WHY INVEST IN TURKISH AGROFOOD INDUSTRY?
AGENDA

1 Executive Summary
2 Turkish Agrofood Industry Outlook
3 Growth Drivers in Türkiye
4 Opportunities in Turkish Agrofood Industry
5 Success Stories

EXECUTIVE SUMMARY
EXECUTIVE SUMMARY

TÜRKİYE HAS A GROWING MACHINERY INDUSTRY
OFFERING OPPORTUNITIES IN MANY AREAS...

FAVORABLE INVESTMENT ENVIRONMENT

• Strong macroeconomic growth with increasing income per capita and a burgeoning middle-class
• Favorable demographics with a dynamic, young, and skilled labor force
• Cost-competitive labor prices. Compared to Europe and the rest of the world, the labor costs in the sector are 70%-80% lower
• Strong government support through incentives
• Developed industrial and commercial infrastructure

STRONG INTERNATIONAL PRESENCE

• Global agrofood giants are present in Türkiye with significant productive activities, using Türkiye as a hub to access regional markets
• Successful partnerships with local companies to grow in the region, capitalizing on locals’ experience and networks

LUCRATIVE OPPORTUNITIES IN SUB-SECTORS

• Geographically well-placed to take advantage of trade opportunities in Europe, Middle East, and former Soviet countries
• With a growing population of more than 83 million, Türkiye is one of the largest markets in the region
• The government invests heavily in irrigation projects and improvements to infrastructure

STRENGTHS OF THE INDUSTRY

• Agriculturally sufficient country with favorable climate, large arable lands, and abundant availability of water resources
• Considered to be one of the leading countries in the world in the field of agriculture and food
• Export opportunities thanks to Türkiye’s proximity to regional markets
• Strong food and agriculture sector, which employed about 18% of the active population of the country and represented approximately 6.6% of GDP in 2020
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TURKISH AGROFOOD INDUSTRY OUTLOOK
LARGEST COUNTRY IN EUROPE IN TERMS OF AGRICULTURAL ECONOMY (2022)

with its **USD 58.5 billion** agricultural production volume

LARGEST COUNTRY IN THE WORLD IN TERMS OF AGRICULTURAL ECONOMY (2022)

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

FRUITS, VEGETABLES, COARSE GRAINS, DAIRY AND OILS

Source: World Bank, United States Department of Agriculture
**TÜRKİYE’S RANKINGS FOR AGRICULTURAL AND AGROFOOD PRODUCTION AND EXPORT (2022)**

**PRODUCTION AMOUNT**

1. **GLOBAL PRODUCER OF**
   - Apricots
   - Cherries
   - Figs
   - Hazelnuts
   - Quinces

2. **GLOBAL PRODUCER OF**
   - Melons
   - Watermelons
   - Cucumbers
   - Apples
   - Natural honey
   - Olives
   - Raw milk of sheep
   - Mandarins

3. **GLOBAL PRODUCER OF**
   - Tomatoes
   - Pistachios
   - Chickpeas
   - Cranberries
   - Peaches and nectarines
   - Spinach
   - Strawberries

4. **GLOBAL PRODUCER OF**
   - Eggplants
   - Lentils
   - Walnuts
   - Chestnut
   - Almonds
   - Chillies and peppers
   - Pears
   - Sour cherries

**EXPORT AMOUNT**

1. **GLOBAL EXPORTER OF**
   - Apricots (fresh and dried)
   - Dried figs
   - Quinces
   - Raisins
   - Hazelnuts

2. **GLOBAL EXPORTER OF**
   - Apricots
   - Apple juice
   - Macaroni
   - Peaches and nectarines

3. **GLOBAL EXPORTER OF**
   - Lentils
   - Yoghurt
   - Cherries

Source: FAO
TÜRKİYE HAS BECOME A MAJOR PLAYER IN THE WORLD AGRICULTURAL PRODUCTION IN THE LAST TWO DECADES.

The agricultural GDP increased by 141% between 2002 and 2022.

Agriculture sector employed almost 18 percent of the country’s working population and that accounted for 6.5% of the country’s GDP in 2022.
Turkish fertilizer consumption per hectare: 130 kg while the world average: 138 kg

Türkiye's demand for fertilizers is 10th highest in the world.

The lack of local raw material supply in all three raw material categories (Nitrat, Phosphorus and Potassium)

756 certified seed producers in Türkiye & a significant proportion is multinational brands & producing 1.36 million tons of seeds

2.8 million enterprises

14k associations & cooperatives

4.7 million employment: 15% of national employment

Agricultural land: 37.7 million ha

Average enterprise size: 6 ha

67% of total enterprises are below 5 ha size, realizing 22% of total planting

78% of planting activities are carried out by remaining medium and large companies.

