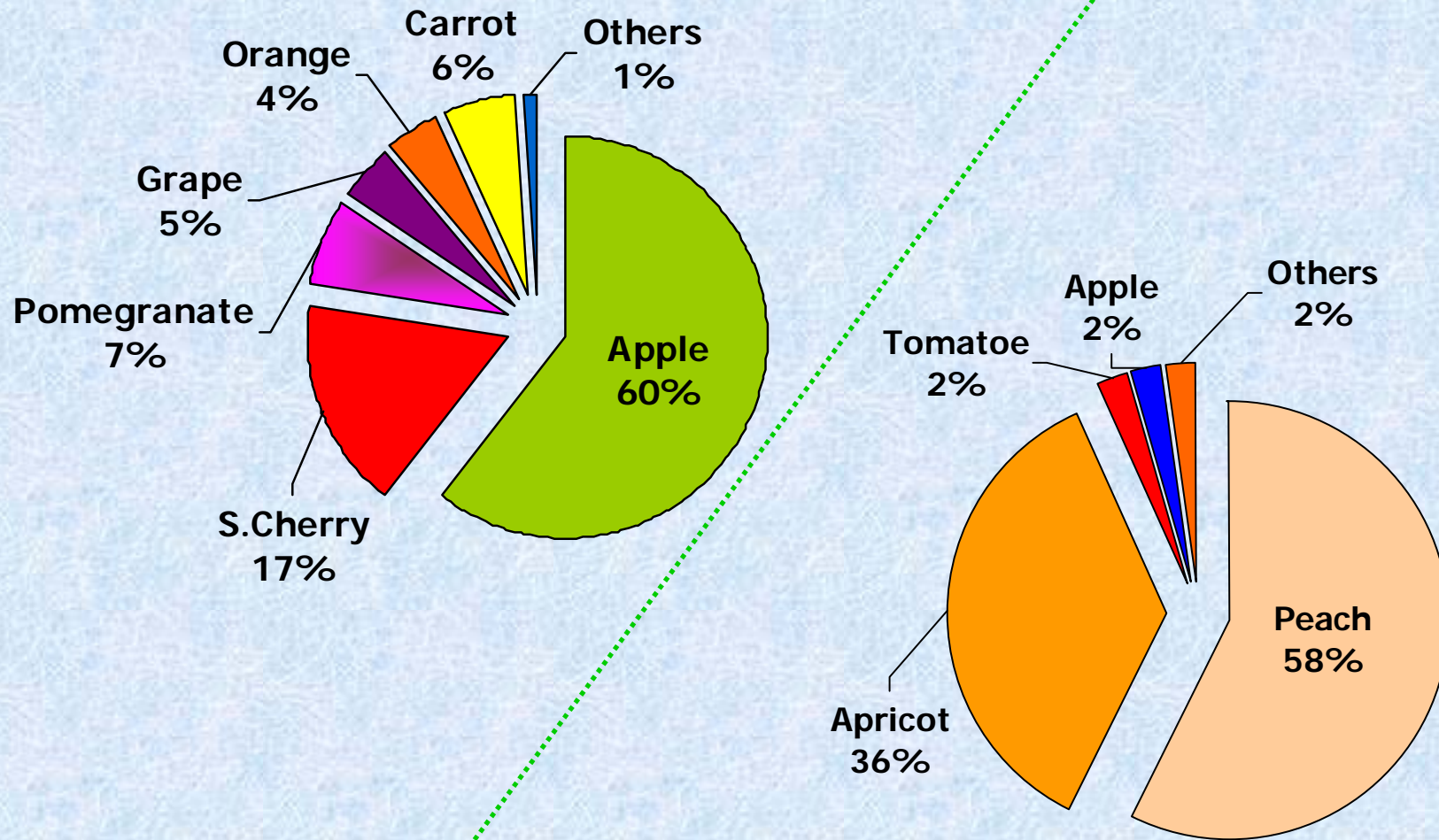
- Steady increase in raw material production
- 3.5 fold increase btw '02 - '08
- 25 % increase in '08 vs '07

