

*3rd International Conference and Exhibition
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***European and Turkish dairy sector: Traditional
dairy products at a glance***

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TURKEY AT A GLANCE



REPULIC OF TURKEY

Population: 77.804.122

Most Populous City: Istanbul

Government: Parliamentary Democracy

Offical Language: Turkish



Turkey Fact Box

Total Population:	77,804,122
Capital:	Ankara
Total Area:	783,562 sq km
Currency:	Lira (TRY)

Agriculture in TURKEY

- **Agricultural product of Turkey valued 62 billion \$**
- **This value made Turkey seventh of scale in the world**
- **The balance between export and import in agricultural and food industry is in favor of export with 4.5 billion \$**
- **Turkish dairy sector's value is the first in food sector**
- **Raw milk production shows the same situation in the livestock**

Livestock Holding

Year	Cattle	Buffalo	Total Bovine Animals	Sheep	Goat	Total Sheep and Goat
2009	10.723.958	87.207	10.811.165	21.749.508	5.128.285	26.877.793
2010	11.369.800	84.726	11.454.526	23.089.691	6.293.233	29.382.924
2011	12.386.337	97.632	12.483.969	25.031.565	7.277.953	32.309.518
2012	13.914.912	107.435	14.022.347	27.425.233	8.357.286	35.782.519
2013	14.415.257	117.591	14.532.848	29.284.247	9.225.548	38.509.795

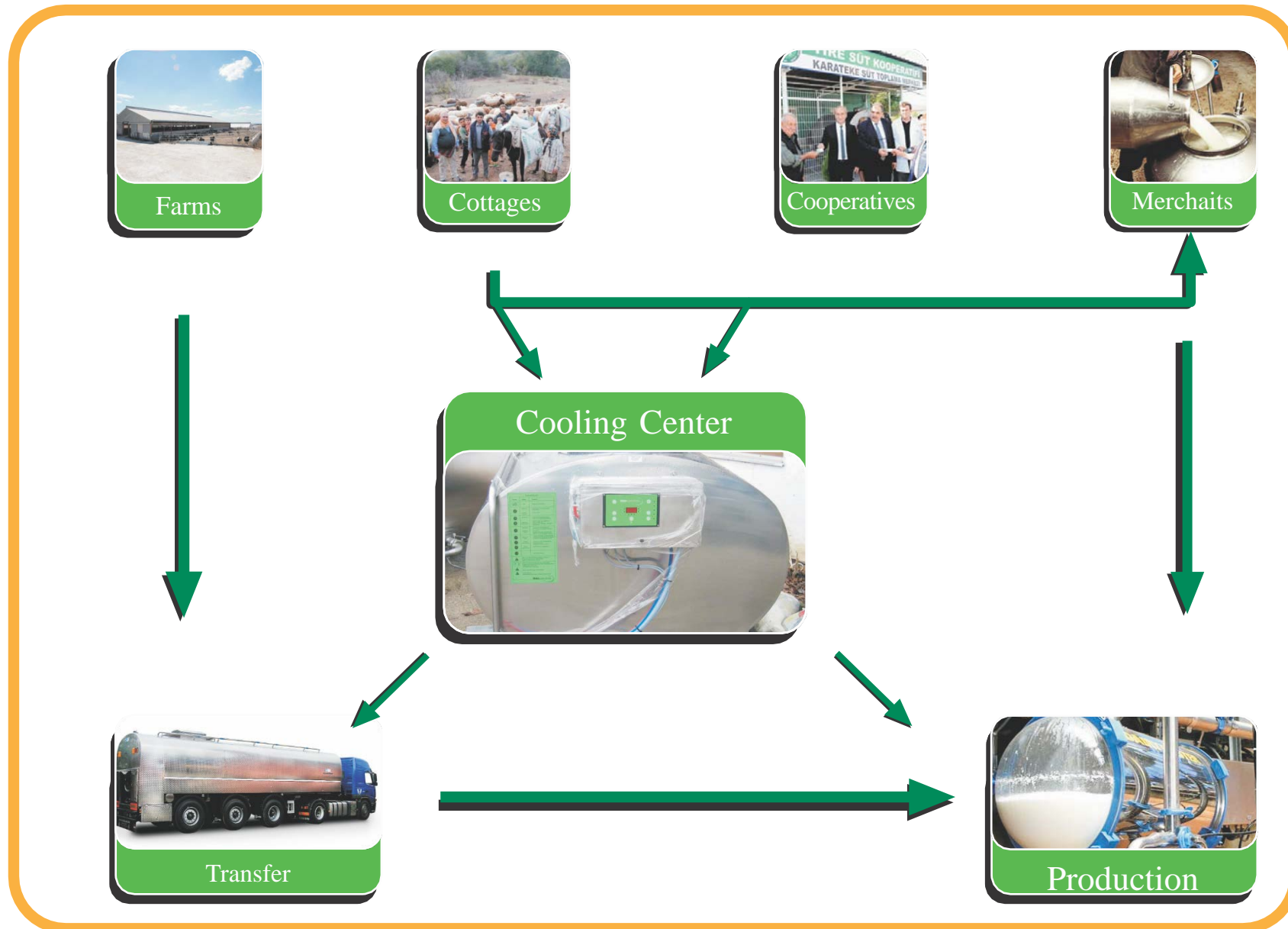
Total Livestock in 2013
53.042.643 Heads

