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# Report Name: Food Processing Ingredients Annual

**Country:** Turkiye

**Post:** Ankara

**Report Category:** Food Processing Ingredients

**Prepared By:** FAS Staff

**Approved By:** Rishan Chaudhry

**Report Highlights:**

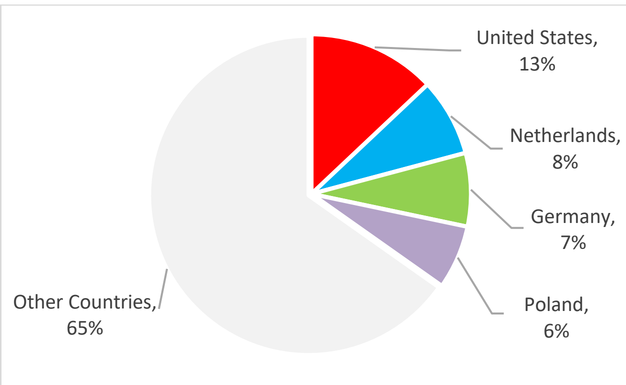
Turkiye's food processing ingredients industry is a vital component of its sophisticated food and beverage manufacturing sector, which includes nearly 58,357 businesses. Opportunities exist for U.S. exporters, particularly in natural and organic ingredients, although they face competition from EU suppliers benefiting from preferential trade agreements. Successful market entry requires a long-term perspective, local partnerships, and navigating complex import procedures. Continued high inflation has resulted in significant changes in consumer purchasing behavior in Turkiye, with a noticeable shift from branded products to economy-priced or private label options.

**Executive Summary**:

Turkiye is an emerging, largely free economy and a leading producer of agricultural products, textiles, and construction materials. The economy's growth rate was 3.1 percent in 2024, down year-over-year and below the long-term average. The country continues to struggle with rising inflation and a weakened currency, which will continue influencing food consumption patterns. Even though inflationary pressures are easing, structural shifts persist and will impact inflation trends in the long term.

**Consumer-Oriented Agricultural Imports**

Chart 1: Top Exporting Countries to Türkiye, 2024




**Food Retail Industry**:

Despite recent economic headwinds, the retail food industry continues to grow, with sales topping nearly $75 billion in 2023. A young, largely urban population and growing middle class are driving this growth. The sector is dominated by domestic retailers, especially discount chains.

**Food Processing Industry**:

Turkiye has a large and sophisticated food and beverage manufacturing sector, which relies on domestic and imported ingredients. As of 2024, there were nearly 58,357 food and beverage manufacturers in Turkiye. With declining purchasing power, people have been eating out less and cooking more at home, causing an increase in sales of cooking ingredients.

**Food Service Industry**:

In 2023, there were about 114,000 commercial food service restaurants with sales of more than 442 billion Turkish Lira (TL) ($18.6 billion). The sector has not recovered to pre-pandemic levels in large part because of current economic conditions.

***Quick Facts CY 2024***

**Imports of Consumer-Oriented Products**

*(6.8 $billion)*

**List of Top 10 Growth Products in Turkiye (Imported Processed Food Ingredients) 2021-2023**

1) Food Preparation Nesoi
2) Malt, Not Roasted
3) Vegetable Saps, Nesoi
4) Gum Arabic
5) Yeast Active
6) Mixes and Doughs
7) Malt Extract
8) Pectic Substances
9) Extracts of Hops
10) Starches, Nesoi

**Food Industry by Channels (U.S. billion)**

| | |
|---|---|
| Retail Food Industry | $75 billion |
| Food Service-HRI | $18 billion |
| Food Processing | $102.7 billion |
| Food and Agriculture Exports | $33.9 billion |

**Top 10 Host Country Retailers** (based on sales)

1) Bim
2) Migros
3) CarrefourSA
4) Hakmar
5) Onur
6) A 101
7) Sok
8) Ekomini
9) Sec
10) File

