NEW ZEALAND

AGRICULTURE IN TÜRKİYE

An overview of the sector and opportunities ahead for New Zealand exporters.

EUROPE MARKET RESEARCH, ERIN MADDREN | JULY 2023

Introduction to this report

Background

Agriculture has been a significant sector of the Turkish economy for centuries, and today it remains a vital contributor to the country's GDP. The fertile soils, favourable climate, and diverse topography of Turkey enable the production of a wide range of agricultural products.

Agribusiness is a dynamic and rapidly evolving sector in Türkiye. Despite this, Türkiye is still an import-dependent country when it comes to agricultural products, which makes it an attractive market for exporters. The country imports a wide range of products to meet the demands of its growing population and tourism industry.

Methodology

This report was generated using desktop research, with NZTE subscriptions and publicly available data. Key sources of data are listed below:

- **Euromonitor International**
- **Statista**
- **UNComTrade**
- **ITC Trade Map**

Purpose

The purpose of this research is to:

1) Help inform New Zealand agribusiness exporters on the current agriculture market in Türkiye.
2) Help New Zealand agribusiness exporters to understand the opportunities and challenges within the market, to make informed decisions.

Limitations

Most of the information provided in this report was sourced from secondary data sources. Due to the nature of secondary data, all values and figures should be treated as indicative, rather than absolute. The latest information available at the time of research was used, however present values may differ.

Contents




Key takeaways

The agriculture sector in Türkiye is prominent. It takes up over half of the country's land usage and contributes 6% to the GDP.

Majority of agribusinesses are one-person operations or family businesses. However, there are some larger players.

The government in Türkiye has and continues to show support for the agricultural sector, including interventions like subsidies and tax breaks.

Türkiye typically exports more agricultural products than it imports. This is the case for dairy, meat, fruits/nuts and vegetables, and agricultural and forestry machinery.

Most agricultural products are sold through supermarkets, discounters and small local grocers, in that order. However, modern channels like supermarkets are growing, as traditional channels decline.

New Zealand is the 4th largest supplier of meat to Türkiye. However, imports from New Zealand for dairy and fruits/nuts and vegetables are minimal.

SECTION 1

AGRICULTURE AND AGRIBUSINESS OVERVIEW

Agriculture is a large sector in Türkiye, representing 6% of the country's GDP and almost half of land use.

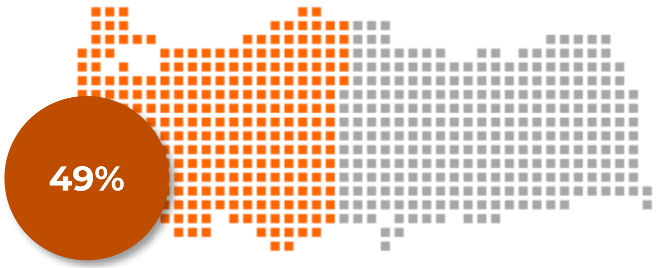
In 2021, the GDP of Türkiye was worth:

€690 billion

By 2022, this increased to:

€862 billion

Forecasts suggest that this will steadily increase over the next five years.



Agriculture made up 6% of the GDP in Türkiye in 2021. This definition includes forestry and fishing.

According to numerous sources, Türkiye is one of the top 10 agricultural nations in the world.

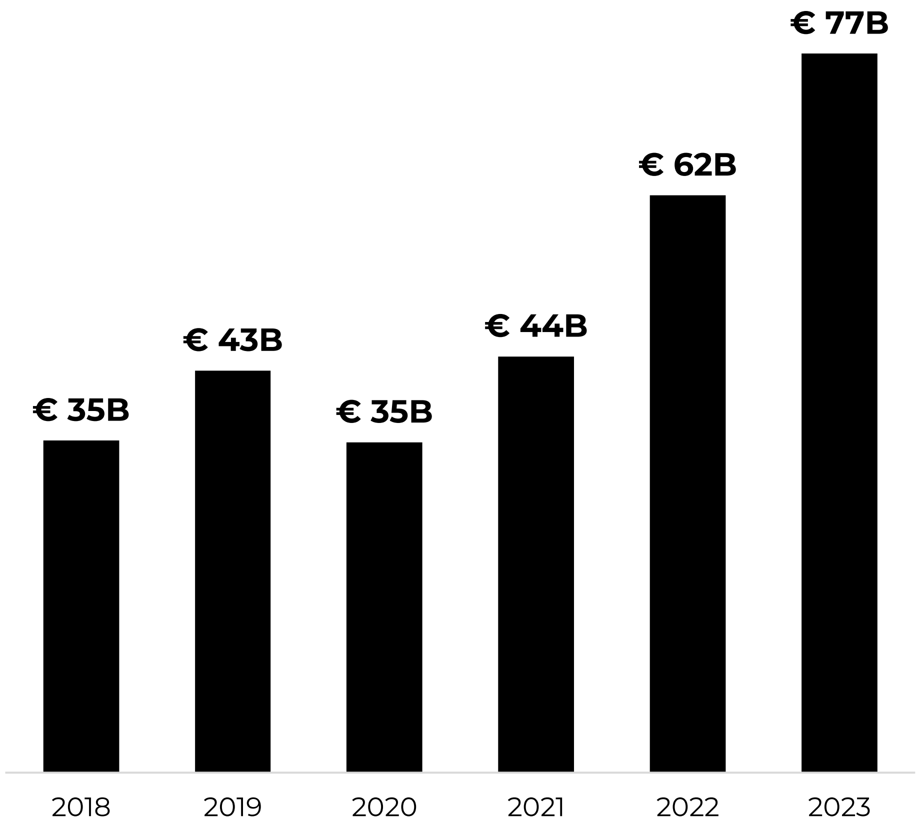
The US Department of Commerce names agriculture as the "best prospect industry sector for this country."

Almost half of Türkiye's land area is used for agricultural purposes (as of 2020).

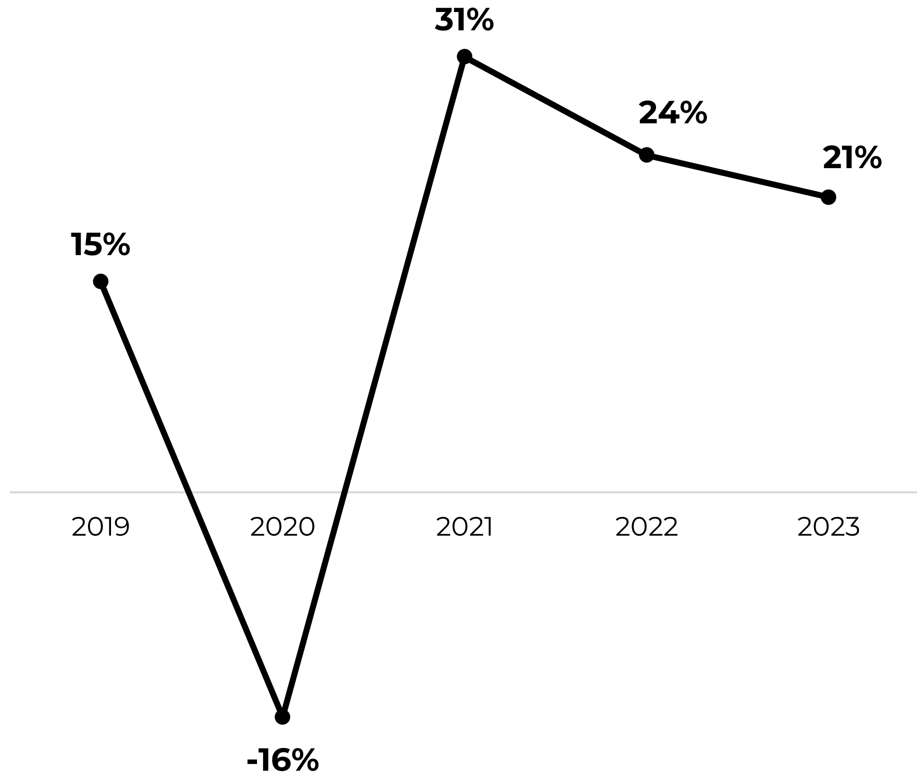
Source: WorldBank, 2022; EuroStat, 2022.; Euromonitor International, 2022.

Agricultural production value in Türkiye has been increasing significantly since 2020.

Total gross production value of agriculture in Türkiye
Billion Euros



Gross production value change of agriculture in Türkiye
Percentage



Source: Statista, *Agriculture Market Insights, 2023.*

In general, Turkey's climate may be considered as Mediterranean. There are 9 distinct agricultural zones, primarily based on climate.

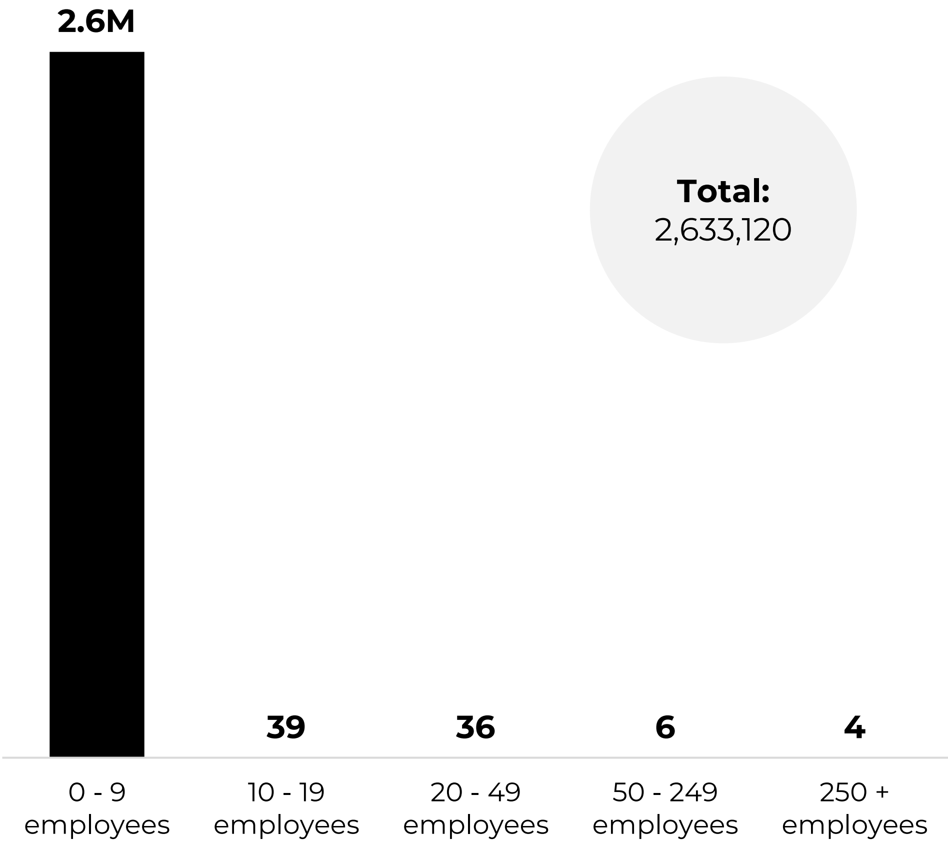
Agricultural zones in Türkiye

1. **Central North:** Continental climate; suitable for rain-fed cereals, food legumes, and forage legume production; extensive small ruminants, intensive dairy cattle.
2. **Aegean:** Mediterranean climate; suitable for extensive small ruminant and beef cattle, intensive dairy cattle; rain-fed cereals, olives, figs, irrigated cotton.
3. **Marmara and Thrace:** Suitable for cereals, sunflower, olives, and vegetables. It is an important cattle region with pure and crossbred animals for milk and meat production.
4. **Mediterranean:** Western coastal area; suitable for rain-fed and irrigated cereals, olives, cotton, citrus, maize; livestock is less important, but there is significant goat meat production.
5. **Northeast:** Hilly and mountainous high elevation area, the coldest part of the country; suitable for extensive livestock production and subsistence cereal production.
6. **Southeast:** Large fertile plains in the southern part, with the largest irrigation project (GAP Project) underway. Suitable for extensive sheep production, rain-fed cereals and food legumes, and irrigated cotton through increasing use of irrigation.
7. **Black Sea**: Suitable for rain-fed hazelnuts, vegetables, maize, and tea; significant local cattle production and extensive sheep raising.
8. **Central East:** Suitable for rain-fed cereal and food legume production, extensive small ruminant production, and local and crossbred cattle for milk.
9. **Central South:** Suitable for extensive small ruminants, intensive dairy cattle, rain-fed cereals, food legumes, and forage production.