Milking Animals

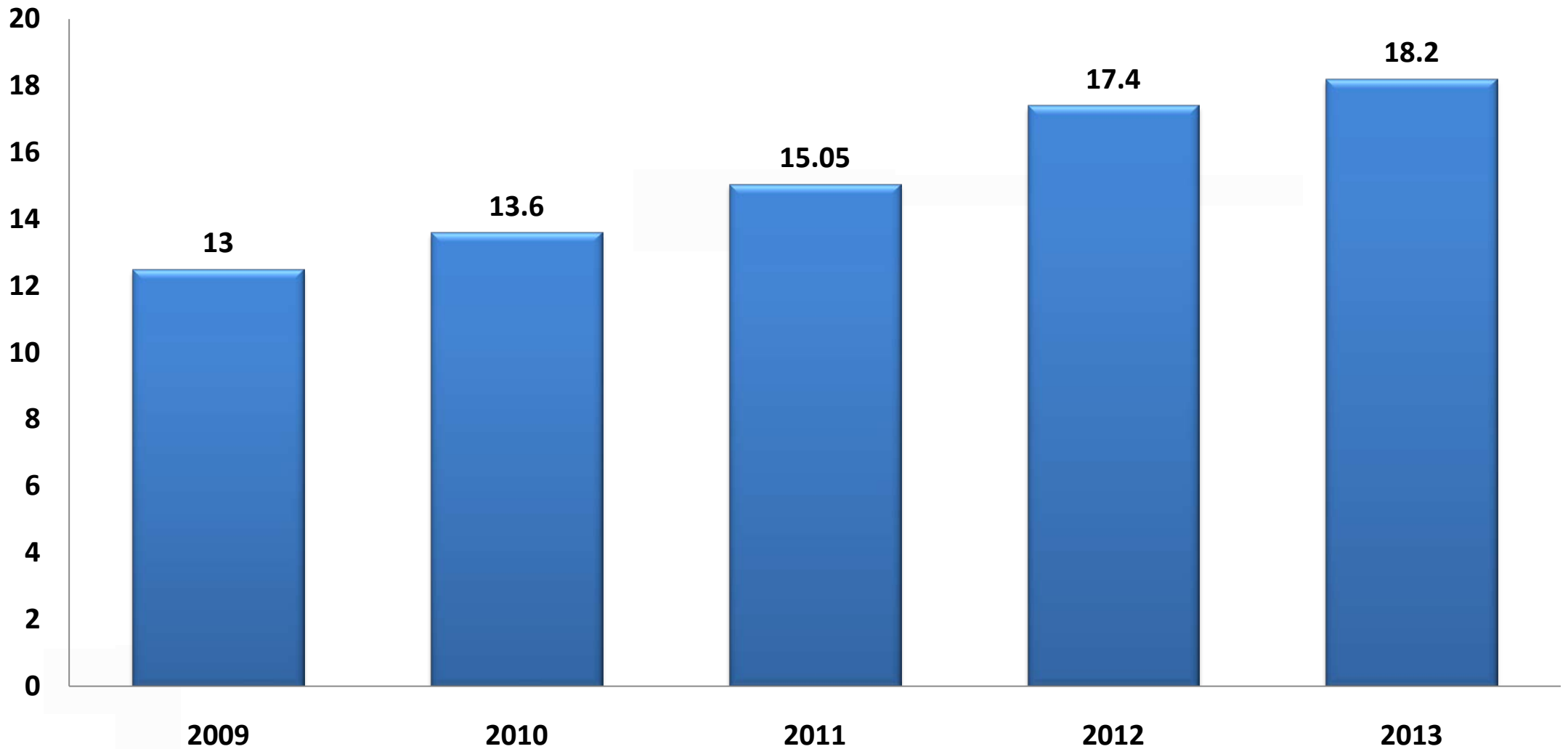
Year/Head	Cow	Sheep	Goat	Buffalo	Total
2009	4.133.148	9.407.866	1.830.814	32.361	15.404.189
2010	4.384.130	10.583.608	2.582.539	35.726	17.563.350
2011	4.761.142	11.561.144	3.033.111	40.218	19.395.615
2012	5.431.400	13.068.428	3.502.272	38.205	22.040.305
2013	5.607.272	14.287.237	3.943.318	51.940	23.889.767

