



IBO

Summit 2023
Poland



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT
OFFICE**



An Overview of the

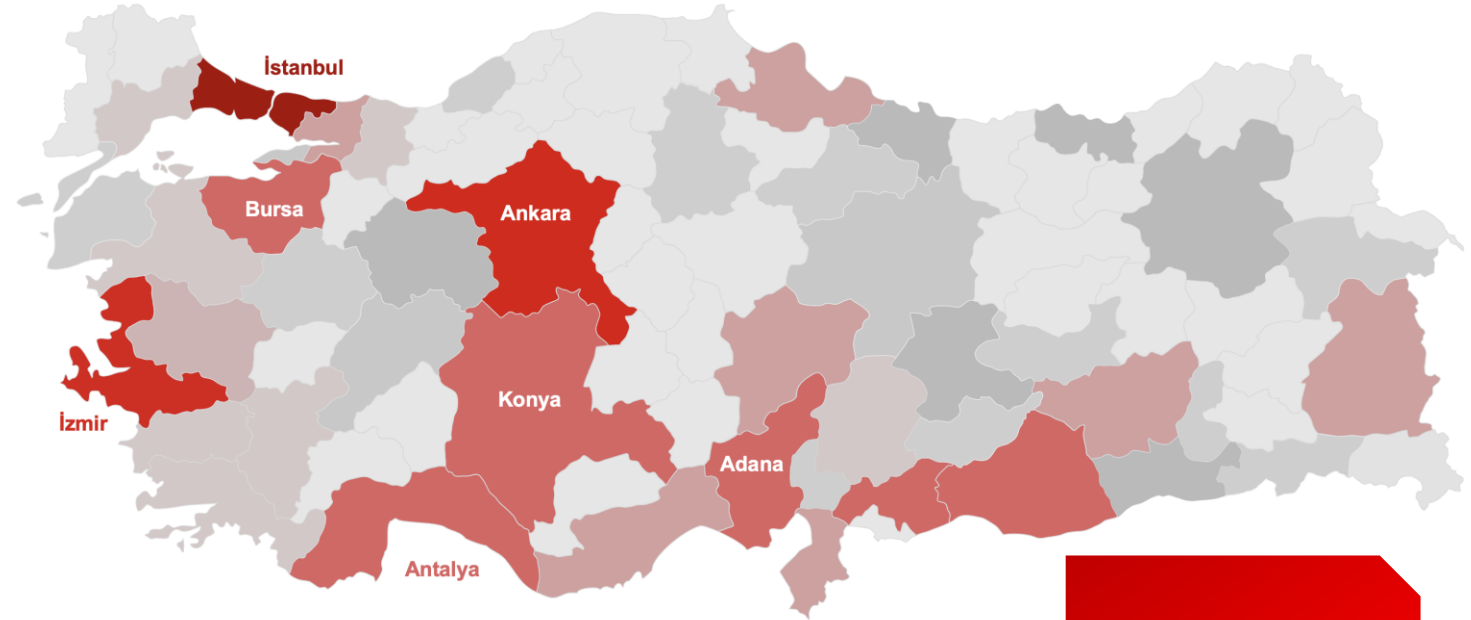
Turkish Blueberry Industry

Halit Duran



Total Population **85.3 Million**

İstanbul	15.9 Million	Denizli	1.1 Million
Ankara	5.8 Million	Muğla	1 Million
İzmir	4.5 Million	Eskişehir	0.9 Million
Bursa	3.2 Million	Mardin	0.9 Million
Antalya	2.7 Million	Trabzon	0.8 Million
Konya	2.3 Million	Malatya	0.8 Million
Adana	2.3 Million	Ordu	0.8 Million
Şanlıurfa	2.2 Million	Erzurum	0.7 Million
Gaziantep	2.2 Million	Afyonkarahisar	0.7 Million
Kocaeli	2.1 Million	Sivas	0.6 Million
Mersin	1.9 Million	Adıyaman	0.6 Million
Diyarbakır	1.8 Million	Batman	0.6 Million
Hatay	1.7 Million	Tokat	0.6 Million
Manisa	1.5 Million	Zonguldak	0.6 Million
Kayseri	1.4 Million	Elazığ	0.6 Million
Samsun	1.4 Million	Kütahya	0.6 Million
Balıkesir	1.3 Million	Çanakkale	0.6 Million
Kahramanmaraş	1.2 Million	Osmaniye	0.6 Million
Van	1.1 Million	Şırnak	0.6 Million
Aydın	1.1 Million	Çorum	0.5 Million
Tekirdağ	1.1 Million	Ağrı	0.5 Million
Sakarya	1.1 Million		



24 urban centers
With Populations
over 1 million



2nd

LARGEST COUNTRY IN
EUROPE IN TERMS OF
AGRICULTURAL
ECONOMY (2021)

with its **USD 45.4 billion**
agricultural production volume



14th

LARGEST COUNTRY IN
THE WORLD IN TERMS
OF AGRICULTURAL
ECONOMY (2021)



3rd

LARGEST AGRICULTURAL
PRODUCING COUNTRY IN
THE WORLD BY QUANTITY
FOR LEADING
COMMODITIES (2021)



FRUITS,
VEGETABLES,
COARSE GRAINS,
DAIRY AND OILS



TÜRKİYE'S RANKINGS FOR AGRICULTURAL AND AGROFOOD PRODUCTION AND EXPORT



NO 1



GLOBAL PRODUCER OF

**Apricots
Cherries
Figs