**GDP/Population**

Population: *85 million*
GDP: *$1.32 trillion*
GDP per capita: *$15,463*

**Sources:**
Turkish Statistical Institute (TurkStat); Trade Data Monitor (TDM); Economist Intelligence Unit (EIU)

**Strengths/Weaknesses/Opportunities/Threats**

| ***Strengths*** | ***Weaknesses*** |
|---|---|
| -Long term GDP and disposable income growth, despite the recent downturn<br><br>-Large population base: young and growing | -Domestic and international political challenges<br><br>-Economic instabilities such as exchange rate fluctuations and increasing inflation |
| ***Opportunities*** | ***Threats*** |
| -Unsaturated market, open for new items | -Complex, inconsistent, and time-consuming import procedures |

**Contact:**
USDA, FAS Ankara Office of Agricultural Affairs
Telephone: +90 312 457 7393 E-mail: agankara@usda.gov

## I. MARKET SUMMARY

Turkiye has a large and sophisticated food and beverage manufacturing sector. The food processing ingredients industry in Turkiye is a vital component of the broader food processing sector. Turkiye's strategic location, rich agricultural resources, and growing food processing industry make it an important player in the global market for food ingredients. The sector, which boasts nearly 58,357 businesses, continues to grow in response to steady consumer demand for processed food products. In 2024, household expenses continued to rise in Turkiye while wages failed to keep pace with inflation. As a result, consumers experienced significant shrinkage in their disposable income and purchasing power. Consumers are more price sensitive and are cutting spending on non-essential categories despite stable consumption of staple foods.

There is a noticeable shift from branded products to economy-priced or private label. With declining purchasing power, people have been eating out less and cooking more at home, causing an increase in sales of cooking ingredients and ready-made meals. Branded goods responded by launching discount campaigns, promotions, and deals.

Turkiye's economic growth was about 3.1 percent[1] in 2024 and it is expected to be 2.8 percent in 2025. The government has started to increase taxes and interest rates, and is limiting access to credit, which will decrease consumer spending and government expenditure as a tool to decrease high inflation rates. The growth rate is expected to be around 3.5 percent between 2025 and 2028. The inflation rate slowed down to 42.12[2] percent in 2025 from a high of 56.35 percent in 2024. The food inflation rate was 41.76 percent in January 2025 compared to the same month of previous year.

Turkiye's food and beverage sector is facing rising input costs, a weakened currency, and supply chain uncertainties. To keep costs down, businesses are looking to diversify ingredient sources or switch to alternatives. The Government of Turkiye (GoT) cut the value added tax (VAT) on basic food products from 8 percent to 1 percent on February 14, 2022. The cut applies to staples such as flour, rice, pasta, meat, fish, tea, coffee, water, milk and dairy products, cheese, eggs, oils, sugar, fruits, vegetables, nuts, and legumes. However, as inflation continues climbing, consumers have become increasingly price conscious in making food purchase decisions. About 20 percent of household consumption is spent on food in 2023[3].

[1] Economist Intelligence, https://viewpoint.eiu.com/analysis/geography/XG/TR/essential
[2] https://data.tuik.gov.tr/Bulten/Index?p=Tuketici-Fiyat-Endeksi-Ocak-2025-54176
[3] https://data.tuik.gov.tr/Bulten/Index?p=Hanehalki-Tuketim-Harcamasi-2023-53801

**Table 1: Advantages & Challenges facing U.S. Food Processing Ingredients in Turkiye**

| ADVANTAGES | CHALLENGES |
|---|---|
| A large and developed food processing industry requires a wide range of ingredients. | Importing can be complex. Rules and regulations are opaque, import procedures are time consuming and inconsistent, and there is zero tolerance for genetically engineered products or ingredients in food. |
| A growing number of dual-income households drives new demand for processed, frozen, prepared food, and ingredients. | Artisanal food products, such as bakery items and cheese, utilize domestic ingredients and have strong existing relationships with ingredient suppliers. |
| For U.S. companies already exporting to Europe, entering the Turkish market may be less complicated since many Turkish regulations are similar to those in the EU. | The depreciation of the local currency means that imported food ingredients are relatively more expensive than domestic ingredients. Many EU products benefit from preferential duties under the Customs Union and freight advantages due to proximity. |
| The food processing industry has a positive perception of innovative new food processing ingredients from the United States. | There is misinformation among higher end consumers about processed food ingredients and additives. |
| Growing demand for high value packaged food, ready to-eat/cook meals. | The Turkish food industry produces many western style products, such as packaged confectionery products and ready-to-eat meals. |

Source: FAS-Turkiye

## II. ROAD MAP FOR MARKET ENTRY

### a. ENTRY STRATEGY

After conducting market research and determining that there is a potential market in Turkiye for a specific food ingredient, it is important to develop a good strategy for market entry. Turkiye straddles southern European and Middle Eastern cultures, and personal relationships are very important for business.