**Concentrate & Puree Production**



Source: Akdag E, Statistical Evaluation for Turkish Fruit Juice Industry, Istanbul, 2009

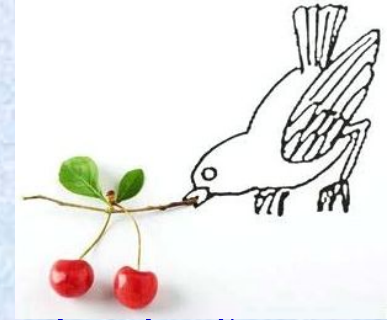
# Concentrate & Puree Production Distribution '08



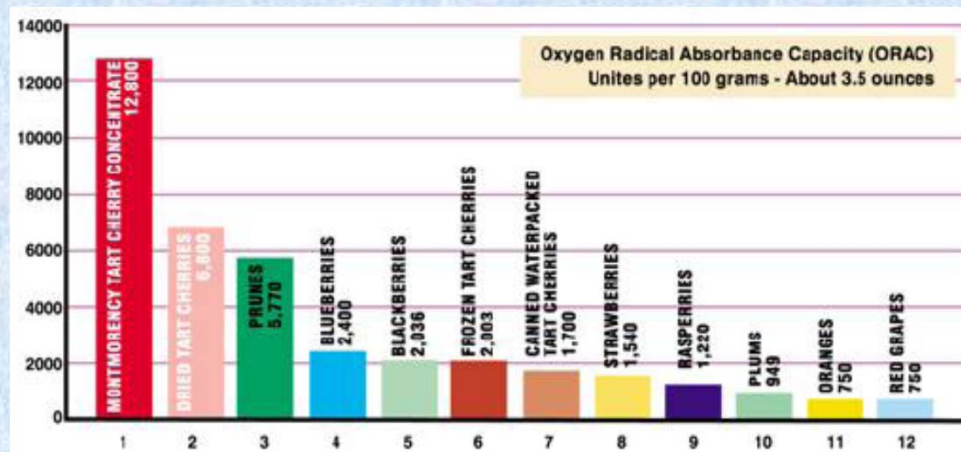
Source: Akdag E, Statistical Evaluation for Turkish Fruit Juice Industry, Istanbul, 2009



# Sourcherry-unrealized alternative



- Considered as “functional food” because of its high content of antioxidant compounds
- Ranked 14 of the top 50 foods for tot. ORAC content per serving
- Of the 150 flavonoids found in plants, greatest antioxidant capacity
- Cherries contain the highest amount of melatonin measured in any fruit to date
- S.cherries; low glysemic index (<55)
- Unlike similar stars no problem associated with level of production & yield

