



# IFEAT TÜRKIYE STUDY TOUR REPORT

1- 8 June 2024

By Divya Sara Mammen  
IFEAT Study Tour Administrator



## Introduction

On Saturday, June 1st, at 5:30 pm, the 33 delegates of the Türkiye Study Tour, along with the IFEAT team and the Local Organising Committee, gathered at a hotel in Istanbul overlooking the Bosphorus Strait separating Europe from Asia, to kick off IFEAT's 15th Study Tour.



The Türkiye Study Tour 2024 (TST 2024) was made possible with the help of Local Organising Committee members Mr Kazim Gürel (Chair), Ms Şerife Ulu, and Dr Süleyman Kinaci, the IFEAT Secretariat, and Arkas Travel, represented by Ms Belde Durmuş.

The study tour took place in western Türkiye, starting in Istanbul and continuing to Izmir, Denizli, Isparta, and culminating in Antalya. Over the course of 7 days and 7 nights delegates travelled by road and air, covering approximately 1,400 kilometres, in almost perfect weather.

The TST 2024 comprised delegates from 17 different countries, including founders of new businesses, multi-generational family enterprise owners, and employees of corporate companies in various segments of the flavour, fragrance, food and aromatherapy sectors. The group was diverse not only in culture and language but also in age, ranging from their 20s to their 70s. While some had attended over 10 IFEAT study tours previously, for many this was their first and it was gratifying to see that a third of the delegates were young IFEAT Members.

***“The IFEAT Türkiye Study Tour was a comprehensive learning experience and a window into the F&F industry in Türkiye. The delegates visited fields, factories, labs and packing facilities, all of which are experiences mostly limited to company insiders and local farmers, making this a unique educational opportunity for us. In addition, the variety (age, country, business type) of the delegates attending the trip made the exchange of knowledge and social interactions even more engaging and educational. 100% would go on another study tour with IFEAT.”***

**Sahil Tekriwal**

Among the participants were several members of IFEAT’s Executive Committee and noteworthy stalwarts of the industry, including the world’s three largest jasmine producers. Sharing knowledge and experience is a founding principle of IFEAT’s Study Tours, and TST 2024 was no different. Travelling together in Türkiye and closely observing crop production, harvesting, processing, packaging, final products, storage, transport, laboratories, R&D, quality assessments and new product development provided an enjoyable and informative learning experience for everyone involved.

Upon arrival delegates received their lanyards, rucksacks, gifts, and briefing documents, which included a detailed itinerary, maps, and profiles of the delegates and companies to be visited. This was followed by a briefing session where Dr Peter Greenhalgh, the Study Tour Coordinator, introduced the Executive Committee members present, the Local Organising Committee, and the IFEAT Team as well as outlining various aspects of the TST 24 aims and objectives.

The Welcome Reception and Dinner included a boat tour of the majestic Bosphorus. Dr Sedat Bornovali, an art historian, interpreter, and professional tour guide, highlighted the sights and scenes along the Bosphorus while sharing stories of its strategic significance. Lined with historic palaces, fortresses, and charming waterfront homes, the Bosphorus provided a picturesque backdrop as we officially began the tour.



## THE ROSE INDUSTRY



Rose pickers

Türkiye's rose market is notable for its long history of rose cultivation, primarily in the Isparta region, which was developed by the Ottoman Empire in the 19th century while retreating from the region that became Bulgaria. Thanks to its ideal climate and soil, this area is renowned for producing high-quality *Rosa damascena*. The first commercial rose oil distillery was established in 1934/1935.<sup>1</sup>

Türkiye is now a significant player in the global rose oil and rose concrete markets. Rose oil is obtained almost exclusively from steam distillation of the single clone of *Rosa damascena*, as in Bulgaria. Turkish rose oil production is estimated between 1,500 and 2,000 kg/year on average, while rose concrete production exceeds 14,000 kg/year. Türkiye is the world's leader in the rose concrete market.

