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Turkey

Exporter Guide

2014 Turkey Exporter Guide

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Report Highlights:
Turkey is a growing market with a young population of increasing affluence. Especially younger consumers are increasingly interested in consumer-oriented products, especially of ethnic flavors, which are uncommon on the market. Exports in these novel products have potential for companies willing to market and introduce their products. Exporters must be aware of regulatory and marketing pitfalls, for which a seasoned domestic partner is highly recommended. Recent currency depreciation to the dollar may reduce the appeal of some products that are now more expensive.

Post:

Ankara

Author Defined:

SECTION I. MARKET OVERVIEW

Turkey's population exceeds 81 million and the median age is under 30. Strong economic growth and rising incomes have sparked an expansion in consumer products, including higher quality and new flavors in the food and beverage sector.

The Turkish economy grew 3.8% in 2013 reaching a gross domestic product (GDP) of $821.8 billion, making Turkey the 17th largest economy.

GDP per capita has grown 135% from $4,500 in 2003 to $10,700 in 2013. Household consumption increased by 11.5% in 2013 to reach $582 billion. The proportion of household expenditures spent on food has decreased over the last decade from 27% to 20%, but the amount spent has grown from $59 in 2003 to $116 billion in 2013. While the proportion of expenditures on food and beverage has declined in the last decade, the proportion of expenditures on restaurant and hotels has grown 50% over the same period.

Turkey has undergone rapid urbanization in the last decade, reaching 71.5% in 2011. The population in large cities such as Istanbul, Ankara, Izmir and Bursa is increasing every year with a national average urbanizing rate of 2.4%. The growth has fuelled the growth of supermarket chains, as well as discount retailers – see the 2014 Retail Report (TR4049 published 11/24/2014). In addition, urbanization and growing per capita income has spurred greater dinning out in restaurants and in the food courts of malls – which are more common every day – see the 2014 Hotel Restaurant Institutional Report (TR4059 published 12/31/2014).

Turkish National Statistics

Parameter	Value
Population	75 million (2013)
Labor Force (Population)	27.9 million (2014)
Median Age	29.6 (2014)
GDP	USD 821.8 billion (Official - 2013 est.)
GDP Per Capita	USD 10,957 (2013 est.)
Exports Value	USD 167.6 billion (2013 est.)
Imports Value	USD 242.9 billion (2013 est.)
Tourism Revenue	USD 27.9 billion (2013)
Tourist Number	37.8 million people (2013)
Foreign Direct Investment	USD 15 billion (2013 est.)
Number of Companies with Foreign Capital	32,600 (2012)
Inflation Rate	7.6% (CPI – 2013 est.)

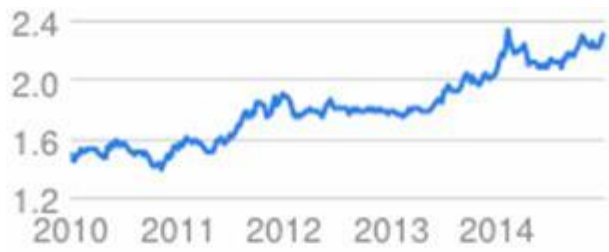
Market Advantages and Challenges

Advantages	Challenges

High export potential due to geographic proximity both to EU, Russian and Middle East markets.	EU exporters enjoy lower transportation costs, better cold chain infrastructure, and faster market access due to geographical proximity
A young and urban population creates demand for and welcomes new products as they are open to try novel tastes.	Laws governing the food sector are mostly focused on protecting local production rather than promoting trade, which can be overwhelming for both the importer and the exporter. In addition, regulations can be unclear, complex and they can be changed overnight
Additional demand for food products comes from the strong and growing tourism sector.	There are some very high import duties on both bulk and processed products.
The good reputation of U.S. food products is the main reason for increasing demand as economic conditions and purchasing power improve.	Recent fluctuations in the foreign exchange rate made imported products more expensive in the Turkish market.
Change in retailing structure has opened new areas for branded import items.	Turkey has a well-developed food-processing sector with qualified products and competitive pricing. There is also a rich base of agricultural production, providing raw ingredients at cheaper prices for this sector.
Some U.S. products (mainly bulk and intermediate commodities) are better priced than local products.	Customs Union with the European Union creates an advantage for EU exports to Turkey, both in terms of price due to lower import duties and regulatory advantage due to harmonization of regulations within the member/candidate states
U.S. products have a high quality image in Turkey and Turkish consumers welcome U.S. style products.	There is significant tariff and non-tariff protection for locally produced foods and agricultural products.
International retailers that market a wide range of imported products in the sector have great influence on purchasing patterns.	The Biosafety Law prevents all GM (Genetically Modified) products for food purposes to enter Turkey. This effects many products with ingredients that have a possibility of being GM.
As the processed food market continues to grow, so does the demand for food ingredients and they are mostly imported.	In the retail stores, competition for shelf space has led to higher costs for introducing new products.

The Republic of Turkey is a complex and challenging market requiring adaptability and persistence.

The Turkish Lira (TL) has lost 35 percent of its value against the dollar since mid-2012.



U.S. exporters face many of the same challenges that exist in other semi-developed countries, such as contradictory policies, a lack of transparency in regulations and documentation requirements, and an unpredictable judiciary and legal and regulatory framework.

Careful planning and patience are the keys to success in Turkey.

