

Economic Report Turkey

July 2025



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Despite headwinds: Turkish food industry continues to grow

A large, young market with moderate growth and plenty of potential: there are opportunities for food manufacturers and suppliers of processing and packaging machines. Turkey is strengthening biotech, but the pharmaceutical industry remains under pressure. The Turkish market for cosmetics is growing.

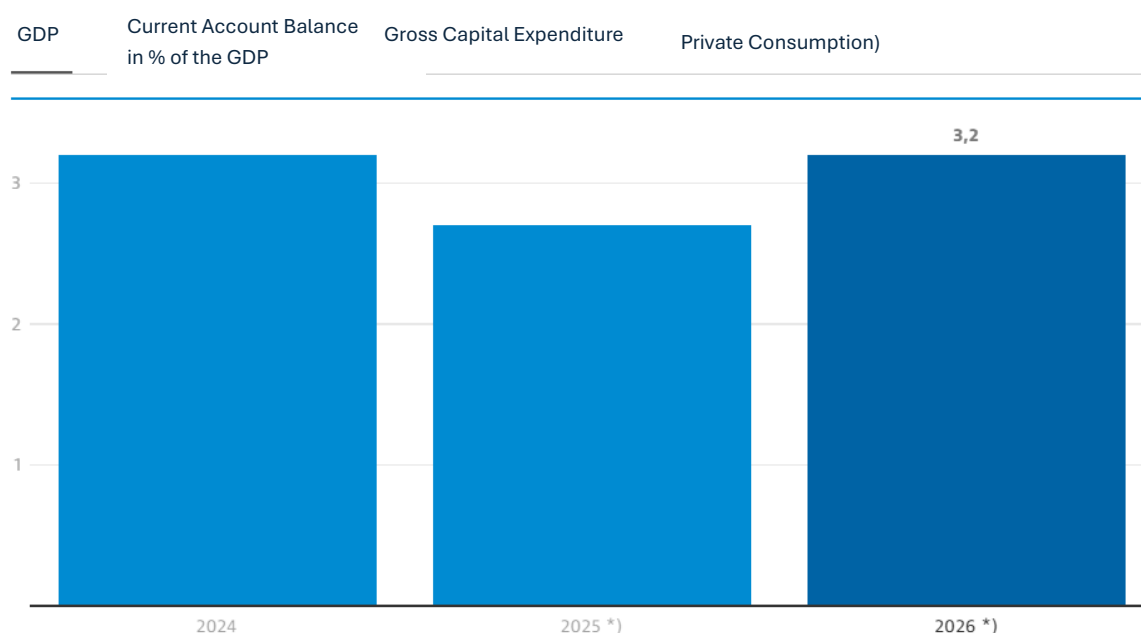
Overall economic outlook (as of May 2025)

The Turkish economy is currently characterized by a restrictive monetary policy, high inflation and a weak currency. Companies are vacillating between confidence and caution.

Economic development: economy cools down

According to the International Monetary Fund, Turkey's economic growth could slow to 2.7 percent in 2025 as a result of tighter monetary policy. Momentum is slowing in key sales markets such as the EU. However, consumption and exports are still driving Turkish growth. In April 2025, inflation amounted to 38%. Although key figures such as the development of producer prices indicate an improvement, events such as the imprisonment of Istanbul's mayor in March 2025 are being watched with concern by companies.

Growth loses momentum (real year-on-year change in percent)



* Forecast.

Source: Turkish Statistical Institute TÜİK 2025; International Monetary Fund 2025; Economist Intelligence Unit 2025

Following his re-election in May 2023, President Erdoğan changed course and adopted a restrictive monetary policy with the primary aim of combating horrendous inflation. Finance Minister Mehmet Şimşek, who took office, advocated a more reliable economic and monetary policy in order to strengthen the economy and attract investors to the country. However, recent developments have once again cast a shadow over confidence in Turkey as a business and investment location.

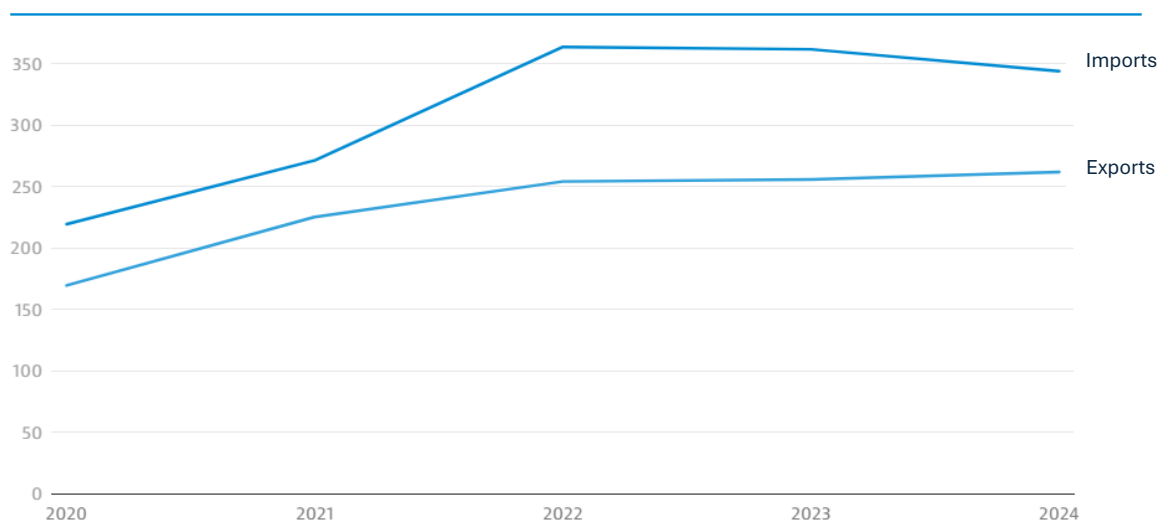
The business community is largely positive about the change of course. The decisions made so far give hope for a more reliable economic and monetary policy. However, many companies fear further U-turns by Erdoğan. It will be crucial for future development to regain the trust of international investors and the domestic economy.