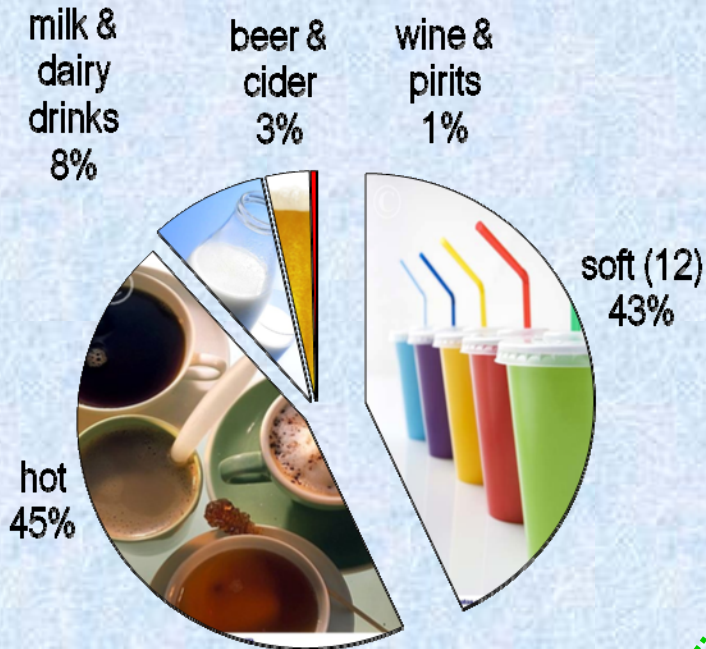


# Turkey & EU Beverage Categories '09

## TURKEY

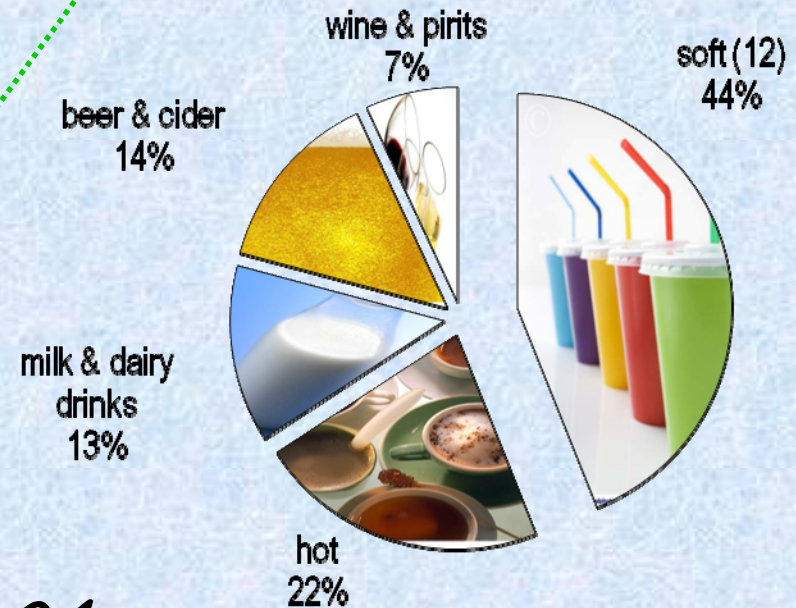