Finding a local agent is a safe approach for entry into the market, especially for small and medium enterprises. Agents in Turkiye are sometimes an importer, distributor, wholesaler, a commission-based trader, or some combination thereof. Local representatives will have experience in market development and contact information of potential buyers, such as the food processors that are likely to use your products. A good representative can guide you in the market, including on import rules and regulations, which ports to utilize, local business practices, conducting market intelligence formally or informally, starting sales calls, etc. Before selecting any local agent, personally visiting them in Turkiye is highly recommended. One should have meetings with several of them before selecting one. Following that, larger companies with more resources may be able to establish a company in Turkiye and hire some local personnel.

Large food processors in Turkiye are often capable of accessing the ingredient suppliers themselves and importing directly. Therefore, one might approach them directly or try and meet them in a large trade show such as Anuga in Germany, Sial in France, or Gulf Food in Dubai. Food trade shows in Turkiye can be helpful to visit before deciding to enter the market. Anfas Food Product, World Food Istanbul, IbaTech , CNR Food Istanbul, and Food Ingredients Fi Istanbul are good shows to visit and meet importers.

Successfully entering the Turkish market often requires a long-term perspective and persistence, as building trust is important. Thorough market analysis must be done before entry. Please review other FAS reports and contact the FAS Turkiye offices in Ankara and Istanbul, as needed.

## b. IMPORT PROCEDURES

Import procedures are complicated and burdensome in Turkiye. This makes a local business ally more essential. For details on the requirements, please refer to our Exporter Guide to Turkiye and FAS Turkiye reports on Food and Agricultural Import Regulations and Standards and Required Certificates. The U.S. Foreign Commercial Service also provides some general information on Turkiye's import procedures, and on doing business in Turkiye.

Turkiye's import processes and regulations can be difficult to navigate; in most cases some counseling with a customs broker/consultant in Turkiye is useful as these brokers/consultants often understand the complex import processes better than a new, lesser-experienced company. Contacts include Istanbul, Izmir , Mersin, or Ankara Customs Brokers Association, depending on needs.

Many laws and regulations are harmonized with those in the European Union. Companies that have exported to the EU before are often better prepared for navigating Turkish regulations, though exporters should not assume all requirements are the same.

Please visit our country page for other FAS exporter assistance reports.

## c. DISTRIBUTION CHANNELS

Food processing ingredients reach processors in Turkiye either through a local importer, agent, distributor, or broker, or are imported directly by the processor. Large processors prefer to buy directly from the producer in the exporting country but also buy from agents as well. Other small and medium sized processors will buy ingredients from importers or wholesalers to reduce risk and complications.