Source: NZTE research, 2016;; local knowledge.

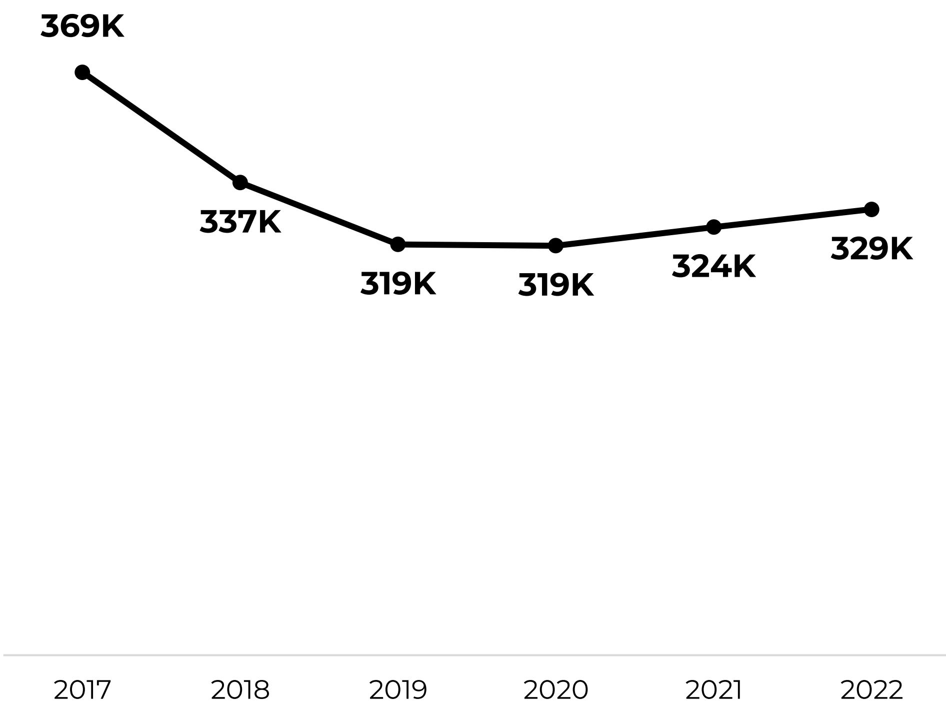
There are over 2.6 million agricultural businesses in Türkiye. Majority of these are small one-person operations or family businesses.

Number of agricultural businesses in Türkiye by size 2022



Formal employment in agriculture in Türkiye 2017-22

Excluding self employment, employers and family workers



Source: Euromonitor International, 2023.

Agriculture is very important to Türkiye, as seen with government support for the sector.

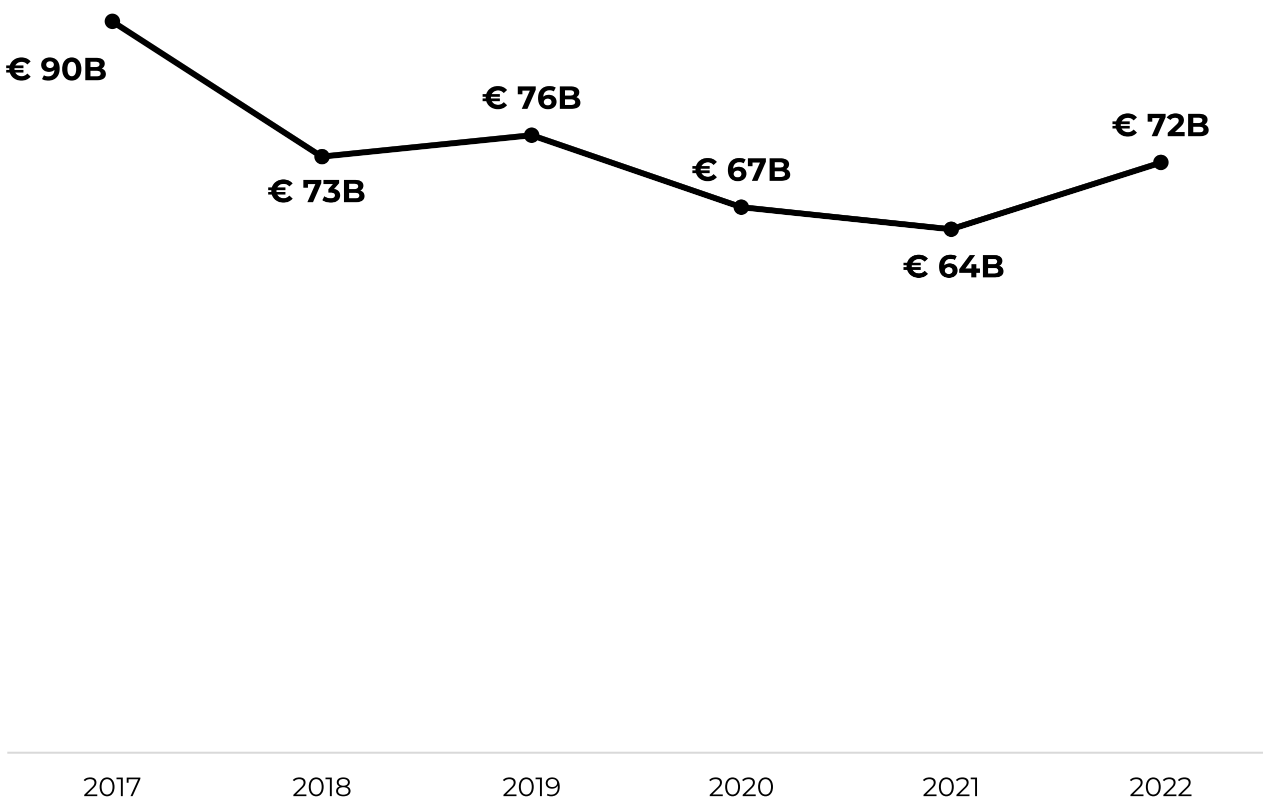
The revenue from agriculture in Türkiye declined slightly from 2019 to 2021, but this has increased again in 2022.

There are a number of factors that have contributed to this decline, including:

- The **depreciation of the Turkish lira**, which has made it more expensive for Turkish farmers to import agricultural inputs.
- The **increase in the cost of labour**, which has made it more expensive for Turkish farmers to hire workers.
- The decline in the amount of agricultural land available, as more and more **land is being converted to urban use**.
- The increase in the **frequency and severity of droughts**, which has damaged crops and reduced yields.

Despite these challenges, agriculture remains an important sector of the Turkish economy. The government has taken a number of steps to try to support the agricultural sector, including providing subsidies to farmers and investing in irrigation infrastructure.

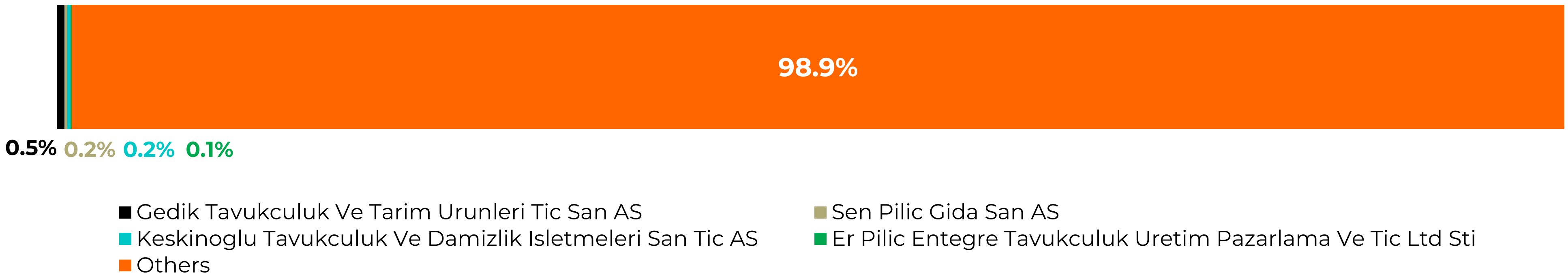
Agricultural revenue in Türkiye 2017-22



Source: Euromonitor International, 2023.

The meat processing/production landscape in Türkiye is extremely fragmented. All the largest players are poultry/chicken-focused.

Market share of agriculture companies in Türkiye 2022
Meat production/processing companies



Gedik Tavukculuk Ve Tarim Urunleri Tic San AS

Ownership: Türkiye
Protein focus: Poultry, eggs
Products: Fresh and frozen chicken meat, chicken cuts, chicken sausages and processed poultry products, poultry feed, eggs .

Sen Pilic Gida San AS

Ownership: Türkiye
Protein focus: Poultry, eggs
Products: Fresh and frozen chicken meat, chicken cuts, marinated chicken products, breaded/coated chicken products, ready-to-cook chicken meals, ready-to-eat chicken products.

Keskinoglu Tavukculuk Ve Damizlik Isletmeleri San Tic AS

Ownership: Türkiye
Protein focus: Poultry, eggs
Products: Fresh and frozen chicken meat, chicken cuts, breaded/coated chicken products, chicken-based deli meats and sausages, chicken-based convenience foods (nuggets, burgers, etc.)

Er Pilic Entegre Tavukculuk Uretim Pazarlama Ve Tic Ltd Sti

Ownership: Türkiye
Protein focus: Poultry, eggs
Products: Fresh and frozen chicken meat, chicken cuts, marinated chicken products, breaded/coated chicken products, value-added chicken products (kebabs, souvlaki, etc.).

Source: Euromonitor International, 2022; company websites.