Rose oil, rose water, concretes and absolutes are highly valued in various industries, including fragrance, cosmetics, and traditional medicine. The production, harvesting, and processing of roses provide vital employment opportunities for local residents and a growing number of Syrian refugees, supporting rural livelihoods.

Isparta's rose fields cover some 5,000 hectares, mainly made up of small plots ranging from 0.3 to 1 hectare. These family-run farms, numbering over 10,000, also employ outside pickers. A very good picker can harvest around 100 kg of flowers in 6 hours. Half of the expected final price is paid on delivery during the season, then adjusted at the end of the season according to yield. The minimum price for 1 kg of flowers is 60 Turkish pounds (TL) per kg, of which 30 TL is paid to the picker.

There are conventional rose fields, which produce up to 10,000 kg of flowers per hectare, and organic rose fields, which produce on average up to 5,000 kg of flowers per hectare. Organic fields can be prone to insect invasions, and the farmer can see his productivity drop by 90% in a very bad year. He may then be forced to prune the shrub almost completely, which considerably reduces the following year's yield.

Rose harvesting begins at 5 am on hot days, or 9 am on cold days, and usually ends by midday, depending on the weather forecast, the aim being to deliver fresh flowers to the distiller as soon as possible. The ideal weather is cold mornings, followed by slightly warmer hours, but not too hot weather.

Short showers every few days help a lot. The traditional weather patterns of May and June have become less frequent over the last ten years, with progressive distortions such as long periods of drought followed by very short periods of heavy rain, affecting the crops. Altitude also defines the season and quality, with most roses growing at higher altitudes starting in mid-May and preferably being used for rose oil production, while roses grown at a lower altitude will be picked from early May and likely be used for concrete.

In general, between 3,600 and 4,000 kg of flowers are needed per kg of rose oil. Copper distillation is still very much required; the first distillation produces the olfactory note and greenish colour demanded by most perfumers, especially in the Middle East. A second distillation yields a more yellowish essential oil, with most producers blending the two rose oils according to the olfactory profile requested by their customers.

Rose concretes are obtained by extracting rose petals using a hexane solvent under pressure, agitation and at low temperature to prevent the petals from burning. It takes between 360 and 400 kg of flowers to produce 1 kg of concrete. The yield from concrete to absolute averages 60%.

## THE OREGANO INDUSTRY



Oregano flower

Oregano is a perennial plant that thrives throughout the Mediterranean region, typically at altitudes ranging from 300 to 1,600 metres. The primary essential oil constituents are carvacrol and/or thymol, along with p-cymene and gamma-terpinene. Used for centuries in both culinary and medicinal applications, its demand has surged in recent decades. Today, oregano is a staple in Mediterranean cuisine worldwide, especially in pizzas, and it is increasingly sought after in the aromatherapy and animal feed industries.

Türkiye dominates the global production and processing of oregano, accounting for approximately 85% of the world's output. Production is concentrated on smallholder farms in the Denizli mountains, with around 85,000 hectares under cultivation. In 2022, the production of dried oregano amounted to 23,000 tonnes.<sup>2</sup>

This is a fine example of how farmers have adapted to the declining demand for tobacco, switching from traditional tobacco cultivation to oregano. Over 6,000 farmers in the Denizli region produce oregano. Wild harvesting is very rare.

<sup>1</sup> IFEAT Socio- Economic Impact Study of the Naturals - Rose

<sup>2</sup> IFEAT Socio-Economic Report on Oregano from Türkiye

***“A ‘business trip’ that is a perfect melding of personalities and cultures, coming together to experience life. Life-long friendships and memories have been created and I genuinely couldn’t be more grateful - it turns out this is my second of what has become some of my favourite trips of my life.”***

Chris Jones

## COMPANY VISITS

### MG INTERNATIONAL FRAGRANCE COMPANY



Our first visit of the study tour was to MG International Fragrance Company (MG International or MG), where we were warmly received by Ms Duygu Beşbiçak and her team. Unfortunately, Mr Aslan Gülçiçek, the CEO of MG International, had a personal emergency and couldn't be present.