Population growth rate for total milking animals between 2009-2013: 55 %

The Supply of Raw milk



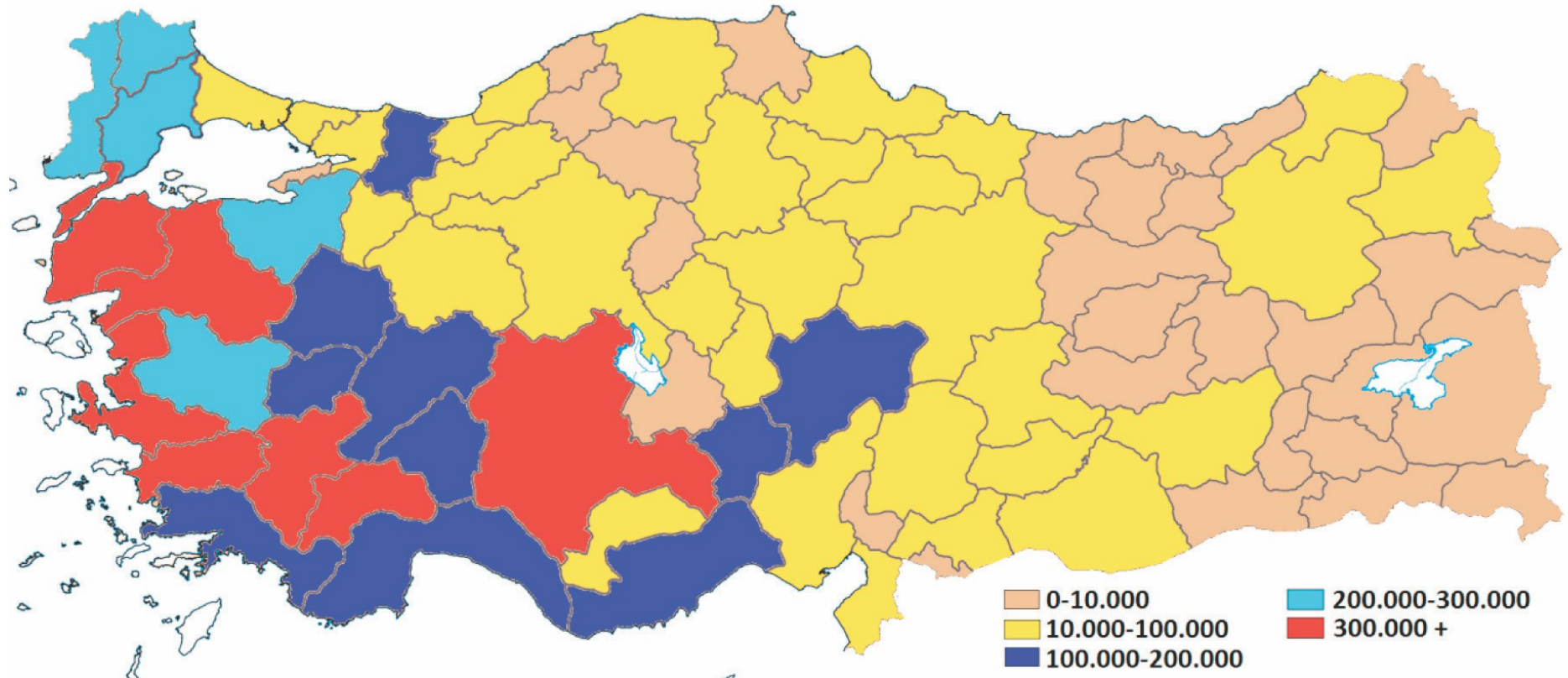
Milk Production in Turkey (million tonnes)



Milk production increase rate for the last 4 years

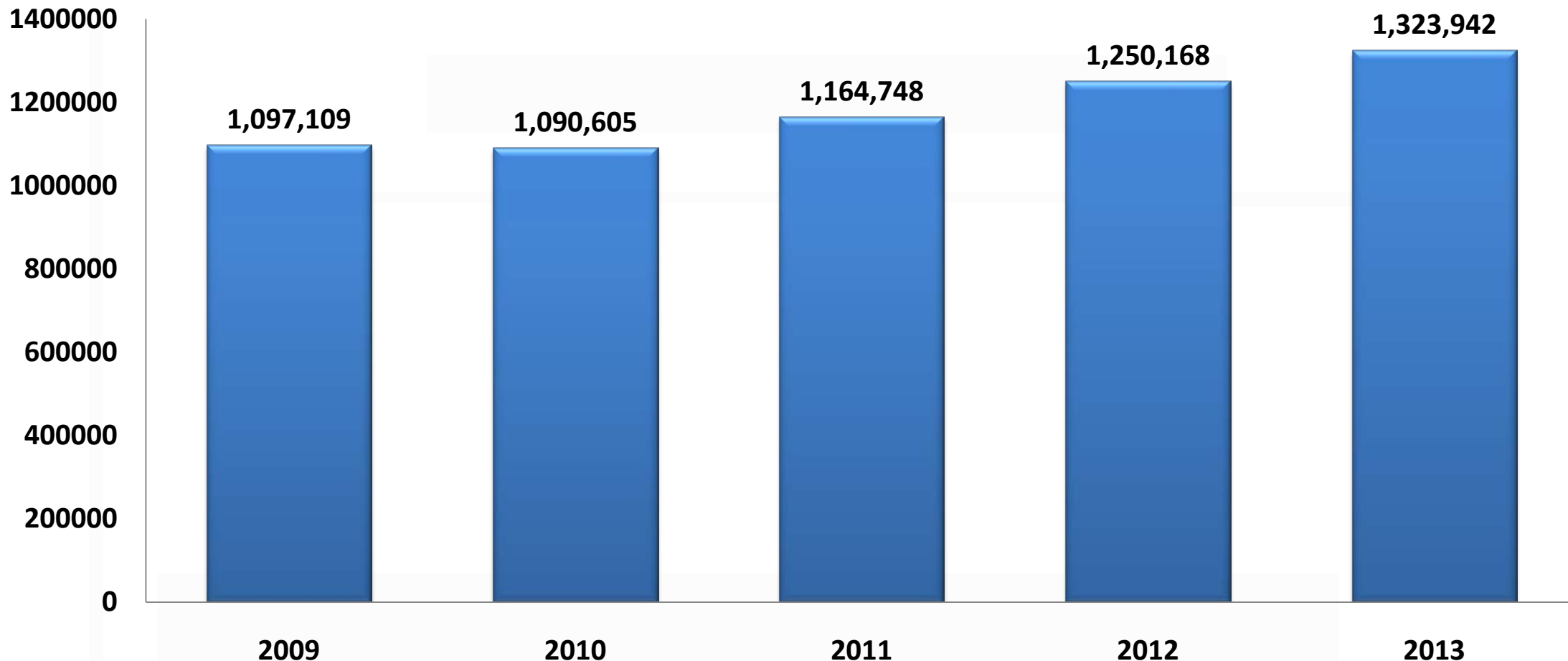
40%

Regional Milk Production (tonnes)