Hazelnuts
Quinces**

NO 2



GLOBAL PRODUCER OF

**Melons
Watermelons
Cucumbers
Apples**

NO 3



GLOBAL PRODUCER OF

**Tomatoes
Sour cherries
Pistachios**

NO 4



GLOBAL PRODUCER OF

**Eggplants
Lentils
Peaches and nectarines
Walnuts
Chestnut**

NO 1



GLOBAL EXPORTER OF

**Dried apricots
Dried figs
Quinces
Raisins
Flour (Wheat)**

NO 2



GLOBAL EXPORTER OF

**Apricots
Apple juice
Macaroni
Peaches and nectarines**

NO 3



GLOBAL EXPORTER OF

Lentils

RISING OPPORTUNITIES

Key policy agendas for Turkish agrofood sector

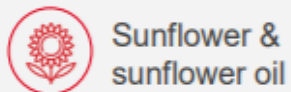
High demand&import

Environment&
Health-friendly

High value - added

Sustainability and
security of food supply

MAJOR COMMODITIES



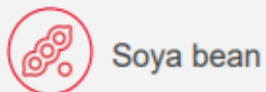
Sunflower & sunflower oil



Wheat



Maize



Soya bean

Rising opportunities



Walnuts



Almonds



Greenhouse products



Industrial hemp



Seeds



Medicinal and aromatic plants



Essential oils



Tropical fruits



Berries



Frozen fruits & vegetables



Licensed warehousing



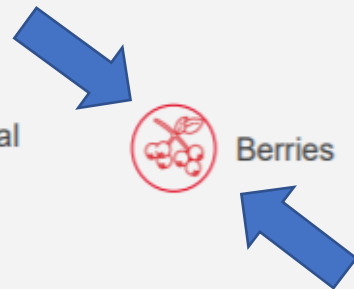
Pet food



Aquaculture



Milk proteins



THE GEOGRAPHY OF BLUEBERRY PRODUCTION



Current production areas













Middle East Highbush Hectares by Country

Middle East	Planting					2021 Production		
Growth Totals	2017	2018	2019	2020	2021	Fresh	Process	Total
Turkey	292	335	250	350	500	3.72	0.17	3.89
Israel	35	45	52	60	68	0.26	-	0.26
United Arab Emirates	2	5	15	25	32	0.11	-	0.11
Egypt	18	20	30	40	60	0.09	-	0.09
Iran	8	10	10	10	12	0.06	-	0.06
Jordan	0	0	2	4	6	0.01	-	0.01
Saudi Arabia	0	1	1	1	1	-	-	0.01
Middle East Totals	356	416	360	490	679	4.25	0.17	4.42