SECTION 2

SECTOR DEEP DIVE: DAIRY

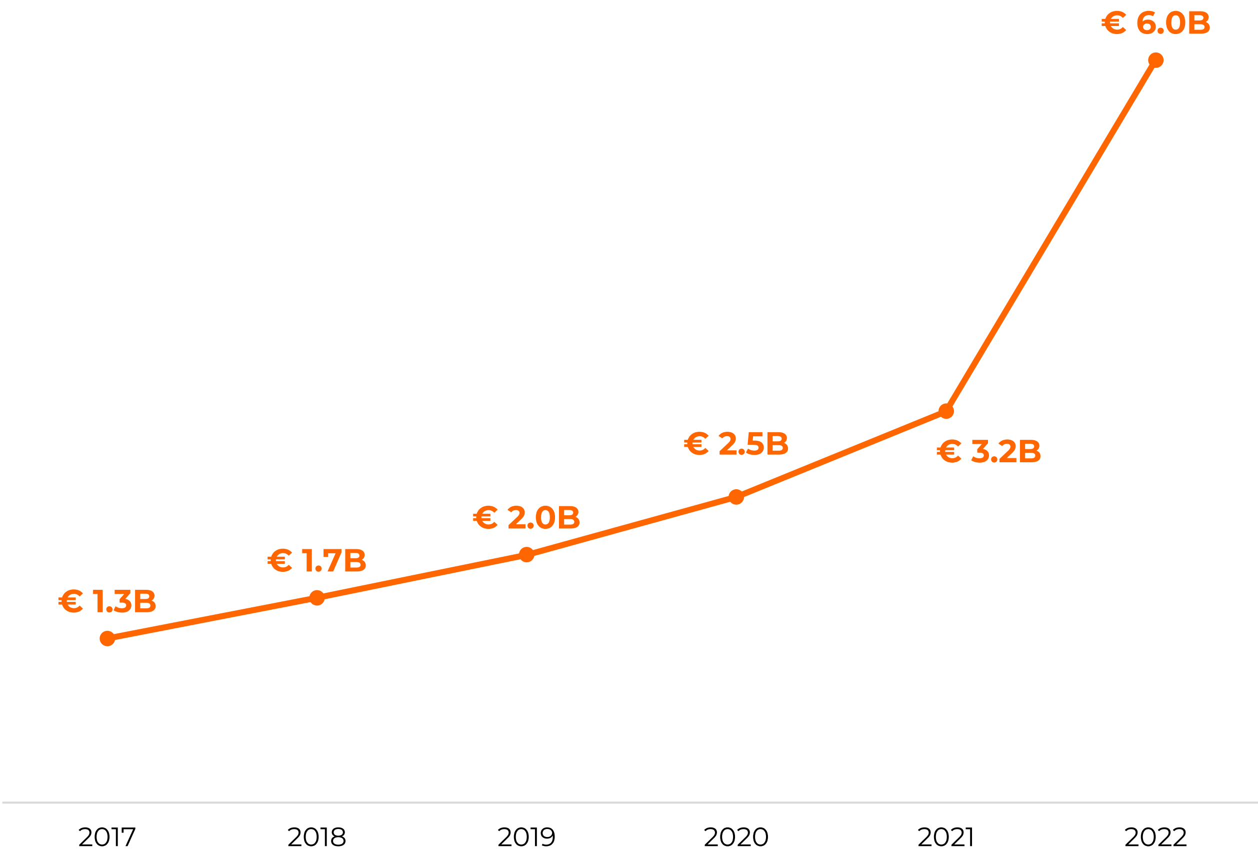
With government support for the industry, dairy production has been growing in Türkiye.

Production value in the Turkish dairy products industry grew at a CAGR of 35% from 2017 to 2022

There are a number of reasons for this, including:

- **Increased government support.** The Turkish government has implemented a number of policies to support the dairy industry, such as providing subsidies and tax breaks for dairy farmers. This has helped to increase production.
- **Improved breeding and feeding practices.** Dairy farmers in Turkey have been using improved breeding and feeding practices to increase the productivity of their herds. This has led to an increase in the amount of milk that each cow produces, which has in turn led to an increase in overall production.
- **Favourable weather conditions.** Turkey has experienced favourable weather conditions in recent years, which has helped to increase milk production. For example, the mild winter of 2021-2022.
- **Growing demand.** The demand for dairy products in Turkey has been growing in recent years, due to a number of factors, including rising incomes, growing populations, and increasing urbanisation. This has led to increased production of dairy products in order to meet demand.

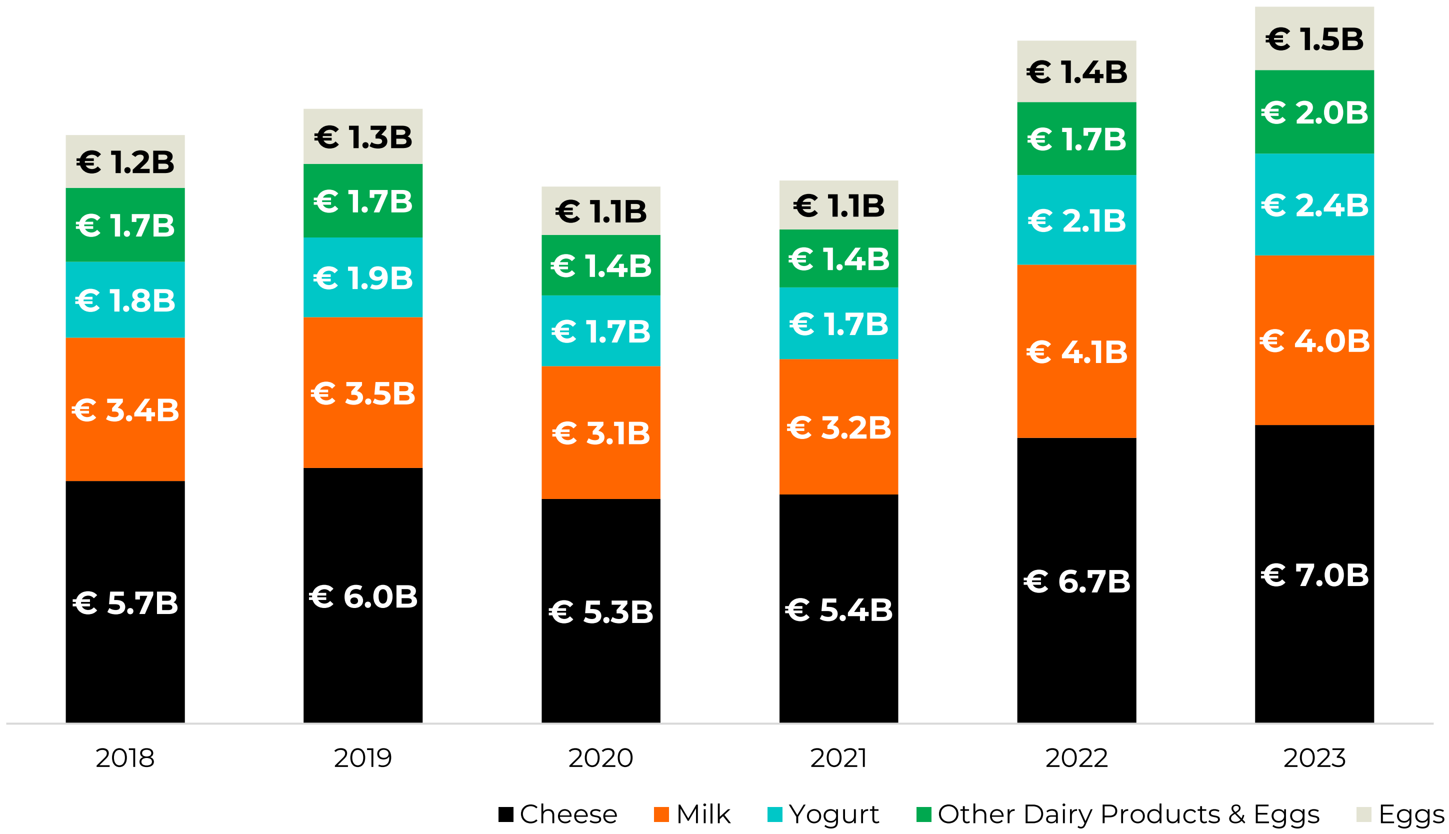
Dairy products production in Türkiye 2017-22

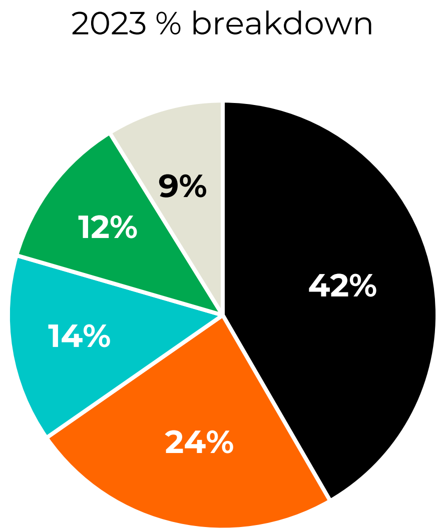


Source: Euromonitor International, 2023.

Cheese makes up 42% of the sales value of dairy and eggs in Türkiye, followed by milk at 24%.

Dairy products and eggs revenue in Türkiye 2018-23
In billion Euros





Majority of dairy products in Türkiye are sold via physical retail channels, primarily discounters, supermarkets and local grocers.

E-commerce sales of dairy are low, albeit they are growing.

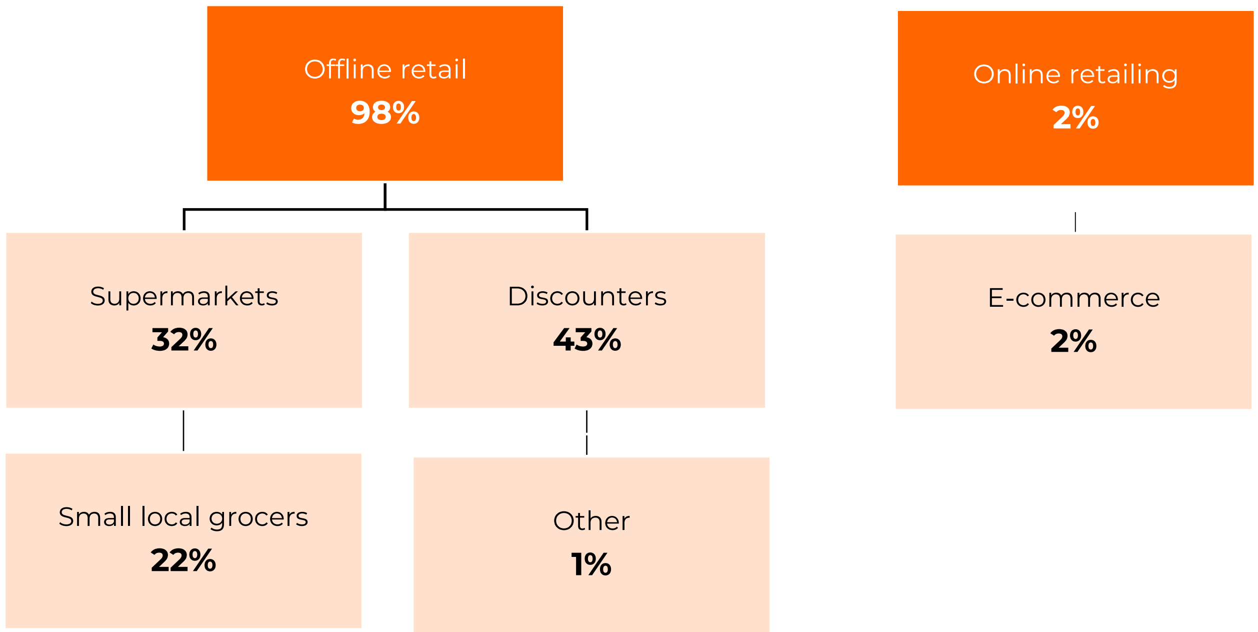
Most dairy products are sold in traditional grocery retail stores, including discounters, supermarkets and local grocers, in that order.

The top three grocery retailers, by market share are:

- BIM **10%**
- A101 **6%**
- Migros **5%**

Foodservice sales of dairy products are expected to increase dramatically and exceed pre-COVID levels. This is largely due to devaluation of the Turkish lira against foreign currencies, making it an attractive tourist destination. Additionally, domestic consumers are increasing their foodservice spending with the recovery of the Turkish economy.

Dairy product retail channels in Türkiye 2022



A note from our local team in Türkiye: E-commerce is much larger outside of food categories. Culturally, the population tend to want to buy fresh food products in person.

Source: Euromonitor International, 2023; IGD Retail Analysis, 2023.

Sütas, a Turkish owned company, is the leading dairy brand. However, the market is relatively fragmented.

