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Turkey

Exporter Guide

Annual

2002

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Report Highlights:
The Turkish market offers both rewards and challenges to the U.S. exporter. A large and growing population is rapidly changing its consumption patterns while maintaining many traditions as well. While Turkey's economy continues to rebound, problems still exist. Historically, there have been more opportunities for U.S. exports of bulk commodities than for high-value products. Opportunities for exporting high-valued products are limited by restrictive non-tariff barriers, high tariffs, and competition from Turkey's neighbors including the European Union.

Includes PSD changes: No
Includes Trade Matrix: No
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Ankara [TU1], TU

SECTION I. Market Overview

I.1. Economic Situation

Turkey's economy is a mix of both modern and traditional. Turkey has a vibrant private sector although the government still plays a major role in many areas including transportation, communication and agriculture. Turkey's economy rebounded in 2002 after two years of negative growth. GNP is expected to grow by 4 % in 2002 with year-end inflation to be around 35 % which is significantly lower than the average inflation rate during the last 10 years.

Turkey signed a stand-by agreement with the IMF hoping to ensure macro-economic stability and alleviate persistent budgetary problems. The Turkish Lira (TL) was allowed to float in February 2001 and, after a significant depreciation, has stabilized over the past 8 months.
Agriculture accounts for 6.4 percent of GNP while industrial production accounts for 23 percent and services 47.5 percent. Textiles continue to be one of Turkey's most important industries.

The EU is Turkey's main market accounting for 50% of all exports. Overall, Turkey exported $31.2 billion worth of goods, mainly consumer and semi-manufactured products in 2001. Turkey exported about $4 billion in agricultural products in 2001 with about 40% going to the European Union. Turkey's main agricultural exports are fresh fruits, vegetables, tree nuts (mainly hazelnuts and pistachios), dried fruits (mainly raisins and figs), cereal products (mainly wheat flour and pasta), tobacco and tomato paste.

Turkey imported USD 40.5 billion worth of goods in 2001, mainly semi-manufactured products, consumer goods and raw materials. The EU supplied about 50 % of Turkey's imports compared to about 9 % from the United States. In 2001, Turkey imported about $2.6 billion in agricultural products, down nearly 30 % from 2000. Turkey's main agricultural imports include cotton, soybeans, soybean meals, vegetable oils, tobacco, corn, tallow, rice and retail products.

U.S. agriculture exports were impacted less from Turkey's economic crisis than those from other countries as the United States supplies predominantly bulk commodities. According to 2001 UN Trade figures, the U.S. market share of Turkey's agricultural imports was 42 percent for bulk commodities, 23 percent for intermediate products, and 5 percent for consumer-oriented products. In FY2002, U.S. agricultural exports to Turkey reached a five-year high of $730 million, up nearly 30 percent from FY2001.

The EU and Turkey entered into a customs union in 1996. The agreement covers trade in industrial products and processed agricultural goods. Turkey has also adopted the EU's common external tariff (CCT), resulting in lower duty rates for third countries, including the United States. Turkey is seeking to begin negotiations with the EU on full membership, although no date has been set.

I.2. Demographic Developments

Turkey has a population of about 70 million with an annual growth rate of 1.24 %. Fifty (50) percent of Turkey's population is under the age 25. Over the past 30 years, Turkey's population has shifted to urban areas, however 40 percent of all Turks still live in rural settings. Unemployment continues to be a serious problem running over 10 percent.

I.3. Consumer Buying Habits

Turkey has a $23 billion food market and its retail food sector continues to grow and modernize, however the vast majority of products available are produced locally using local ingredients. Although some supermarkets and hyperstores exist in large cities such as Istanbul, Izmir and Ankara, the majority of Turks continue to buy food products from small specialized neighborhood outlets. Turkish consumers spend close to 50 % of their income on food.

I.4. The market for U.S. products

Historically, export opportunities have been better for U.S. bulk commodities such as soybeans, soybean meal, vegetable oils, corn and cotton than for high-valued products. High tariffs , non-tariff barriers and competition from Europe has limited U.S. access to this market. Turkey bans all imports of meat product, and regularly imposes seasonal 'unofficial' bans on rice and corn imports. These restrictions are generally used to protect domestic producers. Turkey's non-transparent import licensing system poses numerous problems for U.S. processed food exporters. Despite the existence of published regulations, many import requirements are established through internal memoranda. U.S. processed food exports to Turkey include condiments and Tex-Mex products. Despite a large tourist industry, U.S. wines face duties that total 138%. Due to a government monopoly, wine cannot be sold in retail stores.

The following is a summary of the advantages and challenges facing U.S. exporters in Turkey.