Exports barely increase despite weak lira

The weak lira and nearshoring efforts by European companies are benefiting Turkish exporters. At the same time, however, imports of raw materials and primary products are becoming more expensive, which is weighing on the import-dependent industry.

The economic weakness in key markets is also putting pressure on exports. In 2024, exports rose moderately by 2 percent, while imports fell by 5 percent. With the EU accounting for 40 percent of Turkish exports, CBAM, the EU's CO₂ border adjustment mechanism, is a key issue for many exporters.

Exports increase only slightly (development of Turkish foreign trade; in billion US dollars)



Source: TÜİK 2025

Consuming instead of saving

Inflation has reduced the real purchasing power of households. Salary increases usually only cushion the losses. But inflation is still driving consumption, as saving is hardly worthwhile. The population is fleeing into gold, foreign currency, shares, cryptocurrencies or real estate due to the weak lira. Inflation signals are positive, but fall short of expectations. The central bank's key interest rate hike in April 2025 dampened hopes of more significant interest rate cuts in the second half of the year, which could enable cheaper loans and more consumption.

Top topic: Financing bottlenecks hamper economic activities

Small and medium-sized Turkish companies in particular are having a hard time at the moment, as

- the financing difficulties are exacerbated by key interest rate hikes,
- the weak lira makes it more expensive to take out and service foreign loans,
- the high exchange rate volatility complicates long-term planning and cost calculations and
- labor costs have risen sharply.

New investors remain skeptical

Despite the challenges, some companies are planning capacity expansions, especially export-oriented companies. However, new foreign investors are usually hesitant. One exception is the automotive industry. With a view to the EU as a sales market, foreign companies are investing heavily in e-mobility.

In 2024, 6.7 billion US dollars (US\$) of foreign direct investment flowed into Turkey. The largest inflows came from the Netherlands, followed by Germany, the USA, Ireland and Azerbaijan.

Government investments come under scrutiny

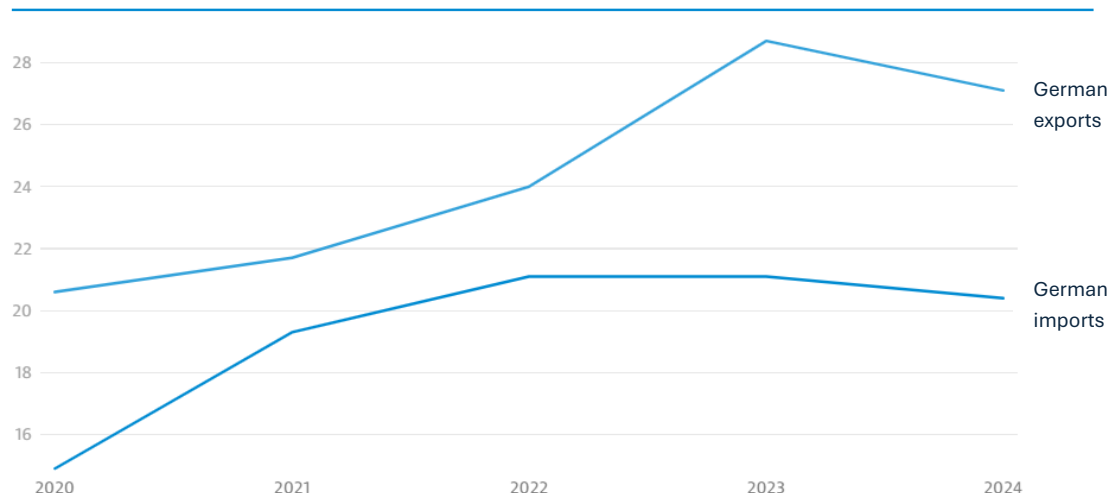
Finance Minister Şimşek has imposed a strict austerity program on public institutions. No new projects are to be included in the public sector investment program unless they are absolutely necessary. Ongoing projects are also being put to the test. The construction association TMB fears that progress on some projects will be very slow.

German perspective: market opportunities under pressure

Turkish importers are particularly price-sensitive due to financing difficulties and the weak lira, which weakens the competitive position of German suppliers. A further devaluation of the lira could exacerbate this situation, while falling key interest rates could ease the financing situation.

In 2024, German deliveries fell by 6 percent to around US\$ 27 billion. This put Germany in third place among the most important supplier countries, behind China (stable at USD 45 billion) and Russia (-4 percent to USD 44 billion). The largest German delivery items were motor vehicles and motor vehicle parts, machinery, medical and pharmaceutical products, plastics and aircraft.

German deliveries fall back after boom year 2023 (Bilateral trade in goods; in billion US dollars)



Source: TÜİK 2025

Companies undecided between optimism and caution

In the traditional survey conducted by the Turkish Chamber of Commerce Abroad in fall 2024, half of German companies rated their business situation as good despite the difficult conditions. Around 43 percent expect stable development over the next twelve months, while 31 percent even anticipate improvements. They cited the exchange rate, general conditions and labor costs as the biggest risks. Germany is a major investor in the country. In 2024, direct investments amounting to USD 772 million flowed into Turkey from Germany (2023: USD 511 million). At the end of 2024, Turkish statistics registered over 8,463 companies with German capital participation in Turkey. Given the current situation, the sentiment would probably be different today.