51k food companies with 514k employment

Food manufacturing industry turnover: USD 54bn - most contributing sector to total manufacturing sector turnover

A large number of major multinationals active in processing business: Mondelez, PepsiCo, The Coca-Cola Company, Mars, Nestle, Unilever, Corteva, Dr. Oetker, Cargill, Ferrero, Danone, among others.

Türkiye's grocery retail market has experienced rapid expansion in parallel with the shift to modern Western-style grocery retail formats.

Strong presence of Turkish retailers such as BİM, A101, Şok and Migros, while foreign retailers including CarrefourSA (JV) and Metro are also performing well.

Total sales of grocery retailers: USD 69Bn (Modern grocery retailers: USD 43bn - Traditional grocery retailers: USD 27bn)

Imports of consumer-oriented agrofood products: USD 3.5bn

A domestic market of 85 million with increasing per capita food consumption each year

Türkiye is well-positioned to easily reach Europe, MENA, and Central Asia markets.

Agrofood exports: USD 29.9bn

Agrofood imports: USD 23bn

Source: TurkStat, SSI, MOAF, USDA
TÜRKİYE HAS AN ESTIMATED TOTAL OF 11,000 PLANT SPECIES, WHEREAS THE TOTAL NUMBER OF SPECIES IN EUROPE IS 11,500.

TÜRKİYE IS THE WORLD LEADER IN THE PRODUCTION OF VARIOUS CROPS.

**ONE OF TOP 5 PRODUCERS**
Melons, apples, watermelons, cucumbers, lentils, pistachios, sour cherries, almonds, chestnut, green beans, olives, sugar beet, tomatoes, walnuts, plums

**ONE OF TOP 10 PRODUCERS**
Cotton, barley, sunflower seed, grapes

Plant production (million tonnes)

<table>
<thead>
<tr>
<th>Year</th>
<th>Cereals and other crops</th>
<th>Fruits, beverages and spices crops</th>
<th>Vegetables</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>25</td>
<td>13</td>
<td>77</td>
</tr>
<tr>
<td>2023</td>
<td>32</td>
<td>27</td>
<td>58</td>
</tr>
</tbody>
</table>

Plant production (billion USD)

<table>
<thead>
<tr>
<th>Year</th>
<th>Plant production (billion USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>22.6</td>
</tr>
<tr>
<td>2020</td>
<td>34.9</td>
</tr>
</tbody>
</table>

CAGR 2002-2022: 2.4%

Source: TurkStat

invest.gov.tr
TÜRKİYE BOASTED PRODUCTION OF 22.9 MILLION TONS OF MILK IN 2019, MAKING IT THE LEADING MILK AND DAIRY PRODUCER IN ITS REGION

The country is one of top ten producing countries of honey and eggs in the world.

Production of animal products
(million tonnes)

Production of animal products
(billion USD)

Source: TurkStat
AGROFOOD FOREIGN TRADE

TURKISH EXPORTS OF AGROFOOD PRODUCTS INCREASED 6 TIMES IN THE LAST TWO DECADES.

Agrofood exports make up 11% of Türkiye’s total exports

Exports (billion USD)

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<thead>
<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>3.7</td>
<td>7.8</td>
<td>18</td>
<td>18.6</td>
<td>19.2</td>
<td>19.7</td>
<td>20.7</td>
<td>23</td>
<td>29.9</td>
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</tbody>
</table>

CAGR 2002-2022: 10%

Imports (billion USD)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<td>Value</td>
<td>2</td>
<td>3.4</td>
<td>12.5</td>
<td>14.4</td>
<td>14.4</td>
<td>14.6</td>
<td>15.2</td>
<td>17.1</td>
<td>23.2</td>
</tr>
</tbody>
</table>

CAGR 2002-2022: 12%

World leader in the export of flour, quinces and raisins

Breakdown of exports by sub-sector (2022)

- Plants and plant-based food: 84%
- Animal products and animal-based food: 3%
- Beverages: 13%

Breakdown of imports by sub-sector (2022)

- Plants and plant-based food: 93%
- Animal products and animal-based food: 5%
- Beverages: 2%

Source: TurkStat
A SIGNIFICANT PORTION OF IMPORTED AGRO-PRODUCTS ARE USED BY AGROFOOD INDUSTRY TO PROCESS AND EXPORT.

