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**Report Highlights:**

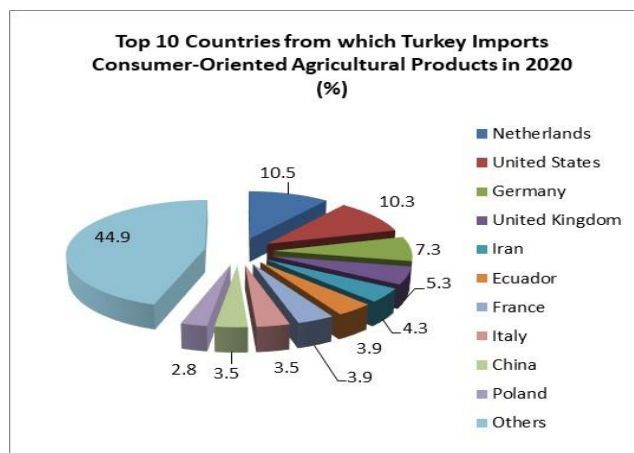
Turkey has a young population of 84 million people fueling consumption of consumer-oriented agricultural products. The country is in a Customs Union with the EU and is the 20th largest economy in the world and the 7th largest agricultural producer. Despite the current economic slowdown and geopolitical difficulties, there is still a gap in the market to fill, and increased demand in the long-term for many different types of agricultural products is expected to continue. With the effects of COVID-19-related restrictions and the stagnation in the economy, food inflation is a major concern but there has been no scarcity of food or beverage availability for those with adequate means.

## Executive Summary

The Republic of Turkey is an upper-middle-income country with a young population of 84 million people fueling consumption of consumer-oriented agricultural products. The country has a Customs Union with the EU and is the 20<sup>th</sup> largest economy in the world. Though the Turkish economy stagnated recently, an annual average GDP growth rate of 3.9 percent is forecasted by the IMF between 2021 to 2025. Total imports of consumer-oriented agricultural goods have grown 13 percent in the first ten months of 2021 compared to the same period in 2020. In most cases, U.S. food exporters should utilize importers in Turkey to penetrate the market.

## Imports of Consumer-Oriented Agricultural Products

EU countries are the major suppliers of consumer-oriented agricultural products to Turkey, having the advantage of proximity and Customs Union duty rates. Turkey imports consumer-oriented products such as rice, dried beans, walnuts, almonds, bananas, coffee, cocoa, composite meat products, fish, lumber, and different kinds of processed/packaged food items.



## Food Processing Industry

There are 51,338 food processing and 649 beverage producing enterprises in Turkey as of 2019, according to the latest statistics published by The Turkish Statistical Institute. Turkey has a modern and developed food processing industry supplying the domestic population and exporting, especially regionally, accounting for 15 percent of total manufacturing in Turkey

## Food Retail Industry

Grocery sales totaled \$75 billion as of the end of 2020. The inflation/seasonally adjusted Real Retail Sales Index has declined slightly in 2019 but started to increase in 2020. Despite the recent political and economic challenges, the food retail industry had been growing, particularly in the hard discount segment. Organized/modern retailers make up the majority of the grocery market share as traditional retailers slowly exit the market.

## Quick Facts

**Imports of Consumer-Oriented Ag. Products 2020**  
US \$3.5 billion

### List of Top 10 Growth Products in Turkey (Imported Consumer-oriented Agricultural Products) 2018-2020

- |                               |                                    |
|-------------------------------|------------------------------------|
| 1. Garlic, fresh or chilled   | 6. Bulgur wheat, pre-cooked, prep. |
| 2. Nuts nesoi, fresh or dried | 7. Coriander seeds, not crushed    |
| 3. Whey & modified whey       | 8. Beer without alcohol            |
| 4. Tomatoes in Pcs Prep/Pres  | 9. Cumin seeds, not crushed        |
| 5. Guavas, mangoes            | 10. Brazil nuts, fresh or dried    |

### Food Retailers by Channel (Sales in Mill. USD) 2020

<b>Modern Grocery Retailers</b>	<b>43,124</b>
- Convenience Stores	1,413
- Discounters	16,058
- Gas station/ Forecourt retailers	595
- Hypermarkets	1,155
- Supermarkets	23,904
<b>Traditional Grocery Retailers</b>	<b>32,109</b>
<b>Grocery Retailers Total</b>	<b>75,233</b>

### Top 10 Retailers (by Marketshare in 2020)

- |                |            |
|----------------|------------|
| 1. Bim         | 6. Ekomini |
| 2. A 101       | 7. Hakmar  |
| 3. Migros      | 8. Sec     |
| 4. Şok         | 9. Onur    |
| 5. CarrefourSA | 10. File   |

### GDP/Population 2020

Population: 83.6 million (TurkStat, Year-end 2020)  
GDP: USD 753 billion (TurkStat, 2019)  
GDP Per Capita: USD 8,495 (World Bank, 2020)

## Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
Long-term GDP and disposable income growth	Domestic and international political challenges
Large population base: young and growing	Current economic downturn and currency volatility
Opportunities	Challenges
Unsaturated market, open for new items	Complex and time-consuming import procedures
Growing demand for high value packed food; ready to-eat/cook meals as the share of working women increases	Strong traditional food and cuisine affect consumption habits. There is a developed domestic food processing industry that also exports.