Source: IBO 2022 Report

2022: 660 hectares

June 2023 : 1000 hectares , 7k tons

2025: 3500* hectares ,40k* tons

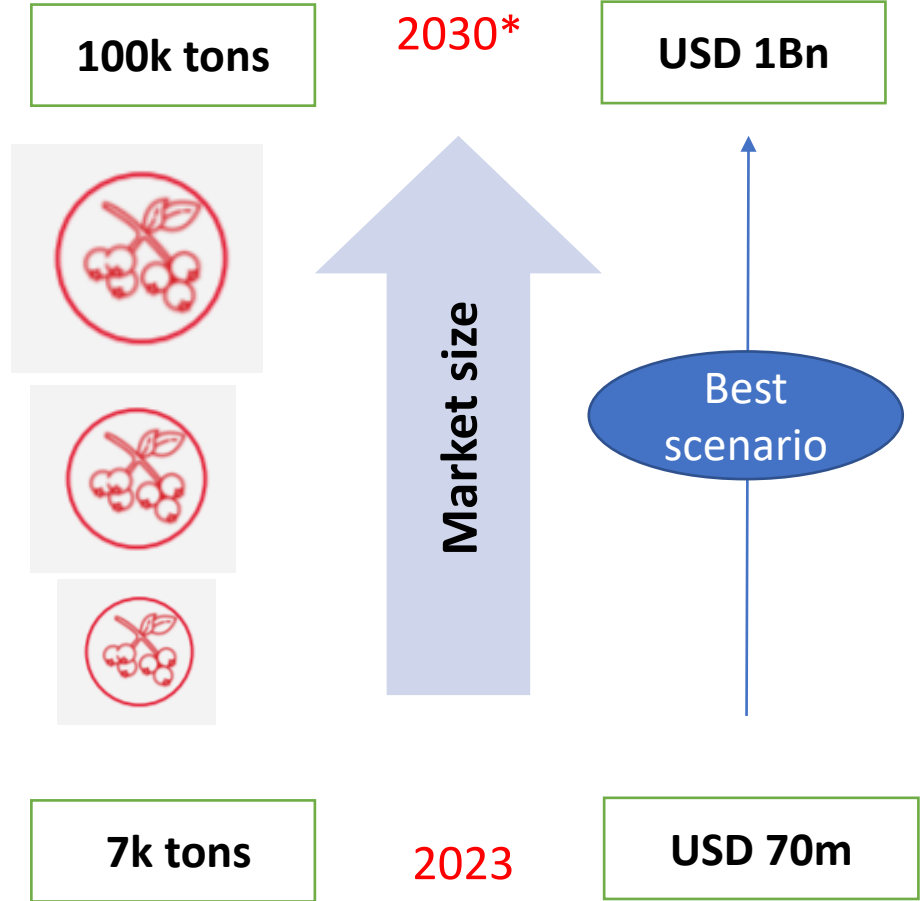
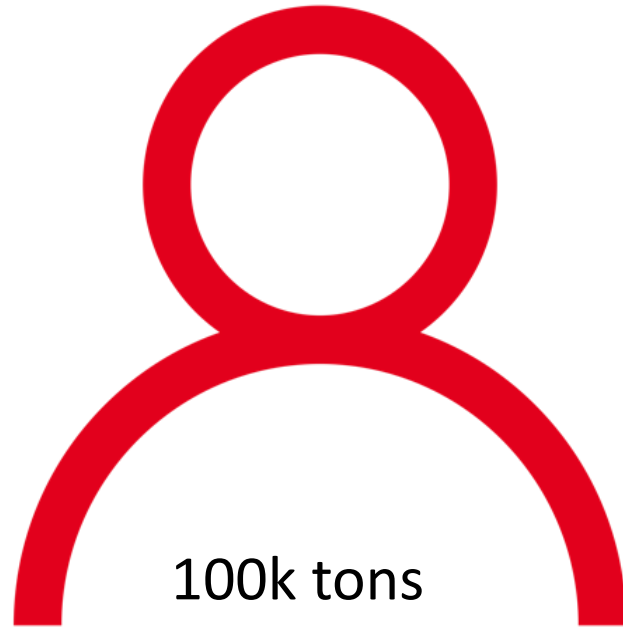
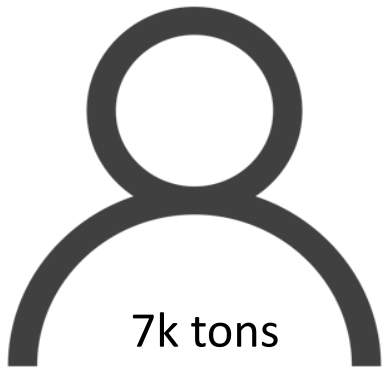
2021 Top 10 Highbush Yield by Country

