

Turkey Cold Chain Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The Turkish cold chain logistics market is expected to register a growth rate of greater than 7.30% during the forecast period. The COVID-19 pandemic had a positive effect on the cold chain logistics industry. The growing popularity of packaged foods and beverages has helped the expansion of the cold chain as the demand for temperature-controlled warehousing increased. Additionally, the demand for vaccine supply across the country has played a vital role in boosting the market.

Turkey's strategic position, which connects Europe, the Middle East, and Asia, makes it an ideal transportation and logistics hub. Turkey ranked 8th in the world in terms of cold storage capacity. According to the Global Cold Chain Alliance, the average size of the refrigerated warehouse in Turkey was about 729 cubic meters in 2021. The Refrigerated Warehouse Market Development Index of Turkey was 0.242 in 2021, which was higher in the middle-range index countries.

The growth of cold chain logistics is driven by the increase in the demand for food products like dairy, fish, and meat, and the share of these products in the total food revenue is 35%. Other factors are government initiatives toward the cold chain infrastructure development.

Turkey Cold Chain Logistics Market Trends

Increase in Demand for Fresh and Frozen Foods Driving the Market

Horticultural production, including fruits, vegetables, and flowers, has been emerging as a major economic activity in Turkey. The diverse ecosystems make it possible to grow a wide range of horticultural crops economically. Turkey is one of the largest producers of hazelnuts, cherries, figs, apricots, and pomegranates. The country also produces quinces, watermelons, cucumbers,

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green peppers, lentils, pistachios, apples, tomatoes, eggplants, olives, tea, chickpeas, sugar beet, almonds, onions, lemons, grapefruit, cotton, and barley.

In 2021, the annual production of Turkey reached over 45 million metric tons of fruit and vegetables, accounting for approximately 3% of total global production, with a rapid increase in production over the last few decades.

The rapid urbanization and proportional age of the population of Turkey are driving the demand for food products. During the COVID-19 pandemic-induced lockdowns around the world, consumer demand for frozen fruits and vegetables soared. In December 2020, representatives of the frozen food sector, which has a market of approximately USD 136 million in Turkey, decided to form associations to change the prejudice against frozen food products and to develop the sector. The goal of the association is to increase domestic consumption and exports.

Government Initiatives Driving the Growth of the Market

The Turkish government has been heavily investing in the cold chain infrastructure of the country, aiding in the increasing warehousing capacity. The government announced that it would be pouring USD 200 billion into infrastructure projects to support its ambitious plan to increase trade levels to USD 1.1 trillion by 2023. Turkey uses the option of fiscal incentives to channel domestic and foreign investments for industrial development and rural-urban integration. These incentives or tax expenditures are usually available to investors for the promotion of private investment activities in selected sectors/regions, depending on the scale of investment. According to the Ministry of Industry and Technology, investment companies can invest in the cold storage sector, which will be considered under the "Regional Investment Incentive scheme". Under this scheme, the companies that invest in cold storage may get a tax reduction of up to 50%. The Turkish government also increased spending on infrastructure R&D, while in 2015, the government spent USD 12 billion. In 2020 the spending increased to USD 25 billion.

Turkey Cold Chain Logistics Market Competitor Analysis

The industry has a handful of players and is largely dominated by organized companies that have a presence in other countries. The companies that have made a foothold in the Turkish cold chain logistics market are Havi Logistics, Ekol, Polar Logistics, DHL, and Emran Logistics. The Turkish cold chain logistics market has been witnessing a gradual increase in the number of value-added service providers because of heightened demand in the local and international markets. This has led cold chain companies to realize the benefits of providing end-to-end services to their customers. Companies have already started providing a range of value-added services to their customers and are planning to expand their service spectrum.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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