Most Producing Provinces
İzmir, Balıkesir, Konya, Aydın,
Çanakkale, Denizli, Burdur

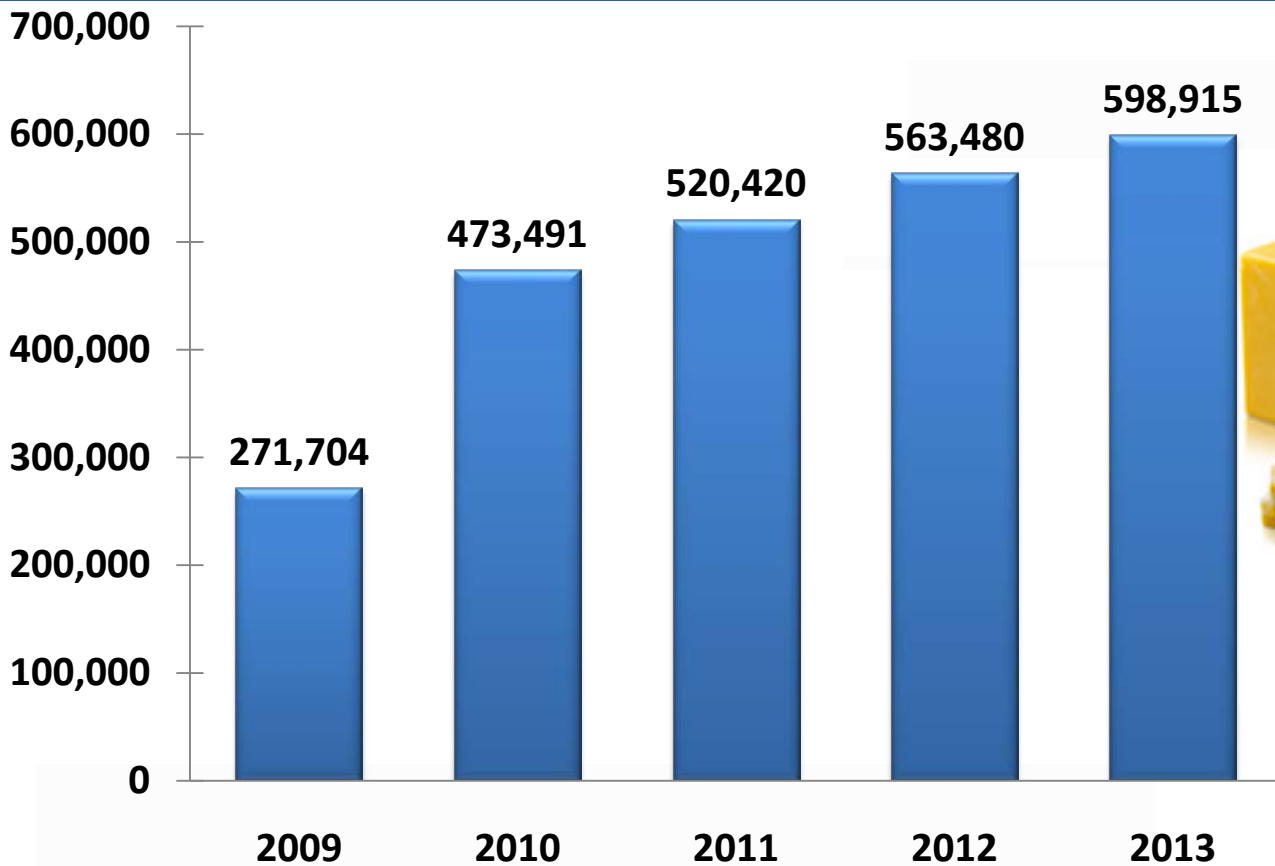
Liquid Milk Production



Liquid Milk is produced
UHT → 90 %
Pasteurised → 10 %

Liquid milk production growth rate
between 2009-2013; **20 %**

