

FOOD PROCESSING MACHINERY

Prepared by
Bora ESEN
2011



Export Promotion Center of Turkey

FOOD PROCESSING AND PACKAGING MACHINERY AND EQUIPMENT INDUSTRY IN TURKEY

Turkey is the largest producer and exporter of agricultural products in the Near East and North Africa. Exports of agricultural commodities and food products were valued at US\$ 12 billion in 2010 and accounted about 10.5 % of Turkey's total export earnings.

Bread being the staple food of Turkey, cereals are of great importance in Turkish agriculture. In addition, Turkey has an important place among the major pulse producing countries and has the means of dominating the world trade. Turkish edible nuts and dried fruit production is quite high and dominates the world markets. Turkey's vast agricultural potential offers an extensive range of fruits and vegetables which are preserved in a variety of ways. Rapidly growing sectors of Turkey's agro industry are frozen/canned and dried fruit and vegetable industry. Utilizing the advantages of its agricultural potential, Turkey has an important place among other countries regarding the quantity and quality of its vegetable oil, especially olive oil, production. With the technological advances and increased investments realized in the last years, the milling and pastry, the sugar confectionary, chocolate and cacao products, pasta and biscuits, fishery products, poultry, drinking water, alcoholic beverages are regarded as promising sectors for Turkish agro industry.

The above mentioned strong agricultural potential and Turkey's food industry, changing lifestyles and tastes due to increased industrialization and urbanization, the increase in family income and the decrease in available time for preparing meals, have resulted in a strong food processing sector. Accordingly, a large food processing sector has accelerated the development of the food processing machinery and equipment industry in Turkey. At present, the Turkish food processing machinery and equipment industry is the most modern in the Middle East, North Africa, Balkans, Baltic and Central Asia.

The Turkish food processing machinery industry produces every kind of machinery and equipment required for food processing industry and most parts and accessories. Flour and grain mill machinery, bakery and pasta making machinery, bakery ovens, industrial machinery for food and drink preparation, machinery for extraction/preparation of fats and oils, machinery for cleaning/ sorting/grading seeds and grains, cacao and confectionery machinery, presses and crushers for wine, fruit juice and beverages, pasteurizers and sterilizers, machinery for sugar manufacture, meat and poultry processing machinery, milking machinery, dairy machinery, machinery for the preparation of fruits and vegetables, cream separators and brewery machinery are the main food processing machinery and equipment in Turkey. The majority of food processing machinery and equipment manufacturers in Turkey range from small to medium sized companies mainly located in Istanbul, Konya, Ankara, Izmir and Gaziantep. The line of products manufactured by the companies varies substantially from highly automated equipment to manual and basic models. Moreover, food processing machinery manufacturers are increasingly focusing on research & development in an attempt to comply with the demand for more sophisticated machinery and greater flexibility.

The food processing machinery and equipment industry has particular importance for Turkey due to its promising export potential. In this field, manufacturing firms were producing mainly for the domestic market until 1990. After 1990, the sector has directed its attention to foreign markets also.

Recent developments in the demand for packaged food have resulted in a large food packaging sector and a considerable demand for packaging machinery. At present the Turkish packaging machinery sector meets domestic demand and has a remarkable capacity for exports.

EXPORTS

The Turkish food processing manufacturers/exporters follow European and international standards and norms. Companies exporting to the European Union affix the “CE Mark” under the “New Approach” Directives. The obligation to affix the “CE Mark” started in the Turkish domestic market in 2002.

High engineering skills, product flexibility, continuous product development and adaptation, and efficient after-sales-services enable Turkey to export Turkish made food processing and packaging machinery and equipment all over the world at an increasing rate.

Exports of Turkish Food Processing Industry (US\$ 1,000)

H.S. Code	Products	2007	2008	2009	2010
8417.20	Bakery ovens, including biscuit ovens	6,013	7,289	9,590	9,184
8419.31	Driers for agricultural products	1,415	3,554	1,988	2,521
8421.11	Cream separators	321	629	250	617
8434.10	Milking machinery	5,894	12,223	6,986	8,298
8434.20	Dairy machinery	2,771	6,293	7,658	10,088
8434.90	Parts of milking machinery and dairy machinery	1,755	2,467	2,352	2,784
8435.10	Presses, crushers etc. for wine, fruit juice, beverage	630	935	736	590
8435.90	Parts of presses, crushers for wine, fruit juice etc.	33	9	200	218
8437.10	Machines for cleaning, sorting or grading seed, grain or dried leguminous vegetables	11,273	17,208	28,554	17,213
8437.80	Machines to mill or work cereals or dried legumes nes.	88,525	117,468	107,761	122,746
8437.90	Parts of grain, seed, dry legumes processing equipment	14,557	25,503	19,765	26,300
8438.10	Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products	19,365	24,665	27,091	26,699
8438.20	Machinery for the manufacture of confectionery, cocoa or chocolate	11,177	10,836	12,762	14,571
8438.30	Machinery for sugar manufacture	1,201	7,201	3,948	8,042
8438.40	Brewery machinery	235	1	0	0
8438.50	Machinery for the preparation of meat or poultry	2,187	2,395	1,038	2,178
8438.60	Machinery for the preparation of fruits, nuts or vegetables	3,786	6,000	5,162	7,283
8438.80	Industrial machinery nes for food, drink preparation	5,673	6,682	5,845	4,935
8438.90	Industrial machine parts, food, drink preparation	9,286	12,456	7,928	11,370
8479.20	Machinery for the extraction or preparation of animal or fixed vegetable fats or oils	15,956	20,186	16,767	10,688
	TOTAL	202,054	283,999	266,379	286,325

Exports of Turkish Food Processing Industry by Countries (Value: US\$ 1,000)

	2007	2008	2009	2010
Kazakhstan	22,200	19,019	26,332	22,233
Azerbaijan	7,635	10,705	12,786	21,888
Iran	13,673	17,043	15,257	21,588
Egypt	4,601	9,578	18,340	14,621
Russia	13,275	21,448	10,256	14,266
Iraq	5,729	13,756	16,441	13,905
Sryia	7,245	17,309	19,681	12,157
Libya	2,328	10,731	4,698	11,751
Algeria	4,679	13,364	9,536	8,376
Mersin Free Zone	8,078	16,261	1,738	8,241
Nigeria	713	1,331	3,234	7,768
Uzbekistan	4,957	4,097	3,691	7,751
Bulgaria	7,778	6,416	5,403	6,880
Ukraine	3,194	3,551	3,487	6,289
Sudan	3,564	4,679	7,489	6,087
United States	1,379	1,605	1,232	6,081
Germany	4,401	4,955	4,414	5,078
Italy	5,693	3,138	6,108	5,023
Netherlands	4,090	4,860	4,629	4,794
Georgia	8,297	4,410	3,255	4,742
Other countries	68,546	95,742	88,376	76,807
TOTAL	202,054	283,999	266,379	286,325

Source: Undersecretariat for Foreign Trade