#	Country	2018 Yield	2019 Yield	2020 Yield	2021 Yield
1	Peru	13,501.34	17,101.33	16,379.18	19,205.91
2	Spain	20,919.95	20,057.56	18,694.98	19,008.71
3	Namibia	9,106.00	9,464.00	13,600.00	17,391.30
4	Austria	13,835.01	18,481.73	16,900.00	17,272.73
5	Turkey	5,600.00	6,800.00	8,000.00	15,560.00
6	Ecuador	0.00	15,000.00	16,000.00	15,000.00
7	Georgia	9,117.65	9,400.00	9,500.00	14,545.45
8	New Zealand	3,755.93	5,149.66	7,155.56	14,461.54
9	Portugal	18,760.20	21,666.67	21,000.00	14,414.40
10	Morocco	13,480.66	12,700.00	13,457.94	13,694.74

Source: IBO 2022 Report

TÜRKİYE'S BLUEBERRY INDUSTRY GROWTH FORECAST

Blueberry production



The breakdown of targeted production: 60% for export as fresh fruit, 20% for domestic market as fresh fruit, 20% for processing

Advantages of Türkiye

- ✓ Its agricultural history
- ✓ Hourly cost of harvest worker is around \$2.5 in Türkiye, while it is around \$10 in the advanced economies. Availability of labors!
- ✓ Wide range of climatic conditions: Possibility to extend the harvest period from 2 months to 7-8 months
- ✓ Well-positioned to supply to Europe and the ME and Russia regions. Wide geographical range of Turkish Cargo can help!
- ✓ Advantageous loans for blueberry growers
- ✓ Fast growing domestic demand