➤ 552 L / cap

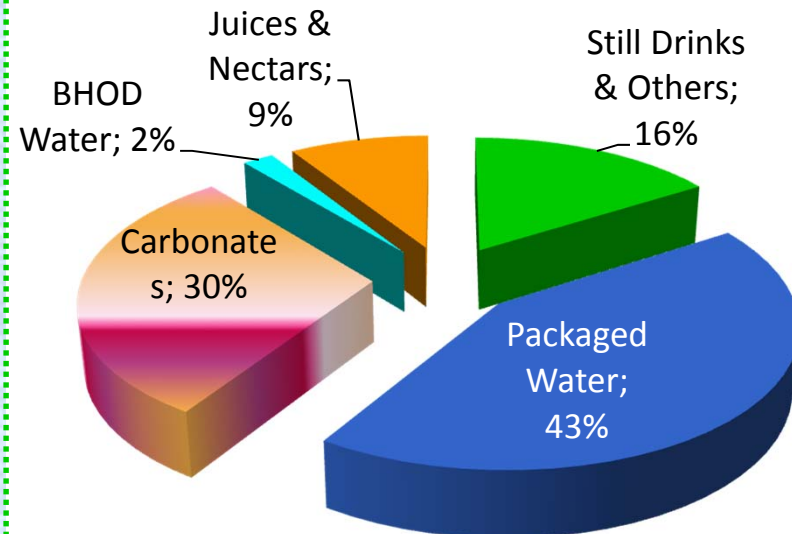
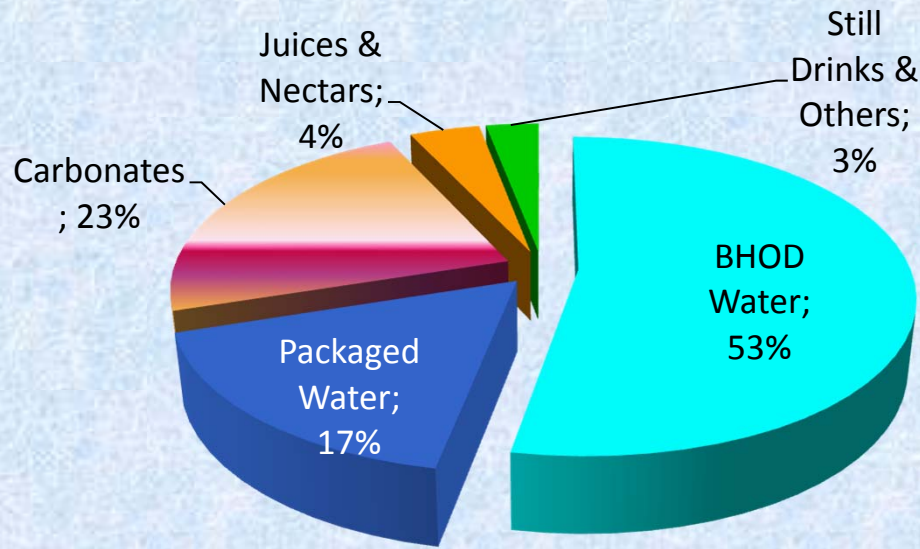