**Sources:** CIA World Fact Book; Euromonitor International; Turkish Statistical Institute, Economist Intelligence Unit

**Contact:** [Office of Agricultural Affairs](#), U.S. Embassy Ankara

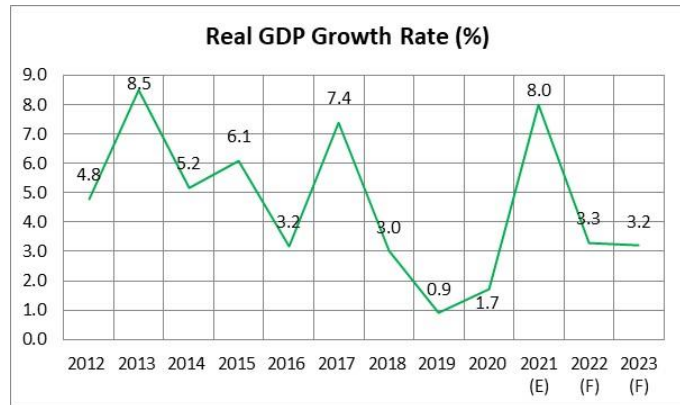
## I. MARKET OVERVIEW

The Republic of Turkey, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea in the north and the Mediterranean Sea in the south, has a young population of 84 million people<sup>1</sup> fueling consumption of consumer-oriented agricultural products. The median age is 32.2 and 59 percent of the population is between the ages 15 to 54. The urbanization rate has reached 76%, with rapid urbanization since 2000. Along with the young population, a high urbanization rate, increasing middle-class household income, a broadening base of female participation in the labor force, and a culture of spending drives consumption. The country is an Associate Member of the European Union (EU) and is in a Customs Union with the EU, which includes processed, but not primary, agricultural products. In addition, [Turkey has Free Trade Agreements](#) with EFTA (European Free Trade Association Countries: Norway, Liechtenstein, Iceland, Switzerland) and [21 other countries](#). Turkey was the 20<sup>th</sup> largest economy in the world in 2020 according to the World Bank.

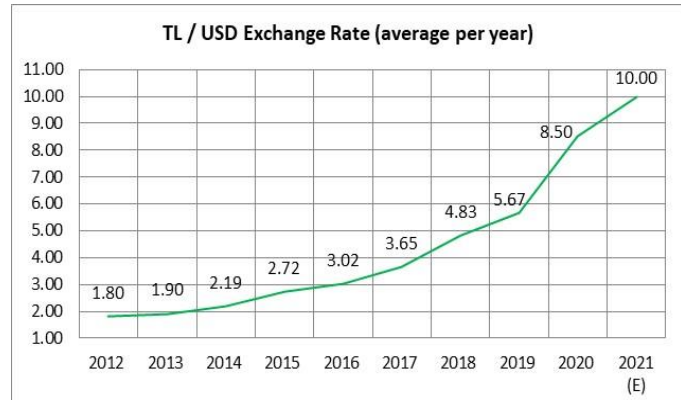
The average Gross Domestic Product (GDP) growth rate between 2015 and 2019 was 3.2 percent and the annual average GDP growth rate is estimated to be around five percent between 2021 and 2023 by Economist Intelligence Unit (EIU). After registering the lowest growth rate in 2019 in a decade, at only 0.9 percent, Turkey managed to have real growth of 1.7 percent in 2020. Turkey became one of only two G20 countries to register real growth amidst the COVID-19 pandemic.

Despite robust growth expectations in the long term, Turkey's macroeconomic outlook is facing severe challenges in the short term. Persistent political concerns and geopolitical developments in the region, the opaqueness of policies and tensions in international relations, and investors' perceptions of the lack of rule of law and lack of democratic standards make the Turkish economy fragile. These developments have negatively impacted trade, tourism, investment, and growth.