Advantages	**Challenges**
Change in retailing structure has opened new areas for branded import items.	Customs Union with the EU created a privileged position for EU imports to Turkey.
Some US products are better priced than local products.	Transportation costs are much lower for nearby countries.
US products have a good image in Turkey and US tastes are welcomed by Turkish consumers.	There are high import duties on particular products. (Between 12% to 240% on bulk agricultural commodity products and 6% to 140% on processed food products)
International retailers who market a wide range of imported products in the sector have great influence on purchasing patterns.	There is a well-developed local food-processing sector supplying most product segments in the marketplace.

Advantages	Challenges
There is a growing demand for specialized products such as diabetic and diet foods, ready-to-eat foods and frozen food, which are mostly imported.	US food products are weakly promoted in Turkey. Competition for shelf space has led to high costs for introducing new products.
Under the WTO, U.S. exporters should expect a transparent system.	A non-transparent import licensing system results in numerous problems. Despite published regulations, many import requirements are established through internal memoranda.

SECTION II: Exporter Business Tips

II.1. Local Business Customs/Practices

A visitor to Turkey can see the 'modern', the 'ancient' and the 'traditional' all wrapped into one as East literally meets West in this fascinating country. Business practices in Turkey can be considered very 'Western' or 'European' on the surface, but important cultural complexities exist. For those who plan on working in, or supplying to this market, it is advisable to read up on modern Turkish culture and business practices.

Personal contact is still very important for most if not all business transactions. In addition to building trust in relationships, establishing a personal relationship with the importer can assist the exporter in meeting the sometimes daunting documentation requirements. Many importers and distributors prefer direct contacts with suppliers and exporters as there is a feeling that agents and middlemen complicate transactions, lower profits and also provide more competition by selling to others.

In general, Turks are usually not as direct as Americans. They generally avoid confrontation. Criticism is often approached in an indirect manner.

Many importers and distributors also like to identify and import unique products that are not currently available on the market. A number of importers in Turkey and the surrounding region have been frustrated by dealing with non-responsive agents who have been assigned the region by large food manufacturers.

II.2. Consumer Tastes and Preferences

On one hand, Turkish tastes and preferences are very traditional. Fast-food restaurants, as well as most Turkish restaurants specialize in traditional dishes, the most common of which is kebabs served with french fries and bulgur or rice. Outside of Istanbul and Ankara, or the tourist destinations of Izmir, Antalya and Bodrum, it is hard to find much variety.

On the other hand, the demographics in Turkey are driving many changes. Turkey has a large (70 million) and young (50% under age 25) population with rising income levels (especially in urban areas). Increased foreign travel by Turks and by tourists to Turkey is also stimulating significant changes in the attitudes and consumption patterns. Moreover, rapid urbanisation and the growing numbers of working women are increasing the demand for processed foods. Consumer expectations have also changed significantly.

Faced with an increasingly diverse range of products, quality and price, consumers have become more demanding. In response to changing consumer expectations, large food retailers, especially international companies, are demanding higher quality standards from Turkish food manufacturers which has led to new investments and improvements within the processing sector. Consumers in larger cities are more aware of international trends, have higher disposable incomes, and have automobiles to reach large warehouse-sized stores. Middle and upper-middle income shoppers are drawn to larger stores, especially if they provide imported and specialty items.

The rapid change in consumption patterns has led Turkish food processors to invest in ready-to-eat meals and frozen food products as well. There are about twenty companies that are in the frozen food and ready-to-eat meal market today with many diverse products. One of the biggest canned tomato paste manufacturers, is planning to invest in the production of ready-to-eat meals.

II.3. Food Standards & Regulations

All food and food imports in Turkey are regulated by three laws which were developed in accordance with the Codex Alimentarus, EU food regulations and WTO requirements. All packaged food imports require a license (registration) number from the General Directorate of Protection and Control, Ministry of Agriculture and Rural Affairs. Products are inspected at point-of-entry, as well as wholesale and retail levels. The process can be very confusing at times, as the Ministry of Agriculture, the Ministry of Health, and local municipalities all have overlapping areas of responsibility. Working with a reputable importer will help to sort out any conflicting problems.

Imported food may arrive in its original packaging but must have a permanent label in Turkish affixed prior to sale. Foods, food additives and flavoring all have separate labeling requirements. Turkish regulations have nine standards for food grade packaging materials although the size and types of packaging is flexible.

The Turkish Patent and Trademark Institute is responsible for registering trademarks. The process takes about six months and costs approximately $250. New laws on copyright registration and trademarks have grown exponentially since 1995 in Turkey, in anticipation of EU accession. However, limited staffing and funding limits the government’s ability to monitor compliance.

For a more detailed description of Turkey’s food regulatory system, please refer to FAS Ankara Report TU1053 available on the FAS website www.fas.usda.gov.