➤ 407 L / cap

## EU 24



# Turkey & EU-Macro Soft Categories '09

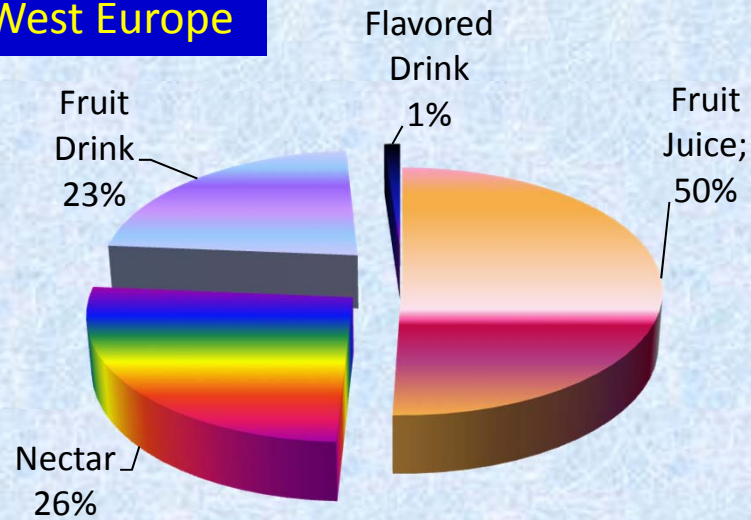


Source: Canadean Wisdom

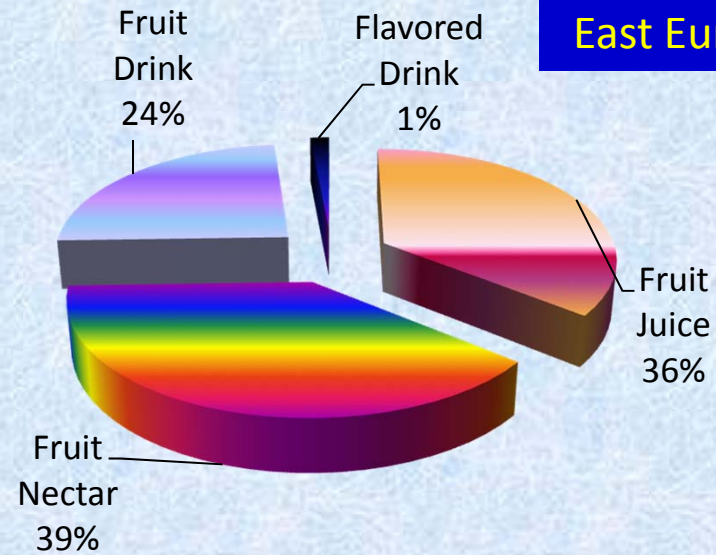


# Category Distribution

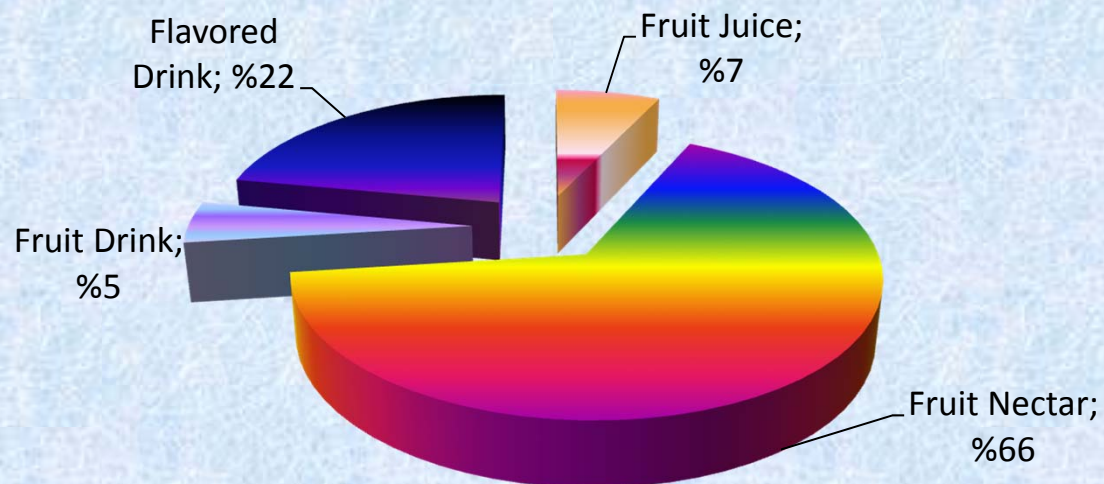