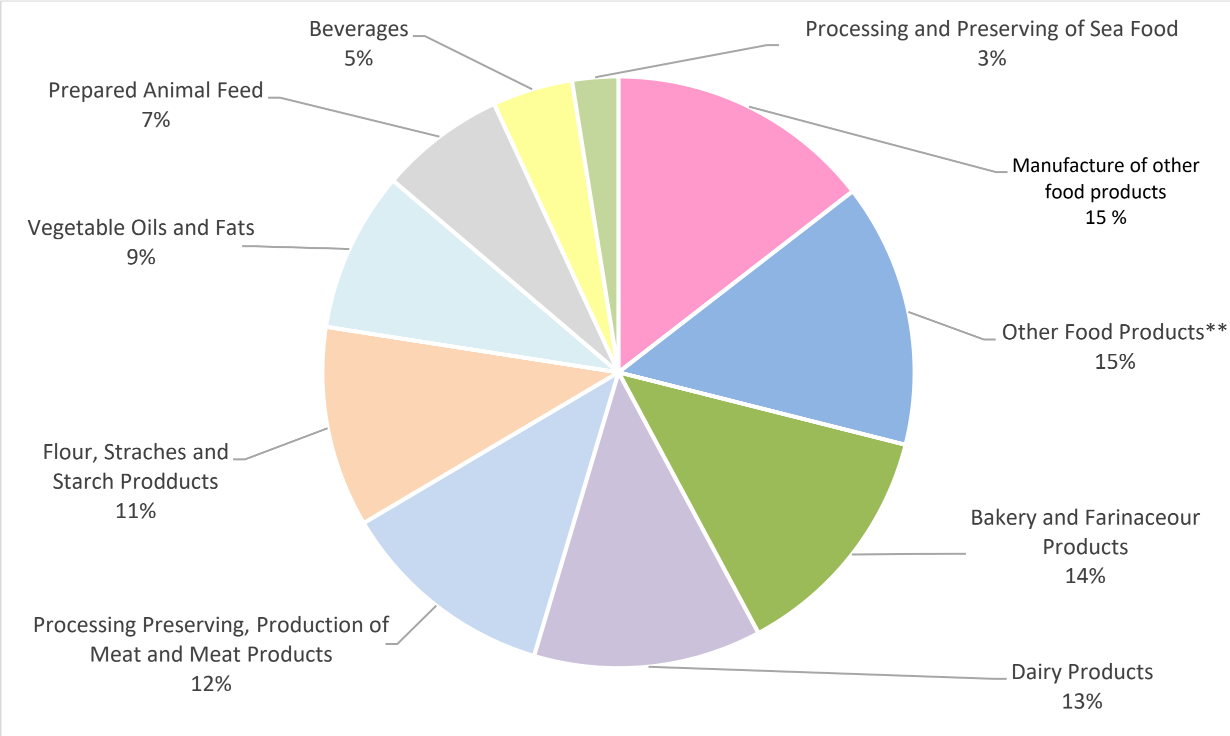
Imported processed food is distributed mostly through premium organized retailers in the country. The penetration of organized retailers is approximately 50 percent, with the rest being traditional, small, family-owned corner grocery stores. These smaller stores have little or no imported packaged food, but more domestically produced processed products such as cheese, bakery items, confectionary items, and snacks.

Please review our Turkish Food Retail Sector Report to better understand the retail market structure and distribution channels and opportunities.

Food service is another way of reaching consumers. High end restaurants that are generally in large metropolitan areas or coastal resort towns are potential users of imported processed food and ingredients. Please review our Food Service - Hotel, Restaurant, Institutional Report for more information.

## d. SHARE OF MAJOR SEGMENTS in the FOOD PROCESSING INDUSTRY in 2023

**Figure 1. Share Of Major Segments in the Food Processing Industry -Turkiye (2023)**




*The above chart is for 2023 which is the latest year that TurkStat reported data.
** Other food products include manufacturing of sugar, manufacturing of cocoa, chocolate and sugar confectionery, processing of tea and coffee, manufacturing of other food products
*** Percentages are calculated on the basis of turnover created by the respective industry. See actual data.

## e. COMPANY PROFILES

Turkiye is home to more than 58,357 food and beverage manufacturers. The leading companies from each sub-sector are included below with links to their individual websites. There are 35 food and beverage companies listed among Turkiye's Fortune 500 for 2023.

### Dairy Companies

1. Sutas Sut Urunleri
2. Pinar Sut Mamulleri
3. Aynes Gida Sut Urunleri
4. Yorukoglu Sut Urunleri
5. Enka Sut ve Gida Mamulleri
6. Dimes Gida San.
7. Teksut Sut Urunleri
8. Ekiciler Sut Gida Tarim Hayvancilik
9. Akova Sut ve Gida Mamulleri
10. Izi Sut ve Gida Mamulleri

### Meat and Poultry Processing

1. Sen Poultry
2. Abalıoğlu Lezita Gıda Sanayi A.Ş.
3. Pinar Et
4. Namet Et
5. Maret Et (Owned by Namet since 2014)
6. Et ve Süt Kurumu Genel Müdürlüğü
7. Gedik Poultry
8. Polonez Et Urunleri
9. Sahin Melek Et ve Mamulleri
10. Coskun Et Mamulleri
11. Banvit Poultry
12. Keskinoglu Poultry