### Dried Fruits and Vegetables Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Raisins: 478
    - Dried apricots: 393
    - Dried figs: 248
  - **Imports**:
    - Raisins: 42
    - Dried coconuts: 39
    - Prunes: 17

### Vegetable Oils Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Sunflower oil, refined: 1,175
    - Sunflower oil, crude: 706
    - Soybean meal: 537
  - **Imports**:
    - Sunflower oil, crude: 2,198
    - Palm oil, refined: 1,207
    - Soybean meal: 814

### Flour Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Flour, wheat: 1,497
  - **Imports**:
    - Wheat: 3,280
    - Wheat bran: 314
    - Flour, wheat: 28

### Sugar & Sugar Products Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Candies: 537
    - Biscuits: 439
    - Wafer and waffles: 434
  - **Imports**:
    - Sugar: 445
    - Foods with chocolates: 108
    - Molasses: 92

### Pasta Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Pasta: 880
    - Semolina: 122
    - Noodle: 79
  - **Imports**:
    - Durum wheat: 74
    - Pasta: 10
    - Noodle: 1.7

### Fresh Fruits Sector (million USD)

- **Top 3 Trade Items**
  - **Exports**:
    - Mandarins: 422
    - Lemons: 271
    - Cherries: 201
  - **Imports**:
    - Dates: 63
    - Bananas: 37
    - Mandarins: 14

Source: TurkStat
THE LIVESTOCK SECTOR NEEDS FURTHER INVESTMENTS TO MEET THE GROWING DEMAND..

Source: TurkStat
GROWTH DRIVERS IN TÜRKİYE

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11th largest economy in the World

RANKING OF ECONOMIES BY GDP AT PPP

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>USA</td>
<td>CHINA</td>
<td>CHINA</td>
</tr>
<tr>
<td>2.</td>
<td>CHINA</td>
<td>USA</td>
<td>USA</td>
</tr>
<tr>
<td>3.</td>
<td>JAPAN</td>
<td>INDIA</td>
<td>INDIA</td>
</tr>
<tr>
<td>4.</td>
<td>GERMANY</td>
<td>JAPAN</td>
<td>GERMANY</td>
</tr>
<tr>
<td>5.</td>
<td>INDIA</td>
<td>GERMANY</td>
<td>RUSSIA</td>
</tr>
<tr>
<td>6.</td>
<td>RUSSIA</td>
<td>INDONESIA</td>
<td>JAPAN</td>
</tr>
<tr>
<td>7.</td>
<td>FRANCE</td>
<td>BRAZIL</td>
<td>BRAZIL</td>
</tr>
<tr>
<td>8.</td>
<td>UK</td>
<td>UK</td>
<td>UK</td>
</tr>
<tr>
<td>9.</td>
<td>BRAZIL</td>
<td>FRANCE</td>
<td>FRANCE</td>
</tr>
<tr>
<td>10.</td>
<td>ITALY</td>
<td>MEXICO</td>
<td>MEXICO</td>
</tr>
<tr>
<td>11.</td>
<td>MEXICO</td>
<td>ITALY</td>
<td>TÜRKİYE</td>
</tr>
<tr>
<td>12.</td>
<td>INDONESIA</td>
<td>TÜRKİYE</td>
<td>TÜRKİYE</td>
</tr>
<tr>
<td>13.</td>
<td>SPAIN</td>
<td>POLAND</td>
<td>POLAND</td>
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<tr>
<td>14.</td>
<td>CANADA</td>
<td>ROMANIA*</td>
<td>ROMANIA*</td>
</tr>
<tr>
<td>15.</td>
<td>S.KOREA</td>
<td>BULGARIA*</td>
<td>BULGARIA*</td>
</tr>
<tr>
<td>16.</td>
<td>SPAIN</td>
<td>CZECHIA</td>
<td>CZECHIA</td>
</tr>
<tr>
<td>17.</td>
<td>S.ARABIA</td>
<td>HUNGARY</td>
<td>HUNGARY</td>
</tr>
<tr>
<td>18.</td>
<td>IRAN</td>
<td>TAIWAN, PRC</td>
<td>TAIWAN, PRC</td>
</tr>
</tbody>
</table>

AVERAGE ANNUAL GDP GROWTH (%)

2002-2022

<table>
<thead>
<tr>
<th></th>
<th>2002-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4</td>
<td>TÜRKİYE</td>
</tr>
<tr>
<td>3.9</td>
<td>POLAND</td>
</tr>
<tr>
<td>3.5</td>
<td>ROMANIA*</td>
</tr>
<tr>
<td>2.9</td>
<td>BULGARIA*</td>
</tr>
<tr>
<td>2.5</td>
<td>CZECHIA</td>
</tr>
<tr>
<td>2.5</td>
<td>HUNGARY</td>
</tr>
</tbody>
</table>

REAL GDP GROWTH

(INDEX: 2002=100)

Source: TurkStat, IMF, PPP; Purchasing Power Parity, *2021 Data
Turkish economy has more than tripled over the past 20 years and is promising to be on the growing trend.