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

Business in Turkey is a personal affair and should not be conducted without first visiting and sharing a cup of tea and friendly conversation. The spoken word is more significant than is common in the U.S., and these details can change the expectations of a business deal or partnership more than what is written in a contract. Styles vary across Turkey as much as does the cuisine. Business in Istanbul, Thrace or the Aegean region will be more familiar than in Anatolia or in east Turkey.

Finding the right local partner is essential for navigating local business customs, legislation and regulations. Local partners can be adept at conducting business in a regulatory environment where the rules change frequently.

Consumer Tastes and Preferences

Younger and metropolitan Turkish consumers are seeking and experimenting with exotic tastes and imported foods. However, the majority of consumers are content with familiar staples of traditional Turkish cuisine.

Turkish cuisine varies across the country. The cooking of Istanbul, Bursa, Izmir, and rest of the Aegean region inherits many elements of Ottoman court cuisine, with a lighter use of spices, a preference for rice over bulgur, *koftes* and a wider availability of vegetables stew (*türlü*), eggplant, stuffed dolmas and fish. The cuisine of the Black Sea Region uses fish extensively, especially the Black Sea anchovy (*hamsi*), has been influenced by Balkan and Slavic cuisine, and includes maize dishes. The cuisine of the southeast -Urfa, Gaziantep and Adana- is famous for its variety of kebabs, *mezes* and dough-based desserts such as *baklava*, *kadayıf* and *künefe*.

Especially in the western parts of Turkey, where olive trees grow abundantly, olive oil is the major type of oil used for cooking. The cuisines of the Aegean, Marmara and Mediterranean regions are rich in vegetables, herbs, and fish. Central Anatolia has many famous specialties, such as *keşkek* (kashkak), *mantı* (especially from Kayseri) and *gözleme*.

A specialty's name sometimes includes that of a city or region, either in or outside of Turkey, and may refer to the specific technique or ingredients used in that area. For example, the difference between urfa kebab and adana kebab is the thickness of the skewer and the amount of hot pepper that kebab contains. Urfa kebab is less spicy and thicker than adana kebab.

As much as regional tastes differ, Turkish consumers share a common concern for the safety of their food. Consumers tend to hold traditional food in high regard and are concerned with modern utilization of antibiotics, hormones, and especially agricultural biotechnology. Many consumers are unfamiliar with each, and may confuse them for being one in the same. A number of television doctors have built careers around warning consumers of health hazards from any number of inputs – biotech products likely topping the charts. Some products have turned this trend to their advantage, carefully navigating Turkey's strict labeling regulations to market products to health-conscious consumers.

Food Standards and Regulations

For information on Turkey's food standards and import requirements, see the Food and Agricultural Import Regulations and Standards *(FAIRS)* Reports TR4013 and TR4015. As Turkey's regulation of biotech traits is broad and severe also review the Agricultural Biotechnology Annual Report (TR4014) and agricultural situation reports on biotechnology regulatory developments, such as Exports to Turkey Disrupted by New Biotech Enzyme Requirement (TR4046).

Agriculture Sector

Agriculture has long been a dominant sector for Turkey's economy, employment, and exports.

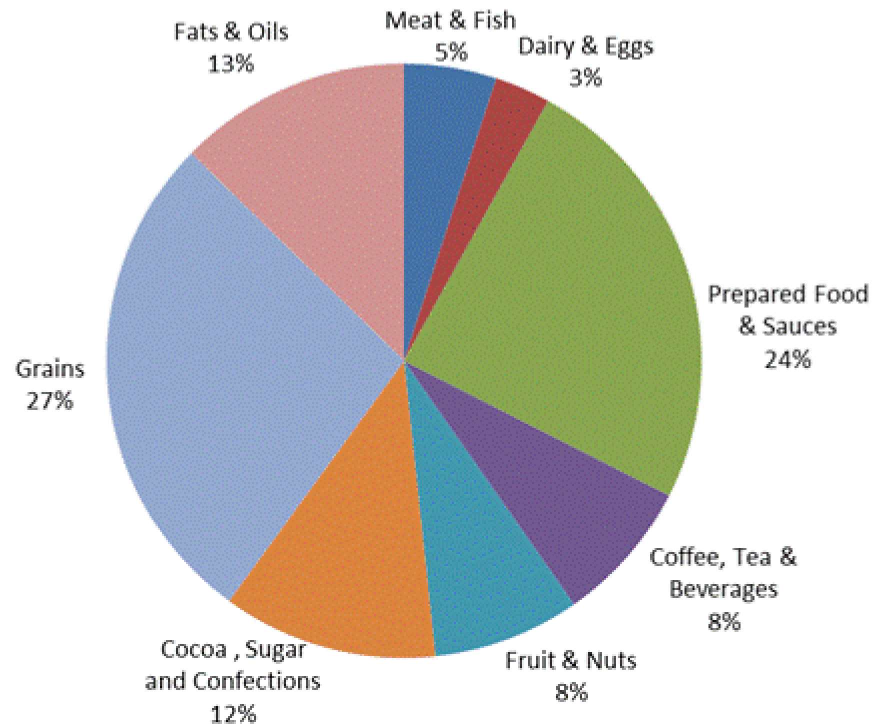
Around 40 percent of Turkey's land area is arable and offers a large range of products such as grains, pulses, oil seeds, fruits and vegetables, cut flowers, poultry, dairy products, seafood, honey and tobacco.

Turkish food and beverage imports increased 7.4 percent and reached $6 billion in 2013. The Russian Federation was the largest supplier to Turkey's food and beverage sector with 13.8 percent, followed by the U.S. with 10.5 percent in 2013.