Cheese Production



96 % of the total production is made from cow's milk

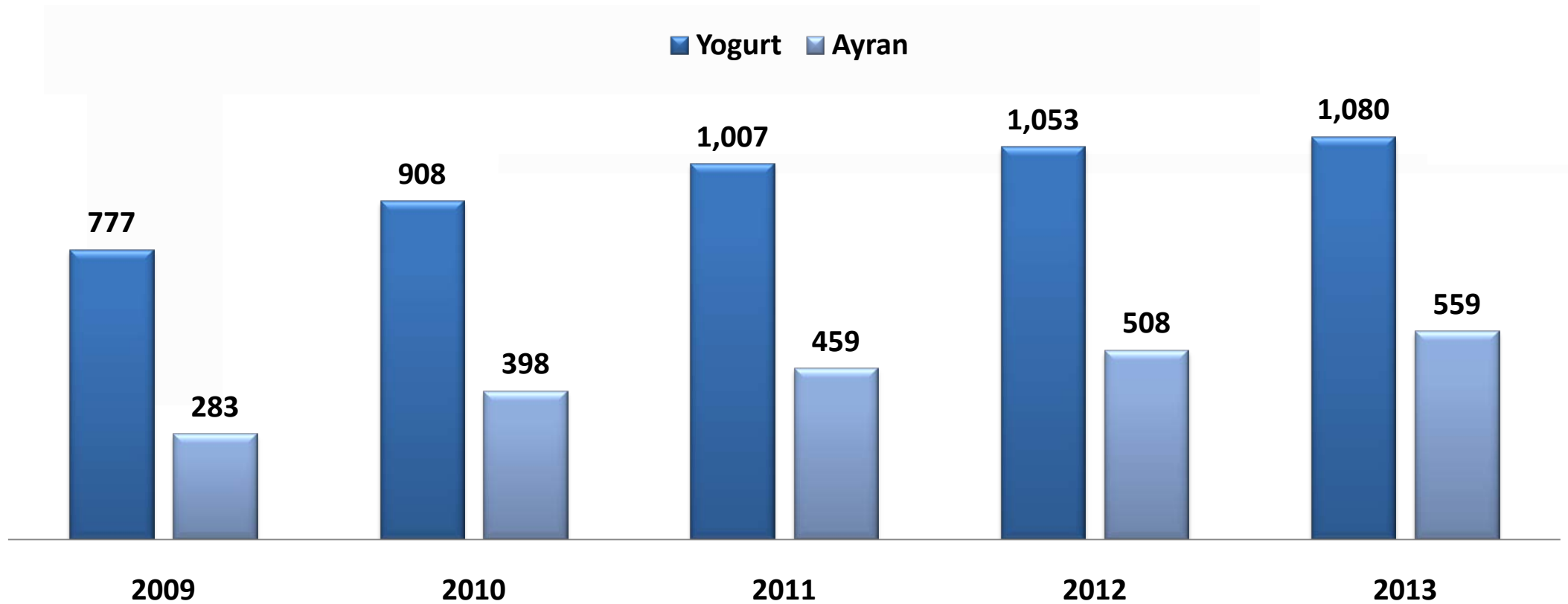
Cheese production growth rate during last four years

120 %

204 Different kind of cheese is produced



Yogurt and Ayran Production (x1000 tonnes)