Top 10 dairy product brands in Türkiye 2022

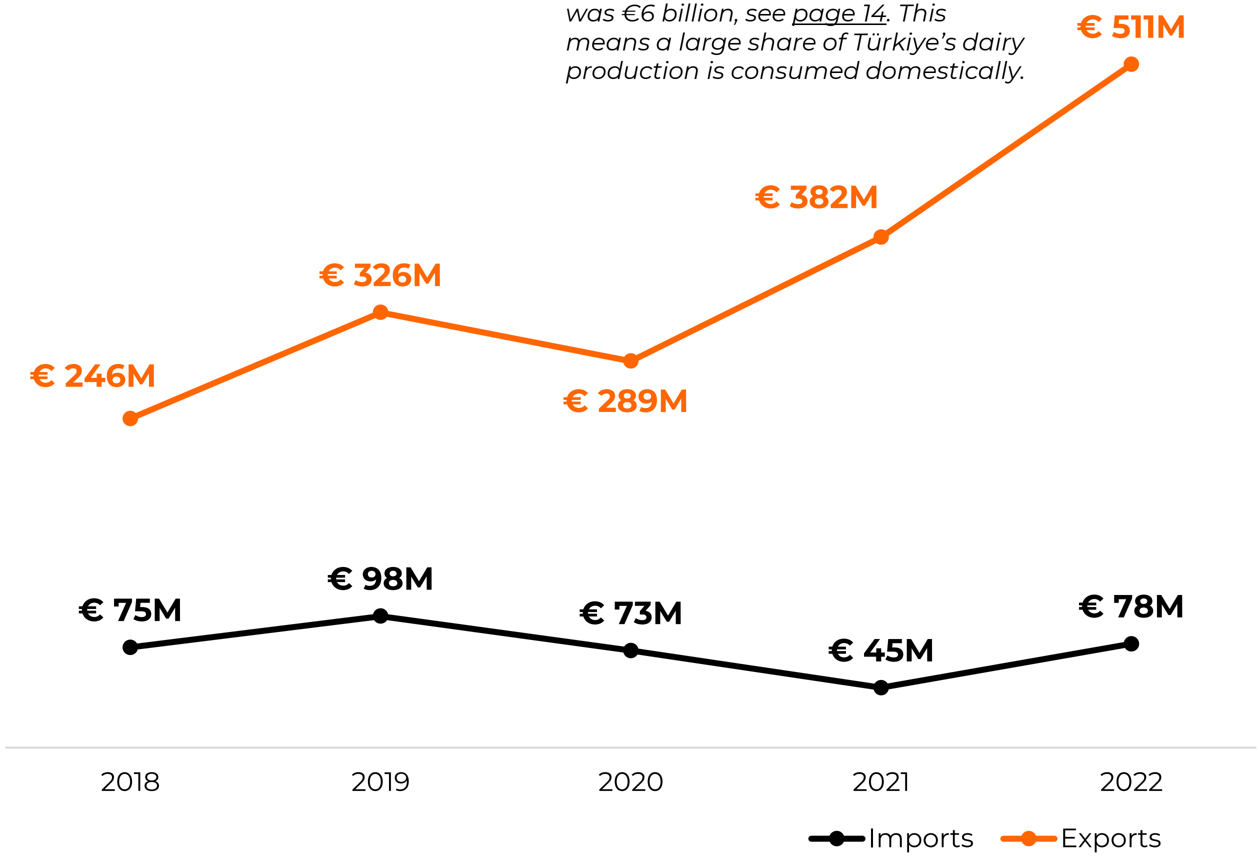
Brand	Parent Company	Country of Origin	Brand Share
Sütas	Sütas AS	Türkiye	**10%**
Pinar	Yasar Holding AS	Türkiye	**8%**
Içim	Lactalis, Groupe	France	**7%**
SEK	Tat Gida San AS	Türkiye	**4%**
Torku	Konya Seker San ve Tic AS	Türkiye	**2%**
Yörükoglu	Yörükoglu Süt ve Ürünleri San Tic Ltd Sti	Türkiye	**1.4%**
Bizimyag	Kerevitas AS	Türkiye	**1.4%**
Danone	Danone, Groupe	France	**1.3%**
Muratbey	Muratbey Gida ve Sut Urunleri Pazarlama San ve Tic AS	Türkiye	**1.2%**
Altinkilic	Altinkilic Sut Urunleri AS	Türkiye	**1.2%**
Other			**63%**

Source: Euromonitor International, 2023.

Türkiye operates in a trade surplus for dairy products, exporting a lot more than they import.

Imports and exports of dairy products between Türkiye and World

Total production value of dairy in 2022 was €6 billion, see page 14. This means a large share of Türkiye's dairy production is consumed domestically.



Product	Export Value 2022
Cheese & curd	€194M
Milk & cream	€184M
Butter	€70M
Whey	€54M
Buttermilk	€9.8M

Product	Import Value 2022
Cheese & curd	€49M
Milk & cream	€15M
Butter	€8.6M
Whey	€4.1M
Buttermilk	€1.3M

Source: ITC Trade Map, 2023.

HS codes used: 0401, 0402, 0403, 0404, 0405,0406.

Türkiye has imported a significant amount of dairy product from New Zealand in the past, but this is not currently the case.

Top 5 markets Türkiye imports dairy products from 2022

#1

€20 million imported from Cyprus. 90% of this was cheese.

#2

€8.8 million imported from Iran. 97% of this was sweetened or concentrated milk/ cream.

#3

€7.5 million imported from the Netherlands. This was primarily butter (68%) and cheese (28%).

#4

€7.1 million imported from Italy. Almost 100% of this was cheese, besides €6,000 .

#5

€6.8 million imported from Ireland. 86% of this was cheese and 13% butter.

Important note: data displaying import from one country does not guarantee that this is the origin of the product. Sometimes products pass through markets as logistics hubs.

In 2022, only **€14K** worth of dairy products was imported from New Zealand to Türkiye, ranking number **34th**. Dairy product imports from New Zealand in Türkiye have declined significantly over the past 10 years. At its peak, €50 million worth of dairy product was imported from New Zealand, majority of which was butter.

A note from our local team in Türkiye: The Turkish Government are strictly controlling dairy imports to protect local producers. Some years they will open up imports to New Zealand companies, hence the occasional spikes in imports from New Zealand.

Source: ITC Trade Map, 2023.

HS codes used: 0401, 0402, 0403, 0404, 0405,0406.

SECTION 3

SECTOR DEEP DIVE: MEAT

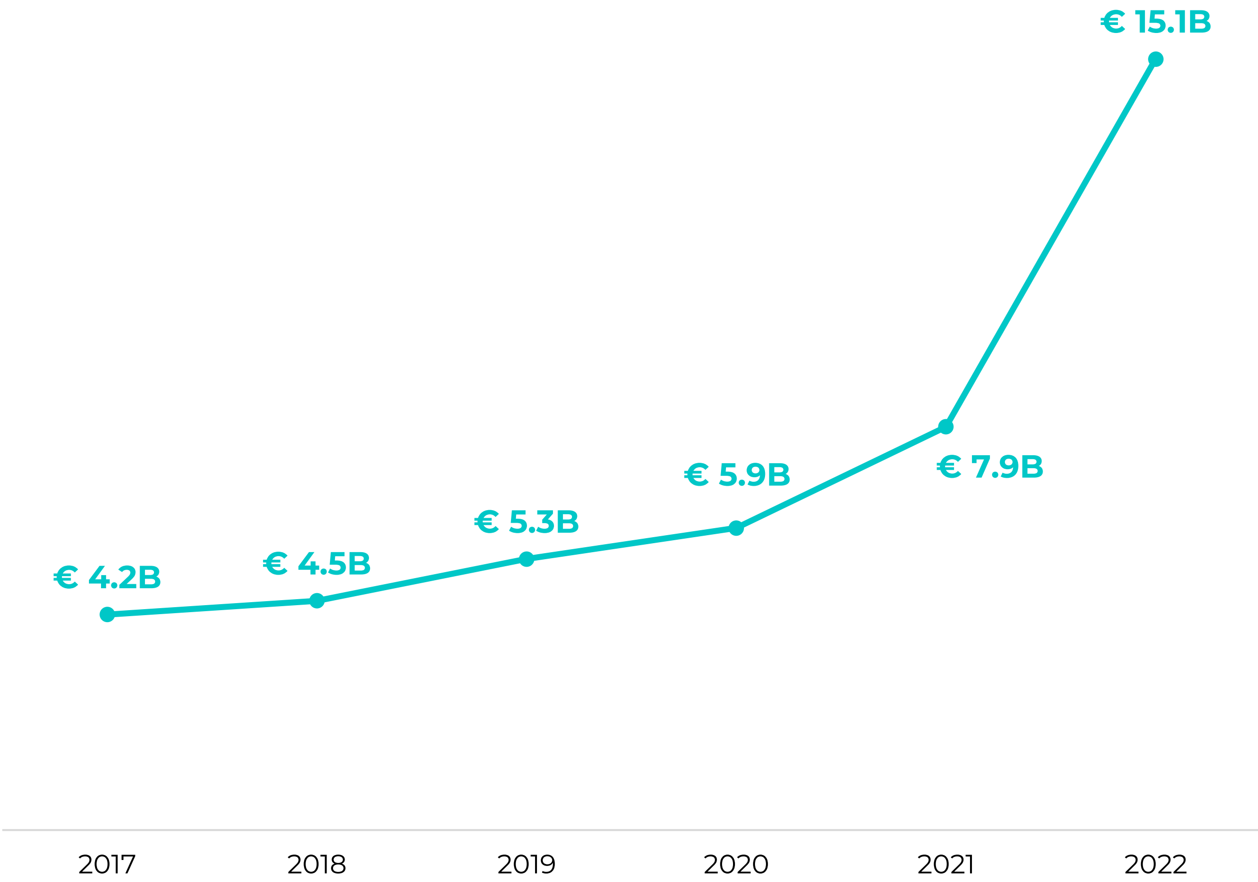
Türkiye's production value of meat and meat products had 29% CAGR from 2017-22 and 91% year-on-year growth from 2021-22.

The production of meat and meat products in Türkiye reached €15 billion in 2022.