Background information on Turkey can be found in the GTAI-series "[Wirtschaftsdaten kompakt](#)", "[Recht kompakt](#)" and "[Zoll und Einfuhr kompakt](#)" as well as in the special "[Lieferkettensorgfaltspflichtengesetz \(LkSG\)](#)" and in the "[Klimaschutzatlas](#)".

Market Trends Food Industry

Inflation and currency weakness are currently weighing on demand. In the long term, however, the large, young market with growing consumer demand promises great potential.

The Turkish food market is growing steadily, albeit moderately. The main impetus is coming from the rising demand for ready-made and convenience products, growing health awareness and large-scale agricultural production. Online trade is also gaining momentum.

At the same time, the market is under pressure: persistently high inflation, currency fluctuations and economic uncertainties are reducing real purchasing power and dampening demand. Imported products are also becoming more expensive due to the devaluation of the Turkish lira, which is affecting their competitiveness.

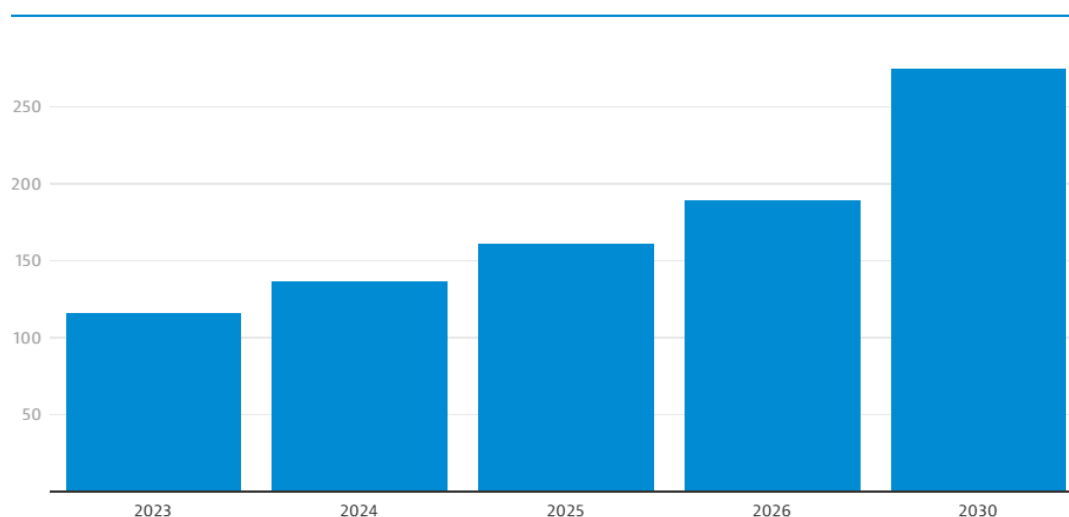
85 million people live in Turkey, including many young consumers who are keen to spend.

Consumer change and market reactions in the food industry

Consumer behavior has changed noticeably. Many households eat out less often and cook for themselves more frequently - this increases the demand for cooking ingredients, staple foods and ready meals. Many are turning to cheaper alternatives instead of brands. Discounters such as BIM, A101 or Şok are particularly popular, as are weekly markets, where fruit and vegetables are considered particularly inexpensive. The industry is responding flexibly: some manufacturers are focusing on smaller pack sizes at the same or increasing prices. Others are offering cheaper product lines for the domestic market and exporting higher-margin premium products.

Despite the tense situation, the medium-term prospects remain promising - also for foreign suppliers. The growing middle class, particularly in western metropolitan regions, and the young generation's openness to international brands are boosting demand for high-quality food. Tourism should further stimulate demand in the 2025 summer season.

Food sales in Turkey on the rise *) (in billions of US dollars)



* Estimates and forecasts.

Source: Statista 2025

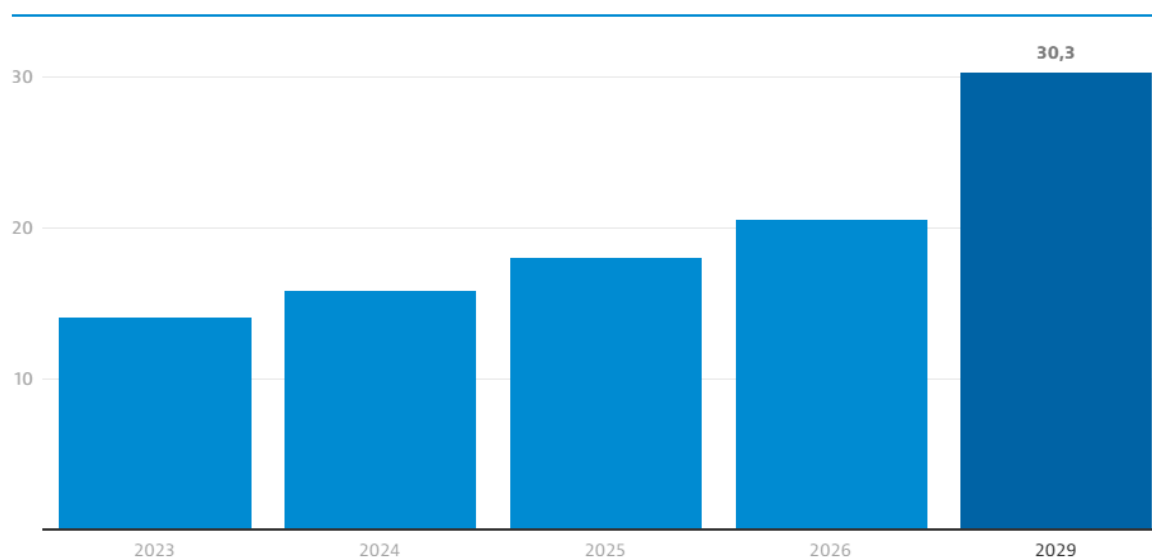
Which segments are growing in the Turkish food market

Sales in the food market are expected to amount to 161 billion US dollars (US\$) in 2025. In the medium term, from 2025 to 2030, the market research institute Statista expects average annual growth of 11.3 percent. Per capita sales are then expected to reach US\$ 1,830. The frozen food sector is developing particularly dynamically: according to Kerevitas (SuperFresh's parent company), the market will reach a volume of around US\$ 645 million and a market penetration of 85 percent in 2024 - an indication of the growing demand for frozen products.