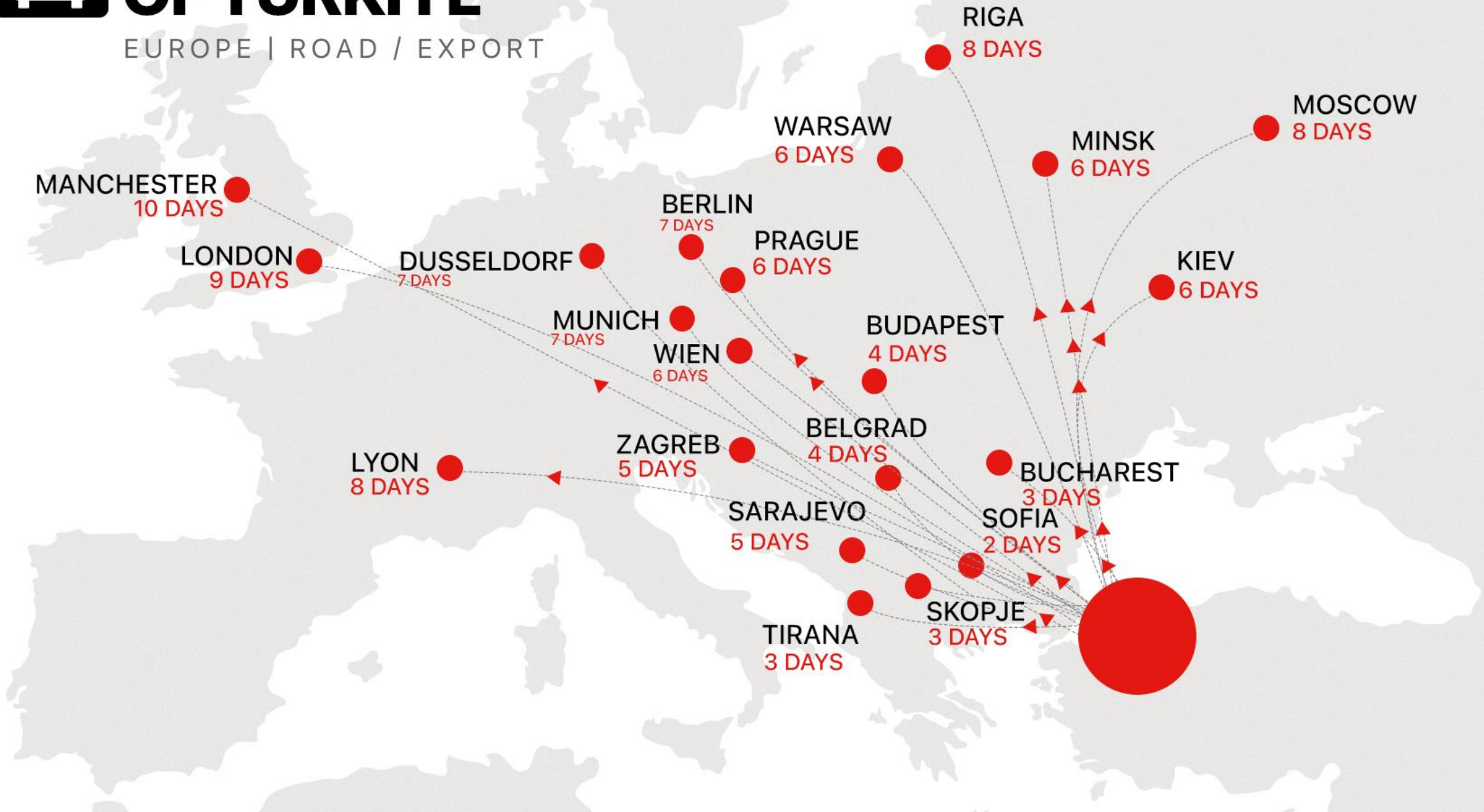
Things to improve

- ✓ IP Protection in vegetatively propagated crops is the key!
- ✓ More FDIs (breeders, producers, etc.) for proper production and ensuring standards as well as know-how transfer
- ✓ Building a proper university-industry collaboration model