Key reasons for increase in production value:

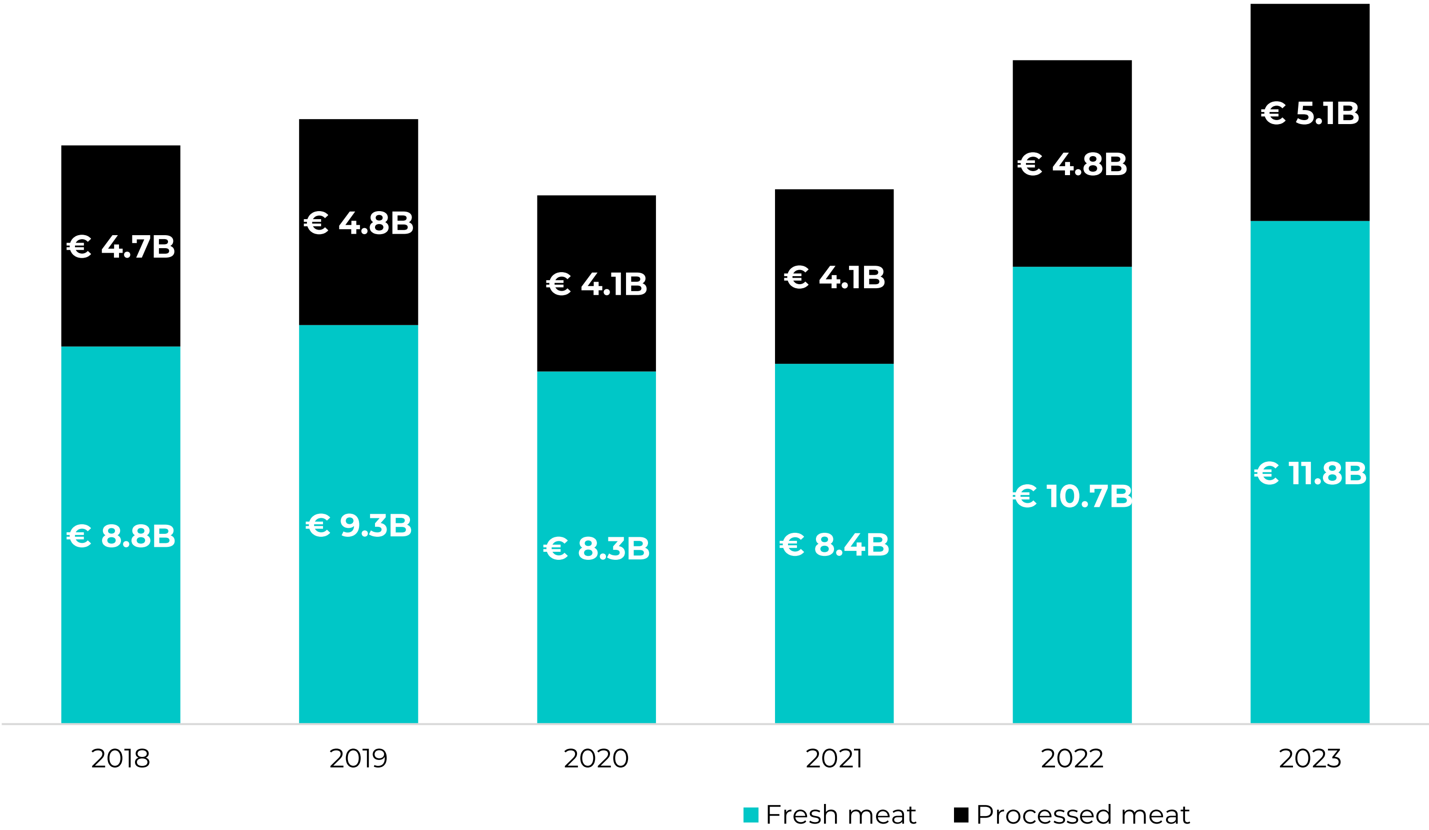
- **Increased domestic demand.** Rising population and incomes drive higher meat consumption, leading to increased production. 90% of total demand was attributed to household spending in 2021.
- **Economic growth.** Türkiye's expanding economy provides consumers with more disposable income to spend on meat products, boosting the industry.
- **Government support.** Policies and initiatives from the Turkish government foster agricultural development, including the meat industry.
- **Favourable geography and resources.** Türkiye's diverse climate and ample grazing land support livestock farming and contribute to increased meat production.
- **Rising exports.** Türkiye's focus on international trade has led to expanded meat exports, driving production growth to meet both domestic and export demands.

Meat/meat products production in Türkiye 2017-22

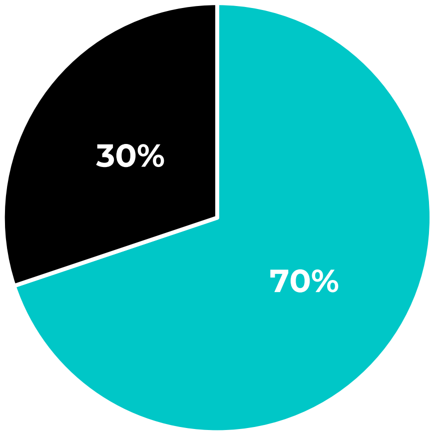


Fresh meat makes up 70% of all meat consumption revenue. The remaining 30% is processed meat.

Meat (processed and fresh) revenue in Türkiye 2018-23
In billion Euros



2023 % breakdown



Source: Statista, 2023.

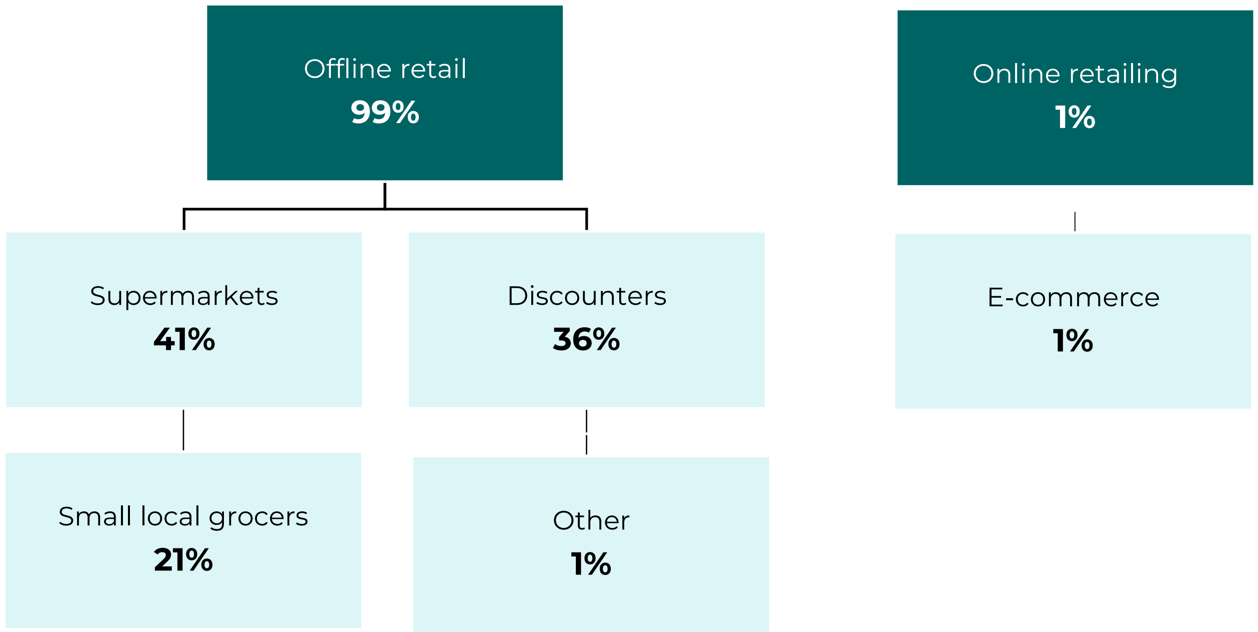
Although local grocers are a relatively dominant channel, they are declining as they cannot stay competitive with modern grocery retail.

Supermarkets are the leading distribution channel across all categories in the Turkish meat market.

This is followed by discounters and small local grocers. Only 1% of meat (processed) is sold online. This channel may grow in the future, but it is currently relatively insignificant in Türkiye currently.

Small local grocers are declining in terms of their share in meat sales, as they struggle to remain competitive with supermarkets and discounters in terms of price and number of brands/products available. Many local grocers are closing down or being converted to convenience stores.

Processed meat, seafood and meat alternatives* retail channels in Türkiye 2022



A note from our local team in Türkiye: E-commerce is much larger outside of food categories. Culturally, the population tend to want to buy fresh food products in person.

Source: Euromonitor International, 2023; GlobalData, 2023.

**Used as a proxy indicator. Retail channel data is not available for fresh meat.*

Namet Gida San ve Tic has two meat brands in the top 10 for processed meat brand share, Namet and Maret.

Top 10 processed meat* brands in Türkiye 2022

Brand	Parent Company	Country of Origin	Brand Share
Pinar	Yasar Holding AS	Türkiye	**15%**
Namet	Namet Gida San ve Tic AS	Türkiye	**11%**
Polonez	Trakya Et ve Sut AS	Türkiye	**9%**
Maret	Namet Gida San ve Tic AS	Türkiye	**8%**
Torku	Konya Seker San ve Tic AS	Türkiye	**6%**
Ersan	Ersan Et ve Et Ürünleri San ve Tic AS	Türkiye	**2.1**
Lezita	Abalioglu Gida AS	Türkiye	**2.1**
Banvit	Banvit AS	Türkiye	**2.1**
Coskun Et	Coskun Et ve Gida San AS	Türkiye	**1.5**
Apikoglu	Etsan Gida Sanayi AS	Türkiye	**1.4**
Other			**43%**

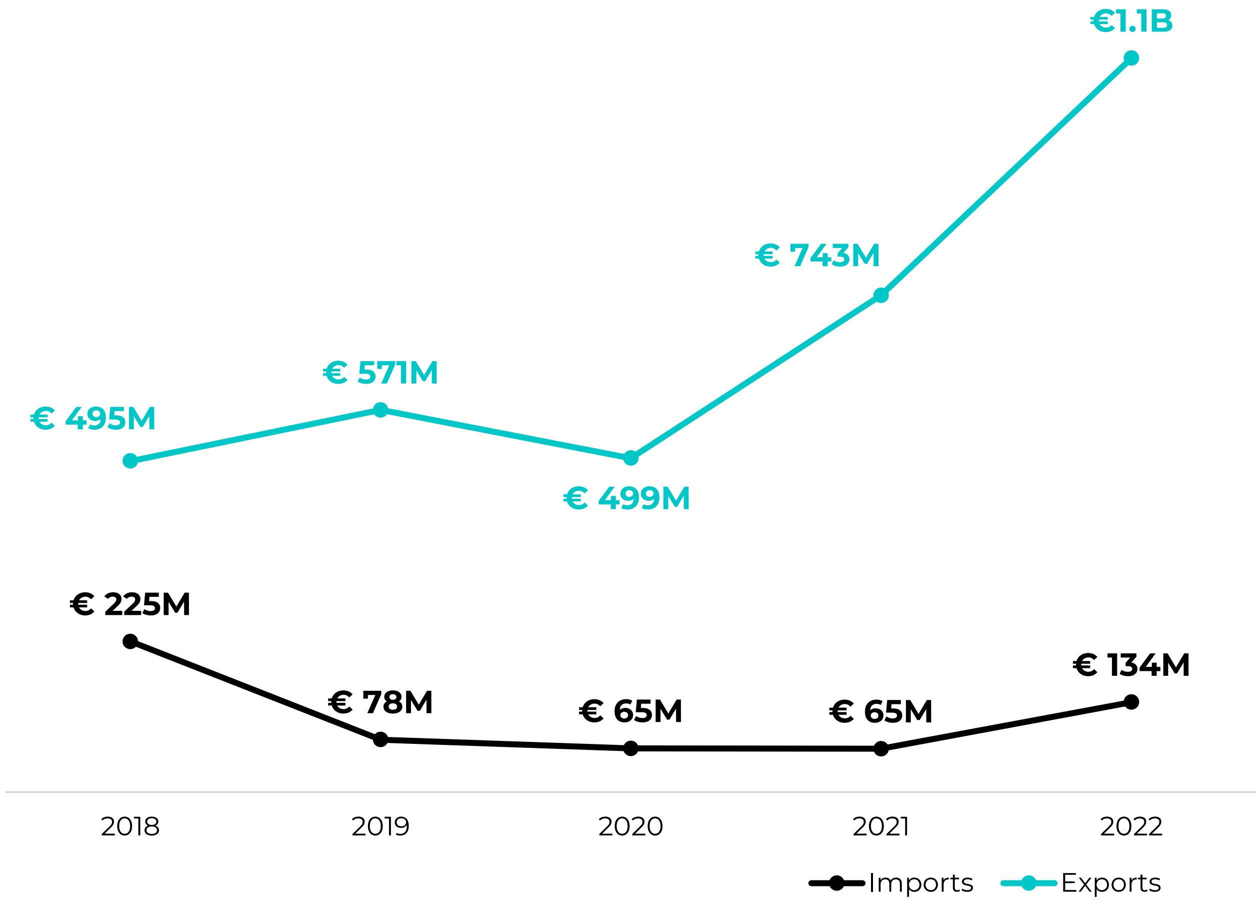
According to GlobalData, Namet, which has the second highest brand share in processed meat, is the market leader in the fresh meat category.