MG International was founded in 1961 by Mr Misel Gülçiçek and remained a family operation until 2020 when they entered an alliance with industry leader Firmenich. The dsm-firmenich merger was launched in 2023, bringing together two market leaders in fragrance, taste, texture, and nutrition. The motto “For the love of fragrance” has been MG’s guiding principle since 1961.

Our visit commenced with a sumptuous lunch organised at MG’s canteen facilities. The delegates were amazed not only by the state-of-the-art facilities but also by their impressive scale. Lunch was followed by a short presentation on the work being done at MG and an overview of their facilities. We then began our tour, which included visits to their creation & application laboratory, R&D laboratory, quality control

laboratory, as well as their synthesis and naturals laboratory. We were also able to sample several of their signature scents, including Turkish rose, pink pepper, and Turkish coffee.

The delegates were then escorted to the Gebze facility and production area, where we closely observed the Concordia machines. The facility has an annual production capacity of 5,000 tonnes and includes a 28 km stainless steel supply line. We were also shown the Roxane machines, which have a production capacity of 70 batches per day. Other parts of the tour included the powder unit, dosing unit, mixing tanks, mixing area, and the robot feeding system.



MG’s staff were open to all questions and all operations were available for viewing. A special mention here of the fabulous facilities that were available to the employees of MG. These included a large swimming pool, state of the art gym, recreation centres, a bar, a coffee shop and even a hotel. We also acknowledge their graciousness in opening their facilities and hosting us on a Sunday, which would otherwise have been a non-working day for the staff.

***“Is it still necessary to talk about the legendary beauty of Türkiye? It’s a fact that this country is magical in so many ways. We enjoyed beautiful landscapes, beautiful food, and wonderful encounters. Sharing and connections were created during this study tour. I think that before creating commercial relationships, there are first (and even above all) human relationships.”***

**Khadija Farissi**

### AROMSA



We arrived at Aromsa, located in the Gebze Organised Industry Zone, on June 3rd at 8:30 am. We were warmly welcomed by Mr Murat Yasa, the founder and General Manager, his daughter Melis Yasa, the Deputy General Manager and second-generation representative, Ms Canan Kaya, the head of Marketing and Corporate Communications, and the rest of the team.

Aromsa was founded in 1982 by Murat Yasa. It is a 100% local flavour producer, a leader in the Turkish market, exporting to more than 80 countries worldwide. It currently has 9 factories, 7 in Türkiye and 2 in Emmerich, Germany, and an R&D and Innovation centre in Türkiye. Aromsa has had a long association with IFEAT, and Murat Yasa was closely involved in the IFEAT Conferences held in Antalya and Istanbul in 1990 and 1995 respectively.

The visit began with a briefing and a welcome for the delegates, setting the agenda for the day. This was followed by a detailed presentation about Aromsa, covering its history, values, and vision. We were then taken on a comprehensive guided tour of the facilities, with detailed explanations of the activities in the plants.

Following this, we toured Aromsa’s R&D laboratories. Murat Yasa personally guided us through a sensorial atelier tour where we experienced different stages of life through scents, from birth to old age. We then had a special visit to their museum, showcasing Aromsa’s journey from its inception to the present through objects, letters, photographs, and memorabilia.

The tour concluded with lunch, where we had further opportunities to interact with Aromsa’s staff and enjoy a delectable Turkish meal.

## KÜTAS FOOD GROUP

Mr Kazim Gürel, CEO of the Kütas Group, joined us on the coach to his facilities in Izmir, providing a briefing along the way. Upon arrival, we were given a presentation on Kütas Tarım and the broader activities of the Gürel Group. In addition, Mr Hugo Bovill a former IFEAT President joined us for the Kütas portion of the TST 24.

The Kütas Group, established four generations ago, was founded with a vision to leverage Türkiye's natural resources to build a legacy of quality, integrity, and sustainability. In just over 40 years, it has become the leading provider of oregano, sage, and laurel, and the largest processor of Mediterranean herbs. The Kütas Group serves as the food division of the Gürel Group, which has a well-established presence in various industries, including tobacco, real estate, automotive, finance, and other investments.