A major concern is inflation in the Turkish economy. The inflation rate by consumer price index (CPI) was at 14.60 by at the end of the 2020, up from 11.84 percent in 2019. However, the CPI inflation is 21.31 percent (officially, most experts estimate it higher) as of November 2021 indicating a major value loss in the Turkish Lira (TL) causing the purchasing power of the consumers to decline in the country. Inflation by producer price index is well above the CPI inflation. The value of the lira has depreciated significantly against major currencies like the U.S. dollar and the Euro in last few years. The latest major devaluation was in Fall 2021 causing about 113 percent depreciation<sup>2</sup> of TL against USD. The ability of the Central Bank of Turkey to fight inflation and currency instability have been undermined by political interventions in the leadership of the Central Bank of Turkey. Cutting policy interest rates and declarations of a commitment to unorthodox and erratic economic policies by the Government of Turkey (GoT) have triggered the latest devaluation. Moreover, since March 2020, Turkey has been struggling, like many other countries, with COVID-19 that adversely affected the economy and food prices in 2020.



Source: Turkish Statistical Institute. (E) Estimate by EIU. (F) Forecast by EIU.



Source: Central Bank of Turkey (CBT). (E) Estimate by EIU.

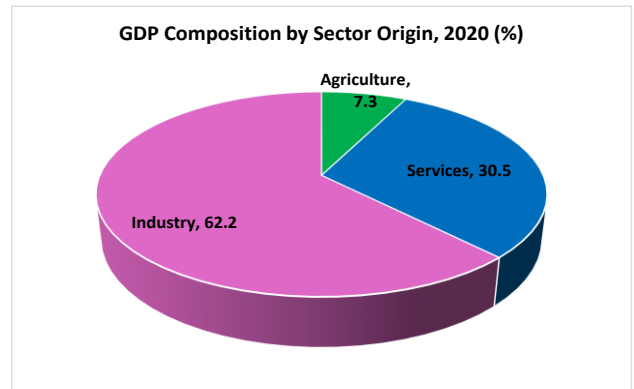
<sup>1</sup> United Nations mid-year estimate for 2020.

<sup>2</sup> Exchange rate on September 01, 2021 was 8.30 TL/USD and depreciated further to 17.70 TL/USD on December 20, 2021.

Incoming foreign direct investments to Turkey per year dropped 53 percent between 2015 and 2020<sup>3</sup>. Western FDI was replaced by Gulf region investments.

COVID-19 has affected Turkey since March 2020. Major industries and logistics kept working during the pandemic, as well as the retail food industry, and there has been no scarcity of food items across the country. Nevertheless, major lock downs in Turkey and European countries have affected the Turkish economy, as the EU is the largest trading partner. The tourism industry was also negatively impacted in 2021, like in 2020, because of COVID-19.

As of 2020, the agriculture sector represents 7.3 percent, or \$52 billion, of total GDP. The State Department provides [information about the investment climate in Turkey](#) which has business-related information that can be valuable for traders.



Note that some products from the United States currently face [additional tariffs](#), which affects the competitiveness of U.S.-origin agricultural goods in the Turkish market.

**Table 1:** Important socio-economic parameters for Turkey

Parameter	Value
Population	83.6 million (2020)
Median Age	32.2 (2020)
Labor Force (ages 15-64)	30.9 million (2020)
Unemployment Rate (ages 15-64)	13.1 percent (2020)
Unemployment Among Youth* (ages 15-24)	25.3 percent (2020)
GDP	USD 716 billion (2020)
GDP per Capita	USD 8,495 (2020)
Trade Balance	USD -38 billion (2020)
Tourists (# of foreign citizens entering)	22 million (2020)
Inflation – CPI year-end	14.60 percent (2020) [21.21%, Nov. 2021]
Exchange Rate (end of period)	7.35 TRL/USD (2020) [13.70 TRL/USD, Dec. 2021]
Number of Companies with Foreign Capital	73,625 (Total as of 2020)
Major Export Markets (all products)	Germany (9.5%), UK (6.7%), USA (6.0%), Iraq (5.3%), Italy (4.7%), France (4.2%), Spain (4.0%), Netherlands (3.1%), Israel (2.8%), Russia (2.6%) (2020)
Major Import Sources (all products)	China (10.4%), Germany (9.7%), Russia (8.0%), USA (5.6%), Italy (4.1%), Iraq (3.9%), Switzerland (3.1%), France (3.1%), South Korea (3.7%), UAE (2.6%) (2020)
Major Cities	Istanbul (15.5 m), Ankara (5.7 m), Izmir (4.4 m), Bursa (3.1 m), Antalya (2.5 m), Adana (2.3 m), Konya (2.3 m), Sanliurfa (2.1 m), Gaziantep (2.1 m), 15 other cities over one million population (2020)

Source: TurkStat, CIA World Fact Book, EIU, OECD, Trade Data Monitor (TDM).