Turkey's leading import category is grains ($1.3 billion), which is largely wheat to feed Turkey's large inward processing regime for wheat flour, pasta and biscuit exports. The remainder is largely medium grain rice ($150 million) that competes with domestic production.

The next largest category is a catch-all that includes prepared foods, sauces, yeast, vegetables, fruits and nuts. Turkey is a major exporter to Europe and the Middle East, including dairy, prepared foods and bakers' wares. Turkey imported $620 million in sugar, cocoa and confections in 2013, and $670 million in fats and oils.

Categories of Turkey's Food Imports



Despite leading global production of several tree nuts, demand for Turkey's exports exceeds their production. Turkey imports $213 million in tree nuts to supplement varieties produced in Turkey, and uncommon varieties such as almonds.

Turkey imported $413 million in coffee, tea and beverages, and $160 million in dairy, milk products and eggs. Turkey also imported $266 million in meat and fish, but does not import red meat from the United States and is not a large consumer of U.S. fish or fish products.

Food purchasing behavior

The Turkish food sector is becoming more advanced due to retailer demands for higher standards and investments by food manufactures. Through the widespread presence of modern international and domestic grocery retail outlets such as Metro, Carrefour, Tesco and Migros, as well as rising incomes, the consumption patterns of Turkish consumers have shifted away from bulk and raw foods towards packaged and processed foods, including ready-to-eat meals and frozen foods. An increase in the number of females working full-time and higher levels of disposable income has supported this trend. This is particularly the case in urban centers.

The major food consumption patterns have not changed as much in the rural areas and are still based on wheat and grain products, and a variety of meat products. Consumers in the south east of Turkey mainly consume lamb, but more consumers in central Anatolia and the west prefer beef. Milk consumption has not increased as quickly as milk production, which increased from 3 million metric tons (MT) in 2011 to 18 million MT in 2013. However, the variety of milk products such as yogurt and cheese has increased. There are still a lot of opportunities for investments in the dairy products sector, but products should be adjusted to local tastes.

Turkey should be considered a door to Middle Eastern market. Due to shared history and religion, as well as common cultures, Turkish agriculture and food exports to the Middle East have increased dramatically in the past decade. The Halal and organic food subsectors are areas which could be ready for investments or partnerships in the region.

Production in the food and beverage sector reached $157 billion in 20012, which constitutes approcimately20 percent of the country's GDP.

The proportion of Turkish household expenditure allocated to food and beverages, which was around 27 percent in 2003 declined to 19.9 percent in 2013; which remains high compared to Western standards, which range between 15-20 percent.

The Turkish economy grew 17.6 fold between 1980 and 2013 from $46.6 billion to 823.6 billion, whereas the food sector grew 14.8 fold from $10 billion to $148 billion over the same period.

The Turkish diet contains a large share of baked goods. Hence, the bakery subsector forms the majority (65 percent) of the total number of food and beverage companies in Turkey. In 2013, Turkey consumed 7,486,000 MT of bread. Turkish consumers tend to buy bread from small bakeries when it is hot, and generally don't buy packaged sliced bread. Another important bakery product is the 'Simit' (a type of bagel) as well as salty cookie or biscuit-like products. Modern bakery shops have begun to open, especially in Istanbul, but are not widespread throughout Turkey. Moreover, due to the low quality of flour available in Turkey, pita style bread is popular in east and south-east Anatolia. Therefore, the bakery sector in general offers a lot of opportunities for growth and development.

Turkey Import Statistics From United States							
Commodity: Food & Ag All (HS 02 thru 24, ex 13 & 14)							
Calendar Year: 2011 - 2013							
Description	United States Dollars			% Share			% Change
	2011	2012	2013	2011	2012	2013	2013/2012
Total Value	1,097,841,741	1,045,534,442	1,185,252,977	100	100	100	-10.79
Fish, Crustaceans & Aquatic Invertebrates	3,224,930	4,162,744	3,183,413	0.29 %	0.40 %	0.27 %	-23.53
Dairy Prods; Birds Eggs; Honey; Ed Animal Pr Nesoi	5,758,256	3,075,075	23,570,931	0.52 %	0.29 %	1.99 %	666.52
Edible Vegetables & Certain Roots & Tubers	12,155,998	6,722,698	20,112,240	1.11 %	0.64 %	1.70 %	199.17
Edible	121,520,69	159,910,66	136,797,97	11.07	15.29	11.54	-14.45

Fruit & Nuts; Citrus Fruit Or Melon Peel	0	1	4	%	%	%	
Cereals	433,364,801	64,023,882	161,745,243	39.47%	6.12%	13.65%	152.63
Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant Etc	185,804,549	396,607,892	236,162,109	16.92%	37.93%	19.93%	-40.45
Animal Or Vegetable Fats, Oils Etc. & Waxes	158,334,273	130,469,217	81,550,728	14.42%	12.48%	6.88%	-37.49
Miscellaneous Edible Preparations	39,280,210	39,637,842	51,449,026	3.58%	3.79%	4.34%	29.8
Beverages, Spirits And Vinegar	14,295,459	17,584,260	23,327,913	1.30%	1.68%	1.97%	32.66
Food Industry Residues & Waste; Prep Animal Feed	71,441,295	159,713,814	383,722,142	6.51%	15.28%	32.37%	140.26
Tobacco And Manufactured Tobacco Substitutes	38,857,293	49,010,495	44,427,501	3.54%	4.69%	3.75%	-9.35