II.4. Import Process
In order to import any food product to Turkey, an importer must first submit a written application to the Turkish Ministry of Agriculture (MARA), General Directorate of Protection and Control. Attached to the application letter must be the following documents:
1. A completed import permit form obtained from MARA/Protection and Control;
2. A Proforma Invoice;
3. An Analysis Report providing physical, chemical, microbiological and heavy metal specifications of the product imported. Frozen seafood is exempt from this requirement. A dioxin-free certificate is also required from all countries.
4. For consumer-ready products, a sanitary or phytosanitary certificate from a government food inspection agency of the country of origin stating that the product meets the phytosanitary requirements of the importing country, is fit for human consumption and is freely marketed in the country of origin;
5. A sample of the Turkish label for the product.
6. For alcohol products, a "distribution certificate" provided by the producer's company to the importer and/or distributor indicating that the Turkish company is authorized to market and deliver the product in Turkey;
7. For "special" foods such as diet foods, foods for diabetics, vitamins, baby foods, etc. the importer must provide a written declaration that he will not advertise the foodstuff in such a way as to mislead the consumer.

The importer will normally receive written approval along with an import permit from the Ministry of Agriculture within one or two weeks.

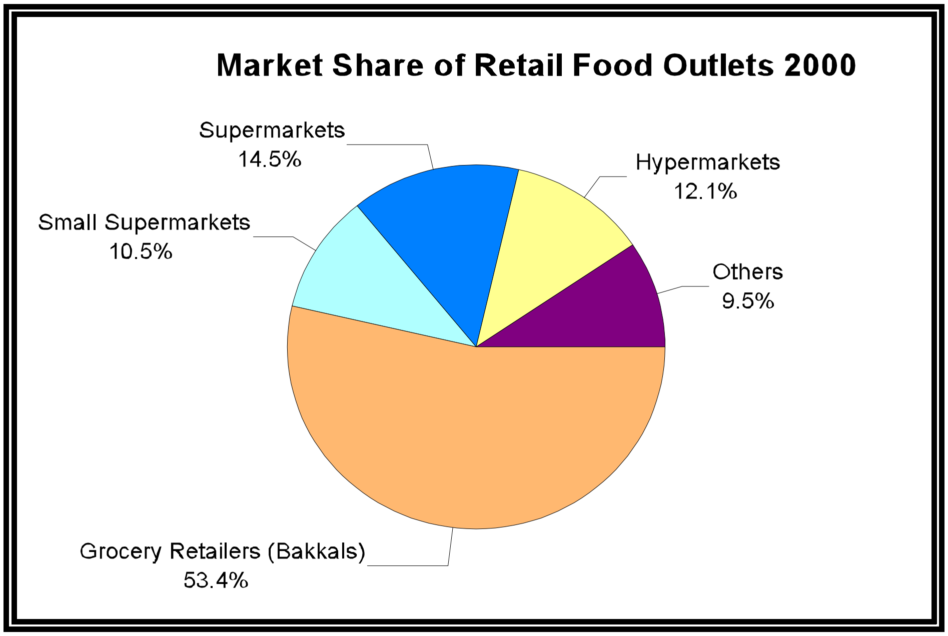
II.5. Customs Process

Importers need to present an approved import license, bill of lading, certificate of origin, sanitary or phyto-sanitary certificate, the analysis report (physical, chemical, etc.) and other standard import documents to Customs upon entry of the product. The Ministry of Agriculture officials take samples for testing to confirm the analysis report with results generally available in two to three days. Bulk or semi-processed commodities are subject to further checks for compliance with either the plant quarantine law or the animal health law.

Section III: Market Sector Structure and Trends

III.1. Retail Food Sector

Turkey had a total of 145,430 retail food outlets in 2000 including small traditional neighbourhood grocery stores (bakkal) to less common but rapidly growing hypermarkets. Food retailing in Turkey is shifting towards more modern westerm-style operations. This transformation has mainly occurred in large cities, but recent investments have targeted medium-sized cities where the population is over 600,000. Investments by the international companies and local retail chains are continuing despite the slow economic recovery. For the retail food market, many products are imported by an importer or agent who may also be a wholesaler and/or distributor. Significant number of distributors offer nationwide service. It is estimated that nearly 50% of total food and other consumer goods are distributed by national



distribution companies. Almost one-third of major manufacturers have their own distribution departments. Most hypermarkets import directly besides purchasing from other distribution channels. Some medium sized markets have begun to use e-commerce for the supply of particular foreign products.

For a more detailed description of Turkey's retail food market, please refer to FAS Ankara Report TU1050 available on the FAS website www.fas.usda.gov.

III.2. Food Processing Sector

Turkey with its rich agricultural base has a highly developed food-processing industry. According to the 1998 census there are 24,308 food processing firms in Turkey. Most are small to medium sized enterprises. About 4,000 of these firms use modern technology for production and quality control.