\* According to OECD criteria.

<sup>3</sup> Central Bank of Republic of Turkey.

Turkey had high expectations for the tourism industry for 2020 after record-high tourist arrivals in 2019. However, the COVID-19 pandemic had major negative effects on the Turkish tourism industry. The number of tourists that traveled to Turkey in 2020 was only about half of the number of tourists in 2019<sup>4</sup>. Travelers are advised to [check the U.S. Department of State travel advisory](#) before planning to travel to Turkey.

<b>ADVANTAGES</b>	<b>CHALLENGES</b>
GDP growth and disposable income growth in the long-term despite a recent slowdown.	Domestic and international political challenges bring instability, which also affects the tourism industry.
Strong and steady retail market, as well as more dual income households, drives new demand for processed, frozen, prepared food and ingredients.	Artisan domestic products such as baked goods and cheese utilize domestic ingredients and have strong existing relationships with ingredient suppliers.
Large population base: young and growing, middle and upper middle class are growing.	Economic instabilities such as exchange rate fluctuations and increasing inflation.
High and increasing urbanization rate; increasing rates of female participation in work force.	Lack of transparency in rules and regulations.
Strong and steady retail market growth.	High import duties on processed/packaged food and agricultural products.
A growing market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry that requires a wide range of ingredients inputs. The industry is also open to new ingredients, like additives and processing aids.	Importing can be complex: Time-consuming and non-transparent import procedures.
An internationally savvy new generation of Turks are more open to new tastes from abroad.	Strong traditional food and cuisine affecting consumption habits.
Growing demand for high value packaged food; ready to-eat/cook meals as the share of working women increases.	The Turkish industry has developed many western-origin products domestically, such as packaged confectionery products and ready-to-eat meals, rather than import.
Fast-growing modern, organized grocery chains.	Unregistered economy can create unfair competition.
Positive perception for products from the United States.	No genetically engineered products or ingredients are approved for food use in Turkey.
Strong food culture and a tradition of gathering for meals in large groups, so new products fitting into the existing food culture and eating habits are easily adopted.	Marketing for some products can be difficult: Labeling laws limit health-related claims, and regulations limit alcohol advertising.
Many regulations are similar to those of the EU, so expansion to Turkey can be easier for companies already exporting to Europe.	Competition from many products imported under FTAs or European countries with lower tariffs. Additional taxes were introduced for several U.S.-origin goods in 2018, which continues in 2021.

<sup>4</sup> You may check our [Food Service: Hotel, Restaurant, Institutional](#) report more information on tourism.

## **II. EXPORTERS BUSINESS TIPS**

### **a. MARKET RESEARCH**

It is important to conduct market research before deciding to launch businesses relations in Turkey; either a detailed analysis or a quick market scan, depending on your product and experience level with Turkey, is necessary. It is essential to make sure that there is a market for a specific product in Turkey. Even if you are experienced in diverse regions, the Turkish market might be quite different than expected. It is a mix of Middle Eastern, Western European, and U.S. cultures, traditions, consumers, and business practices. Markets, companies, and consumers in Turkey are less transparent compared to Western Europe and the United States. It is often harder and more expensive to access market intelligence; usually there are fewer open sources compared to developed economies. Like some other Mediterranean/Levant cultures, most of the market intelligence and business is conducted based on personal relationships. Please visit [our country page](#) for other FAS exporter assistance reports. Other reports can be purchased from various sources such as, but not limited to, Euromonitor or Nielsen. Getting a reliable local partner/agent is a good way of starting relationship-based market research.

### **b. LOCAL BUSINESS CUSTOMS & TRENDS**

After conducting market research and determining that there is a potential market in Turkey for the food/agricultural item that you are exporting, it is important to develop a good strategy for market entry considering the local business customs. The Turkish business community is very open to international business. Turkey straddles Southern European and Middle Eastern cultures, and relationships are very important for business. This makes already existing relationships and connections in the country especially important; personal relationships and connections are essential. Turkish businesspeople attach great importance to courtesy in business-related endeavors. Turkey is a country with a business culture and people that is somewhat like Southern/Western European countries/cultures; on the other hand, it has many qualities taken from Middle Eastern/Islamic cultures and Central Asian, Turkic cultures. Business life and habits are all affected from the mix of cultures and traditions, so it is important to understand your counterparts. In most cases, a local business partner is very useful to understand the culture context. Some points to consider are as follows:

- Dress well for business meetings, especially if it is the “getting to know each other” stage. Overdress if not sure what to wear. Dress conservatively if not sure. Shorts, sandals and sportswear are not taken well in business environments, especially for men, even in southern beach cities.
- Punctuality is taken seriously compared to Mediterranean and Middle Eastern cultures. Standard time is three hours ahead of Greenwich Mean Time (GMT). Turkey has not observed daylight savings time since 2016.
- Take Turkish and Islamic holidays into consideration. Although business is conducted at all times, it is smart to consider the Islamic holy month of Ramadan and avoid events during the two major Bayram religious holidays and Turkish Republic Day. It is important to judge how much value your counterpart attaches to these days. If unknown, err on the side of caution to avoid serious offense.
- Family is important in Turkey; the superiors in the company are often seen as father/mother figures that need to take care of the employees in many senses.
- Turkish people take pride in their rich history and cultural heritage. Try to learn something about Turkish/Ottoman history.
- Turkish people are also proud of their rich and varied cuisine. When you try Turkish food, compliments are appreciated.
- Turkish coffee and tea have a special role in Turkish culture and also in business meetings. They will be offered at the start of a meeting as a courtesy. It is polite to accept one of those beverages when offered or ask for a glass of water.
- Turkish businesspeople prefer to work with people they know and trust on a personal level. In-person meetings and business lunches and dinners are important to build personal and business relationships; it is a good sign when invited. Try to accept when possible. These relations will affect business opportunities.

- Almost everything is taken personally. There is a very fine line between personal and business matters.
- In Turkish culture, it is important to take good care of business guests (as they do with personal guests), especially foreign ones. Reciprocity is expected and taken as a positive indicator when done properly.

### **c. GENERAL CONSUMER TASTES & TRENDS**

Although there is a strong Turkish culinary tradition and ample processed food production in the country, upper-middle and upper income level consumers, especially in large cities like Istanbul, Izmir, Ankara, Antalya, Bursa etc., tend to be open to new, imported tastes. Young and single professionals in the metropolitan areas tend to have more interest in international travel compared to their parents. Thanks to this younger metropolitan population with increasing disposable income, there is an increased awareness of international tastes and influx of international cuisine in Turkey in the last two decades. This is seen in the rise of Italian restaurants, sushi places, Mexican restaurants, Indian restaurants, East Asian restaurants and takeaways, American-style diners, luxury burger houses, various fast-food chains dominantly from the United States, and many fusion cuisines. In the last decade or so, Turkish supermarkets have been featuring more international ingredients and imported processed food compared to almost nothing a decade ago.

According to Post observations, thanks to the same demographic group, healthy, functional, and organic food sectors are growing as well. Consumers are becoming increasingly educated about and aware of the quality, nutritional value, and packaging of their food. They tend to be more aware of the food safety and expiration date of the foods they consume compared to a few decades ago.

Except for those at higher income levels, Turkish consumers are price sensitive in general; discount retailers and private label brands are on the rise.

## **III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES**

### **a. CUSTOMS CLEARANCE AND DOCUMENTS GENERALLY REQUIRED BY THE COUNTRY AUTHORITY FOR IMPORTED FOOD**

Import procedures are complicated and burdensome in Turkey. Generally, a local business ally eases the process, as they are familiar with the procedures. For details on the requirements, please refer to FAS Turkey reports on [Food and Agricultural Import Regulations and Standards](#) and [Required Certificates](#). The U.S. Foreign Commercial Service also gives some general information on [import procedures](#) to Turkey.

In most cases, some counseling with a customs broker or consultant in Turkey is useful as these brokers/consultants often understand the complex import processes better than a new-to-the-market, lesser-experienced company. You might contact [Istanbul](#), [Izmir](#), [Mersin](#), or [Ankara Customs Brokers Association](#), depending on your needs.

### **b. COUNTRY LANGUAGE LABELING REQUIREMENTS**

On January 26, 2017, the Ministry of Food, Agriculture & Livestock (changed to the [Ministry of Agriculture and Forestry](#) as of Summer 2018) abolished the previous Turkish Food Codex Regulation on Labeling and published two separate regulations to replace it which include: The “Turkish Food Codex Regulation on Food Labeling and Provision of Information to Consumers” (available [here](#) in Turkish) and “The Turkish Food Codex Regulation on Nutrition and Health Claims” (available [here](#) in Turkish). As with the prior versions of the regulations, these were prepared in parallel to the relevant the EU Directives and Regulations within the framework of EU harmonization.

Please have a look at the Section II of our [Food and Agricultural Import Regulations and Standards Report](#) if you need details on labeling requirements. In general, most labeling requirements can be met with a sticker put on the packaging of imported processed food with the appropriate information available in Turkish<sup>5</sup>.

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<sup>5</sup> Nevertheless, each product should be examined, and a decision of packaging and labeling should be made separately.