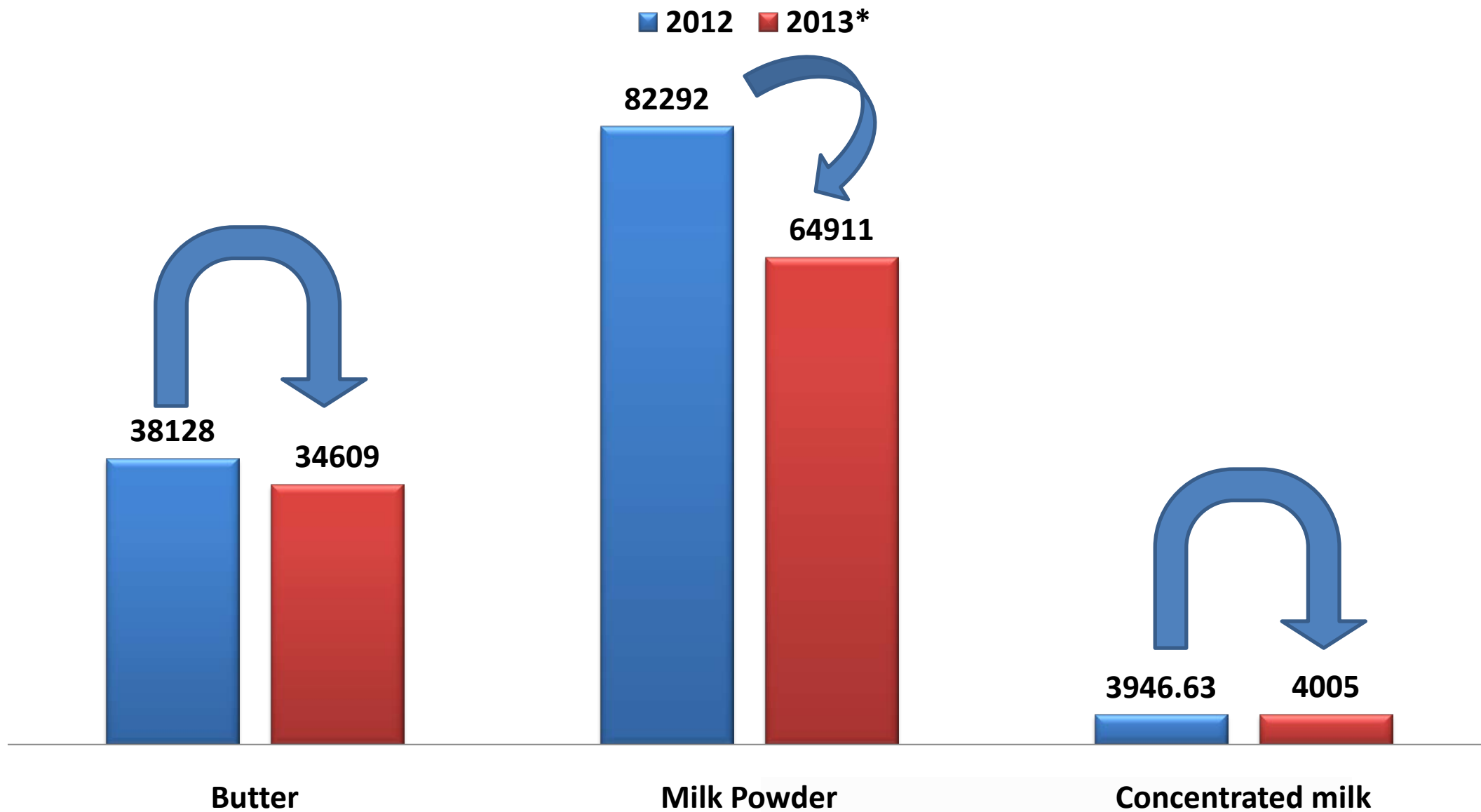


Yogurt production growth rate between 2009-2013: **38 %**

Ayran production growth rate between 2009-2013: **97 %**



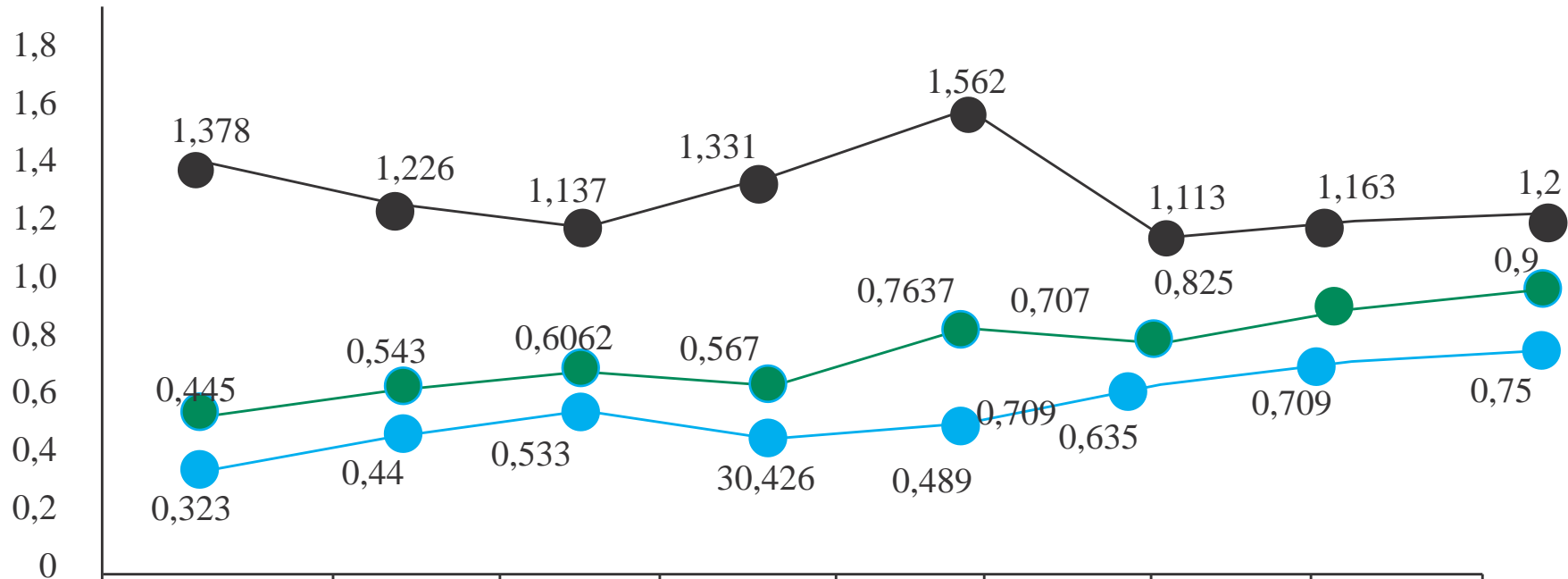
Butter, milk powder, concentrated milk production



Amount
(tonnes)