In 2000 processed foods expenditures were estimated at $18.7 billion down from $20 billion in 1998 due to a drastic devaluation of Turkish Lira. The size of the sector continued to decrease in 2001 but is expected to grow slowly in 2002. The worst effected sectors were growing at extremely quick prior to the crisis, i.e., poultry, meat. Annual expenditures on processed food items still only amounts to about $265 per person.

Large food processors prefer to purchase locally or import their food supplies directly most of the time. However, small to medium sized processors get in contact with importers, brokers, and/or wholesalers. Often times, an importer also acts as a wholesaler.

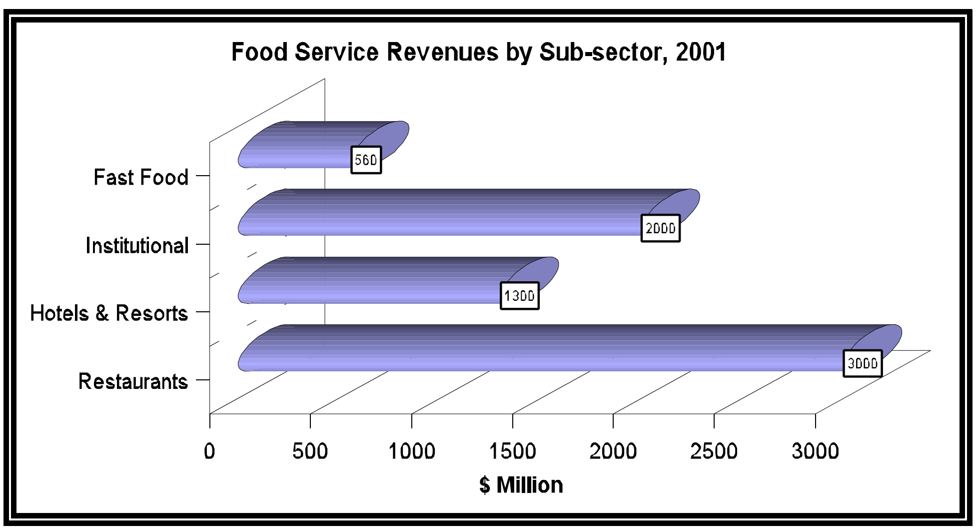
For a more detailed description of Turkey's food processing sector, please refer to FAS Ankara Report TU2047 available on the FAS website www.fas.usda.gov.

III.3. HRI Food Service

The changing demographics in Turkey has brought the rapid development of two niche sectors - fast food and institutional food service. There are about 50,000 restaurants in Turkey. Restaurants comprise the leading market segment in the food service sector, accounting in 2001 for 44% of total food service sales - 85% in food and 15% in beverages. It is a large category covering all outlets from traditional kebab & pide (similar to pizza) houses to luxurious restaurants offering a wide variety of international dishes.

Traditional restaurants have a 26% share of total restaurant sales. Their use of imported food & beverages is negligible, as the high import tariffs and complex importation process are major deterrents to most independent restauranteurs. An average 10% growth rate is expected in restaurant food service for the next five years. Luxury restaurants comprise the main market for imported food & beverages, but only 5-10% of the total restaurant market.

Foreign restaurants procure their imported items either through importers or wholesalers. A few international chains, like TGI Fridays, import directly. The main import items are wine, beer, fish products, specialty cheeses, sauces and pastry, and staple items like corn, rice, etc. when domestic supplies are not appropriate.



Fast food chains are a relatively new concept in Turkey having begun only 15 years ago. Turkey's fast food market reached about $750 million in 2000 but is estimated to have decreased about 25 percent in 2001. The sector is expected to grow again beginning in 2002. Currently there are 20 fast food chains with a total of 650 outlets. The great majority (about 75%) of them are located in big cities.

In the 1980s, institutional food services began emerging in Turkey to supply food to cafeterias in factories, schools, hospitals, private companies, and public sector organizations. The institutional food service sector developed rapidly, accounting for 29% of the overall HRI sector in 2001. There are about 2,700 food service enterprises in Istanbul alone and the total for Turkey is estimated more than 5,000. A large number (65%) of these companies are working informally without registration with the Ministry of Industry or the tax authorities.

The hotel sector has a 19% market share of total food service sales. It is expected that between 2001-2005 the growth in hotel and resorts food service could increase by 15-20% per year, parallelling the anticipated growth in the tourism sector from $9.5 billon in 2001 to $15-20 billon in 2005.

For more information on this sector, please refer to FAS Ankara report TU2012 available at the FAS website www.fas.usda.gov.

Section IV: Best High-Value Product Prospects

The best high-valued products for the imported food market (retail) are internationally recognized branded food products. These types of products in general accounted for 30 percent of overall imported food products. These include cocoa and instant coffee, chocolate and confectionary goods, cookies and crackers, breakfast cereal, various cheeses, soft drinks & alcoholic beverages, sauces and petfoods.