Finding Business Partners in Turkey

There are 467 foreign companies actively operating in the Turkish food sector. Cargill, Bunge, Nestle, Unilever, Coca-Cola, and Pepsi-Co are some of the most prominent ones. Restaurant franchises are one way of introducing new products. An increasing number of restaurant chains are opening in Turkey, especially in Istanbul. These include casual dining, fast food and cafes. While most of these companies source food ingredients produced in Turkey, some require specialized ingredients or imports of certain items that are not readily available. Exporters should check with importers to see if they are approved suppliers for franchises. Additionally, Turkey's hotel sector has traditionally represented an important niche market for certain high-value food products that cannot be readily found throughout Turkey. Turkey attracts 30 million tourists every year, especially in Istanbul and Antalya.

There are 336 five star and 543 four star hotels in Turkey and most of them are located in Antalya and Istanbul. Global hotel chains including the Marriot, Hilton and Sheraton have a strong presence in Turkey. Turkey is a major tourism destination for Germans, Russians, British and Scandinavian travelers. Five star hotels would like to offer more high-quality products to their customers. Fresh fruits and vegetables are readily available in Turkey but high quality meat (especially steak) and fishery products (especially shrimp and crab) can be extremely difficult to source.

Trader associations are also very important contacts for those seeking to enter the market. The Feed Millers Association, Turkish Food and Drink Industry Association Federation, and Poultry Meat Producers and Breeders Association are examples of important trader's organizations. (See Annex A for more details).

A visit to Turkey to gain a first-hand information about the Turkish market, preferably coinciding with a major trade show such as FOODİST (See Annex C for more details), is a good way to get started before entering the Turkish market and meeting prospective importers. Similarly, international food shows such as ANUGA, SIAL and Gulfood area attracting more and more Turkish importers, and may also be a way to meet prospective customers.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

In Turkish culture eating is a form of socialization that brings together family or friends. Lately, Turkish eating habits have shifted towards eating out, largely due to factors such as the increase in per capita income and the increase in the number of working women. In 2002, when per capita income was around $3,500, people ate out once a month. Now, per capita income has increased to $10,700 and people eat out at least 3 times a month (this average is at least once a week in Istanbul). Annual expenditure per person has increased to $70, according to the data of Turkish Statistics Institute.

The same potential exists for high-end coffee shops as well. Considering that Turks introduced coffee to Europe in the 17th century, younger Turks have quickly embraced the new coffee culture after Starbucks entered the market, and other similar coffee shops began to emerge soon after (second wave coffee shops). Specialty and flavored coffee is spreading at a high pace and this trend is being promoted both by international coffee chains and their Turkish competitors. In 2014 boutique coffee shops have started to open as part of the "third wave" trend (for more information on first, second and third wave coffee trends: http://www.slowtravelberlin.com/third-wave-coffee-a-history/).

The table below shows the changes in the number of establishments in the food service sector in the past 5 years.

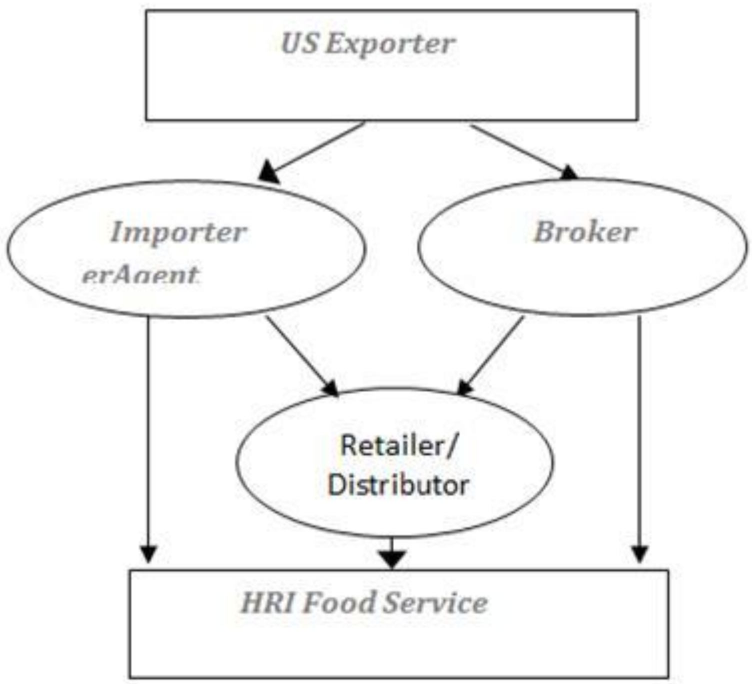
Number of Food Establishments by Type 2009-2013

`000s	**2009**	**2010**	**2011**	**2012**	**2013**
Consumer Foodservice by Type	104,996	98,235	99,060	99,744	101,351
100% Home Delivery/Takeaway	812	774	870	963	1,077
Bars/Pubs	1,469	1,400	1,386	1,389	1,396

Cafés	49,145	42,361	42,281	42,283	42,574
Full-Service Restaurants	39,466	39,418	39,516	39,736	40,047
Fast Food	3,754	3,958	4,600	4,925	5,658
Self-Service Cafeterias	4,537	4,455	4,446	4,463	4,491
Street Stalls/Kiosks	5,433	5,468	5,508	5,510	5,528

Source: Euromonitor International

Distribution network for HRI food service purchasers.