The largest market segment is bread and cereal products with a projected revenue of US\$ 31 billion in 2025. The market for dairy products and eggs will reach around US\$ 22 billion in the same year. The high domestic demand and importance as a staple food makes these segments resistant to economic cycles. Demand for meat continues to rise - albeit under difficult conditions. Particularly sharp price increases for red meat are having a negative impact on consumption. Many households are cutting back on their meat consumption and opting for cheaper poultry. Nevertheless, the market is growing. The confectionery and snacks segment is also experiencing dynamic growth. Statista forecasts average annual growth of around 10 percent until 2030. Within the "sweet snacks" segment, chocolate is likely to retain the largest market share, while demand for premium and artisan products is on the rise.

The Turkish beverage industry is expected to generate sales of around USD 18 billion in 2025. Bottled water is the most sought-after segment among non-alcoholic beverages, followed by soft drinks. Ready-to-drink coffee and tea preparations are gaining in popularity: their turnover is expected to rise to around US\$ 129 million by 2030.

Sales of beverages in Turkey will grow strongly until 2029 *) (in million US dollars)



* Estimates and forecasts.
Source: Statista 2024

The market for pet food is growing rapidly - driven by a growing middle class, increasing pet ownership and the feeding of street animals by local authorities and volunteers. According to the Turkish Veterinary Association (TVHB), there are around 4.5 million dogs and 1.5 million cats living in households - plus many more street animals. While many animals continue to be fed table scraps, the demand for commercial food is increasing noticeably. Statista expects sales of US\$ 6 billion by 2025, and this figure could rise to US\$ 9 billion by 2030. Around two thirds of the feed comes from local production, the rest is imported. Supply opportunities also exist for ingredients for local production.

New consumer trends around organic, health and e-commerce are gaining in importance

Functional and health-related foods are also becoming increasingly important. So far, gluten-free or low-calorie products suitable for diabetics have only been available to a limited extent - but growing health awareness is likely to boost demand significantly in the coming years. Healthy eating is increasingly becoming a lifestyle issue. Conventional agriculture is being viewed more critically - particularly with regard to the use of pesticides and additives. So far, organic products have mainly been sold in milk, baby food and snacks. Vegetarian and vegan diets are also gaining popularity. Particularly fortified products, for example with vitamins or minerals, offer additional potential - especially in the area of infant and toddler nutrition.

In Turkey, the food industry is experiencing strong growth in online delivery services. Young, tech-savvy consumers in particular are increasingly buying food online. Even discounters such as A101 or Şok offer delivery services. By 2025, around 1.5 percent of total food sales are expected to be generated online. Increasing digitalization is opening up new opportunities for small and medium-sized companies in particular to increase their reach. At the same time, there are gaps in cold chain logistics - an area with potential for specialized providers.

Selected food production projects in Turkey (investment amount in millions of US dollars *)

Company	Investment	Remarks
Doruk Un	50	Planned capacity increase for flour production line
Kandira g2m	42	Planned factory for sauce production
Kervan Gıda	20	Planned capacity increase for confectionery
Torku	20	Planned capacity increase for chocolate products
Dardanel	11	Planned capacity increase for sushi production
Etiler Gıda	1,8	Planned capacity increase for dried fruit

* Exchange rate on 27.5.25: 1 US dollar = 38.93 Turkish lira.

Source: Press releases 2025

Sector Structure of the Food Industry

The Turkish food industry is modern and well developed. Suppliers of primary products and technology can benefit from this.

A considerable number of large companies manufacture in Turkey, including domestic producers such as Anadolu Efes, Ülker or Sütaş and international brands such as Coca-Cola, Nestlé and the Ferrero Group. However, by far the largest number of manufacturers are small and micro-enterprises, with the majority being bakeries and pasta manufacturers. According to Statista, the number of food and beverage manufacturers amounted to around 58,000 in 2023. Numerous international companies not only use Turkey as a production location, but have also chosen Turkey as an export hub.

Strong agricultural base promotes food processing

Thanks to its favorable geographical location and climatic conditions, Turkey is one of the world's leading agricultural producers. The country is one of the most important suppliers of dried figs, hazelnuts, raisins, raisins, apricots and honey. Agricultural imports come predominantly from EU countries, above all from the Netherlands and Germany. Due to the high level of agricultural production, a significant proportion of local food production is also accounted for by the simple processing of agricultural products - particularly fruit and vegetables, including peeling, slicing and freezing vegetables, pickling or preserving peppers, tomatoes and cucumbers, canning cherries, apricots and peaches and producing dried fruit. The fruit and vegetables category accounts for the largest share of processed food sales in Turkey.

High number of food companies in Turkey (production of processed food in 2022; share of sales in percent)

Division	Number of companies in 2022	Share of sales ^{*)}
Baked goods and pasta	39,395	12.4
Processed or preserved fruit and vegetables	3.838	15.9
Grain mill products. Starch and starch products	3.097	11.2
Milk and milk products	2.963	12.8
Vegetable oils and fats	1.720	8.8
Meat and meat products	1608	10.7
Animal feed	827	6.7
Fish. Crustaceans and molluscs	351	2.0
Other foodstuffs	5.347	14.5
Beverages	678	4.8

^{*)} Of total national food production. Source: USDA (United States Department of Agriculture) 2024

Supply opportunities open up for primary products and machines

Despite its strong agricultural base, the Turkish food industry is highly dependent on imports of ingredients and primary products. The demand for modern processing and packaging machines is also high - as is the need for cold chain technologies. Storage. Greenhouses. Irrigation and fertilization. This results in a wide range of opportunities for foreign suppliers.