## West Europe



## East Europe





## Turkey



Source: Canadean Wisdom & MEYED

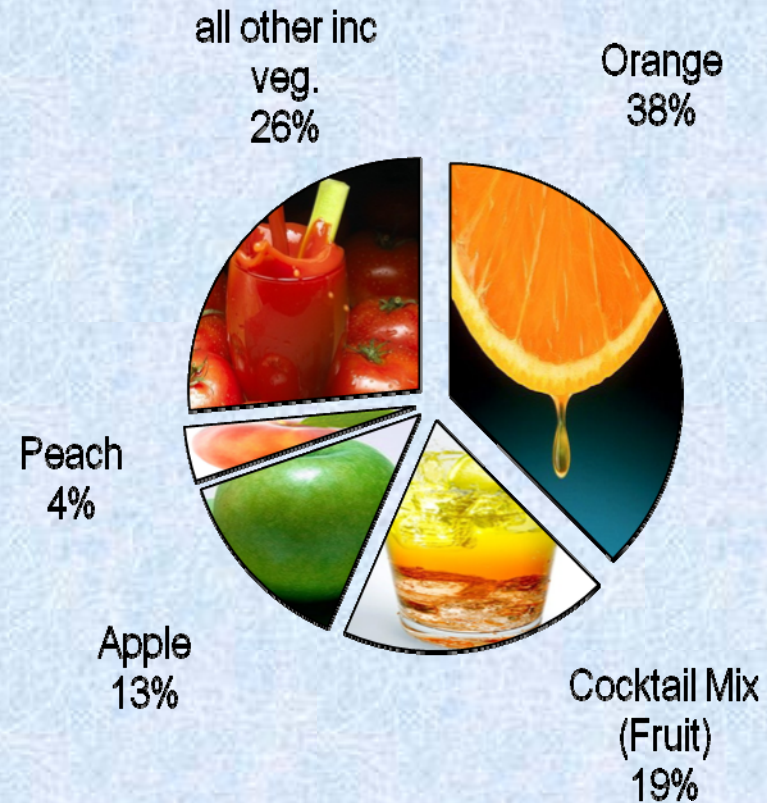
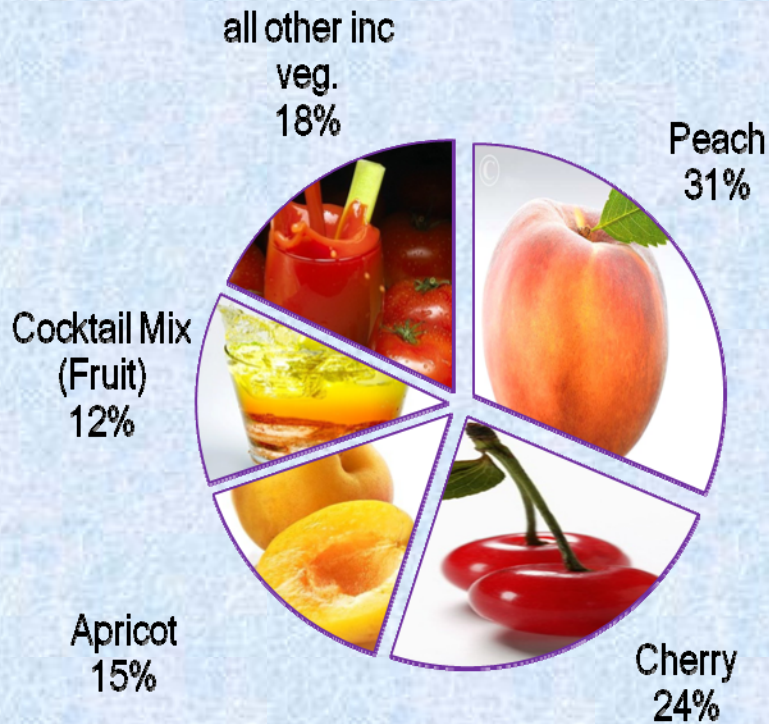
# Juice + Nectar Consumption Comparison