Importers used by HRI companies also act as distributors with their own fleet, but also making use of cargo delivery companies to supply food products to large supermarkets.

The Inward Processing Regime (DIR) allows importers to benefit from low customs duties and tax exemptions provided that they process the imported raw material and export the end-product. This makes Turkey an attractive hub for transshipments to other Middle East and Central Asia countries.

Tourism

In 2013, 35 million tourists visited Turkey, generating $32.3 billion in revenues despite significant public disruptions from what is known as the Gezi Park protests which took place nation-wide in the beginning of the summer season. In 2014, Turkey expects 43 million tourists and to generate

$35 billion in tourism revenues.

Tourism revenues constitute almost 20 percent of Turkey's total exports. Foreign tourists spend an average of $760 and Turkish citizens living abroad spend an average of $1,300 dollars during their visits to Turkey.

European Consumers Choice Organization selected Istanbul as Europe's best destination in 2013. Antalya, located on the Mediterranean coast, is the tourism capital of the country. Of the visitors that come to Turkey, 60 percent enter the country from Istanbul and Antalya. Fifty-one percent of 5 star hotels are located in Antalya and 13 percent in Istanbul. Tourists spend almost an equal amount of money on their food as on their accommodation (each accounts to 20 percent of total expenditure). The tourism profile of Turkey is diversifying from sea-sun-sand (mass) tourism and embracing specialty areas such as cruises, health, culture, and religion tourism.

The Turkish food and beverage sector is a $300 billion market with approximately 40,000 companies operating in this sector. Of these companies, 536 are foreign: 100 of them are German, 47 are Dutch, 30 are French, 29 are American, and 26 are Italian companies.

BEST MARKET PROSPECTS

Adopting products popular in the west is a large part of the modern Turkish life. Internationally known brand names are well placed for this. Exporters should be particularly sensitive to brand positioning and be ready to invest in the necessary research and marketing support to assist their local partners for a successful entry.

The best products for the imported food market are internationally recognized branded food products. These types of products in general account for 30 percent of overall imported food items. These include cocoa and instant coffee, chocolate and confectionary goods, cookies and crackers, breakfast cereal, cheese, alcoholic beverages, sauces, seafood and pet foods. The change in wine and beer import and distribution regulations now allows imported products to be sold in the retail market, which have created new opportunities for U.S. wine and beer to be sold in the Turkish market, although taxes still remain high. Functional food items such as food supplements and "sports drinks" also represents a new opportunity for U.S. exports since it is a relatively new sub-sector with a rapid growth.

Major products that have market potential are:

<u>Health and beauty promoting beverages</u>
Non-alcoholic beverages in Turkey are largely limited to fruit juices, sodas and mineral waters. There is a vast void in health promoting beverages such as digestive health, bone and joint health, brain and memory, cardiovascular health, etc. There are also few products in the market for 'beauty from within'. Consumers are looking for such products, which is a source of untapped demand.

<u>Functional foods</u>
Turkish consumers' awareness of functional foods is increasing in Turkey. Functional chocolate and sugar confectionary products, baby and toddler food, and biscuits offer a good market opportunity. Specialized products for diabetics also provide a good market potential.

<u>Wine</u>

Although highly taxed, wine has increased in popularity in recent years with annual imports increasing 5,700 percent in the last decade. Turkish wine imports in 2013 were $9.6 million, of which only $208,729 were from the United States. The leading suppliers are France ($4.4 million), Italy ($2.7 million), and Chile ($1.3 million). Imports of Chilean wine have increased the most in the last decade, while the U.S. is the fifth largest supplier.

Turkey has 191 licensed vineyards producing an estimated at $300 million and 70 million liters of wine.

Whiskey
Blended scotch is the whiskey of choice. Two American Bourbon brands in the market -Jack Daniels and Jim Beam- are targeting the younger generation through rock concerts and motor-rally sponsorships.

Seafood
Turkey is a promising market for various seafood products. In addition to the local fresh fish, frozen, preserved and ready to eat seafood products are welcomed by Turkish consumers.

Dairy products
Specialty cheeses and butter have good market potential for U.S. suppliers. Currently, EU countries dominate the market. However, exports of U.S. milk powder, which supply Turkish export manufacture, and butter have had a dramatic increase.

Breakfast cereals
Consumption of breakfast cereals is increasing. Chocolate cereals, corn flakes, bran fiber flakes with raisins and mixed fruit and chocolate cereals are becoming popular among the Turkish consumers.

Sauces and Syrups
Various brands of sauces for salads, meat and international cuisines are popular in Turkey. Especially the increasing popularity of Asian cuisine is promoting the specialty herb, sauce, and syrup demand. Currently sauces are imported from Germany, UK, France, Asian countries and the United States.