Top-selling companies in the Turkish food and beverage industry in 2023 (in million US dollars)

Company	Industry Segment	Turnover ^{*)}	Exports
Anadolu Efes Biracılık	Beer/Malt	4,871,3	4,109,2
Coca Cola İçecek	Cola drinks	3,077,4	k,A,
Ülker Bisküvi	Cookie products. Confectionery	1,701,3	465,8
Ulusoy Un	Flour	1,208,4	127,3
Eti Gıda	Confectionery. Cookie products	1,084,3	288,1
Tarım Kredi Tedarik	Oilseeds. honey	799,2	24,3
Sütaş	Dairy products	719,0	18,8
Oba Makarna	Pasta. noodles	713,9	604,1
Mey İçki	Spirits	700,5	33,2

^{*)} Average exchange rate 2023: 1 US dollar = 32.8215 Turkish lira.

Source: Business magazine "Capital. No.8/2024

Turkey is a major exporter of agricultural products

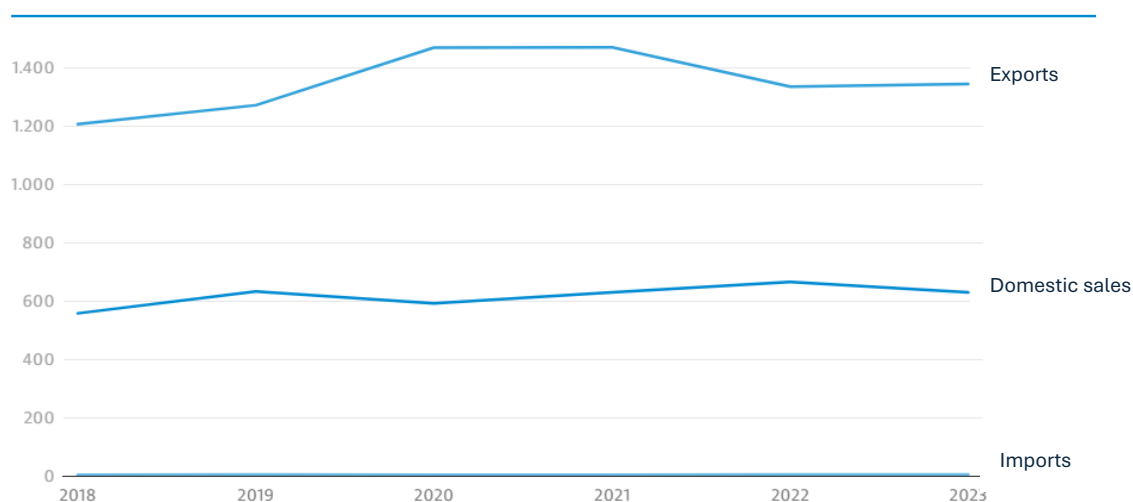
The Turkish agricultural and food industry is heavily export-oriented. According to the TÜİK Statistics Office, exports of agricultural products and foodstuffs (SITC 0) amounted to around USD 24 billion in 2024 - an increase of 5 percent compared to the previous year. The most important export goods included vegetables and fruit. Cereals and cereal products as well as fish. Crustaceans and molluscs. As in previous years, the largest sales markets in terms of export value were Iraq, Germany, Russia and the USA. On the other hand, imports amounted to US\$ 21 billion. The main supplier countries were Russia, Ukraine, Brazil and the USA; Germany was in 6th place. Imports fell by 18 percent year-on-year. Important imported goods were grain, animal feed, coffee and tea as well as fruit and vegetables.

Exports also increased in the beverage segment: in 2024, Turkey exported beverages worth US\$ 498 million - an increase of 11 percent compared to the previous year. The majority was accounted for by non-alcoholic beverages (US\$ 374 million). At US\$ 687 million, imports were significantly higher than exports. They were divided roughly equally between non-alcoholic (US\$ 332 million) and alcoholic beverages (US\$ 354 million).

High competitiveness for flour, pasta and hazelnuts

Wheat flour production plays a key role in the Turkish food industry. In recent years, Turkey has become the world's largest exporter of wheat flour despite high producer prices. The basis for this success is the comparatively cheap procurement of raw materials - especially from Russia and partly from Ukraine. In 2024, exports of wheat flour fell by 20 percent to USD 1.2 billion. Pasta exports rose by 5 percent to US\$ 856 million.

Turkish pasta production declines slightly (in 1,000 tons)



Source: Association of Pasta Producers MÜSAD 2025

Turkey is also an international leader in hazelnuts. The Ferrero Group, for example, sources the majority of its hazelnuts from Turkey and operates several processing plants there. In 2024, Turkey exported nuts worth US\$ 1 billion.

Deficits in meat and milk

In contrast, there are weaknesses in other areas: Domestic meat and sausage production is not sufficient to meet national demand. The more important producers include Namet Gıda and Konya Şeker. In the poultry sector, companies such as Banvit, Lezita and Keskinoglu are important.

Production of meat and eggs in Turkey (meat in millions of tons; eggs in billions)

Product group	2022	2023
Red meat	2,2	2,4
Chicken	2,4	2,3
Eggs	19,8	20,6

Source: TÜİK April 2025

Milk production also has structural deficits. Productivity is low. Less than half of the milk produced is marketed through dairies. The product range focuses on yoghurt, various types of white cheese and butter. The leading dairies include Sütaş, Pınar Süt and Konya Şeker Fabrikası.