Fruit Juice + Nectar	 TURKIYE	 EU
Change in '08 vs '07 (%)	% 8	% 0.2
'03 - '08 5 year CAGR (%)	% 15.8	% - 0.1
CAGR in '09 vs '08 (%)	% 0.3	% - 1.3
Per capita consumption (l)	7.8	22.7



Source: Canadean Wisdom

# Flavor Preference in JN Category Turkey vs EU





4) Turkey's strength in  
Juice sector

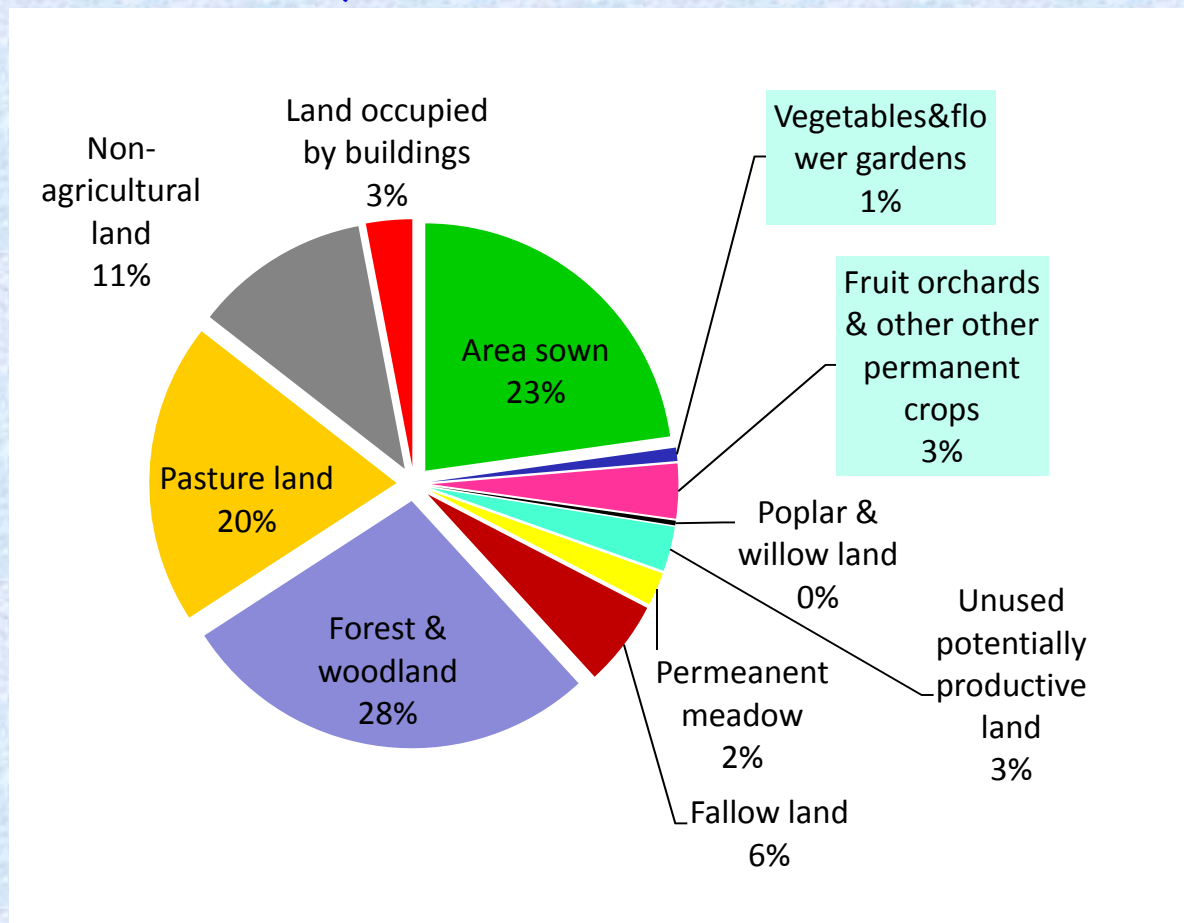
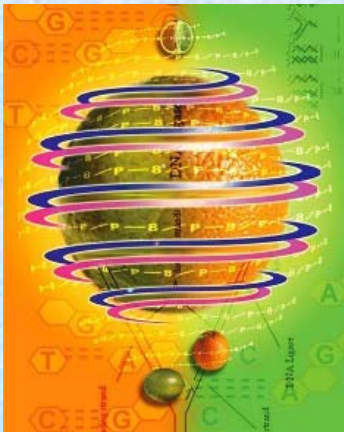
# Strong Side: Agricultural Richness

- *Appropriate climatic conditions*
- *Rich in biological diversity & genetic resources*
- *13 thousand plant species in EU*
- *11 thousand plant species in Turkey*
- *3 905 of 12 thousand endemic plant species world wide*
- *Within first 6 in WORLD production (apricot, sour cherry, pomegranate, apple, grape and peach)*



# Strong Side: Land & Industry

- Only 3 % of total area is fruit plantation
- Improvement on agricultural policy in favor of juice industry
- The industry is very much developed on know-how & technology used





# Strong Side: Potential of Turkish Market

- Successful economy (\$ 305 bn to \$747 bn GDP in 5 years)
- 73 million population (average age 28.5, 61 % under 34)
- Large domestic market
- Liberal & reformist investment environment
- Dynamic & mature private sector
- Qualified & cost-effective labor



Source: The Republic of Turkey Prime Ministry Investment Support and Promotion Agency (ISPAT)

# Strong Side: Potential of Turkish Market

- Centrally located (Europe, Central Asia, Middle East)
- Energy corridor & terminal of Europe
- Low taxes & incentives
- Accession negotiations with EU since 2005
- Customs Union with EU since 1996
- Opportunities, opportunities, opportunities...



Source: The Republic of Turkey Prime Ministry Investment Support and Promotion Agency (ISPAT)

Thanks a lot....

And wish you all a

'Fruitful' Congress !

Thanks to Secr. Gen of MEYED, Ms E.Akdag for her contribution