Organic processed products
Even though Turkey has organic production, it is limited mostly to produce, herbs and other bulk commodities. In this respect there is an opportunity for organic processed products to meet the growing demand of health conscious consumers.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Product Category	2013 Import Market Size (Volume)	2013 Imports ($Mil)	5-Yr. Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Tree Nuts	67,965 metric tons	237	34.5%	43.2%	Prices, development in Turkey's export	Rising incomes translate into demand for

					markets	new products; export demand requires mixing nuts not available in Turkey
Dairy Products	33,773 metric tons	157.5	25.7%	65-180%	Turkey has set deadlines for the acceptance of the current bilateral milk and m ilk products certificate – extensions provided thus far	Turkey is a consumer and exporter of milk products. Both demand high quality milk inputs. Further, the hotel and restaurant sectors demand quality products for which the U.S. has an advantage.
Distilled Spirits	94 million liters	176.8	92%	70 (additiona l fees apply)	The combined tariff and fees and sales tax raise the price of spirits considerably. Strict marketing restrictions were implemented in early 2013.	Rising incomes have contributed to growing interest in spirits and cocktails. Little local competition and brand recognition are advantages for U.S. products.
Fish Products	66,695 metric tons	176	79%	11-35%	High prices limit the current market. Primary competition is from Norway.	Turkish cuisine includes varieties available from the Mediterranean and Black Sea. Consumers in large cities are seeking new varieties.
Pet Food	21,100 metric tons	37.8	39%	7-8%	European products less expensive and familiar	US product variety and perceived quality
Snack Foods	31,591 metric	152.9	76.3%		Domestic production is	US varieties not available

	tons				abundant and inexpensive; Price sensitivity; Biosafety Law prohibits imports that test positive for biotech content	on the market; perceived high quality
Sauces	7,800 tons	23	67%	7.7-10.2%	Turkey requires certification that most U.S. authorities cannot provide stating that imports did not use genetically engineered enzymes or microorganisms.	New flavors, such as Tex-Mex and Asian cuisines are increasing in popularity.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Annex A- Traders Associations Contact List

Turkish Feed Manufacturers Association
Chairman: Ulku Karakus
General Secretary: Dr. Nizamettin Senkoylu
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Fax: +90 312 472 83 23
E-Mail: info@yem.org.tr
Web: http://www.turkiyeyembir.org.tr/yembir/index.php

Turkish Food and Drink Industry Association Federation
Chairman: Şemsi Kopuz
General Secretary: Ersin Taranoglu
Address: Altunizade Mah.Kısıklı Cad. Tekin Ak İş Merkezi No:3 Kat:2 Daire:7 34662 Bağlarbaşı-Üsküdar ISTANBUL
Phone: +90 216 651 86 81
Fax: +90 216 651 86 83
E-Mail: tgdf@tgdf.org.tr
Web: http://www.tgdf.org.tr/english/

Poultry Meat Producers and Breeders Association
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General Secretary: Dr. Bediha Demirozu
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E-Mail: besd-bir@besd-bir.org

Web: http://www.besd-bir.org/

Turkish Egg Producers Association
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General Secretary: Dr. Huseyin Sungur
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Union of Dairy, Beef, Food Industrialists and Producers of Turkey
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Acting General Secretary: Elif Yucel
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Fax: +90 312 428 47 46
E-Mail: setbir@setbir.org.tr
Web: http://www.setbir.org.tr/eng/default.asp

Association of Packaged Dairy Industry of Turkey
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General Secretary: Dr. İsmail Mert
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Fax: +90 312 284 92 58
E-Mail: info@asuder.org.tr
Web: http://www.asuder.org.tr/index.php

All Food Importers Association
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General Secretary: Melehat Ozkan
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Fax: +90 0212 347 25 70
E-Mail: tugider@tugider.org.tr
Web: http://www.tugider.org.tr/

Turkish Wheat Millers Federation
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General Secretary: Vural Kural
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Fax: +90 0312 440 03 64
E-Mail: bilgi@tusaf.org
Web: www.tusaf.org

Dairy Breeders Association
Chairman: Cemalettin Ozden
General Secretary: Dr.Huseyin Velioglu

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Fax: +90 0312 219 45 59
E-Mail: dsymb@dsymb.org.tr
Web: http://www.dsymb.org.tr/

Vegetable Oil and Fats Industrialist Association
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General Secretary: Dr. Huseyin Buyuksahin
Address: Atatürk Bulvarı 231/15 06680 Kavaklıdere / ANKARA
Phone: +90 0312 426 16 82
Fax: +90 0312 426 16 95
E-Mail: info@bysd.org
Web: www.bysd.org

Annex B: Government Regulatory Agency Contacts

General Directorate of Food and Control/ Ministry of Agriculture, Food and Livestock Central. This office has the authority to control food and feed safety, is responsible to manage import and domestic controls, prepare regulations and laws, authorize animal and animal products imports, plant and plant products imports, communicate directly with public on food safety issues, and is responsible for animal health and quarantine.

***Professor Irfan Erol*, General Director**
General Directorate of Food and Control
Ministry of Agriculture, Food and Livestock
http://www.gkgm.gov.tr/indeks.html
Address: Eskişehir Yolu 9. Km. Lodumlu/ANKARA
Telephone: 00 90 312 258 76 10
Fax: +90 312 258 76 93
E-Mail: irfan.erol@tarim.gov.tr

***Dr. Ahmet Aslan*, Deputy General Director**
General Directorate of Food and Control
Ministry of Agriculture, Food and Livestock
http://www.gkgm.gov.tr/indeks.html
Address: Eskişehir Yolu 9. Km. Lodumlu/ANKARA
Telephone: +90 312 258 76 13
Fax: +90 312 258 76 65
E-Mail: ahmet.arslan@tarim.gov.tr

There are 20 Provincial Agricultural Directorate Authorities, each of which has the first-line regulatory authority to issue control certificates for specific products. They are intended to be the primary point of contact for importers to submit their import applications. The complete list can be found on the internet at:

http://www.gkgm.gov.tr/genel/bagli_kurum.html

The Main Provincial Directorate Authorities are:

Nazif Koca, Acting Istanbul Provincial Director
Provincial Agricultural Directorate
Istanbul Tarim Il Mudurlugu, Bagdat Cad. No.333, Kadikoy Istanbul, Turkey
Phone: (90-216) 467 57 34
Fax: (90-216) 369 81 51

Ahmet Guldal, Izmir Provincial Director
Izmir Tarim Il Mudurlugu, Universite Cad. No: 47 Bornova, Izmir, Turkey
Phone: (90-232) 462 60 33
Fax: (90-232) 462 24 93

Kadir Ciftepala, Mersin Provincial Director
Mersin Tarim Il Mudurlugu, Gazi Mah., Mersin, Turkey
Phone: (90-324) 326 40 13
Fax: (90-324) 326 40 12

There are 40 provincial and one reference food control laboratories, the three largest being:

Ankara Provincial Food Control Laboratory Directorate Ankara, Turkey
Phone: (90 312) 315-0089 or 315-8709
Fax: (90 312) 315 7934 2)

Istanbul Provincial Food Control Laboratory Directorate Istanbul, Turkey
Phone: (90 212) 663-3961 or 663-3959
Fax: (90 212) 663-4296 3)

Izmir Provincial Food Control Laboratory Directorate Izmir, Turkey
Phone: (90 232) 435-1481 or 435-6637
Fax: (90 232)-462 4197

National Food Reference Laboratory
Fatih Sultan Mehmet Bulvarı (İstanbul Yolu) Yenimahalle, Tarim Kampüsü No: 70, Yenimahalle, ANKARA - TÜRKİYE
Phone : +90 (312) 327 37 03
Fax : +90 (312) 327 41 56
E-mail : ugrl@ugrl.gov.tr

Other Import Specialist Contacts:

U.S. exporters are advised to contact the FAS offices in Ankara or Istanbul for additional information and/or a list of private sector firms which can provide assistance with customs clearance and import regulation issues. In most cases, the importing company or agent should be familiar with (and ultimately responsible for) existing regulations.

Foreign Agricultural Service Offices in Turkey

American Embassy
110 Ataturk Blvd., Kavaklidere, 06100 Ankara
Tel: +90-312-455-5555
Fax: +90-312-467-0056
Email: agankara@fas.usda.gov

American Consulate, Istanbul
Kaplicalar Mevki Sokak, Istinye, 334460 Istanbul
Tel: +90-212-335-9000
Fax: +90-212-335-9077
Email: agistanbul@fas.usda.gov

Annex C-Important conference and trade shows

Conference

Date	**Conferences**	**Location**
March 5-8	Flour Millers Conference	Antalya
April 22-26	Poultry Producers Conference	Antalya
May 7-8	Food Safety Conference	Istanbul
December 3-4	Fats & Oils Istanbul/Feeds & Grains Istanbul	Istanbul

Trade shows

Date	**2015 Major Food Trade Shows in Turkey**	**Location**
January 22-25	**Emmitt:** 19th East Mediterranean Intl Tourism & Travel Exhibition http://www.emittistanbul.com/en/	Istanbul (Tuyap)
February 5-8	**Animalia Istanbul:** International Cattle Breeding Technologies Trade Fair http://www.animaliaistanbul.com/en/index.html	Istanbul
February 5-8	**Yarn Fair 2015:** 12th International İstanbul Yarn Fair	Istanbul (Tuyap)
February 18-21	**KONYA SEED 2015**: 4th Seed Technologies and Equipment Fair	Konya (Tuyap)
February 18-21	**KONYA STOCKBREEDING 2015:** 3rd Stock Breeding, Stock Breed Production Technology, Feed Industry Fair - Poultry Special Section	Konya (Tuyap)
February 25-28	**Anfas Food Product:** 22nd International food trade exhibition http://www.anfasfoodproduct.com/index.php/en	Antalya
February 25-28	**Anfas Bevex:** 3rd International beverage trade exhibition http://www.anfasbevex.com/	Antalya
March 11-14	**ÇUKUROVA FOOD / FOOD-TECH FAIR 2015:** Adana 9th Food, Beverage, Food Processing, Pastry Technologies, Storage, Cooling Transportation, and Shop-Market Equipment Fair	Adana (Tuyap)

