

Tomato processing in Turkey

Turkey accounts for 13 % of the tonnage processed within AMITOM, with an average of 1 565 000 tonnes over the last five years. Since the creation of AMITOM in 1978/79, the tonnage processed has increased almost four-fold. There are however huge annual variations, with a minimum of 950 000 tonnes and a maximum of 2 000 000 tonnes over the last five years. Along with Spain and Tunisia, Turkey is one of the Mediterranean countries where production has increased the most.

In 2005, 1 626 000 tonnes of fresh tomatoes were processed out of which 269 000 tonnes of paste, 11 000 tonnes of diced/peeled tomatoes and 8 000 tonnes of sundried tomatoes have been produced.

Tomato production and processing are mainly situated in the region around Bursa, on the Marmara coast, and in the region of Balıkesir and Izmir, along the North Aegean Region. There are also some small companies by the Black Sea and in the European part of the country and Central Anatolia. Altogether there are about 30 processing firms running 45 factories. The first modern plant was set up in 1968 by TAT in the region of Bursa with the assistance of Heinz and the partnership of Migros-Switzerland. TAT was Turkey's first tomato paste producer on industrial basis. The industry has greatly developed since then, notably thanks to government incentives in the 1970's, which enabled processing capacity to quickly reach 270 000 tonnes of paste.



Processing tomatoes are mainly grown on small farms employing mainly family labor. About 80% of the production is contracted between farmers and processors prior to planting. The seeds are then supplied by the processors, which explains why over 50% of the varieties used are hybrids, chosen because they produce tomatoes with a high dry matter content. Processors also provide technical assistance to the growers, supply fertilizers, advance payments and even pesticides if diseases appear. Farmers have their own nurseries and sow around mid-March. When there is no more risk of frost, towards the end of April, plants are transplanted into the fields, with

bare roots. But during last 5 years the tube seedling distribution to the contracted growers has been increasing very rapidly, through the leadership of big companies. The harvesting season starts as early as early July in the South near Izmir but is quite late for the more Northern factories, starting end July. By using very early varieties, tomato season can begin end of July and last mid October. Harvesting is still done manually, with up to three pickings in the same fields. The first picking is carried out when more than half of the tomatoes are ripe. Most of the crop is irrigated by furrows. In some regions, especially in the ones that don't have access to enough water resources, sprinkler system is used for irrigation. Also, the drip irrigation system has been used more extensively recent years, with up to 60-70% usage by some factories' farmers.

Factories are equipped with very modern and high performance technology. Big daily processing capacities absorb production peaks. Processing capacity is estimated at close to 500 000 tonnes of paste, with a 60 days season and factories operating round the clock. In practice, the real processing capacity in Turkey is close to 375 000 tonnes of paste and only 7 or 8 plants (3 – 4 companies) can produce high quality paste. Because of the short duration of the harvest season and of the uncertain weather, these firms have very powerful industrial equipment, with high daily processing capacities.

Since the beginning of the 1990's, the industry has undergone a major reorganization, with notably the break-up of one large Turkish company, which had to sell off large parts of its capacity, subsequently taken over by small local operators. In the meantime, some newcomers acquired their own processing capacities. Few plants have been built, which paved the way for increasing the Turkish processing capacity. However, due to the financial crisis that the industry experienced in 2001, many factories changed hands or shut down.

Turkey exports quality products, notably to Japan and Russia. The exports to the EU countries have fallen extensively in recent years due to the ineffectiveness of the Turkish non-duty tariff quotas. The country also has large outlets for standard quality products produced in large quantity towards the end of the processing seasons: such as its own domestic market (estimated to be about 100 000 tonnes of canned paste), as well as Arab countries and some former Soviet Republics and to Eastern Africa.

ANNEE	Production totale de tomates (1000tonnes)	Production de tomates transformées (1000 tonnes)	Evolution du volume transformé (index100 en 1978)	Evolution du volume transformé (en % AMITOM)	Evolution du prix des tomates fraiches (US/100kg bord champs)
1978/79	3 300	450	100%	8,10%	2,8
1979/80	3 500	550	122%	8,00%	
1980/81	3 500	600	133%	8,90%	
1981/82	3 600	700	156%	10,60%	
1982/83	3 700	800	178%	12,00%	3,52
1983/84	3 700	900	200%	11,00%	2,93
1984/85	4 000	1 000	222%	9,40%	2,73
1985/86	4 900	1 100	244%	12,60%	2,87
1986/87	5 000	700	156%	11,60%	2,97
1987/88	5 000	760	169%	12,10%	2,83
1988/89	5 250	1 050	233%	15,00%	3,67
1989/90	5 750	1 500	333%	16,50%	4,38
1990/91	6 000	1 280	284%	14,50%	6,15
1991/92	6 200	1 110	247%	13,60%	5,16
1992/93	6 450	1 115	248%	15,30%	5
1993/94	6 150	832	185%	11,00%	5,75
1994/94	6 300	1 100	244%	12,40%	6,7
1995/96	7 150	1 920	427%	20,30%	6,99
1996/97	7 300	1 775	394%	16,80%	5,55
1997/98	6 600	1 145	254%	13,40%	9,05
1998/99	8 290	1 790	398%	16,30%	6,51
99/2000	8 956	1 750	389%	14,20%	6,26
2000/01	8 890	1 300	289%	11,80%	5,85
2001/02	8 425	950	211%	10,00%	3,4 to 5,0
2002/03	9 450	1 500	333%	14,25%	-
2003/04	9 820	2 000	364%	16,93%	7,14
2004/05	9 440	1 750	292%	12,29%	6,67
2005/06	9 700	1 626	361%	12,40%	6,63
YEAR	Total tomato production ('000 tonnes)	Processing tomato production ('000 tonnes)	Evolution of the processed volume (index 100 in 1978)	Evolution of the processe volume (in % AMITOM)	Evolution of the rpice of fresh totatoes (US 100kg farm gate)

SIID Tomato Paste Exporters and Producers Association

Tomato Paste Exporters and Producers Association joined AMITOM in 1980. The entity serves its mission with activities in three major groups. The basis of these groups of activities can be summarized as follows: Communication with state on behalf of its members for the benefit and securing the rights of its members and the sector they are active in, organizing internal meetings for cooperation; Developing and supervising the execution of agricultural research projects in cooperation with various universities; Initiating worldwide contacts for opening up to world markets and AMITOM membership for collaboration with European countries.