*:the first ten months period

Yearly Milk/Feed Price

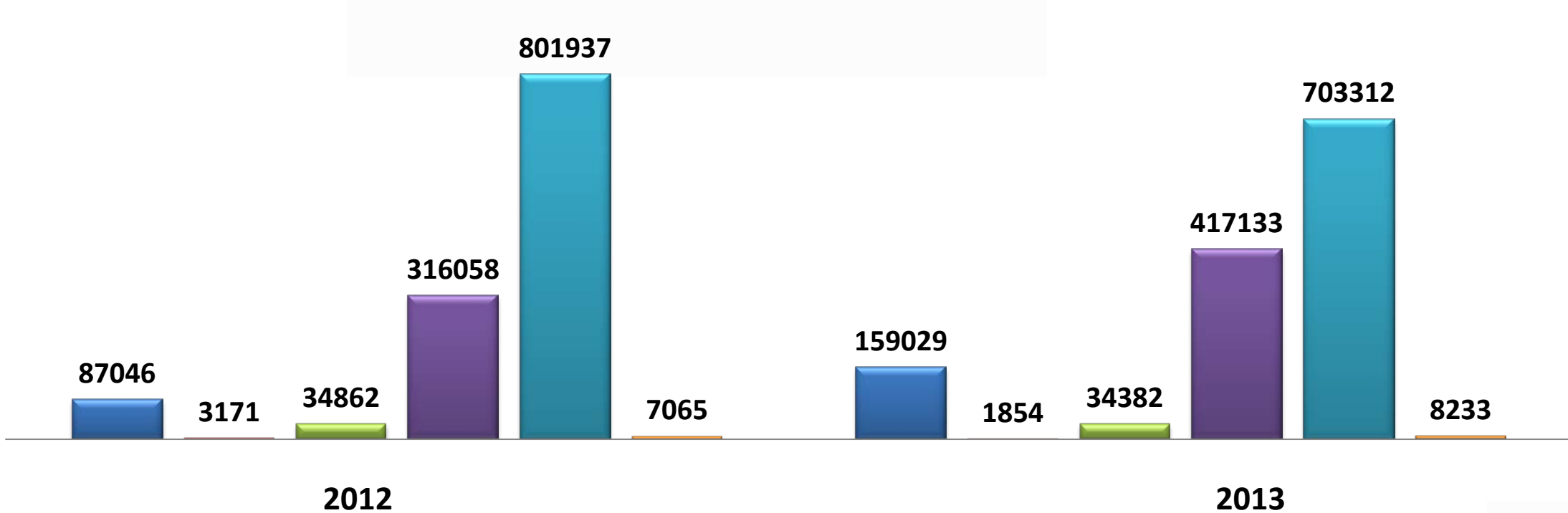


	2006	2007	2008	2009	2010	2011	2012	2013
● Feed Price	0,323	0,443	0,533	0,426	0,489	0,635	0,709	0,75
● Raw Milk Price	0,445	0,543	0,6062	0,567	0,764	0,707	0,825	0,9
● Ratio	1,378	1,226	1,137	1,331	1,562	1,113	1,163	1,2

Liquid Milk Consumption

PER CAPITA MILK CONSUMPTION IN MILK EQUIVALENT: 230 KG

- Pasteurised
- Pasteurised Skimmed
- Pasteurised Semi Skimmed
- UHT Semi Skimmed
- UHT Whole
- UHT Skimmed



Liquid Milk Consumption per capita is estimated
33,1 kg

Foreign Trade

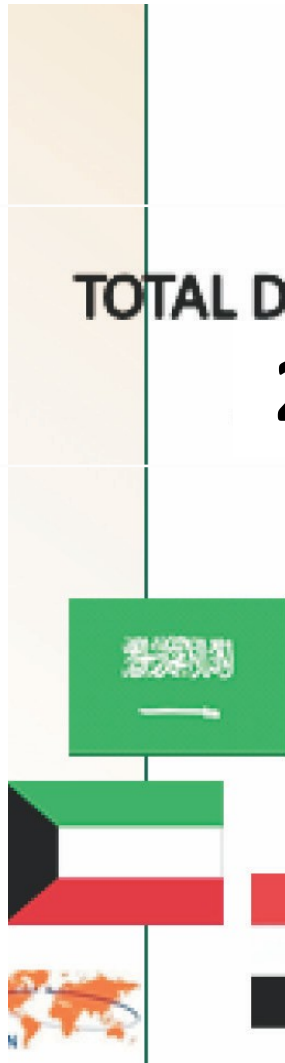
✓ Export

TOTAL DAIRY PRODUCTS EXPORT VALUE
282 MILLION USD

Key Products for Export
→ Cheese → Whey Powder

Key Markets for Dairy Products

- Saudi Arabia
- Kuwait
- Iraq
- Azerbaijan
- United Arab Emirates
- Libya
- South Korea



✓ **Import**

**TOTAL DAIRY PRODUCTS IMPORT
VALUE**

105,9 MILLION USD



Key Products for Import;

→ **Butter** (15.000 tonnes for 2012)

