

TRANSPORTATION

Turkey's main port, which can handle unloading of bulk seed and bulk oil are as follows: Haydarpasa (Istanbul), Mersin, Iskenderun, Izmir, Giresun, Antalya. All these ports have minimum 300,000 tonnes/year unloading capacity for bulk seed and bulk oils, and high speed conveyor systems, and all other pier equipment used for loading and unloading.

Each port listed in above paragraph has either railway or highway (or both) connection to the plants located in inner parts of the country.

There are no transportation/distribution constraints in Turkey.

INDUSTRY STRUCTURE

OILSEED CRUSHING & REFINING

Major Turkish oilseed processing companies are provided above. Only Trakyabirlik is a farmers' cooperative; the rest are privately owned. In addition to these major processing plants, there are about 10,000 medium or small size processing plants throughout the country. It is very difficult to provide information on crushing/refining capacities and approximate market shares of each plant in Turkey. A survey on such information has not yet been conducted.

Almost 95% of local processing plants in Turkey are privately owned. The Turkish Government's Standards Institute (TSE) long ago determined standards for all oilseed products, and all producers must comply with TSE standards.

Turkey does not import oilseed end products, i.e. ready for retail sale. Local producers import only inputs they use in their production (seeds for crushing, soybean oil). For imported inputs agents and commission agents serve as intermediary between non-Turkish suppliers and local users (production plants). Local producers of oilseed products have their own distribution systems, and geographically they can reach almost 50-60% of the country. In other areas they work with authorized wholesaler/stocking distributors, the numbers of which are in the thousands.

In Turkey there are 74 provinces, and each province has its own chamber of industry. Oilseed processing plants are members of the chambers of their province. There is no association of oilseed products industrialists in Turkey.

OTHER OILSEED PRODUCTS

The following firms of those listed above produce margarine, other vegetable shortening, and soyfood products for both human and industrial uses: