

OILS, FATS AND MARGARINE MARKET IN TURKEY

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ABOUT MUMSAD

- Association of Culinary Products and Margarine Industrialists
- Established in 2004
- Number of members: 30 - 15 Companies
- Margarine producers: Ulker, Unilever, Marsa, Cargill, AAK Turkey , Kucukbay
- Some other member companies: Nestle, Dr. Oetker, Kerevitas, Martin Bauer, Dogadan

MUMSAD

- IMACE & IFMA member
- YABITED (Turkish Lipid Group) member
- Cooperating with
 - MPOC
 - MPOB
 - AOCS
 - EFL
 - APK-INFORM
 - OFI

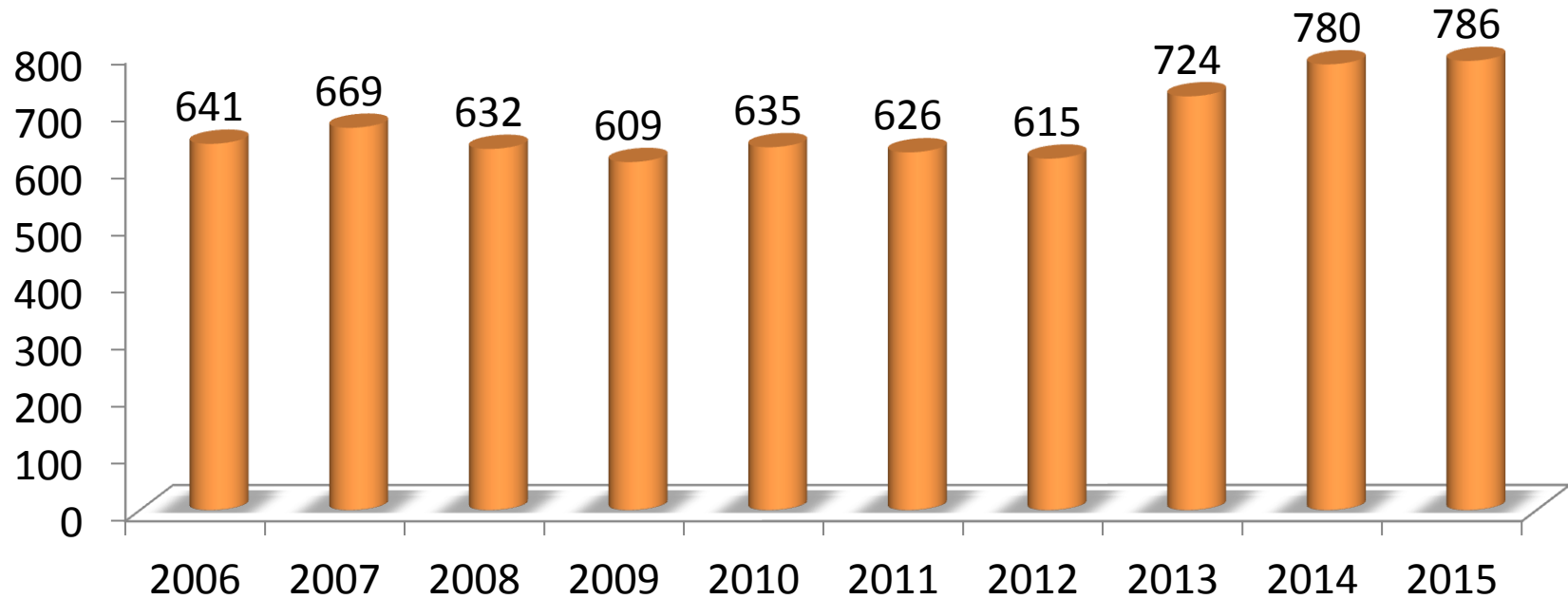
OILS, FATS & MARGARINE MARKET

- Total consumption 1.750 TT (22kg/p.c.a)
- Liquid Oils
 - Saturated market
 - Most consumed SFO (43%)
 - Sensitive to price
- Olive Oil
 - 150 TT annual production
 - 1 kg per capita consumption
 - Most expensive oil