Section VI: Key Contacts and Further Information

Important Associations in Turkey

Organization	**Contact Name**	**Address**	**Phone**	**Fax**
The Union of Chambers of Commerce, Industry, Maritime Trade And Commodity Exchanges of Turkey/ *Turkiye Odalar ve Borsalar Birligi (TOBB)*	Mr. Rifat Hisarciklioglu	Ataturk Bulvari 149 Bakanliklar Ankara, Turkey	90-312-417-7700 90-312-417-7709	90-312-418-3268
Ankara Chamber of Commerce / *Ankara Ticaret Odasi*	Mr. Sinan Aygun	Eskisehir Yolu Uzeri, II. Cadde No.5 06530 Sogutozu Ankara, Turkey	90-312-285-7950 90-312-285-7954	90-312-286-2764
Ankara Chamber of Industry/ *Ankara Sanayi Odasi*	Mr. Zafer Caglayan	Ataturk Bulvari 193-4 06680 Kavaklidere Ankara, Turkey	90-312-417-1200 90-312-417-1204	90-312-417-2060 90-312-417-5205
Chamber of Marine Trade/ *Deniz Ticaret Odasi*	Mr. Cengiz Kaptanoglu	Meclisi Mebusan Cad., 22 80154 Salipazari Istanbul, Turkey	90-212-252-0130 90-212-252-0136	90-212-293-7935
Istanbul Chamber of Industry / *Istanbul Sanayi Odasi*	Mr. Tanil Kucuk	Mesrutiyet Cad., 118, 80050 Tepebasi Istanbul, Turkey	90-212-252-2900 90-212-252-2909	90-212-249-3963
Istanbul Chamber of Commerce / *Istanbul Ticaret Odasi*	Mr. Mehmet Yildirim	Seyh Mehmet Geylani Mah., Resadiye Cad., Yalikosku Konagi Sok., 34378 Sirkeci Istanbul, Turkey	90-212-455-6000	90-212-513-1565
Aegean Chamber of Industry / *Ege Bolgesi Sanayi Odasi*	Mr. Salih Esen	Cumhuriyet Bulvari 63 35210 Pasaport Izmir, Turkey	90-232-441-0909	90-232-483-9937

Organization	Contact Name	Address	Phone	Fax
SET-BIR (Union Of Dairy Producers)	Prof. Dr. Erkan Benli, Secretary General	Mebusevleri Mah. Ayten Sok. No. 27/8, Tandogan, Ankara	90-312-212-7902	90-312-212-3662
BESD-BIR (Union of Poultry Producers)	Kemal Akman, Chairman	Cetin Emec Blv., 8. Cad. No.4/6, Ovecler, Ankara	90-312-479-6246	90-312-479-6247
Turkish Flour Millers Association/ *Turkiye Un Sanayicileri Birligi*	Ilker Tanik, Secretary General	Selanik Cad. No. 82/30, Kizilay, Ankara	90-312-417-5357	90-312-417-5358
Turkish Feed Millers Association/ *Turkiye Yem Sanayicileri Birligi*	Ulku Karakus, President	Cetin Emec Blv., 8. Cad., 79. Sok., No.3/1, Ovecler, Ankara	90-312-479-9591	90-312-479-0698
Turkish Seed Industry Association/ *Turkiye Tohumcular Birligi*	Ayhan Elci, Secretary General	Tuna Cad. No.14/14, Yenisehir, Ankara	90-312-432-0050	90-312-432-2650
Union of Pasta Producers/ *Makarnacilar Dernegi*	Ergin Erzurumlu, Secretary General	Cinnah Cad. No. 59/5, Cankaya, Ankara	90-312-441-5547	90-312-438-3433
Foreign Economic Relations Board / *Dis Ekonomik Iliskiler Kurulu - DEIK*	Mr. Rifat Hisarciklioglu	Odakule 80050 Beyoglu Istanbul, Turkey	90-212-243-4180	90-212-243-4184
Turkish-American Business Association / *Turk-Amerikan Isadamlari Dernegi*	Mr. Zeynel Abidin Erdem	Barbaros Bulvari Eser Apt., No:48, Kat:5, D.16, Balmumcu, Besiktas, Istanbul Turkey	90-212-274-2824	90-212-275-9316
Turkish Industrialists and Businessmen Assn./ *Turk Sanayicileri ve Isadamlari Dernegi-TUSIAD*	Mr. Tuncay Ozilhan	Mesrutiyet Cad., No.74 80050 Tepebasi Istanbul, Turkey	90-212-249-5448 90-212-249-0723 90-212-249-1929	90-212-249-0913 90-212-249-1350