### Turkish Economy
(GDP at current prices, $Billion)

- 2002: 236
- 2022: 906

### Contribution to GDP Growth 2002-2022 (%)

- Domestic Consumption: 86
- Investment Expenditures: 29
- Exports: 26
- Stocks: -20
- Imports: -21

Source: TurkStat

Robust domestic market and entrepreneurial private sector spurred investments and exports.
DOMESTIC MARKET

Türkiye’s economic growth has paved the way for emergence of a sizeable agri-middle-class with an increasing purchasing power.

**Income per capita**

\[(\text{GDP per capita, current prices at purchasing power parity})\]

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>$10,988</td>
</tr>
<tr>
<td>2022</td>
<td>$39,301</td>
</tr>
</tbody>
</table>

**Stock of Tractors**

\[(\text{millions of tractors})\]

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2</td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Largest tractor sales in Europe, 5th in the world, 75% of the local market supplied by local players.

Major producers in Türkiye:

- TürkTraktör
- YANMAR
- TÜMOSAN
- JOHN DEERE

Source: TurkStat, IMF
DOMESTIC MARKET FURTHER SUPPORTED BY EMERGING URBAN CENTERS

Total Population in 2022 85.3 million

İstanbul 15.9 Million
Ankara 5.8 Million
İzmir 4.5 Million
Bursa 3.2 Million
Antalya 2.7 Million
Konya 2.3 Million
Adana 2.3 Million
Şanlıurfa 2.2 Million
Gaziantep 2.2 Million
Kocaeli 2.1 Million
Mersin 1.9 Million
Diyarbakır 1.8 Million
Hatay 1.7 Million
Manisa 1.5 Million
Kayseri 1.4 Million
Samsun 1.4 Million
Balıkesir 1.3 Million
Kahramanmaraş 1.2 Million
Van 1.1 Million
Aydın 1.1 Million
Tekirdağ 1.1 Million
Sakarya 1.1 Million

Denizli 1.1 Million
Muğla 1 Million
Eskişehir 0.9 Million
Mardin 0.9 Million
Trabzon 0.8 Million
Malatya 0.8 Million
Ordu 0.8 Million
Erzurum 0.7 Million
Afyonkarahisar 0.7 Million
Sivas 0.6 Million
Adıyaman 0.6 Million
Batman 0.6 Million
Tokat 0.6 Million
Zonguldak 0.6 Million
Elazığ 0.6 Million
Kütahya 0.6 Million
Çanakkale 0.6 Million
Osmaniye 0.6 Million
Şırnak 0.6 Million
Çorum 0.5 Million
Âğrı 0.5 Million

Source: TurkStat, 2021
SKILLED AND COMPETITIVE LABOR FORCE

ANNUAL NUMBER OF GRADUATES
(thousands)

AVAILABILITY OF QUALIFIED ENGINEERS
(10=Available; 0=Unavailable) 2023

AVAILABILITY OF COMPETENT SENIOR MANAGERS
(10=Available; 0=Unavailable)

LABOR FORCE BY EDUCATION LEVEL

COST OF LIVING INDEX 2023
(New York=100)

REMUNERATION OF MANAGEMENT/ENGINEER
Total base salary plus bonuses and long-term incentives

Source: Ministry of National Education, Council of Higher Education, Turkstat, IMD World Competitiveness Yearbook Executive Opinion Survey based on an index from 0 to 10, Numbeo
DOMESTIC + ACCESSIBLE MARKETS

Customs Union with the EU allows direct access to the EU Market

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA

F R E E   A C C E S S

1 BILLION CONSUMERS

446 MILLION in EU
477 MILLION in FTA AREA
85 MILLION in TÜRKİYE

Source: IMF, Ministry of Trade, TurkStat, World Bank, Population as of 2022
*In ratification process
TÜRKİYE IS ALSO VERY ADVANTAGEOUS FOR MARITIME TRANSPORTATION, ALLOWING AGROFOOD PRODUCERS TO EXPORT EASILY.