13. Beypilic Poultry
14. Akpilic Poultry
15. CP Turkiye Poultry
16. Has Poultry

**Confectionary, Chocolate, Snack**

1. Unilever San. ve Tic.
2. Eti Gida
3. Ulker Gida
4. Nestle Turkiye
5. Frito Lay Turkiye
6. Mondolez International Turkiye
7. Torku Gida
8. Dogus
9. Ferrero Turkiye
10. Saray Biscuits
11. Haribo Turkiye
12. Bifa Gida

**Processed Seafood**

1. Dardanel Gida
2. Kerevitas
3. Leroy Turkiye
4. Kocaman
5. Kilic Deniz
6. Marines Sea Food

**Nuts and Dried Fruits**

1. Malatya Pazari
2. Tadim
3. Papagan
4. Peyman
5. Pinar Kuruyemis
6. Milhans Kuruyemis
7. Seyran Gida

**Beverages**

1. Dimes Gida (Fruit Juices)
2. Aroma (Fruit Juices, Carbonated Drinks, Water)
3. Tamek (Fruit Juices)
4. PepsiCo Turkiye (Carbonated drinks, chips)
5. Coca Cola Turkiye (Carbonated drinks, fruit juices, water)
6. Anadolu Efes (Beer)
7. Turk Tuborg (Beer)
8. Mey Icki (Hard liquor, wine)
9. Doluca Wine
10. Kavaklidere Wine

**Canned Food, Ready to Eat Food, Frozen Food, Processed Vegetables & Fruits**

1. Tat (canned, glass bottle conserved)
2. Tamek (canned, glass bottle conserved)
3. Yurt Konserve (canned)
4. Superfresh (frozen)
5. Pinar (Frozen)
6. Feast (Frozen)
7. Tukas Gida (canned, glass bottle conserved)
8. Penguen Gida (glass bottle conserved)

## f. SECTOR TRENDS

Turkiye's food manufacturing industry has not only benefited from sustained economic growth but has also been a major driver of growth for over a decade. The production of food and beverages is a key component of Turkiye's economy, accounting for nearly 15 percent of total manufacturing production. In 2023, the sector achieved a turnover of $103 billion, which is double the 2022 turnover due to hyperinflation. As the second largest industry in Turkiye, the food and beverage sector continue to play a crucial role in the country's economic landscape.

The Turkish population continues to grapple with persistently high inflation, which steadily erodes their purchasing power. This trend has significantly impacted the entire packaged food industry, compelling consumers to alter their consumption patterns drastically. Due to the high cost of dining out, out-of-home consumption has declined markedly, potentially driving volume growth in categories such as cooking ingredients and ready-made meals. In response, leading players in the food industry have adopted strategies to reduce operating costs while remaining competitive. A notable trend is the reduction in package sizes while maintaining or increasing prices, a practice commonly referred to as shrinkflation.