LOGISTICS CAPABILITIES OF TÜRKİYE

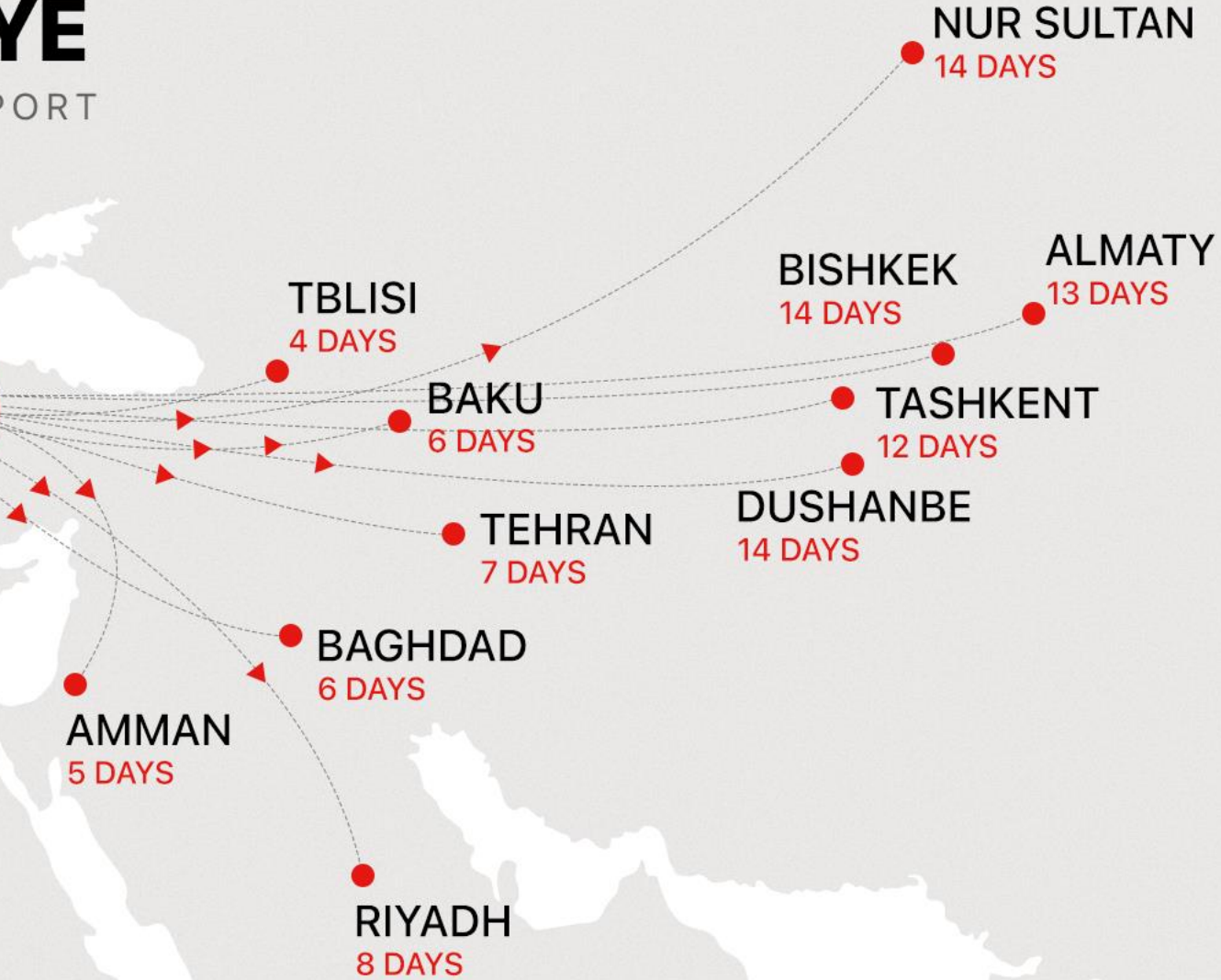
EUROPE | ROAD / EXPORT



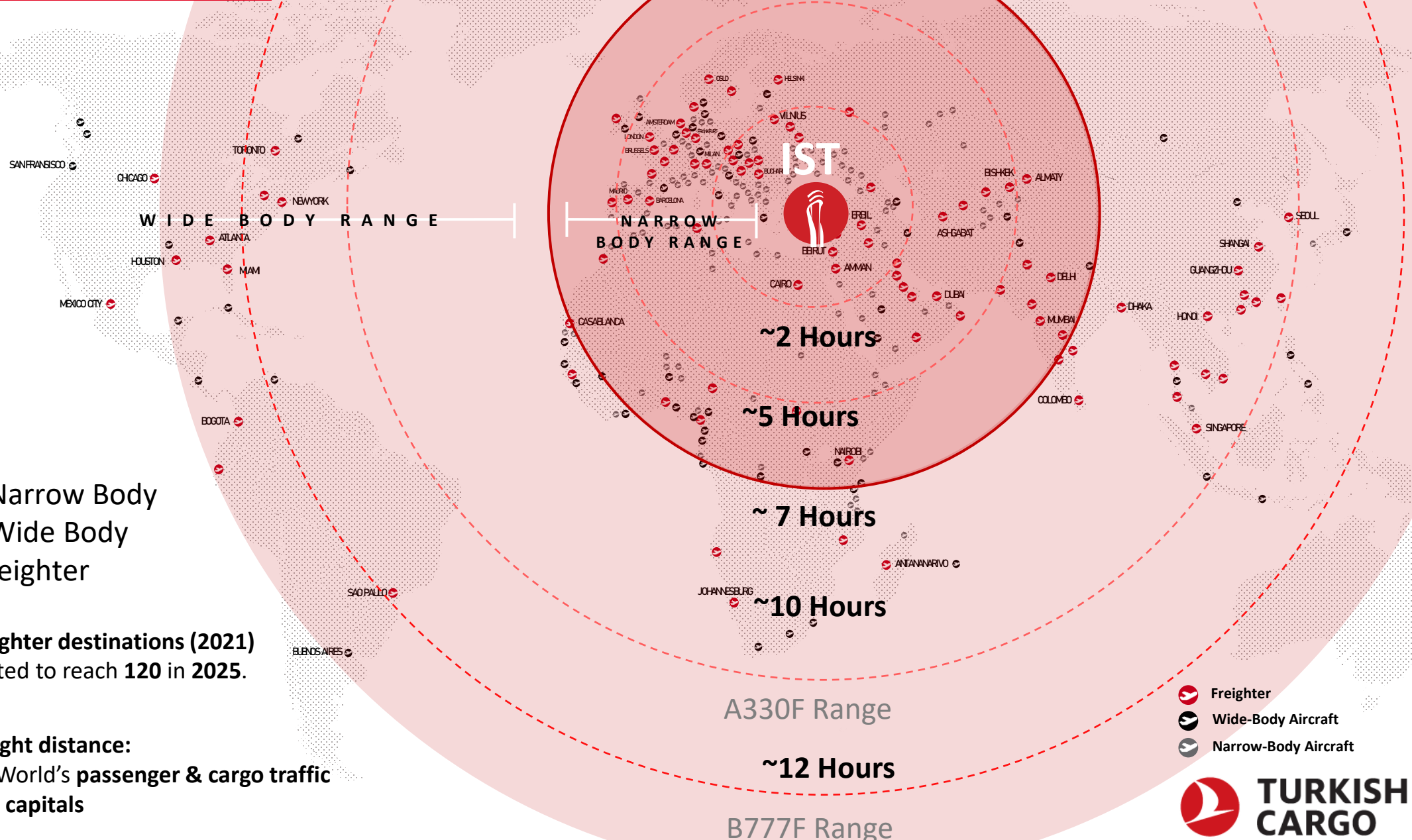


LOGISTICS CAPABILITIES OF TÜRKİYE

ASIA | ROAD / EXPORT



ISTANBUL AS A MEGA HUB



WIDE BODY RANGE

NARROW BODY RANGE

~2 Hours

~5 Hours

~7 Hours

~10 Hours

A330F Range

~12 Hours

B777F Range

FLEET



257 Narrow Body
109 Wide Body
20 Freighter



98 freighter destinations (2021)
expected to reach 120 in 2025.

In 7 hours flight distance:

- 40% of World's passenger & cargo traffic
- Over 60 capitals

- Freighter
- Wide-Body Aircraft
- Narrow-Body Aircraft





PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT
OFFICE**

Thanks for listening!

Halit Duran

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