### c. TARIFFS and FOREIGN TRADE AGREEMENTS (FTAs)

There are tariffs for most food and agricultural items imported from the United States to Turkey. The tariff rates vary for different products. The tariff rates may be checked at the Turkish Ministry of Trade [web page](#) by HS code (Tariffs for the U.S. are listed under D.Ü. (Other Countries)). Several agricultural/food items from the United States currently face [additional tariffs](#) since June 2018. While these tariffs are expected to be temporary, there is currently no timeline for their removal.

Turkey is in a Customs Union with the EU. In addition, [Turkey has Free Trade Agreements](#) with EFTA (European Free Trade Association Countries: Norway, Liechtenstein, Iceland, Switzerland) and [21 other countries](#). Among these 21 countries, the FTA with Syria is on hold for a period of time. Furthermore, FTAs with Lebanon, Sudan and Qatar have been signed but not ratified yet.

Due to the FTAs with the EU, UK, and EFTA, European countries are major competitors for U.S. products in categories such as packaged foods and food processing ingredients and additives.

### d. TRADEMARKS and PATENTS

The [Turkish Patent and Trademark Office](#) under the Turkish Ministry of Industry and Technology is responsible for Patents and Trade Marks. You can take a look at the [Turkish industrial property law](#) which governs the patents and trademarks and [related regulations](#) (link in Turkish) about the applications of the law.

## IV. MARKET SECTOR STRUCTURE and TRENDS

### a. SUPPLY CHAIN & PRODUCT FLOW

A good way of exporting to Turkey is using a local agent in the country. This agent is sometimes an importer, distributor, wholesaler, a commission-based trader, or some combination thereof. Local representatives will have experience in market development and contact information of potential buyers, such as the organized grocery retailers, food processors, and/or food service sector. A good representative can guide you in the market, including on import rules and regulations, which ports to utilize, local business practices, conducting market intelligence formally or informally, starting sales calls, etc.



The chart represents the flow of consumer oriented agricultural goods. In rare cases, retailer/cash & carry might import items themselves rather than buying from an importer (not shown on the chart).

### b. RETAIL FOOD SECTOR

Despite the political and economic challenges that Turkey is facing in recent years, the food retail industry has been growing due to a young, dynamic population with a 75 percent urbanization rate and a growing middle class. The grocery retail sector had been growing for the last decade up until the recent economic stagnation that began in 2018. Grocery retail sales were 75 billion USD in 2020, which constituted 57 percent of all retail sales through approximately 346,000 organized and unorganized grocery retailers. Discount and hard-discount chains have been growing for the last five years with their private label products. Several foreign market chains have left the market in the past decade, leaving the stage mostly for domestic chains. Although still limited in sales, there is an increasing demand for imported processed food. There is also an increasing trend of online shopping for groceries in major cities, especially in Istanbul, Ankara, Izmir, and Bursa as the number of companies that offer online ordering and delivery increase. There was a major boost to grocery e-commerce in 2020 due to COVID-19 restrictions. Initial reports indicate that supermarket chains saw record sales before the COVID-19 lock-down and throughout the pandemic period so far. There was no reported scarcity of food or beverages, but significant food inflation was observed. Please read [our Retail Foods Report](#) for detailed analysis of the sector.



### c. HOTEL, RESTAURANT, INSTITUTIONAL (HRI) FOOD SERVICE SECTOR

The COVID-19 pandemic had a very negative impact on the Turkish consumer food service industry in 2020, with a strong decline in sales and widespread outlet closures seen throughout the industry. Full-service restaurants saw sales decline by 33 percent by value from 2019 to 2020, as the number of outlets in the category declined by 10 percent and transaction volume declined by 43 percent. Both independent and chain restaurants shifted their focus towards home delivery. Relatively moderate sales declines were recorded in limited-service restaurants compared to full-service restaurants during 2020, as such outlets benefitted from strong industry-wide shift towards less expensive options and home delivery orders. Bars and pubs were required to remain closed for most of 2020 due to COVID-19 regulations and were the worst-affected of the restaurant sector. Altogether, in 2020, there were about 128,000 commercial food service locations throughout the country, a 12 percent decline from 2019. Five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises. Please read [our Food Service: HRI Report](#) for detailed analysis of the sector.

### d. FOOD PROCESSING SECTOR

Despite the COVID-19 health crises with its political and economic difficulties, the food processing industry is still one of the largest industries in Turkey. There are 51,338 food processing and 649 beverage products enterprises in Turkey as of 2019. The food processing industry constitutes approximately 15.3 percent of all production industries. During the pandemic, retail sales of packaged foods and organic packaged foods increased dramatically. Also, sales of products fortified with vitamins and minerals to support the immune system gained in popularity. Even though U.S. processed foods and food processing ingredients face strong competition from local suppliers and from European countries, there are still market opportunities for U.S producers. There are opportunities for innovative ingredients and additives, including aromas and flavorings. Please read [our Food Processing Ingredients Report](#) for more details.