**Table 2: Number of Enterprises and Turnover Values of Food Manufacturing Industry Turkiye**

| | Number of Enterprises | | | | | Turnover in Millions of USD* | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **FOOD MANUFACTURING INDUSTRY in TURKIYE** | **2019** | **2020** | **2021** | **2022** | **2023** | **2019** | **2020** | **2021** | **2022** | **2023** |
| **Manufacture of food products** | **51,338** | **52,869** | **57,573** | **59,146** | **57,664** | **63,396** | **63,580** | **73,886** | **51,271** | **98,261** |
| Processing and preserving of meat and production of meat products | 1,358 | 1,422 | 1,505 | 1,608 | 1,567 | 7,122 | 6,412 | 7,924 | 5,760 | 12,219 |
| Processing and preserving of fish, crustaceans and mollusks | 283 | 305 | 329 | 351 | 351 | 1,328 | 1,463 | 1,792 | 1,074 | 2,586 |
| Processing and preserving of fruit and vegetables | 2,791 | 3,061 | 3,553 | 3,838 | 3,982 | 10,577 | 10,956 | 12,098 | 8,554 | 14,818 |
| Manufacture of vegetable oils and fats | 1,404 | 1,451 | 1,600 | 1,720 | 1,725 | 5,843 | 6,211 | 8,178 | 4,726 | 9,007 |
| Manufacture of dairy products | 2,409 | 2,542 | 2,837 | 2,963 | 2,977 | 8,511 | 8,423 | 9,102 | 6,883 | 12,787 |
| Manufacture of grain mill products, starches, and starch products | 3,132 | 3,062 | 3,216 | 3,097 | 2,657 | 7,484 | 7,360 | 8,461 | 6,053 | 11,270 |
| Manufacture of bakery and farinaceous products | 35,511 | 36,217 | 38,896 | 39,395 | 38,051 | 8,243 | 7,774 | 9,084 | 6,667 | 13,589 |
| Manufacture of other food products | 3,832 | 4,133 | 4,875 | 5,347 | 5,502 | 9,834 | 10,211 | 11,169 | 7,953 | 14,920 |
| Manufacture of prepared animal feeds | 619 | 676 | 762 | 827 | 852 | 4,455 | 4,771 | 6,077 | 3,603 | 7,061 |
| **Manufacture of beverages** | **649** | **657** | **654** | **678** | **693** | **3,205** | **2,759** | **3,096** | **2,592** | **4,507** |
| **TL/USD*** | | | | | | **5.68** | **7.02** | **8.88** | **16.58** | **23.78** |

Source: Turkish Statistical Institute, 2023 is latest available year as of March 2025.
***** The values are calculated using the average TL-USD rate for that year.

Despite the decrease in purchasing power, ready meals and sauces have driven growth in both retail volume and value during 2024. The shift from foodservice to more affordable product choices has benefited ready meals, while frozen products are expected to perform well due to their practicality and ease of storage. As Turkish consumers, particularly the youth, become more health-conscious, there is a rising demand for natural and organic ingredients. Clean label products, which use minimal and recognizable ingredients, are gaining popularity. This trend towards healthy living is making artisanal products increasingly appealing to middle-income households. Additionally, the industry is witnessing innovation in the development of new ingredients, such as plant-based alternatives and functional ingredients with health benefits.

**Table 3. Percentage Volume Growth of Staple Food**

| Percentage of volume growth | 2019/2024 | 2023/2024 |
|---|---|---|
| Staple Foods | 24.8% | 1.9% |
| Baked Goods | 15.1% | 0.1% |
| Breakfast Cereals | 6.4% | 0.1% |
| Processed Fruit and Vegetables | 36.2% | 1.7% |
| Processed Meat, Seafood and Alternatives to Meat | 48.4% | 6.5% |
| Rice, Pasta, and Noodles | 91.0% | 10.0% |

Source: Euromonitor, 2025.

As shown in Table 3, staple food categories showed resilience during Turkiye's economic crises, as expected. Companies are reacting to the weak purchasing power of consumers, accordingly, responding with cost effective alternatives.

High inflation and increasing prices are the main factors impacting the performance of dairy products and alternatives in 2024. Although the supply of milk increased in 2023, higher costs of animal feed, energy, wages, and logistics caused a considerable increase in unit prices. This has made baby food and other dairy products less affordable, forcing consumers to switch to cheaper brands or price-promoted brands.

As meat prices continued to be high in 2024, frozen processed meat demand has increased (Table 3). Private label processed red meat was offered in very small packs to reduce the retail selling price and make products more affordable for a wider consumer base.

*Additives/Flavorings*

Turkish companies still tend to import food additives, such as artificial colorings and sweeteners. There is one prominent Turkish company that is producing aromas and natural-identical flavors called Aromsa. Three large companies produce yeast for the baking sector: Turkish-owned Pakmaya, French-owned Lesaffre, and British-owned Mauri. All three are also exporting to other countries. A list of Food Processing Ingredients producers can be found at the Turkish Association of Food Ingredients and Improvers Manufacturers (GIDABIL) .

Most enzymes used as food processing aids are imported from other countries, with a small amount of local production. There are currently two local enzyme producers in Turkiye, with Lvzym, established in 2014, being the biggest. Turkiye is currently consuming 20,000 metric tons of enzymes, with 25 percent used in the food industry. With a new operation facility, Lvzym is planning to supply most of the enzymes needed for the domestic food production industry.