**Used as a proxy indicator. Brand share data is not available for fresh meat.*

Source: Euromonitor International, 2023.

Türkiye's exports of meat are made up mostly of poultry. They import more bovine meat than they export.

<u>Imports and exports</u> **of meat products between Türkiye and World**



Product	Export Value 2022
Poultry	**€1B**
Sheep & goat	**€31M**
Bovine	**€15M**
Offal	**€8M**
Swine	**€3M**

Product	Import Value 2022
Poultry	**€101M**
Bovine	**€21M**
Sheep & goat	**€9.2M**
Swine	**€3.2M**
Offal	**€706K**

Source: ITC Trade Map, 2023.

HS codes used: 02.

New Zealand is the leading supplier of sheep/goat meat to Türkiye and overall, the 4th largest supplier of meat to the market.

Top 5 markets Türkiye imports meat from 2022

#1

€53 million imported from Brazil. 93% of this was poultry.

#2

€33 million imported from Ukraine. 100% of this was poultry.

#3

€18 million imported from the USA. Almost 100% of this was poultry.

#4

€12 million imported from New Zealand. 68% of this was sheep/goat (lamb) and 32% was frozen bovine.

#5

€10 million imported from Uruguay. 94% of this was frozen bovine. A small portion was sheep/goat.

Important note: data displaying import from one country does not guarantee that this is the origin of the product. Sometimes products pass through markets as logistics hubs.

Dating back 10 years ago, Türkiye was importing meat from New Zealand. However, from 2015 to 2018, no meat was imported from New Zealand. In 2019, €10 million was imported from New Zealand and €3 million each in 2020 and 2021.

New Zealand is the leading supplier of sheep/goat meat in Türkiye, making up 91% of their imports.

Uruguay and Spain supply small amounts of sheep/goat meat making up the remaining imports.

Source: ITC Trade Map, 2023.

HS codes used: 02.

SECTION 4

SECTOR DEEP DIVE: FRUIT & VEGETABLES

Türkiye's production value of fruit and vegetables more than doubled from 2021 to 2022.

Türkiye is a major producer of fruits and vegetables, and the value of its production has been increasing in recent years.

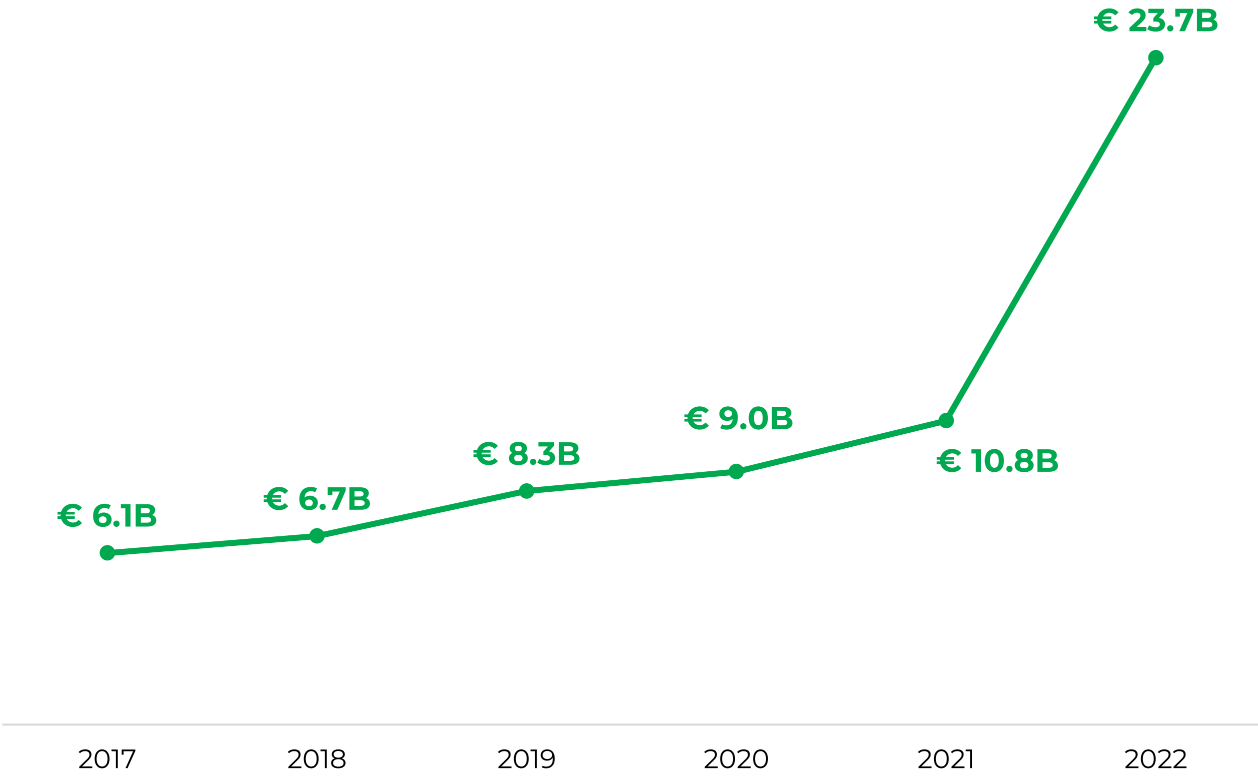
Some key factors behind this production value growth are:

- **Increased demand for fresh and healthy food**. Turkish consumers are becoming more health-conscious, and they are increasingly demanding fresh and healthy fruits and vegetables.
- **Government support for the fruit and vegetable sector.** The Turkish government is providing financial and technical support to the fruit and vegetable sector, including:
    - Subsidies for farmers
    - Investment in research and development.
    - Promoting exports.
- **Changes in climate.** The climate in Türkiye is becoming more favourable for the cultivation of fruits and vegetables. This is due to longer and warmer growing seasons.

Fruit & vegetable* production in Türkiye 2017-22

**Including crops for beverages, including coffee, tea and cocoa.*

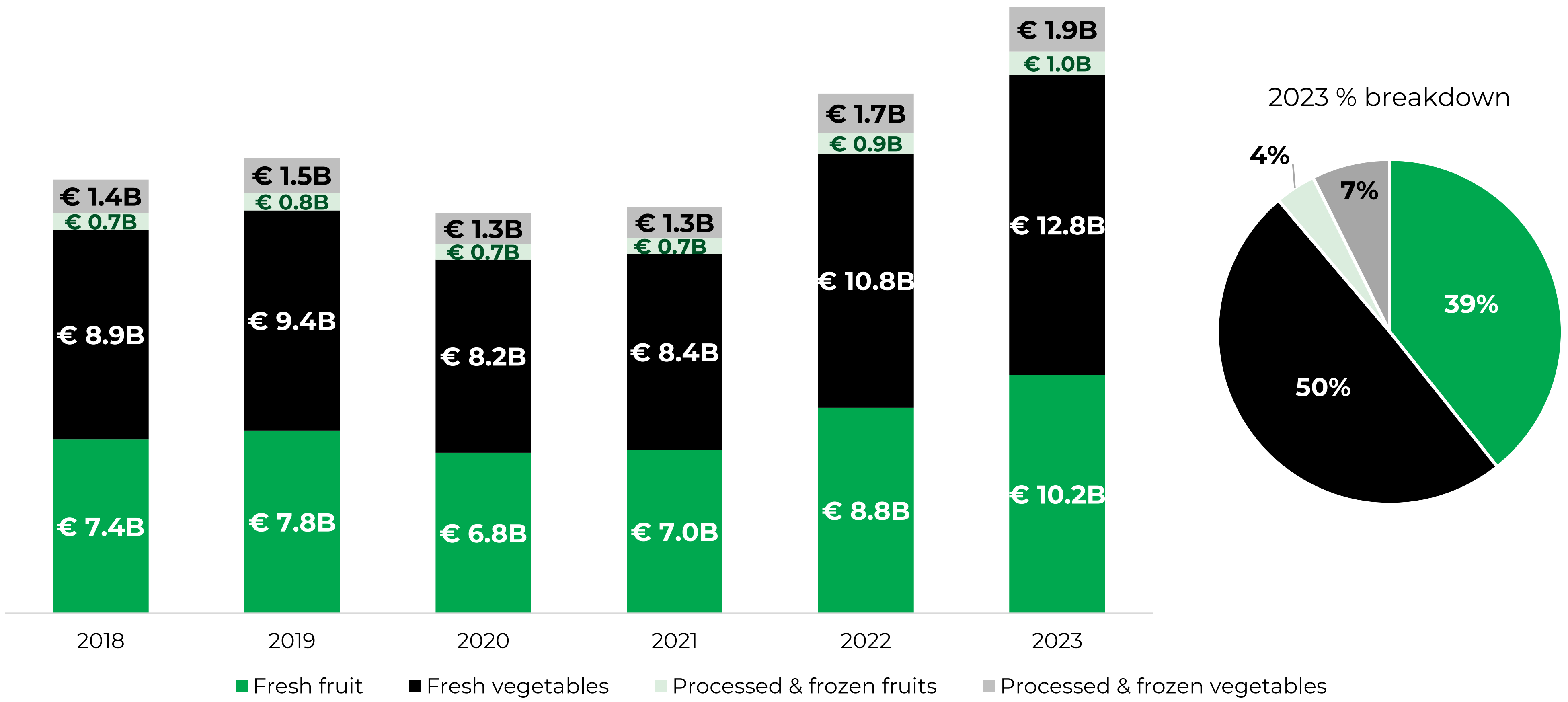
It is important to note that this definition includes the production of crops for beverages, including tea. Türkiye is one of the largest tea producers in the world, and therefore much of this turnover will come from this.



Source: Euromonitor International, 2023.