Organization	Contact Name	Address	Phone	Fax
Assn. Of Bursa Industrialists & Businessmen / *Bursa Sanayici ve Isadamlari Dernegi- BUSIAD*	Mr. Celal Beysel	Kultur Park Ici Arkeoloji Muzesi Yani, 16080 Bursa, Turkey	90-224-233-5018	90-224-235-2350
Assn. Of Foreign Capital Coordination / *Yabanci Sermaye Koordinasyon Dernegi-YASED*	Mr. Faruk Yoneyman	Barbaros Bulvari Murbasan Sok., Koza Is Merkezi B-Blok, Kat:1 80700 Besiktas Istanbul, Turkey	90-212-272-5094 90-212 272-5095	90-212 274-6664
Independent Industrialists and Businessmen's Assn./ *Mustakil Sanayici ve Isadamlari Dernegi - MUSIAD*	Mr. Ali Bayramoglu	Mecidiye Cad., No.7/50 Cansizoglu Ishani, 80310 Mecidiyekoy Istanbul, Turkey	90-212-213-6100 90-212-213-6119	90-212-213-7890 90-212-216-0142
The Banks Association of Turkey / *Turkiye Bankalar Birligi*	Mr. Ersin Ozince	Nispetiye Cad., Akmerkez B3 Blok, Kat:13-14 80630 Etiler Istanbul, Turkey	90-212-282-0973 90-212-282-0988	90-212-282-0946 90-212-282-0947
Turkish Industrial Development Bank / *Turkiye Sinai Kalkinma Bankasi-TSKB*	Mr. Halil Eroglu	Meclisi Mebusan Cad., 161 80040 Findikli Istanbul, Turkey	90-212-334-5050	90-212-243-2975
Union of Turkish Agricultural Chambers / *Turkiye Ziraat Odalari Birligi*	Mr. Mehmet Rifat Akyuz	GMK Bulvari No:25 Demirtepe Ankara, Turkey	90-312-231-6300	90-312-231-7627
Chamber of Agricultural Engineers / *Ziraat Muhendisleri Odasi*	Prof. Dr. Gurol Ergin	Karanfil Sok., 28/19 Kizilay Ankara, Turkey	90-312-425-0555 90-312-418-3115	90-312-418-5198

Organization	**Contact Name**	**Address**	**Phone**	**Fax**
Chamber of Forest Engineers / *Orman Muhendisleri Odasi*	Mr. Salih Sonmezisik	Necatibey Cad., 16/13, Sihhiye Ankara, Turkey	90-312-229-2009	90-312-229-8633
Seed Industry Association / *Tohumcular Endustrisi Birligi Dernegi*	Mr. Yavuz Batur	Tuna Cad., 14/14 Yenisehir Ankara, Turkey	90-312-432-0050	90-312-432-0050
Market and Public Opinion Researchers Assn. / *Pazarlama ve Kamuoyu Arastirmacilari Dernegi*	Mr. Bulent Gundogmus	C/O Peva Etud Musavirlik Arastirma Ltd. Istiklal Cad., Imam Adnan Sok., Peva Han, Kat:2, 80090 Beyoglu Istanbul, Turkey	90-212-249-2319	90-212-251-3929
Advertising Firms Association / Reklamcilar Dernegi	Ms. Nesteren Davutoglu	Yildiz Cicegi Sok., No.19 80630 Etiler Istanbul, Turkey	90-212-257–8873	90-212-257-8870 90-212-287-1797
Advertisers Association / *Reklam Verenler Dernegi*	Mr. Caner Tunaman	Ali Nihat Tarlan cad., Karaman Sok., Hofman Is Merkezi, No:2/15, Kat:7 81110 Bostanci Istanbul, Turkey	90-216-361-4452	90-216-361-4429
Food Importers Association / *Tum Gida Ithalatcilari Dernegi-TUGIDER*	Ms. Melahat Ozkan	Buyukdere Cad., 62/41, Lale Ishani, Mecidiyekoy, Istanbul Turkey	90-212-212-0919	90-212-212-0920
Beverage Producers Association / *Mesrubatcilar Dernegi*	Mr. Mahmut Erdogan	Bedri Rahmi Eyuboglu Sok., Derya Apt., No.3, Kat:6, 81030, Kalamis Istanbul, Turkey	90-216-345-9915 90-216-348-3616	90-216-348-1029
Turkish Franchising Association / *Ulusal Franchising Dernegi-UFRAD*	Mahir Saranga	Ergenekon Cad., Pangalti Is Merkezi, 89/15 Kat: 3, 80240 Pangalti, Istanbul, Turkey	90-212-296-6628 90-212-219-0564	90-212-224-5130