## V. AGRICULTURAL and FOOD IMPORTS

### a. AGRICULTURAL & FOOD IMPORT STATISTICS

Table 1: Consumer Oriented Agricultural Products Imported from the United States to Turkey (2016 - 2021\*)

Thousands of USD		2016	2017	2018	2019	2020	2021*
<b>Total</b>		365,348	403,783	424,879	391,297	359,873	271,402
<b>1</b>	<b>Almonds, Fresh Or Dried, Shelled</b>	79,512	67,853	82,596	76,895	95,555	75,230
<b>2</b>	<b>Walnuts, Fresh Or Dried, In Shell</b>	92,780	107,114	109,880	86,718	82,069	62,232
<b>3</b>	<b>Food Preparations Nesoi</b>	47,014	32,744	38,567	24,773	41,856	38,625
<b>4</b>	<b>Almonds, Fresh Or Dried, In Shell</b>	49,365	66,769	33,515	42,218	38,861	17,161
<b>5</b>	<b>Chicken Cuts &amp; Edible Offal, Frozen</b>	26,193	31,604	26,030	22,261	17,767	8,407
<b>6</b>	<b>Whiskies</b>	16,676	20,660	22,362	14,458	15,096	9,654
<b>7</b>	<b>Cigarettes Containing Tobacco</b>	428	79	5	5	13,378	1
<b>8</b>	<b>Pistachios, Shelled, Fresh Or Dried</b>	1,259	18,357	15,908	15,233	10,230	10,649
<b>9</b>	<b>Pistachios, In Shell, Fresh Or Dried</b>	6,676	11,566	56,081	67,956	9,879	18,235
<b>10</b>	<b>Tomatoes, Other Than Whole or In Pieces, Prep. or Presvd.</b>	7,869	4,076	164	9,351	4,138	0
<b>11</b>	<b>Tea Or Mate Extracts/Essences/Concentrates &amp; Preps</b>	1,515	3,346	3,434	1,932	2,899	3,191
<b>12</b>	<b>Cheese, Nesoi inc. Cheddar And Colby</b>	0	0	0	1,198	2,372	953
<b>13</b>	<b>Citrus Fruit (Including Mixtures), Prep Etc Nesoi</b>	29	949	1,338	2,051	2,050	1,394
<b>14</b>	<b>Other Non-alch. Beverages (except water &amp; non-alch. beer)</b>	0	689	1,241	1,982	1,926	2,030
<b>15</b>	<b>Walnuts, Fresh or Dried, Shelled</b>	4,216	3,381	793	550	1,624	2,914
	<b>Others Consumer Oriented Agricultural Products</b>	31,817	34,596	32,966	23,715	20,175	20,726

Source: Trade Data Monitor.

\* 2021 data is for the first ten months only (Jan. – Oct.)

**Table 2: All Agricultural & Related Products\* Imported from the United States to Turkey (2016 - 2021\*\*)**

Thousands of USD		2016	2017	2018	2019	2020	2021**
<b>Total</b>		1,643,483	1,980,918	1,824,034	1,338,942	1,342,102	1,229,948
<b>1</b>	<b>Cotton, Not Carded or Combed</b>	532,635	734,552	729,118	646,488	590,778	537,997
<b>2</b>	<b>Brewing or Distilling Dregs And Waste, W/Nt Pellet</b>	154,902	266,798	224,224	127,772	161,594	245,596
<b>3</b>	<b>Ethyl Alcohol and Other Spirits, Denatured, Any Strength</b>	0	3,432	0	0	31,535	4,193
<b>4</b>	<b>Tobacco, Partly or Wholly Stemmed/Stripped</b>	66,984	51,273	56,117	16,227	18,909	6,189
<b>5</b>	<b>Rice in the Husk (Paddy or Rough)</b>	19,791	20,875	0	0	17,843	0
<b>6</b>	<b>Wood in Chips or Particles, Coniferous</b>	110,688	90,627	91,067	18,098	17,150	5,641
<b>7</b>	<b>Corn (Maize) Oil and Its Fractions, Crude</b>	16,783	15,202	14,340	8,725	14,165	6,596
<b>8</b>	<b>Animal Feed Prep. Except Dog or Cat Food for Retail Sale</b>	13,935	12,043	13,911	12,657	11,208	6,603
<b>9</b>	<b>Tallow of Bovine Animals Other Than Head, Sheep or Goats</b>	15,338	10,273	9,003	9,050	10,548	6,134
<b>10</b>	<b>Vegetable Seeds for Sowing</b>	7,304	7,051	6,095	5,537	8,383	5,720
<b>11</b>	<b>Ethyl Alcohol, Undenatured, Strength by 80% vol. or Higher</b>	2	0	1	2,077	8,048	10,413
<b>12</b>	<b>Horses, Live, Purebred Breeding</b>	814	665	342	1,855	6,914	582
<b>13</b>	<b>Kidney Beans, Including White Pea Beans, Dried Shelled</b>	6,832	5,462	5,334	9,589	6,198	2,603
<b>14</b>	<b>Residues of Starch Mfr and Similar Residues</b>	45,912	39,406	19,160	22,146	5,583	9,122
<b>15</b>	<b>Mixtures of Odoriferous Substances and Mixtures (Including Alcoholic Solutions)</b>	5,197	6,014	5,539	5,298	4,092	3,500
<b>Other Agricultural &amp; Related Products</b>		646,367	717,246	649,785	453,422	429,154	379,060