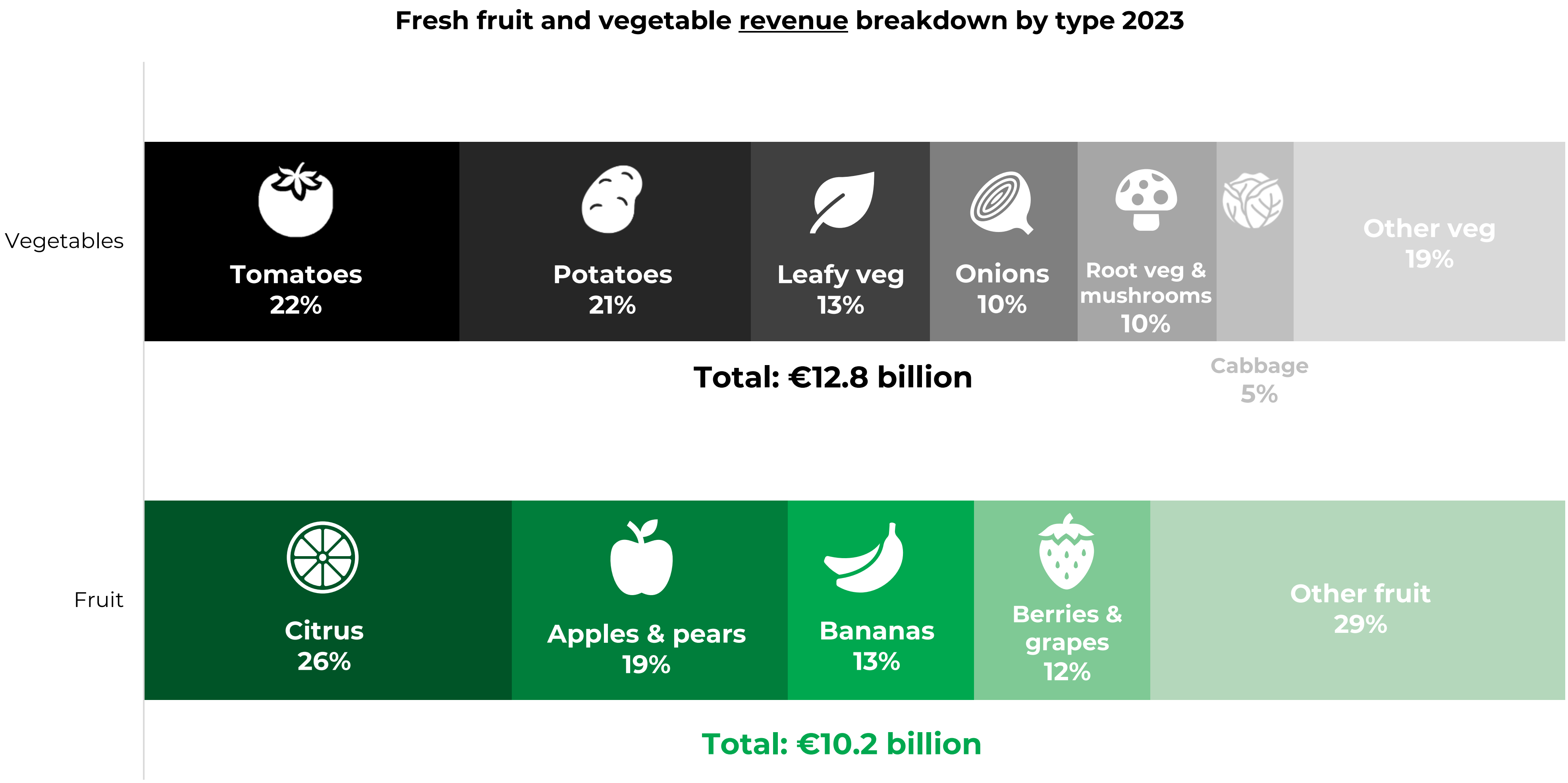
Vegetables, frozen and fresh, make up 57% of production value, while fruit makes up 43%. Majority of both are fresh.

Fruit and vegetables revenue in Türkiye 2018-23
In billion Euros



Source: Statista, 2023.

In revenue terms, tomatoes are the largest in the vegetable market and citrus fruits are the largest in the fruit market.



Source: Statista, 2023.

Alike other food categories in Türkiye, supermarkets, discounters and small local grocers are the key channels, in that order.

Supermarkets are the largest channel for processed fruit and vegetables in Türkiye.

Although 12% of sales are through small local grocers, this channel, including bakkals (small independently owned stores) and pazars (open-air fruit and vegetables stalls), are declining in major cities and towns. Instead, modern grocery retailers are gaining share.

A local Pazar in Türkiye.

Processed fruit and vegetables* retail channels in Türkiye 2022

Offline retail **99%**

- Supermarkets **67%**
  - Small local grocers **12%**
- Discounters **18%**
  - Other **2%**

Online retailing **1%**

- E-commerce **1%**

A note from our local team in Türkiye: E-commerce is much larger outside of food categories. Culturally, the population tend to want to buy fresh food products in person.

Source: Euromonitor International, 2023; GlobalData, 2023.

**Used as a proxy indicator. Retail channel data is not available for fresh fruit and vegetables.*

Superfresh is the largest brand in the processed fruit/vegetables sector in the market, selling products such as frozen vegetables.

Top 10 *processed fruit & vegetable brands in Türkiye 2022

Brand	Parent Company	Country of Origin	Brand Share
Superfresh	Yildiz Holding AS	Türkiye	**15%**
Tat	Tat Gida San AS	Türkiye	**9%**
Oyak	Oyak Group	Türkiye	**9%**
Ozgörkey	Ozgörkey Gida Ürünleri San ve Tic AS	Türkiye	**7%**
Istanbul	Istanbul Gida San Ve Tic AS	Türkiye	**5%**
Penguen	Penguen Gida Sanayii AS	Türkiye	**5%**
Oyak	Oyak Group	Türkiye	**4.2%**
Dardanel	Dardanel Sirketler Grubu	Türkiye	**2.1%**
Burcu	Burcu Gida Konserve ve Salca San AS	Türkiye	**2%**
Yayla	Yayla Agro Gida San ve Nakliyat AS	Türkiye	**1.3%**
Private label			**29%**
Other			**11%**

There are a large number of fresh fruit and vegetable producers/companies in Türkiye as well. Three of the largest are below:

Özgür Tarım Ürünleri
Key products: Raisins/sultanas
Revenue: €68M

Karadere Tarım Ürünleri
Key products: Hazelnuts
Revenue: €56M

Boyrazoğlu Tarım
Key products: Dried fruits, nuts
Revenue: €17M

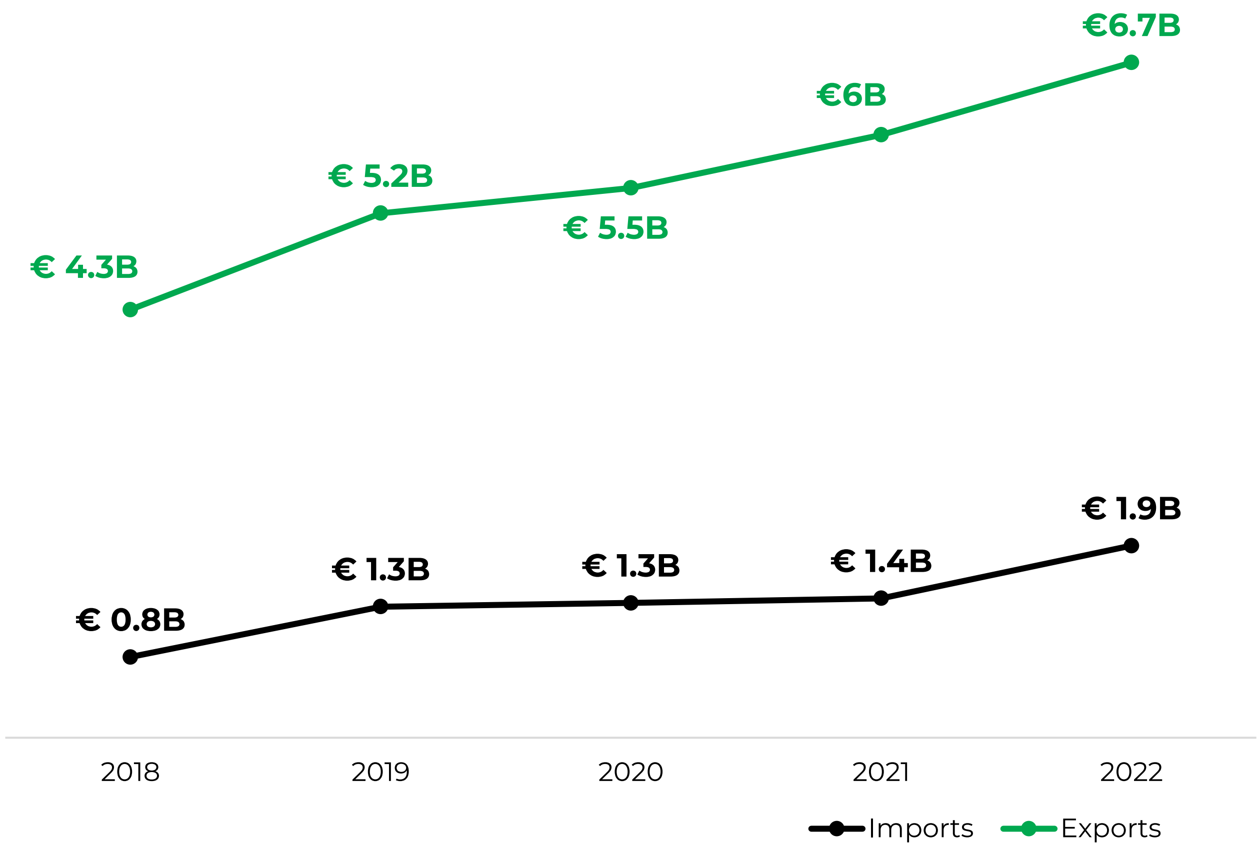
The fresh fruit and vegetable production market is extremely fragmented, with a large number of small players. As a result, smaller producers tend to have lower bargaining power and sell their products for a lot lower than what they sell for at retail.

Source: Euromonitor International, 2023.

**Used as a proxy indicator. Brand share data is not available for fresh fruit & vegetables.*

Nuts and legumes are both the top two fruit/vegetable imports and exports in Türkiye.

Imports and exports of fruit & vegetable products between Türkiye and World



Product	Export Value 2022
Nuts (i.e., almonds, walnuts, pistachios)	**€1.5B**
Legumes	**€1.03B**
Citrus fruit	**€860M**
Grapes	**€626M**
Dried fruits (i.e., apricots, prunes, apples, peaches, pears, papaws etc.)	**€437M**

Product	Import Value 2022
Legumes	**€816M**
Nuts *(i.e., almonds, walnuts, pistachios)*	**€649M**
Coconuts, Brazil nuts & cashew nuts	**€111M**
Dates, figs, pineapples, avocados, guavas, mangoes	**€88.4M**
Grapes	**€43.2M**

Source: ITC Trade Map, 2023.

HS codes used: 07, 08.

Import data suggests that Türkiye does not currently have New Zealand fruit and vegetable products on the market.

Top 5 markets Türkiye imports fruit & vegetables from 2022

#1

€412 million imported from the USA. 98% of this was fruits/nuts; mostly almonds, pistachios and walnuts.

#2

€346 million imported from Canada. Almost 100% of this was vegetables; mostly lentils and other legumes.

#3

€221 million imported from Russia. 97% of this was vegetables; mostly peas, chickpeas and lentils.

#4

€94 million imported from Iran. 99% of this was fruits/nuts, including almonds, pistachios and grapes.

#5

€63 million imported from Chile. 99% of this fruits/nuts, a large share of which was walnuts.

Important note: data displaying import from one country does not guarantee that this is the origin of the product. Sometimes products pass through markets as logistics hubs.

In 2022, Türkiye did not import any fruits/nuts or vegetables from New Zealand directly.

In the past, Türkiye has imported very small amounts of fruit and vegetables from New Zealand, but never amounting to more than €200K per year.

If Türkiye does have fruit and vegetable products from New Zealand on the market, it is not imported directly, and we do not have any accurate data on this.

Source: ITC Trade Map, 2023.

HS codes used: 07, 08.

SECTION 5

SECTOR DEEP DIVE: AGRICULTURAL MACHINERY

Türkiye's agricultural machinery market is one of the largest in Europe, ranking amongst the top 5. They have strong domestic production.

Türkiye has a strong industrial base and consequently strong agricultural machinery production.