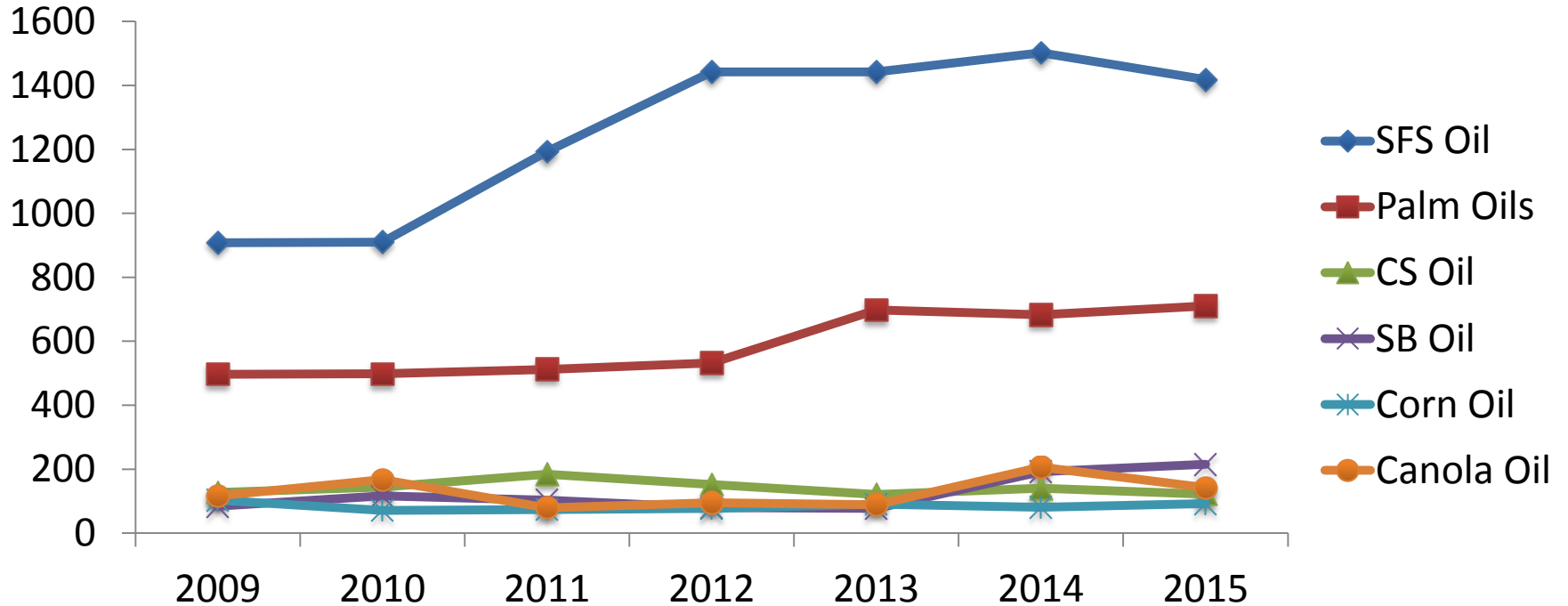
OILS, FATS & MARGARINE MARKET

- **Butter**
 - Improving market
 - Very high price
 - <1 kg p.c.a.
- **Margarine**
 - 1,5 kg p.c.a
 - ± similar prices to liquids
 - High marketing investment
- **B2B Usage**
 - Increasing very fast
 - 81 % of margarine
 - B2B consumption 6,5 kg p.c.a.

MARGARINE & B2B PRODUCTION (TT)



TOTAL OILS USAGE (TT)



ABOUT TFA



- Industry removed TFA in 2007
- No TFA (<1% content)
- EU still discussing on <2%
- FDA decided to be removed TFA from the products as of 2018
- USA announced partly hardening process as unsafe
- Turkey is nearly eleven years ahead of USA
- TFA content roughly half of EU

MODERN MARGARINE

- Produced from 100 % vegetable oils
- No cholesterol
- No TFA (<1%)
- SAFA content in tub almost like liquids (15-17 %)
Per same amount
- 54 kCal in gram

PALM OILS IN TURKEY

- Early 70's palm oil was used just for non-food business (mostly soap manufacturing)
- First use as edible oil in 1974 by Turyag (Henkel joint venture)
- 30% out of total world production
- 24% of total crude oils in Turkey