Key Suppliers for Dairy Import

- Netherlands
- Ireland
- Italy
- New Zealand
- Switzerland

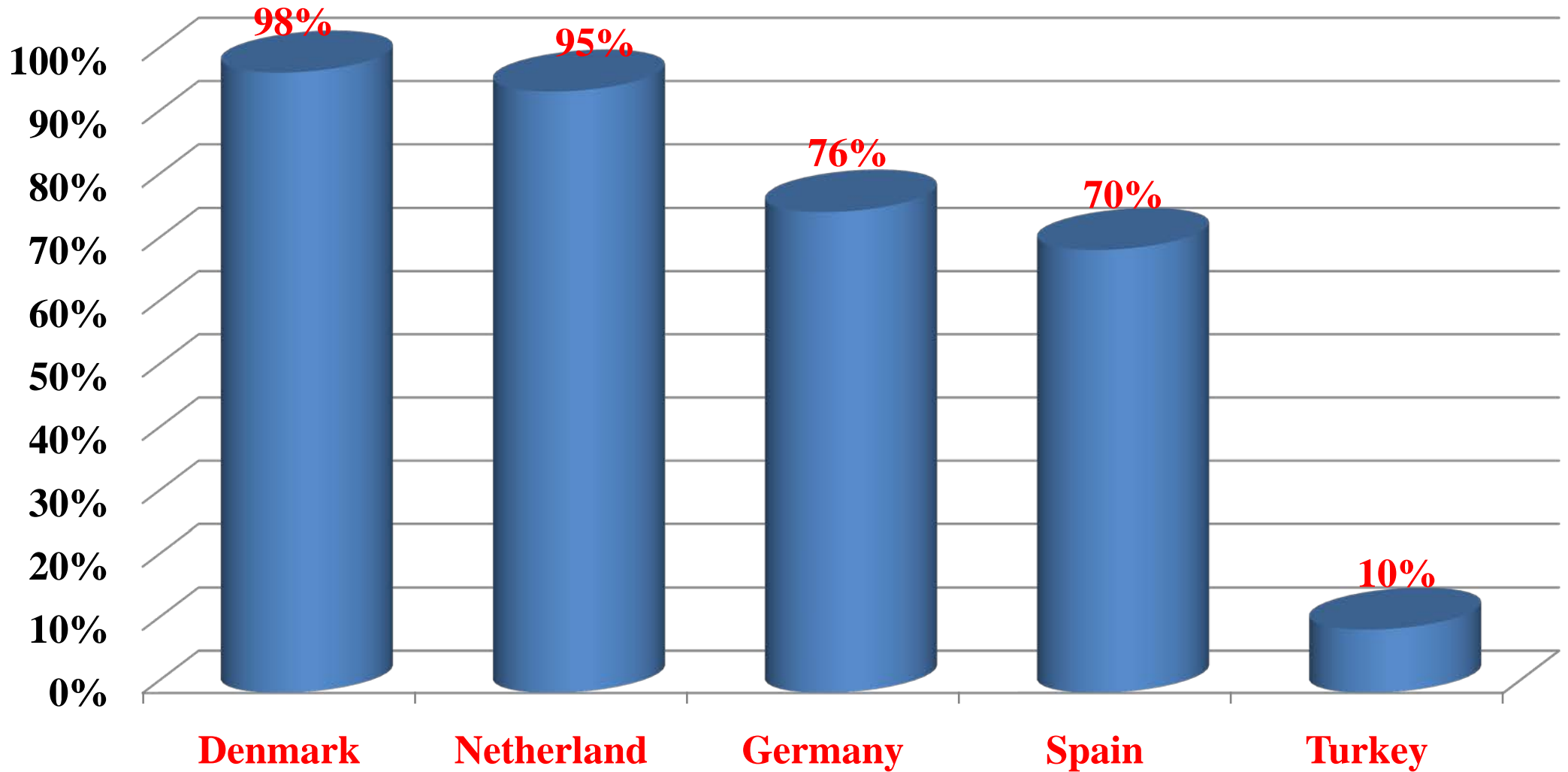


Farm Structure

FARM SIZE (HEAD)	NUMBER OF FARMS	SHARE IN TOTAL %	COW HOLDINGS (HEAD)
1--5	811,778	58,74	2,063,726
6--9	293,799	21,25	2,095,781
10--25	198,117	14,35	2,767,188
26--49	62,858	4,54	1,812,749
50--100	11,681	0,84	899,921
101--199	2,798	0,20	388,490
200+	1,190	0,08	378,959
TOTAL	1,382,221	100	10,406,814

80 % of total farms have between 1-9 cows

EU Cooperatives



Analysis of the Sectoral Situation

Strengths

- **Loam structure**
- **Suitable climatic conditions**
- **Product variety**

Opportunities

- **Strategic geographic location**
- **The increased importance of the food sector**
- **High education level**

Weaknesses

- **Cooperatives not sufficiently developed**
- **Unplanned**
- **The height of Input Costs**

Threats

- **Increase in migration from rural to urban**
- **Urbanization of fertile farmland**

TRADITIONAL CHEESE

TRADITIONAL CHEESE	TOTAL NUMBER OF UNITS	TOTAL PRODUCTION (TONNES/YEAR)
White Cheese	755	5692111
Processed Cheese	158	95981
Precipitated Cheese	65	1279
Dil Cheese (Tongue)	143	24171
Hellim Cheese	13	1037
Kasar Cheese (Khasckaval)	667	2794754
Village Type of Cheese	171	368811



TRADITIONAL CHEESE

TRADITIONAL CHEESE	TOTAL NUMBER OF UNITS	TOTAL PRODUCTION (TONNES/YEAR)
Moldy Cheese	8	119.6
Lor Cheese	506	387388
Herby Cheese (Otlu)	19	571.9
Mesh Cheese (Orgu)	169	38885
Fresh Cream Cheese	37	442.5
Tulum Cheese (Skin)	371	599885
Fresh Cheese (Flavored)	11	11547



LOCAL CHEESE

LOCAL CHEESE	TOTAL NUMBER OF UNITS	TOTAL PRODUCTION (TONNES/YEAR)
Ezine Cheese	15	2673
Yoruk Cheese	4	2388
Kolot Cheese (Golot)	7	90,6
Maras Parmesan Cheese	8	323
Antep Cheese	58	2904
Other Local Cheeses	103	2786.4



FOREIGN STYLE CHEESE

FOREIGN STYLE CHEESE	TOTAL NUMBER OF UNITS	TOTAL PRODUCTION (TONNES/YEAR)
Camambert Cheese	1	0.0
Cheddar Cheese	7	5365
Edam Cheese	5	11927
Emmental Cheese	3	3336
Gouda Cheese	3	12702
Gruyere Cheese	13	219
Parmesan Cheese	2	10.6
Mozzarella Cheese	18	4934,4



obrigado

Dank U

Merci

mahalo

Köszí

спасибо

Grazie

Thank
you

mauruuru

Takk

Gracias

Dziękuję

Děkuju

danke

Kiitos