*Laurel leaf sorting*

The delegates were introduced to the laurel leaf (also known as bay leaf) facility with a short film detailing how wild laurel leaves are harvested and collected by locals before being brought to the factories. We observed the sterilisation, sorting, and grading processes, which use a combination of specially designed machinery and manual labour. Additionally, we witnessed their AI-enabled sorting process, an algorithm that matches 2,000 pictures/second. We were also shown the packaging facilities, where we observed the different packing processes tailored to clients' specific needs. Türkiye exports around 90% of the world's consumption of bay leaves, mainly as fresh or dried culinary herbs. Dried leaves are used as a flavouring and spice. Laurel is harvested in the wild, under government licence. Laurel is an evergreen tree which can reach hundreds of years old, but the best quality leaves are found on shoots at least 3 years old. Once the leaves are dried, any imperfections (insect attacks, stains, etc.) become more visible. Laurel leaf essential oil is distilled either from fresh leaves without drying or from the unusable portions after the physical selection and drying process. Laurel leaf essential oil has become more widely used in the flavouring, cosmetic and perfume industries.

At the oregano facility, we saw how oregano is harvested, dried, separated from large stems, and then packed into bags before being brought to Kütas facilities. A quality check is performed on each bag, which is then tagged and labelled, providing farm to fork traceability. At the facility, delegates observed the processing of oregano, which includes separating the bud into leaves, removing small stems, stones, and lighter material until the final product is ready for packaging. We also visited Kütas's lab facilities where testing is conducted.



*Oregano fields*

Kütas works closely with over 1,500 farmers who apply sustainable farming practices, through the Kütas Herb Club loyalty programme. Through annual contracts, the member-farmer commits to give supply preference to Kütas in exchange for a variety of services such as agronomic support (soil analysis, improved agronomic practices regarding weeding and planting, better use of fertilisers), traceability technology, financing and price discounts on biological materials and equipment. Kütas uses the FarmForce online platform for agricultural data collection, guaranteeing 100% product traceability, which we had the opportunity to see in action during our field visit. It's interesting to note that many agronomists are women, because it's their female counterparts among farmers who are making the biggest improvements in the fields. Indeed, better productivity translates into better value and, ultimately, better conditions for the whole family. An improved lifestyle is necessary to keep young generations working at their farm, often smaller than 1 hectare, although consolidation of farming is going on.

The next day, we visited oregano fields to observe the plants up close, with an expert available to answer all our questions about farming. We also toured sage fields and a lavender garden. After enjoying a lovely farmhouse lunch cooked by local Turkish women, we visited the essential oils facilities of Kütas. This operation, which began in 2021, includes a distillation unit with a capacity of 30,000 litres per year, with plans for rapid expansion in the coming years.



***“The trip to Türkiye has potentially broken prejudices, revealing the professionalism, competence, and further potential present in the country. It highlighted the high calibre of local industry players and their capabilities.”***

Zahra Osman Guelle

### SEBAT ROSE OIL LTD. CO.

Sebat Rose Oil Ltd. Co. (Sebat) is a third-generation family-owned company founded in 1950 by Hasan Kinaci. The company initially focused on buying and selling roses and trading essential oils. The name “Sebat,” meaning “to persevere,” reflects the founder’s advice to remain dedicated to the rose oil business. Sebat’s first modern factory was established in Senir, Isparta in 1985. Since 2000, Sebat has been producing rose concrete, rose absolute, lavender oil, and orange flower absolute. Today, they have a production capacity of 1,200 kg/year of rose oil, 7,000 kg/year of rose concrete, and 4,500 kg/year of rose absolute, making them a leading producer of rose raw materials globally. Sebat is the largest processor of rose in Türkiye, and the largest producer of rose concrete worldwide. As with many processors, only a minor proportion of their needs come from their own plantations. A vast majority of their roses is supplied by not less than 2,000 external farmers in the Isparta region. Interestingly, Sebat has partnerships in Bulgaria, and extend their expertise up to Pakistan in the quest for methyl eugenol-free roses.