Organization	**Contact Name**	**Address**	**Phone**	**Fax**
Milk, Meat and Food Industrialists and Producers Assn. / *Turkiye Sut, Et, Gida Sanayicileri ve Ureticileri Birligi-SETBIR*	Mr. Olgun Erguz	Mebus Evleri Mah., Ayten Sok., No.27/8 06580, Tandogan Ankara, Turkey	90-312-212-7902 90-312-223-5963	90-312-212-3662
Paper and Paper Pulp Industrialists Foundation / *Seluloz ve Kagit Sanayicileri Vakfi*	Mr. Erdal Sukan	Buyukdere Cad., Cinar Apt., No95, Kat:3, D:11-12 Mecidiyekoy Istanbul, Turkey	90-212-275-1389	90-212-266-9524
Chamber of Shipping / *Deniz Ticaret Odasi*	Mr. Cengiz Kaptanoglu	Meclisi Mebusan Cad., No.22 80154 Salipazari Istanbul, Turkey	90-212-252-0130 90-212-252-0137	90-212-293-7935
Textile Research / *Tekstil Arastirma Dergisi*	Mr. Celal Yuksel	Millet Cad., Sule Apt. No.35, Kat:3 34300 Findikzade, Istanbul, Turkey	90-212-588-4524 90-212-589-0179	90-212-632-7129
Turkish Clothing Manufacturers Assn. / *Turkiye Giyim Sanayicileri Dernegi*	Mr. Umut Oran	Istanbul Tekstil Center, Ali Riza Gurcan Cad., Cirpici Yolu, No.1, Kat:5 Merter Istanbul, Turkey	90-212-481-6511 90-212-481-6515	90-212-481-6510 90-212-481-6517
International Overland Transporters Assn. / *Uluslararasi Nakliyeciler Birligi*	Mr. Cetin Nuhoglu	Nispetiye Cad., Seheryildizi Sok., No.10, Etiler Istanbul, Turkey	90-212-287-0912 90-212-287-0980	90-212-287-0913 90-212-287-0981

Important Regulatory and Governmental Contacts

Ministry of Agriculture and Rural Affairs/ *Tarim ve Koyisleri Bakanligi*	Prof. Dr. Sami Guclu	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 419-8300 424-0226	(90-312) 417-7168
Ministry of Agriculture and Rural Affairs/ *Tarim ve Koyisleri Bakanligi*	Dr. Hamit Ayanoglu, Under Secretary	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 425-2107	(90-312) 417-9247
General Directorate of Protection and Control/ *Koruma ve Kontrol Genel Mudurlugu*	Dr. Huseyin Sungur, Director General	Akay Cad. No. 3, Bakanliklar, Ankara	(90-312) 425-7789	(90-312) 418-6318
General Directorate of Production and Development/ *Uretim ve Gelistirme Genel Mudurlugu*	Dr. Ahmet Bulbul, Director General	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 418-2059 417-0026	(90-312) 425-2016
Turkish Grain Board/ *Toprak Mahsulleri Ofisi*	Yavuz Koca, Deputy Director General	Milli Mudafa Cad. No.18, Kizilay, Ankara	(90-312) 418-2313	(90-312) 417-5934
Ministry of Industry/ Sanayi Bakanligi	Ali Coskun, Minister	Eskisehir Yolu 7.Km., No. 154, Ankara	(90-312) 286-0696 286-2006	(90-312) 286-5325
Undersecretariate of Foreign Trade/ *Dis Ticaret Mustesarligi*	Dr. Murat Sezginer, Acting U/S	Eskisehir Yolu, Emek, Ankara	(90-312) 212-8742	(90-312) 212-8255
Undersecretariate of Treasury/ *Hazine Mustesarligi*	Faik Oztrak, U/S	Eskisehir Yolu, Emek, Ankara	(90-312) 212-5745 212-8630	(90-312) 212-2297
Ministry of Forestry/ *Orman Bakanligi*	Osman Pepe, Minister	Ataturk Bulvari, Bakanliklar, Ankara	(90-312) 425-4606 425-2818	(90-312) 418-7354

Ministry of Health/ *Saglik Bakanligi*	Recep Akdag, Minister	Sihhiye, Ankara	(90-312) 430-6095 - 98	(90-312) 431-4879
Ministry of Environment/ *Cevre Bakanligi*	Imdat Sutluoglu, Minister	Eskisehir Yolu, 8.Km. Bilkent Kavsagi, Ankara	(90-312) 285-6636 - 37	(90-312) 285-2742
Ministry of Finance/ *Maliye Bakanligi*	Kemal Unakitan, Minister	Ilkadim Cad. No. 2, Bakanliklar, Ankara	(90-312) 425-0080 425-0023	(90-312) 425-0058