For gelatin, there is demand for non-pork based, halal gelatin, since Turkiye is a predominantly Muslim country; domestic halal gelatin producers use only beef products. Most vitamin and mineral additives are imported, though there is some local production, such as calcium carbonate. Food additives are primarily imported from the Netherlands, Germany, and the United States.

## III. COMPETITION

While Turkiye's food manufacturing and retail sectors are robust, there is still considerable room for international brands to grab a slice of the market. Major competition for U.S. processed food and food processing ingredients mostly comes from local companies and European suppliers which benefit from preferential duties under trade agreements.

Many processed food products from Europe have zero or low import duties under the Turkiye-EU Customs Union. EU-origin processed food ingredients also benefit from lower freight costs, aligned regulatory structures, and familiarity among Turkish consumers. Turkiye also has a free trade agreement with European Free Trade Association (EFTA) countries. For example, Norway sells seafood to Turkiye, some of which goes into food processing and Switzerland sells additives, processing aids, and cocoa to Turkiye. Turkiye has 23 Free Trade Agreements (FTA), with many including preferential tariff rates on food and agriculture products. The FTAs signed with Lebanon, Qatar, Sudan and Ukraine are under ratification process.

Turkiye depends on imported vegetable oil for some of its food processing needs. Malaysia and Indonesia are the leading suppliers of palm oil to Turkiye. Russia and Ukraine supply sunflower oil.

The United States is mainly exporting food additives, aids, and ingredients, most of which fall under the "Food Preparations nesoi" category (HTS 2106.90). Imports of U.S. products under this HTS face a 10 percent retaliatory duty, which Turkiye imposed in 2018 in response to U.S. Section 232 tariffs on Turkish steel and aluminum.

**Table 4. Processed Products and Ingredients Imports to Turkiye by Country**

| Processed Food Import and Share of Turkiye 2022-2024 (Thousand dollars) | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Country** | **Imports 2022** | **Share (%) 2022** | **Imports 2023** | **Share (%) 2023** | **Imports 2024** | **Share (%) 2024** | **FTA Status** |
| Malaysia | 1,175,803 | 15.00 | 1,033,589 | 13.95 | 920,329 | 12.10 | Yes |
| Russia | 1,378,318 | 17.58 | 637,408 | 8.61 | 837,789 | 11.01 | No |
| Ukraine | 1,001,813 | 12.78 | 1,174,780 | 15.86 | 512,780 | 6.74 | No |
| Germany | 331,318 | 4.23 | 390,162 | 5.27 | 449,351 | 5.91 | EU |
| Netherlands | 342,756 | 4.37 | 348,754 | 4.71 | 385,117 | 5.06 | EU |
| United Kingdom | 230,025 | 2.93 | 296,545 | 4.00 | 377,028 | 4.96 | EU |
| Bulgaria | 178,350 | 2.28 | 174,320 | 2.35 | 315,601 | 4.15 | EU |
| France | 219,036 | 2.79 | 291,282 | 3.93 | 297,700 | 3.91 | EU |
| Syria | 129,765 | 1.66 | 234,603 | 3.17 | 288,171 | 3.79 | EU |
| Italy | 179,386 | 2.29 | 260,501 | 3.52 | 257,293 | 3.38 | EU |
| China | 157,367 | 2.01 | 130,945 | 1.77 | 213,887 | 2.81 | No |
| United States | 91,694 | 1.20 | 115,987 | 1.60 | 117,472 | 1.54 | No |
| **World Total** | 7,839,028 | 100 | 7,406,882 | 100 | 7,608,858 | 100 | |

Source: Trade Data Monitor, 2025

In 2024, imports to Turkiye slightly increased to $7.6 billion, up from $7.4 billion in 2023. The U.S. market share reached $117 million, marking a 26 percent increase compared to 2022 imports, despite the significant depreciation of the Turkish lira (TL) against the U.S. dollar. This growth is largely driven by increased imports of processed foods, ingredients, and beverage bases. However, expanding the U.S. market share in the future will be challenging due to strong local and foreign competition and the weak TL.

Germany remains the top supplier of food processing ingredients to Turkiye, primarily exporting food preparations, malt, thickeners, and flavorings (Table 5). Italy and France are also key EU suppliers of similar food processing ingredients. The United States ranks as the fourth largest supplier, with sales of $59 million in 2024.