The company also designs new equipment, improves technologies and markets them through Cebat Technologies. Other rose processors in Türkiye benefit from the know-how acquired through the effective combination of engineering skills and decades of experience with these fragile plants.



*Rose oil extraction at Sebat*

The Sebat tour began with a visit to their own rose fields in Dinar. Dr Süleyman Kinaci, the Chairman of the Board and head of the R&D Department, accompanied us and provided an overview of the processes involved. He also answered numerous questions from the group. Next, we visited the company headquarters, where we enjoyed a live demonstration of a vintage distillation unit. This was followed by a presentation from Dr Süleyman Kinaci and a hearty Turkish lunch.

We then moved to the Sebat production facility, where CEO Hasan Ali Kinaci gave us a tour. This facility is the world’s largest for rose and fragrant plants, with a capacity of 35 rose distillation vessels (20 x 1-ton vessels and 15 x 500-kg vessels), 15 concrete vessels (500 kg), and 2 continuous rose system and absolute units, covering approximately 6,200 square metres. We observed the distillation process, redistillation, extraction of rose concrete, and its conversion to rose absolute.

A special surprise awaited the delegates: a sizeable heap of rose petals, which resulted in a joyful experience reminiscent of toddlers playing in a ball pit, only with rose petals and adult delegates.



We were then shown their stock room, or “treasury,” where large tins of rose oil and rose concrete were stacked, awaiting sales. Finally, we visited Sebat’s product manufacturing facility, where they produce skincare, body care, aromatherapy, and home products under their own brands as well as for others. The delegates also toured the herb processing unit of Sebat.

The next morning, we visited the rose garden, where we saw expansive fields filled with beautiful pink roses. We were taught how to pick the roses, and all the delegates had a chance to try their hand at it. Despite our efforts, we only managed to fill a bag with 2.5 kilos of roses.

Afterwards, we were taken to the collection centre, where we observed how the roses are weighed and packed upon arrival. Due to the roses’ sensitivity to heat, all the bags had to be loaded onto trucks and transported to the processing facilities as early as possible to optimise the quality and quantity of rose oil output.

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## AYDIN GÜLYAĞI

Aydin Rose Oil (Aydin) cultivated roses in its own gardens even before its official establishment in 1989. Since its inception, Aydin has been producing pure rose water, rose oil, and rose concrete. At Aydin, delegates had the opportunity to observe the distillation of rose petals to produce rose oil, as well as the extraction process using hexane as a solvent to produce rose concrete. We were also treated to some delicious rose flavoured ice-cream which was much appreciated by all the delegates. Aydin Gülyağcı has been working with an NGO to improve the working conditions of seasonal migrant workers in the production of their organic rose oil as well as the welfare of their children and this was the subject of a presentation at the IFEAT Berlin Conference in October 2023.



Extraction plant at Aydin Gülyağcı

## GÜLBİRLİK



Rose extraction plant at Gülbirlik

Gülbirlik, a union of cooperatives established in 1954, has over 3,000 active producer partners processing rose flowers. The delegates were welcomed by Mr. Ibrahim Isidan, who showed us an old distillation unit that is no longer in use. This was followed by lunch and a tour of the current facility. Some delegates also had the opportunity to browse the store on the premises, which sells Gülbirlik's own home brand of cosmetics.

Each of the companies visited presented the delegates with a range of excellent gifts. In addition, those IFEAT Turkish Member companies whose operations we were unable to visit were invited to participate in some of the evening receptions or dinners. Botanika Tarım, Demirsoy Tarım, Göymen Aromatik and Orlife Global participated and presented the TST 24 delegates with some of their essential oils and other products.

## CULTURE AND GASTRONOMY



The study tour commenced with a Bosphorus cruise, accompanied by Mr. Sedat Bornovali, an art historian, interpreter, and professional tour guide. Sunset aboard the yacht provided stunning panoramic views of Istanbul's iconic landmarks, including historic mosques, palaces, bridges, and mansions.