Production of milk and dairy products in Turkey (in thousand tons)

Product group	2023	2024
Cow's milk	10,219,0	11,233,5
Drinking milk	1,525,6	1,577,6
Cream	29,2	30,5
Milk powder	45,3	43,3
Low-fat milk powder	67,6	76,9
butter	87,1	100,3
Cow's cheese	773,1	823,8
Sheep, Goat and buffalo cheese	25,8	20,6
Yoghurt	1,219,6	1,300,8
Ayran (yogurt drink)	829,6	931,9

Source: TÜİK April 2025

Pharmaceutical Industry

The government is promoting biotech with an omics platform and production offensive - at the same time, the pharmaceutical industry is suffering from cost and price pressure.

Biotech is the focus of new initiatives in Turkey: there are plans to set up a national omics platform that will systematically record, store and analyze large biomedical data sets in the future. The aim is to promote research in the field of personalized medicine. The platform is part of the "Industry and Technology Strategy 2030" and is intended to strengthen cooperation between science and industry - particularly in the development of innovative biotechnological therapies.

Together with the biotechnology production program that has already been launched, the government wants to expand the domestic biotech sector. This is becoming increasingly important: in 2024, biotech medicines in Turkey generated sales of USD 1.9 billion with 31.2 million units sold. However, dependence on imports remains high - only 32 biosimilars were produced locally in 2022.

At the same time, the pharmaceutical industry is under pressure: rising raw material and labor costs are making local production more difficult, while a state-regulated pricing system puts pressure on both local manufacturers and international suppliers. Production and domestic sales volumes declined in 2024. Nevertheless, the Turkish pharmaceutical market offers long-term potential for growth-oriented companies.

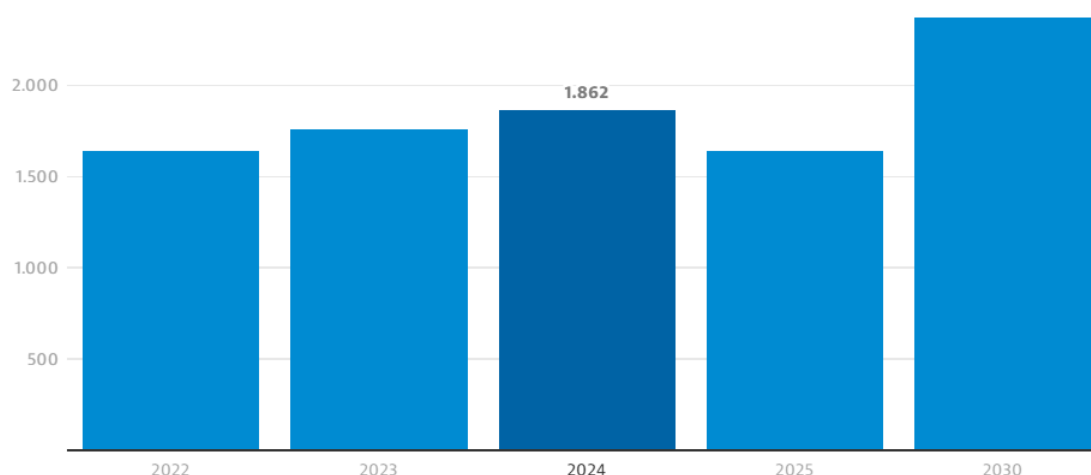
Cosmetics Industry

Cosmetics are on trend: the market is growing in Turkey - driven by a young population, increasing digitalization and the demand for individual care.

The cosmetics market in Turkey is expected to grow by 16 percent in terms of volume in 2025 - following an increase of 15 percent in the previous year. This is the conclusion of a study published by L'Oréal Turkey in February 2025, which analyzes key developments in the market. Young people are the most important growth driver. They make up 45 percent of the Turkish population.

Consumer habits are changing: individuality and sustainability are becoming increasingly important to customers. At the same time, interest in digital, AI-supported solutions for personalized products and advice. Generation Z in particular is driving these trends - it not only stands for a love of innovation, but also for sustainable consumer decisions.

The market for skin care products in Turkey is growing strongly* (sales in millions of US dollars)



* Estimates and forecasts.