March 11-14	**DOOREXPO ISTANBUL 2015**: 7th International Door, Shutter, Lock, Panel, Board, Partition Systems and Accessories Fair	Istanbul (Tuyap)
March 24-28	**KONYA AGRICULTURE 2015:** 13th International Agriculture, Agricultural Mechanization and Field Technologies Fair	Konya (Tuyap)
March 26-29	**MIDDLE EAST FURNITURE RELATED INDUSTRY FAIR:** 5th Furniture Related Industry, Accessories, Upholstery, Door, Window and Wood Working Technologies and Forestry Products Fair	Diyarbakir (Tuyap)
April 7-11	**DİYARBAKIR AGRICULTURE - STOCK BREEDING FAIR:** 7th Middle East Agriculture, Stock Breeding, Poultry and Dairy Industry Fair	Diyarbakir (Tuyap)
April 16-22	**K.MOB 2015**: Kayseri 5th Furniture Fair	Istanbul (Tuyap)
May 7-10	**MIDDLE EAST CONSTRUCTION FAIR 2015:** 7th Construction Materials, Construction Technologies, Electric Systems, Supplies and Automation, Lift, Construction Works Machinery, Natural Gas, Heating, Cooling, Air Conditioning and Installation Supplies Fair	Diyarbakir (Tuyap)
May 13-15	**Fi Istanbul**: Food Ingredients Istanbul http://www.figlobal.com/istanbul/home	Istanbul (ICC)
May 14-16	**ANUFOOD Eurasia (powered by ANUGA) :** 7th International food and beverage products, refrigeration technologies, shop equipment, services and catering trade show http://www.anufoodeurasia.com/	Istanbul (Tuyap)
May 14-16	**ANUFOOD Eurasia -powered by ANUGA:** 7th Internatıonal Food and Beverage Products, Refrigeration Technologies, Shop Equipment, Services and Catering Fair	Istanbul (Tuyap)
June 10-11	**Snackex:** Snacks Exhibition http://www.snackex.com/	Istanbul
September 3-6	**Worldfood Istanbul**: 23rd International food & beverage, food ingredients and food processing exhibition. Co-held with IPACK Turkey http://www.ite-turkey.com/ver3/fairs/gida_en/	Istanbul (CNR)
September 11-13	**ISG Eurasia Occupational Health and Safety Fair** (Organized by İFO İstanbul Fuar Hizmetleri A.Ş.)	Istanbul (Tuyap)
September 16-20	**SAMSUN AGRICULTURE FAIR 2015:** Agriculture, Stock Breeding and Technologies Fair	Samsun (Tuyap)
October 10-14	**INTERMOB 2015:** 18th International Furniture Side Industry, Accessories, Forestry Products and Wood Technology Fair	Istanbul (Tuyap)
October 13-17	**BURSA Agriculture 2015:** Bursa 13th International Agriculture, Seed Raising, Saplings and Dairy Industry Fair	Bursa (Tuyap)
October 22-25	**ISTANBUL FOOD-TECH 2015:** 10th International Food and Beverage Technologies, Food Safety, Additives and Ingredients, Cooling, Ventilation, Storage Systems and Logistics Fair	Istanbul (Tuyap)
October 22-25	**SAMSUN FOOD 2015:** Food and Beverage, Food Processing Technologies, Packaging and Logistics Fair	Samsun (Tuyap)
November 12-15	**KONYA FOOD FAIR:** Konya 10th Food and Beverage Fair	Konya (Tuyap)
November 12-15	**KONYA DAIRY INDUSTRY FAIR:** Konya Dairy, Dairy Products and Industry Fair	Konya (Tuyap)
November 18-22	**ADANA AGRICULTURE FAIR 2015:** 9th Agriculture, Stock Breeding, Poultry and Dairy Industry Fair	Adana (Tuyap)
November 26-28	**Sirha:** 3rd International Food, Gastronomy, Hotel and Catering Services Tradeshow http://sirha-istanbul.com/en/	Istanbul (IKM)

December 3-6	**Travel Turkey Izmir:** 8th International Tourism Trade Show and Conference http://www.travelturkey-expo.com/	Izmir

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%)	$15,447 14.41%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%)	$2,162 11.10%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%)	$176 1.76%
Total Population (Millions) / Annual Growth Rate (%)	81.2 1.3%
Urban Population (Millions) / Annual Growth Rate (%)	72 1.5%
Number of Major Metropolitan Areas (population in excess of 1 million)	9
Size of the Middle Class (Millions) / Growth Rate (%) 2011 [1/]	41 13.9%
Per Capita Gross Domestic Product (U.S. Dollars)	$10,700
Unemployment Rate (%)	11.5%
Per Capita Food Expenditures (U.S. Dollars)	$116 billion
Percent of Female Population Employed [2/]	28.7%
Exchange Rate (US$1 = X.X local currency) [3/]	2.38 TL

Footnotes

1/ Middle Class is defined using the international 10 USD/PPP 2005 line following the Lopez-Calva and Ortiz-Juarez, 2011 also used in Ferreira et al, 2013.

2/ Percent against total number of women (15 years old or above).

3/ The Turkish Lira has lost approximately 34% against the US$ since summer 2012.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

January - December							
Cumulative To Date Values in Thousands of dollars							
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2012/2013**
Partner	**Value**	**Value**	**Value**	**Value**	**Value**	**Value**	**% Change**
World Total	1,455,196	1,298,943	1,757,513	2,347,820	1,956,714	2,159,255	10
Netherlands	140,291	139,463	188,469	223,237	238,142	259,294	9
Germany	138,349	140,056	242,501	298,673	196,664	241,979	23
United	121,293	133,901	146,607	179,983	216,672	230,705	6

States							
Italy	112,422	72,636	85,260	112,448	116,929	136,405	17
Poland	77,545	78,328	201,464	365,865	168,870	94,981	-44
Ecuador	99,743	76,006	77,067	99,846	102,456	94,163	-8
France	59,400	56,761	66,344	149,240	60,982	71,074	17
Switzerland	40,608	42,742	52,695	72,913	57,150	58,655	3
Ghana	1,170	5,159	5,634	25,971	23,018	58,231	153
United Kingdom	29,912	27,687	31,612	42,494	39,800	53,342	34
Belgium	22,035	21,042	29,497	38,133	36,940	51,657	40
India	14,560	11,871	17,888	14,481	33,371	48,289	45
Spain	51,280	41,026	41,957	46,223	44,195	48,078	9
Ireland	19,787	21,417	33,569	30,005	38,241	45,544	19
Cyprus	26,267	28,685	31,961	44,159	44,107	43,175	-2