Appendix I. Statistics

Table A. Key Trade and Demographic Information

Agricultural Imports From All Countries ($mln) U.S. Market Share (%): All data 2001 UN figures	$2,620 28%
Consumer Food Imports From All Countries ($mln) U.S. Market Share (%) All data 2001 UN figures	$304 5%
Edible Fishery Imports From All Countries ($mln) U.S. Market Share (%) All data 2001 UN figures	$12 0.03%
Total Population / Annual Growth Rate (%)	68.6 Million / (1.67%)
Urban Population / Annual Growth Rate (%)	44.9 Million / (2.51%)
Number of Major Metropolitan Areas	7
Size of the Middle Class / Growth Rate (%)	14 Million / (1.2%)
Per Capita Gross Domestic Product (U.S. Dollars)	$2,160
Unemployment Rate (%)	10.6
Per Capita Food Expenditures (USD)	$1,200
Percent of Female Population Employed	23.8%
Exchange Rate (US$1 = Turkish Lira)	TL 1,525,000

Table B. Consumer Food & Edible Fishery Product Imports

Turkey Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
(In Millions of Dollars)	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED AGRICULTURAL TOTAL	**400**	**410**	**304**	**14**	**15**	**14**	**3**	**4**	**5**
Snack Foods (Excl. Nuts)	30	33	26	1	1	1	1	1	2
Breakfast Cereals & Pancake Mix	6	8	6	1	1	1	0	1	1
Red Meats, Fresh/Chilled/Frozen	1	1	1	0	0	0	0	0	0
Red Meats, Prepared/Preserved	1	1	1	1	0	0	2	0	0
Poultry Meat	1	1	1	0	1	1	0	89	36
Dairy Products (Excl. Cheese)	34	25	15	1	1	1	1	1	0
Cheese	7	12	6	1	1	1	1	0	1
Eggs & Products	4	5	7	1	1	1	0	2	10
Fresh Fruit	64	54	22	1	1	1	0	0	0
Fresh Vegetables	12	5	1	0	0	1	0	0	1
Processed Fruit & Vegetables	30	36	18	2	1	1	6	4	5
Fruit & Vegetable Juices	3	4	4	1	1	1	0	2	1
Tree Nuts	5	9	6	1	1	1	9	9	19
Wine & Beer	1	1	1	1	1	1	16	10	4
Nursery Products & Cut Flowers	21	17	10	1	1	1	2	2	0
Pet Foods (Dog & Cat Food)	7	6	5	1	1	3	17	18	53
Other Consumer-Oriented Products	175	192	177	9	10	8	5	5	4
FISH & SEAFOOD PRODUCTS	**30**	**38**	**12**	**1**	**1**	**1**	**0**	**0**	**0**
Salmon	1	2	1	1	0	0	3	0	0
Surimi	1	1	1	1	1	0	24	20	0
Crustaceans	1	1	1	1	0	1	0	0	2
Groundfish & Flatfish	2	2	1	0	0	0	0	0	0
Molluscs	1	2	1	0	0	0	0	0	0
Other Fishery Products	25	31	8	0	1	1	0	0	0
AGRICULTURAL PRODUCTS TOTAL	**2666**	**3226**	**2440**	**606**	**882**	**740**	**23**	**27**	**30**
AGRICULTURAL, FISH & FORESTRY TOTAL	**2926**	**3589**	**2620**	**611**	**892**	**743**	**21**	**25**	**28**

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

Turkey - Top 15 Suppliers

CONSUMER-ORIENTED AGRICULTURAL IMPORTS				FISH & SEAFOOD PRODUCT IMPORTS			
($1,000)	**1999**	**2000**	**2001**	**($1,000)**	**1999**	**2000**	**2001**
Germany	67,955	64,582	55,346	Norway	10,186	12,449	6,972
Netherlands	50,854	53,271	37,805	Spain	14,029	15,037	1,502
Ireland	3,336	5,905	21,514	France	979	3,585	814
France	39,189	42,334	19,294	Seychelles	0	158	537
Italy	26,340	23,184	17,787	Singapore	390	371	224
Spain	14,565	15,432	14,232	India	324	636	204
Ecuador	37,065	36,678	13,894	Georgia, Repub	181	51	178
United States	13,580	15,408	13,696	Free Zones	0	211	166
United Kingdom	16,227	18,590	13,279	Bulgaria	569	564	162
Denmark	18,666	15,712	12,461	Argentina	999	684	119
Switzerland	13,285	12,976	10,715	Morocco	0	0	116
Belgium	16,232	10,480	8,306	China	0	108	115
Austria	6,464	7,342	8,201	Ukraine	270	89	106
Poland	3,716	3,442	6,675	Belgium	1	271	92
Free Zones	956	1,822	4,965	Russian Federa	9	38	72
Other	71,422	83,285	45,809	Other	2,562	3,622	446
World	399,850	410,449	303,993	World	30,499	37,874	11,831