**Table 5. Food Preparations and Ingredients Imports to Turkiye by Country**

| Food Preparations and Ingredients Import of Turkiye 2018-2022 (Thousand dollars) | | | | | | |
|---|---|---|---|---|---|---|
| **Country** | **2020** | **2021** | **2022** | **2023** | **2024** | **FTA Status** |
| Germany | 122,383 | 134,782 | 124,545 | 129,150 | 142,908 | EU |
| Italy | 52,001 | 53,929 | 69,936 | 97,066 | 92,400 | EU |
| France | 48,318 | 52,470 | 41,949 | 63,768 | 67,424 | EU |
| United States | 43,805 | 48,817 | 47,598 | 60,301 | 58,678 | No |
| Netherlands | 152,272 | 169,071 | 55,879 | 53,395 | 52,190 | EU |
| United Kingdom | 44,657 | 45,982 | 45,274 | 53,320 | 45,923 | Yes |
| Denmark | 13,834 | 16,808 | 21,245 | 26,387 | 31,765 | EU |
| China | 11,480 | 14,050 | 19,303 | 24,192 | 30,978 | No |
| Malaysia | 13,185 | 15,831 | 40,490 | 48,500 | 30,742 | Yes |
| Belgium | 15,399 | 18,125 | 19,057 | 32,608 | 28,887 | EU |
| Poland | 23,977 | 27,284 | 47,457 | 34,169 | 26,665 | EU |
| Bulgaria | 6,986 | 10,479 | 18,511 | 20,101 | 21,316 | EU |
| **World Total** | 685,736 | 780,643 | 814,794 | 880,864 | 823,794 | - |

Source: Trade Data Monitor, 2025

## IV. BEST PRODUCT CATEGORIES

Turkiye is a highly competitive and very price sensitive market for many items. A thorough analysis should be done before prospective exporters consider Turkiye as a long-term market investment.

**a. PRODUCTS PRESENT in the MARKET WHICH HAVE GOOD SALES POTENTIAL**

1. Ingredients and beverage bases
2. Food preparations nesoi
3. Distilled spirits
4. Canned fruit
5. Baking inputs, mixes, and doughs
6. Cranberries

**b. PRODUCTS NOT PRESENT in the MARKET BUT WHICH HAVE GOOD SALES POTENTIAL**

1. Ingredients for healthy, natural, or functional foods
2. Ingredients for organic processed food

**c. PRODUCTS NOT PRESENT in the MARKET BECAUSE THEY FACE SIGNIFICANT BARRIERS**

1. Ingredients and additives derived from biotechnology (Agricultural Biotechnology Report - Turkiye)
2. Organic sugar
3. Beef and beef products.

## V. **KEY CONTACTS AND FURTHER INFORMATION**

Republic of Turkiye, Ministry of Agriculture and Forestry (MinAF)

Turkish Statistics Institute (TurkStat)

Union of Chambers and Commodity Exchanges of Turkiye (TOBB)

Foreign Economic Relations Board of Turkiye (DEIK)

Investment Support and Promotion Agency of Turkiye (ISPAT)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

Association of Food Additives and Ingredients Manufacturers (GIDABIL)

All Foods Foreign Trade Association (TUGIDER)

For other agricultural industry reports on Turkiye and other countries in the world, please visit the Foreign Agricultural Service (FAS) Global Agricultural Information Network (GAIN) webpage. Contact the FAS-Turkiye offices via the information below: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|---|---|
| Office of Agricultural Affairs<br>Foreign Agricultural Service<br>U.S. Embassy Ankara<br>1408 Sokak No. 1, Cukurambar, Cankaya<br>Ankara, Turkiye<br>Telephone: +90 312 457 7393<br>E-mail: agankara@usda.gov | Office of Agricultural Affairs<br>Foreign Agricultural Service<br>U.S. Consulate General Istanbul<br>Ucsehitler Sokak No:2, Istinye, 34460<br>Istanbul, Turkiye<br>Telephone: +90 212 335 9068<br>E-mail: agistanbul@usda.gov |


**Attachments:**

No Attachments