Cargo handling statistics of Türkiye in 2020 (tons)

<table>
<thead>
<tr>
<th>Category</th>
<th>Tons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals</td>
<td>13,512,106</td>
</tr>
<tr>
<td>Oil seeds, oleaginous fruit and fats</td>
<td>6,817,726</td>
</tr>
<tr>
<td>Animal feed and foodstuff waste</td>
<td>4,701,744</td>
</tr>
<tr>
<td>Other non-perishable foodstuffs and hops</td>
<td>1,118,428</td>
</tr>
<tr>
<td>Sugars</td>
<td>438,674</td>
</tr>
<tr>
<td>Fresh and frozen fruit and vegetables</td>
<td>312,207</td>
</tr>
<tr>
<td>Livestock</td>
<td>101,377</td>
</tr>
<tr>
<td>Beverages</td>
<td>48,840</td>
</tr>
<tr>
<td>Potatoes (excluding frozen ones)</td>
<td>24,339</td>
</tr>
</tbody>
</table>

invest.gov.tr
INCENTIVES

LUCRATIVE INCENTIVES FOR AGROFOOD INVESTMENTS

Ministry of Agriculture and Forestry
- Supports for facility building/expansion
  - Rural Development Support Program
  - EU-TR Financed IPARD II Program
- Supports based on investment/crop/animal types
  - Livestock supports
  - Input supports (fertilizer, diesel)
  - Organic/Good farming practices supports
  - Crop supports
  - Certified seed and seedling supports
  - Other supports

Ministry of Industry and Technology
- General Investment Incentives
- Regional Investment Incentives
- Strategic Investment Incentives
- Project Based Investment Incentives

Treasury land acquisition for agrofood investments
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OPPORTUNITIES IN TURKISH AGROFOOD INDUSTRY
Key policy agendas for Turkish agrofood sector

**High demand & import**
- Sunflower & sunflower oil
- Wheat
- Maize
- Soya bean

**Environment & Health-friendly**
- 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

**High value - added**

**Sustainability and security of food supply**
SUCCESS STORIES

STRONG INTERNATIONAL PRESENCE IN TÜRKİYE

[Logos of various companies]
SUCCESS STORIES

AGROFOOD INDUSTRY GIANTS HAVE BEEN MANUFACTURING IN TÜRİĞE FOR DECADES

- Operational for 139 years
- 6 manufacturing facilities and 8 offices in Türkiye for chemicals, performance products, functional materials & solutions, agricultural solutions
- Sales of EUR 63 billion globally in 2018
- Managing 78 countries from Türkiye
- 800 employees
- Operational in Türkiye for 110 years
- 2 manufacturing facilities in Bursa
- Employs 3,800 people directly and over 7,000 indirectly
- Produces locally 95% of the products it sells in Türkiye
- Offers more than 800 products and around 50 brands in 12 different categories
- From its production hub in Türkiye, exports to the neighboring countries, particularly to MENA countries

- Producing in Manisa OIZ since 2013
- Made an initial investment of 95 million EUR and expanded it to produce more varieties of products
- 7 manufacturing facilities, 6 of them processing nuts
- Exporting to 100 countries from Türkiye

- Market share in sparkling of of Coca-Cola Icecek (CCI) in Türkiye is 65%
- Producing 25 brands in 5 categories
- Following the acquisition of Efes Invest in 2005, evolved from a bottling operation to a regional beverage company
- Producing 25 brands in 5 categories
- Exporting to 100 countries from Türkiye

- Operational in Türkiye for around 60 years
- 200 employees
- Headquarter & innovation center in Istanbul, seed conditioning & processing plant facility in Adana, sunflower R&D center in Lüleburgaz

- Operational in Türkiye for around 59 years
- More than 600 employees in 7 locations in Türkiye – Adana, Ankara, Istanbul, İzmir, Bursa, Balıkesir, Kocaeli

- 3 production facilities: starch & sweeteners in Bursa, fats & oils in Balıkesir, oleo-chemicals in Kocaeli

- Operational for 139 years
- 6 manufacturing facilities and 8 offices in Türkiye for chemicals, performance products, functional materials & solutions, agricultural solutions
- Sales of EUR 63 billion globally in 2018
- Managing 78 countries from Türkiye
- 800 employees
AGROFOOD INDUSTRY GIANTS HAVE BEEN MANUFACTURING IN TÜRKİYE FOR DECADES

SUCCESS STORIES

- Operational in Türkiye for over 100 years
- 8 manufacturing facilities, over 5,000 employees
- Uses Türkiye as a management hub for 35 countries
- New factory for personal and homecare categories in Türkiye creates an investment ecosystem of EUR 350 million along with suppliers
- 29 brands and presence in 9 out of 10 households with its products
- Exports from Türkiye to 34 countries

- Operating in Türkiye since 1993
- An important production facility with an indoor area of 85,000 m² in Gebze
- Sales of TL 872 million in 2018
- Employs about 1,200 people directly and about 900 indirectly
- Increased its investments in Türkiye steadily over the past 20 years

- Operational in Türkiye since 1998
- Over 500 employees