The next morning, we had a guided tour of Sultanahmet Square, where we walked around the Hagia Sophia, the Blue Mosque, the Grand Bazaar, and other monuments of historical significance. The tour concluded with a quick shopping expedition at the Spice Bazaar, where fragrant teas, delightful sweets, and intricate jewellery, among other things, were sold.

Almost all our meals consisted of Turkish cuisine made with fresh local produce. We enjoyed meals by the water with fresh local catches as well as delicious meats. One dinner, sponsored by Kütas, featured a baked salted fish with "IFEAT" inscribed on top. Another dinner, sponsored by Sebat, included live performances by a belly dancer and a musician. A highlight meal was cooked at a farm by local Turkish women, who rolled dough into flatbreads baked before us. Some delegates had the chance to interact with these women and learn about their lives. Several baklavas and other delectable desserts were devoured throughout the trip. Many delegates have likely returned home a few kilos heavier!



Baked salted fish



Turkish farm lunch

**“After the IFEAT Türkiye Study Tour 2024, we returned full of ideas and projects to implement. An enriching journey, not only professionally but personally in which we worked on the front line with colleagues from all over the world and with workers who have shown us centuries of history and tradition to obtain the best natural aromas. We came back full of experience and knowledge.”**

**Manuel Pena-Alcaraz**

### SOME CONCLUSIONS

Some delegates had visited Türkiye several times, but for those visiting for the first time or after a long hiatus, the advanced infrastructure and modernity of the country were surprising. Almost all the facilities we viewed featured state-of-the-art machinery and used advanced technology in production and processing. Even small villages were easily accessible by well-maintained roads and excellent connectivity.

Each company we visited welcomed us warmly and was eager to show and explain every process. All questions were answered openly, and the delegates were given detailed insights into the growing, harvesting, distillation, and processing of all the crops we had the chance to see.

Our coach lectures, where some delegates take the time to give a brief talk on an area of expertise, have become a popular study tour feature. It's unique to see all

players from the same industry come together to share knowledge and experience openly.

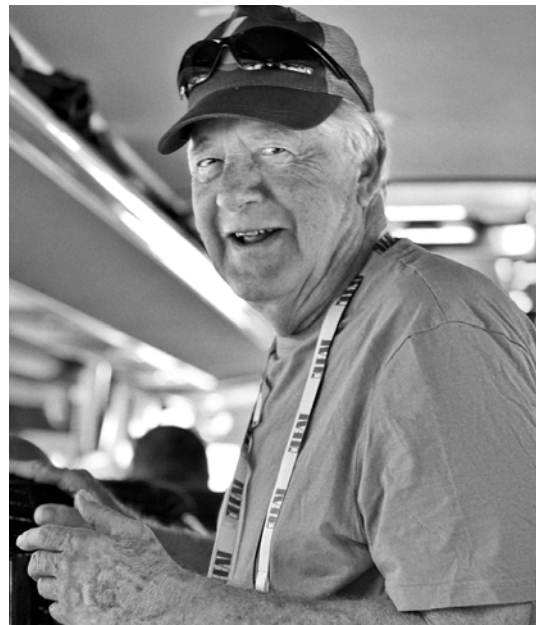
Peter Greenhalgh, IFEAT's Study Tour Coordinator, began his welcome brief by stating, “Though you meet as strangers, at the end of the study tour you will have made some lifelong friends.” Those words couldn't have been truer. Travelling together for seven days created tight friendships and bonds among competitors, buyers, and suppliers.

This study tour was especially poignant as it was Peter Greenhalgh's last one. Our final dinner was dedicated to celebrating his wonderful work in shaping the study tour into what it is today. Several delegates spoke tributes to him, leaving most eyes at the table teary. His absence on future study tours will be deeply felt by everyone who has been on a tour with him, as he leaves behind shoes too big to fill.

*I would like to thank Peter Greenhalgh and Alain Frix, who helped me put together this report, as well as Stephen Pisano and Şerife Ulu for all the photographs used.*



*A final dinner to thank Peter for his dedicated work on so many IFEAT Study Tours*



*Peter Greenhalgh*