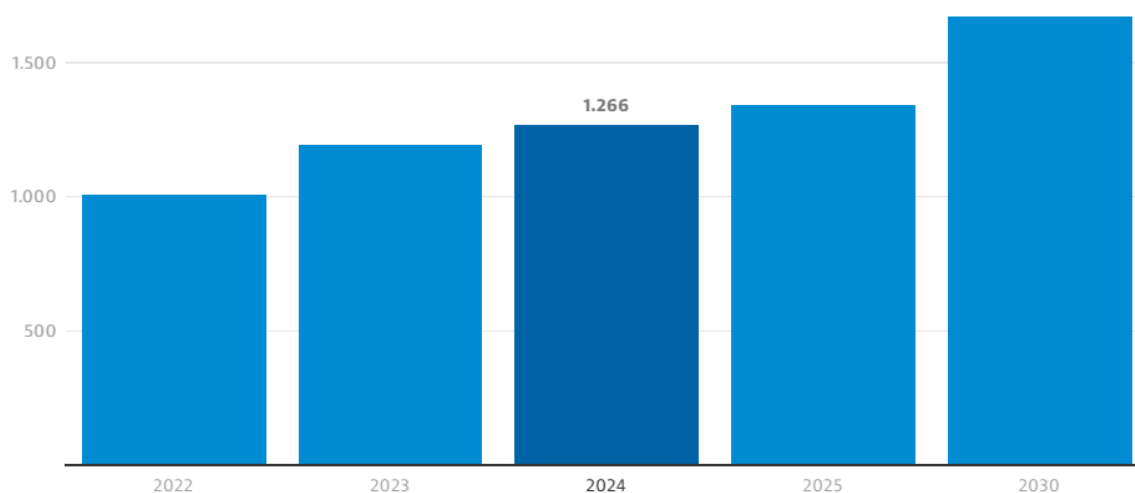
Source: Statista 2025

Changing care and beauty routines

The market is growing in the skin care segment in particular: this category accounts for the largest share of the cosmetics market at 24 percent, followed by hair care, make-up, hygiene products, perfume and hair colorants. With the increasing awareness of skin health, the variety of products is also growing - especially serums. Anti-aging products and multifunctional care products are becoming increasingly popular. Women between the ages of 25 and 34 are increasingly integrating serums into their daily routine. Sunscreens and liquid moisturizers with UV protection are also being used more frequently. The Statista analysis institute expects sales of sun cream in Turkey to reach around 74 million US dollars (US\$) in 2025, which could rise to 120 million US\$ by 2030.

When it comes to hair care, hair loss and hair texture are the most common concerns. Eight out of ten women report problems with their hair, according to L'Oréal, with hair loss cited as the biggest issue. The trend is towards multi-step care routines with pre-wash products, masks and shiny finishing products. Statista estimates sales of hair care products in Turkey at US\$ 1.5 billion (2024). Coloring behavior has also changed: Women are starting to color their hair earlier, on average at the age of 23. The first gray hairs usually appear from the age of 33, but the use of dyes decreases with age.

Sales of decorative cosmetics in Turkey on the rise* (sales in millions of US dollars)



* Estimates and forecasts.

Source: Statista 2025

Decorative cosmetics between everyday life and luxury

The decorative cosmetics sector (i.e. make-up products such as foundation, lipstick and mascara) is developing dynamically in Turkey. According to Statista, sales in the entire cosmetics market will reach around US\$ 1.3 billion in 2025 and could rise to US\$ 1.7 billion by 2030. Non-luxury products currently account for around 90 percent of sales. In comparison: in 2018, the luxury segment still accounted for over 25 percent; according to forecasts, it is likely to level off at around 10 percent in the coming years.

Consumer trends: Sustainability, E-commerce and personalization

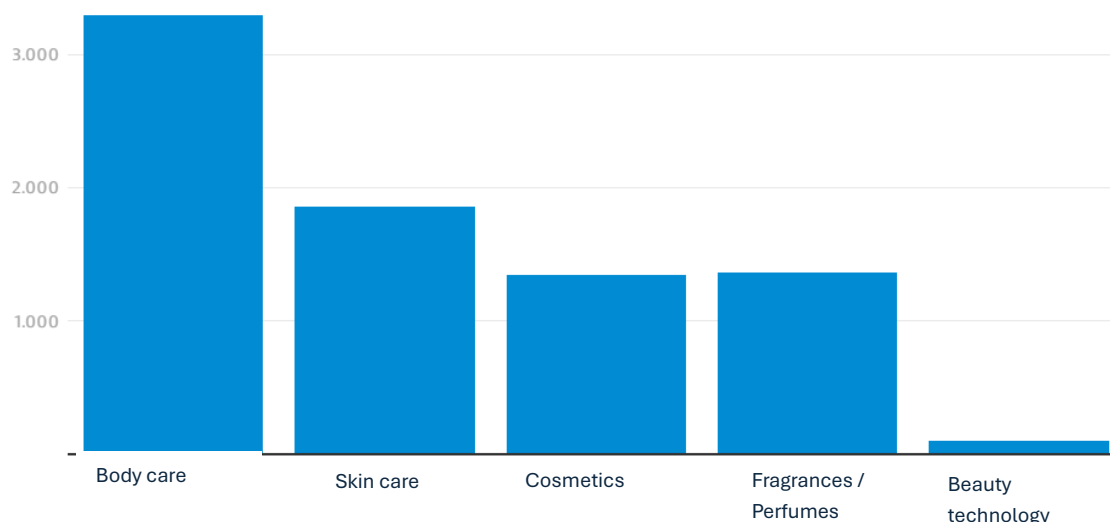
Sustainability is an increasingly important purchasing criterion. Consumers want natural ingredients, transparent communication and environmentally friendly packaging - especially among Generation Z, who consciously avoid companies with "greenwashing" tactics. The increasing importance of online retail is changing the sales structure: around 40 percent of cosmetics are sold via e-commerce platforms. Seven out of ten women compare prices before making a purchase. Social media also has a strong influence: In 2024, beauty-related content was viewed over 22 billion times - twice as much as in the previous year. The majority of this content related to make-up, followed by hair and skincare.

Market potential: men and per capita expenditure

Although men only account for 15 percent of the market volume according to the L'Oréal study, nine out of ten use at least one care product - mainly shaving products, deodorants and perfumes. Over the next three years, their contribution to market growth is estimated to remain constant at around 30 percent. At the same time, a large proportion of men suffer from skin problems, but only a fraction use appropriate care products - there is still great potential for growth here.

According to L'Oréal, per capita spending on beauty products in Turkey currently stands at 196 euros per year - well below the European average of 339 euros. This shows that although the market is on the move, it still offers considerable development potential, especially for international suppliers.

Sales of beauty and care products on the rise* (in millions of US dollars. in 2025)



* Estimates and forecasts.

Source: Statista 2025

Turkey positions itself as a manufacturing and export hub

Turkey is increasingly developing into an important location for the manufacture of cosmetic products. The industry is not only benefiting from strong domestic demand, but also from its growing role in international trade. In addition to established local brands, global FMCG groups such as Unilever, Colgate-Palmolive, Procter & Gamble, Beiersdorf and L'Oréal are also investing in local production capacities. Turkey is also becoming increasingly important as part of European nearshoring strategies - especially as a partner for contract manufacturing of high-quality cosmetic products.