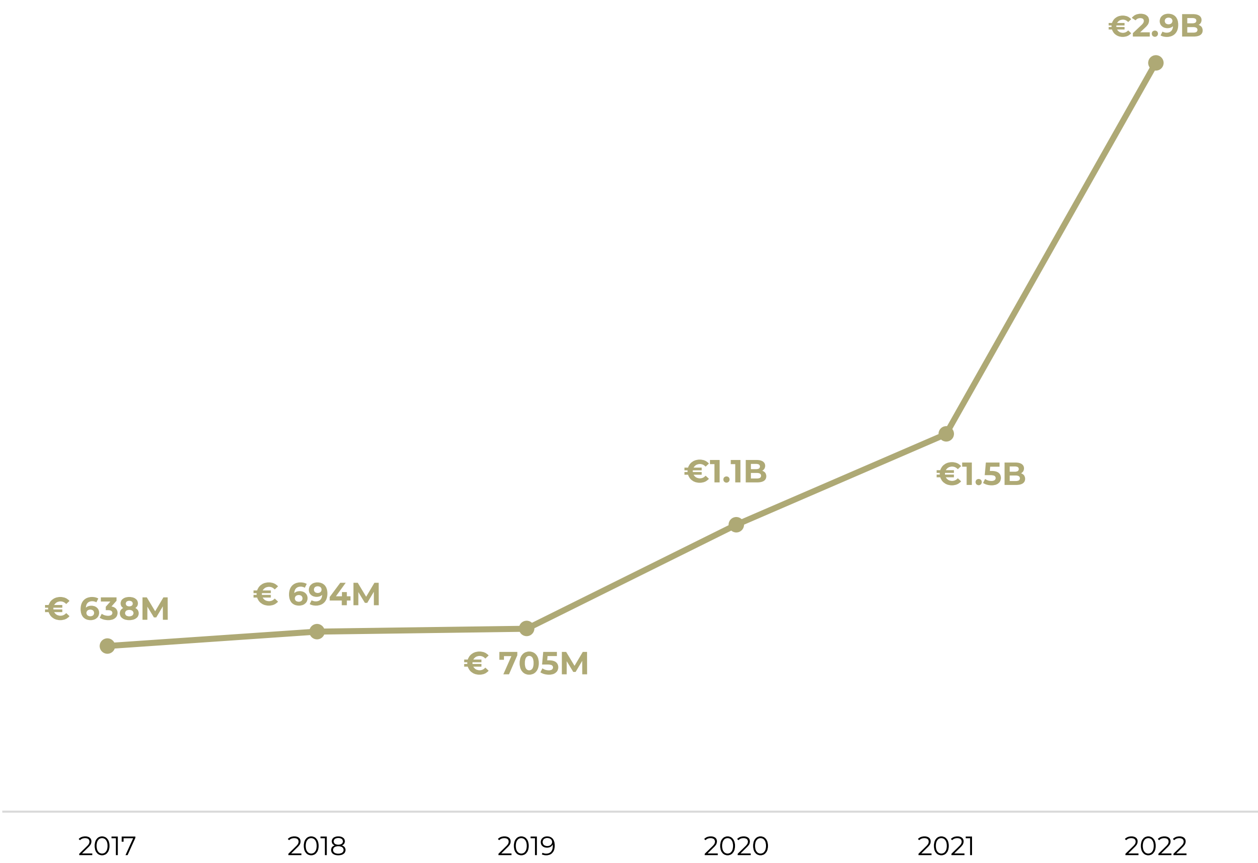
Türkiye produced €1.5 billion worth of agricultural tractors in 2022, 33% of which is exported.

According to Presidency if the Republic of Türkiye Investment Office, 75% of tractors in the market are supplied by local players.

The ecosystem of agricultural machinery, with both local and international and local players, employs approximately 20K people.

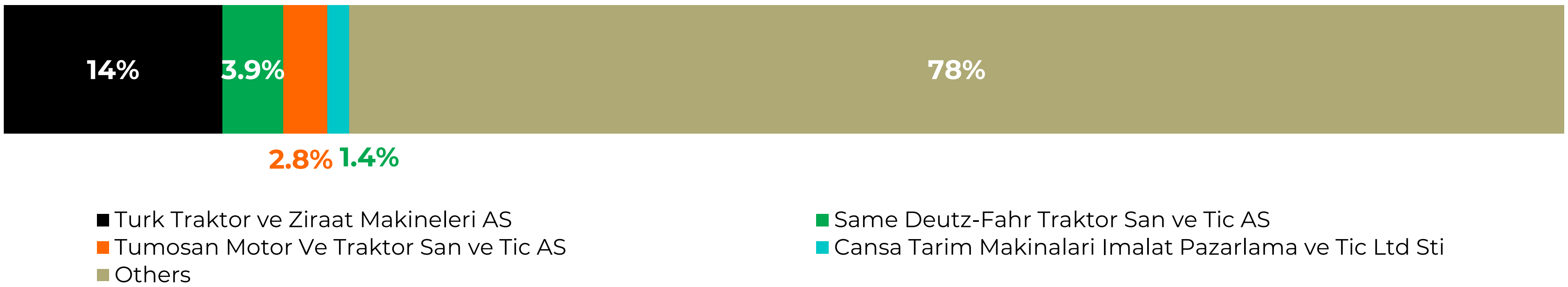
Product	Production Value 2022
Agricultural tractors	**€1.5B**
Soil preparation machinery	**€638M**
Harvesting & threshing machinery	**€207M**
Other	**€583M**

Agricultural and forestry machinery production in Türkiye 2017-22



The agricultural machinery space is more concentrated than agriculture. TürkTraktör have 14% market share.

Market share of agricultural and forestry machinery companies in Türkiye 2022



Turk Traktor ve Ziraat Makineleri AS

HQ: Ankara, Turkey
Ownership: CNH Industrial, a global agricultural & construction equipment manufacturer.
Founded: 1954
Products: Tractors, harvesters, balers, mowers, sprayers etc.

Same Deutz-Fahr Traktor San ve Tic AS

HQ: Istanbul, Turkey
Ownership: SDF Group, an Italian agricultural machinery manufacturer.
Founded: 2004
Products: Tractors, combine harvesters, hay and forage equipment, seeders etc.

Tumosan Motor Ve Traktor San ve Tic AS

HQ: Instanbul, Turkey
Ownership: Tumosan, a Turkish engine manufacturer.
Founded: 1976
Products: Tractors, engines, and other agricultural machinery.

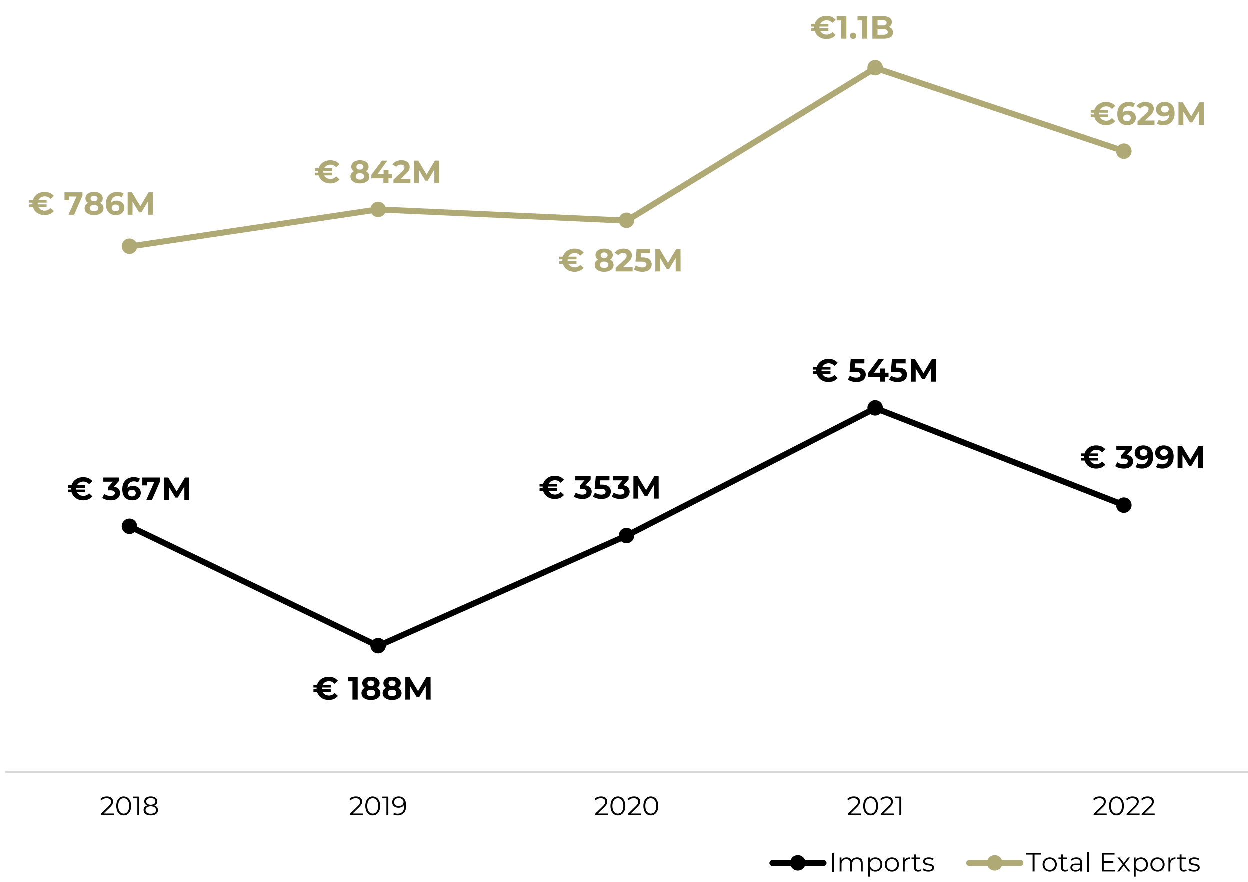
Cansa Tarim Makinalari Imalat Pazarlama ve Tic Ltd Sti

HQ: Adana, Turkey
Ownership: Privately owned.
Founded: 1983
Products: Plows, cultivators, seed drills, sprayers etc.

Source: Euromonitor International, 2022; company websites.

Türkiye exports a lot more soil preparation machinery than they import, as they produce a lot of this domestically. Only about 28% of soil preparation machinery they produce is exported.

Imports and exports agricultural and forestry machinery between Türkiye and World



Product	Export Value 2022
Agricultural tractors	€480M
Soil preparation machinery	€182M
Harvesting & threshing machinery	€104M
Other	€182M

Product	Import Value 2022
Harvesting & threshing machinery	€187M
Agricultural tractors	€146M
Soil preparation machinery	€11M
Other	€64M

Source: Euromonitor International, 2022.

Note: Data on this slide may differ slightly from others due to differences in exchange rates amongst sources.

Imports of agricultural and forestry machinery to Türkiye come mostly from other parts of Europe.

Top 5 markets Türkiye imports agricultural and forestry machinery from 2022

#1

€75 million imported from Italy.

#2

€60 million imported from Poland.

#3

€59 million imported from France.

#4

€58 million imported from Germany.

#5

€32 million imported from India.

Important note: data displaying import from one country does not guarantee that this is the origin of the product. Sometimes products pass through markets as logistics hubs.

Data availability on agricultural machinery imports from New Zealand are unclear. However, some sources suggest that the value in 2022 may have been around ~€5 million. Some of the imported products may have included combine harvesters, tractors and harvesting machinery.

Note that this information may be anecdotal, and sources' data varies.

Source: ITC Trade Map, 2023; UNComtrade, 2022.

Note: Data on this slide may differ slightly from others due to differences in exchange rates amongst sources.

Related report: Selling horticultural tech and equipment in Europe

In 2023, NZTE Europe also undertook a survey to understand the priorities and purchasing behaviours of horticultural buyers in France, Germany, Spain, Italy and Türkiye.

Click here to read the article summary and to download the full report.