

The present and future of the tea industry of Turkey.

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SUMMARY

In Turkey, manufacturing of black tea has been doing in the black sea region from May to October since 1939. The first tea plant was made in 1947 in Rize province. Orthodoxs, rotorvane, CTC tea processing technics or their combinations have been using during production. Tea production,especially, has been supported by goverment authorities from the beginning of 1950s. At the beginning of the studies, amount of tea production was so little. From the 1950s, tea producers have been encouraged to increase tea farming fields and to make more production. While amount of tea production was 42.6 tons/year in early 1980s, it has been reached 140.000 tons/year in the present day. There is no statistical datum about amount of tea production before 1980. Amount of tea consumption has shown an increase year to year, and has reached 2.4 kg/person/year. So many families (approximately 250.000 families) ,now, make tea farming in Turkey. If a comparison is made with the other tea manufacturer countries, Turkey has a good place for both tea production and tea consumption in the world. In the present day, there are more than 200 tea plants in Turkey. 46 of them are official, others are private. Total production capacity for per day is almost 16 tons. Although production range is so high, exporting range (max. %10) is so little. However, Turkish teas have been exported many countries, namely Russsia, Germany and Middle East Countries.

INTRODUCTION

Black tea production in Turkey was begun economically in 1939. In Turkey, tea plant was cultivated in eastern part of black sea region. Tea farming fields is divided into 2 categories according to the productivity levels. The most productive region for cultivating of tea plant extends from Araklı town to border of Russia. This region is approximately 180 km. Secondary productive region extends from Araklı town to Fatsa town located in western part of black sea region. This region is also 286 km.

When our tea production period is compared to the other tea production periods of the other tea producer countries, it is shown that tea farming time in Turkey is shorter than the others. While tea farming has been done for 6 monts (from May to October) in Turkey, Major tea producers grow tea plant almost

throughout the year. Besides of this situation, our competition power for exportation decreases because of the high workers expance and high cost of fresh tea leaves.

TEA PRODUCTION IN TURKEY

In Turkey, tea production is made more than 200 tea factories. Orthodox, rotorvane, CTC technics and their combinations are used while the process is working on. Black tea production stages includes withering, rolling, oxidation, drying, sorting and grading. These stages can be summarized as the following.

Withering : In this stage, moisture of fresh tea leaves has been decreased from 70-80% to 50-55% by using warm air which has 32 °C, thus structure of tea leaves has had suitable form for rolling process. Withering process takes 6 hours.

Rolling : In this stage, tea leaves have been crashed to wring out the cell juice from the leaf by a twisting motion under pressure. This operation will start the chemical changes necessary for black tea production through the fermentation process. Rolling process is made to find an optimum point between apperance and liquor.

Fermentation : Fermentation process is the most characteristic part in black tea processing because of the occuring of the most important properties of tea. The whole operation can be easily regulated, and takes place untill a correct balance is obtained between TF's and TR's (1/10 or 1/12).

Drying : The objectives in drying are to arrest the fermentation and to fix the desirable properties. Temperature for drying is 95-100 °C and, its application time is 25-30 minutes. At the end of this operation, moisture content of tea leaves is reduced to 3-4 %.

Grading and Sorting : During this operation, black tea leaves are seperated according to the particle size by using sieves. Tea is cleaned by winnowing to remove dust, fibre and fluff (the hairs). In Turkey, black tea leaves are seperated from number 1 to number 7. Number 7 means dust tea.

CAPACITY OF TEA PLANTS

While the capacity of tea production in official sector was 2640 tons/day in 1973, it reaches to approximately 7000 tons/day in the present day. In this sector, there are more than 200 tea plants except the officials (ÇAY-KUR, General Directorate of Tea Establisments). Daily tea production capacity is almost 16000 tons /day for official and private sector. If statistical data of the last two years (1999-2000) were examined, 37% of total production were made by officials, and 63% of total were made by private sector in 1999. In 2000, 43%

of total were made by official sector, and 57% of total were made by private sector.

TEA EXPORTING OF TURKEY

Turkey is one of the biggest tea producer country in the world. At the same time, Turkish people consumes tea so much. In the production of tea in the world ;

- India is the first with 28.3 %
- China is the second with 23.6 %
- Kenya is the third with 9.6 %
- Sri Lanka is the fourth with 9.1 %
- **TURKEY is the fifth with 6 %**
- Other countries with 23.4 %

Before 1963, Turkey was an importer country. Studies for tea production, generally, were concentrated on domestic consumption. However, We have to export our teas because of the excess production. But, making an exportation is not easy. Turkey has to find a way to make more exportation in order to reduce tea stocks. Major tea importer country for Turkey is Russia. Over 80% of tea selling has been made to this country for years. Besides of Russia, Turkish teas have been exported to Saudi Arabia, Egypt, Germany, Holland, England, France, Austria, Norway, Sweden, Denmark and Belgium.

EXPORTING TARGETS FOR TURKEY

Due to the excess tea production in Turkey, tea stocks have increased year by year. For this reason that we have to find a new solution for exportation. At the same time, making an exportation will give an opportunity to promote turkish teas and its quality to the world. The first stage for exportation is to find the major importer countries, and to produce high quality teas. Turkey's target countries are especially Holland, Germany, England and other European Countries.

There is no tea production in Holland. Against its position, exportation of tea has had a good role during its economic development. Holland has high tea exportation as much as its domestic consumption. This kind of countries, generally, makes re-exportation. Tea consumption is 0.7 kg/year in this country, and takes the second place after coffee consumption. Major tea importer countries for Holland are Argentina, Indonesia and Kenya. The most part of this importation is exported by using re-exportation way. USA, Belgium, Germany, Poland, and UK comes to head of tea importer countries from Holland. Turkey takes a little portion from this trade. We must take necessary precautions in order to get good position in this bazaar.

Another tea importer country is England. England is the biggest tea importer country in the world. They take different teas from different countries, namely Kenya and India. Then, they sell the teas by using re-exportation way to the different countries, such as France, Germany, Saudi Arabia, Kuwait, USA and Canada. They import the teas as a bulk tea due to their lower prices. Then, they export the same teas after packing, and gain more benefits.

ENTERING IN HOLLAND AND ENGLAND TEA BAZAAR

Quality of tea takes on the most important role to prefer any tea brands in Holland and England tea bazaar. If teas have a good quality, they can be recognized and can find purchaser easily. In this bazaar, some quality parameters, such as origin of tea, flavor and taste and colour of tea, have very important role for determination of tea quality. Besides of the parameters, tea experts have an important role to purchase any tea brands. For this purpose, they work in tea plants as determiner of tea quality.

There are some circumstances to enter the Holland and England Bazaar besides of tea quality.

- Package is clean and has to be resistant for external conditions,
- Product has to be sent to buyers as soon as possible,
- Contracts have to be filled correctly,
- There should be an agreement for special points which are mentioned in contract.

Holland and England apply the same custom rate list. There is no customs duty for Turkey, if Turkish teas will be exported to the members of European Committee.