In 2024, exports of cosmetic products (HS 33) increased by 12 percent to around USD 1.6 billion, according to the Turkish Statistical Institute TÜİK. The most important customer countries included Iraq, Russia, the USA, the United Arab Emirates, Iran, the Netherlands and Azerbaijan. Germany was only the 11th most important target market. Imports of cosmetic products fell slightly to around 1.5 billion US dollars in 2024. The leading supplier countries continued to be France, Germany, Italy, Poland and Switzerland.

Imports of cosmetic products fall slightly (in millions of US dollars)

HS-No.	Product	2023	2024	Thereof from Germany
3301	Essential oils, Resinoids	53,9	68,7	4,7
3302	Mixtures of fragrances and other preparations	524,7	490,9	86,3
3303	Perfumes and toilet waters	123,9	140,4	0,2
3304	Prepared beauty products, Products for make-up and skin care	469,1	524,5	56,9
3305	Prepared hair treatment products	193,0	190,5	23,4
3306	Prepared dental and oral care products	110,5	107,2	12,1
3307	Prepared shaving products	77,5	74,9	15,4
Total	193	1,552,6	1,527,1	199,0

Source: Turkish Statistical Institute TÜİK 2025

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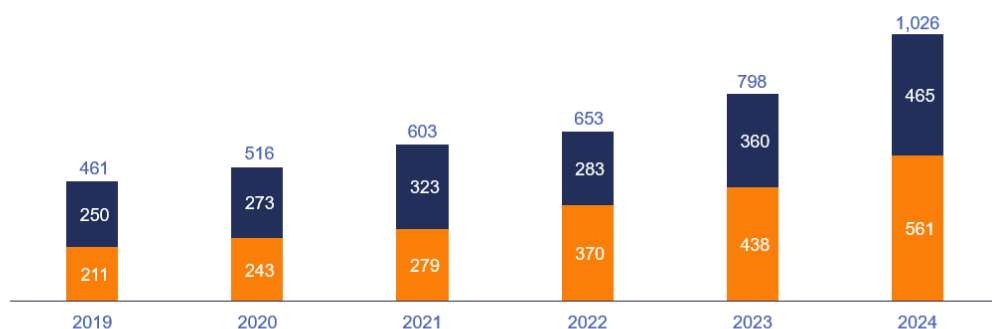
GLOBAL EXPORTS

Food Processing and Packaging Machinery to Türkiye

In million euros

■ Food Processing Machinery ■ Packaging Machinery

2024/2023: +28.7 %



Source: National Statistical Offices, VDMA



Food Processing and Packaging Machinery

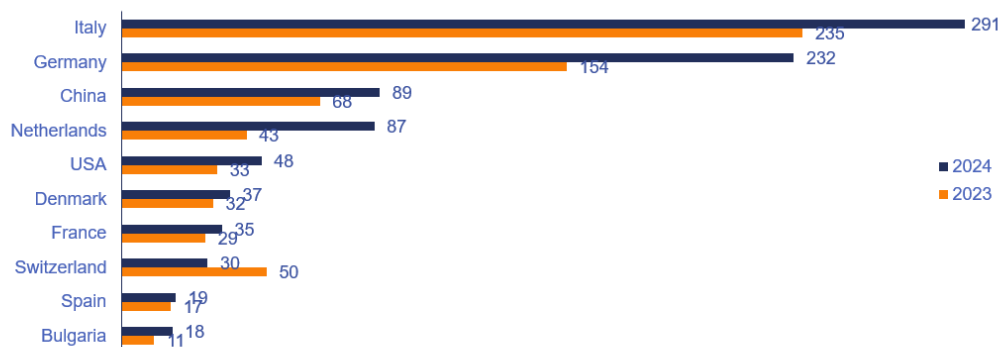
July 2025 2

GLOBAL EXPORTS

Food Processing and Packaging Machinery to Türkiye
TOP 10 Supplier Countries

Export 2024: 1,026 million euros, +28.7 %

In million euros



Source: National Statistical Offices, VDMA



Food Processing and Packaging Machinery

July 2025 3

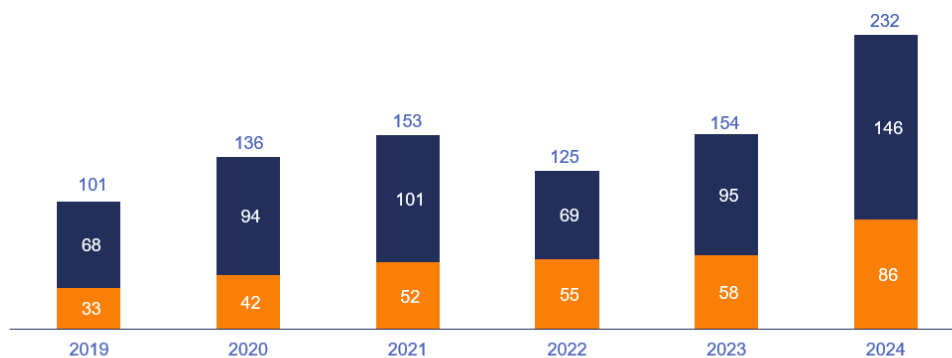
GERMAN EXPORTS

Food Processing and Packaging Machinery to Türkiye

In million euros

■ Food Processing Machinery ■ Packaging Machinery

2024/2023: +50.9 %



Source: National Statistical Offices, VDMA



Food Processing and Packaging Machinery

July 2025 4

GERMAN EXPORTS

Food Processing and Packaging Machinery to Türkiye

Exports 2024: 232 million euros, +50,9 %

in million euro



Source: National Statistical Offices, VDMA



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July 2025 5