Source: Trade Data Monitor.

\* Data for *Consumer Oriented* Agricultural Products is not shown in this table since it has been listed in Table 1 above. However, the total in the table includes Consumer Oriented Agricultural Products.

\*\* 2021 data is for the first nine months only (Jan. – Sept.)

## **b. BEST HIGH-VALUE, CONSUMER-ORIENTED PRODUCT PROSPECTS CATEGORIES**

Tree nuts, sunflower seeds for confectionary, dates, functional foods, sauces, gourmet/ethnic food ingredients, spices, cranberries & dried fruits, wine and non-alcoholic beverages are some consumer-oriented food products that have potential. Please see [our Retail Foods Report](#) for more details.

## **VI. KEY CONTACTS and FURTHER INFORMATION**

Turkish importers, agents, or distribution companies typically attend large trade shows such as [Anuga](#) in Germany, [Sial](#) in France, [Gulfood](#) in Dubai and [Seafood Expo Global](#) in Spain. Food trade shows in Turkey can be helpful to visit before deciding to enter the market and promoting a product. [Anfas Food Product](#), [World Food Istanbul](#), [CNR Food Istanbul](#), [IbakTech](#), [Sirha Istanbul](#), [Ekoloji Izmir Exhibition](#), [Gourmet Izmir OliveTech Exhibition](#), [Future Fish EuroAsia](#) and Food Ingredients [Fi Istanbul](#) are good shows to visit and excellent opportunities to meet importers. The Turkish tourism industry is usually at [ITB Berlin Tourism Exhibition](#) to sell holiday packages; nevertheless there could be opportunities to talk to them as buyers too, although that is not their focus at the show. [Travel Turkey Izmir Expo](#) and [Eastern Mediterranean International Tourism & Travel Exhibition](#) are two local tourism-related exhibitions.

Entering the Turkish market often requires a long-term perspective and persistence, as building trust is important. Correct and thorough market analysis must be done before entry. Turkey is a large country and has a very diverse set of consumers, retailers, HRI, and food processing entities. We recommend reviewing our other [reports](#) and contacting the FAS Turkey office with any questions. Foreign Agriculture Service (FAS) offices listed below may assist with connecting U.S. food exporters and Turkish importers.

Office of Agricultural Affairs United States Department of Agriculture U.S. Embassy Ankara 110 Ataturk Bulvari, Kavaklidere, 06100 Ankara, Turkey Telephone: +90 312 457 7393 E-mail: <a href="mailto:agankara@usda.gov">agankara@usda.gov</a>	Office of Agricultural Affairs United States Department of Agriculture U.S. Consulate General Istanbul Ucsehitler Sokak No:2, Istinye, 34460 Istanbul, Turkey Telephone: +90 212 335 9068 E-mail: <a href="mailto:agistanbul@usda.gov">agistanbul@usda.gov</a>
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Republic of Turkey, [Ministry of Agriculture and Forestry](#) (MinAF)

[Union of Chambers and Commodity Exchanges of Turkey](#) (TOBB)

[Foreign Economic Relations Board of Turkey](#) (DEIK)

[Investment Support and Promotion Agency of Turkey](#) (ISPAT)

[All Foods Foreign Trade Association](#) (TUGIDER)

[Federation of All Food and Drink Industry Associations of Turkey](#) (TGDF)

[Association of Food Additives and Ingredients Manufacturers](#) (GIDABIL)

[Federation of All Food and Drink Industry Associations of Turkey](#) (TGDF)

[Federation of Food Industrialists Associations](#) (YESIDEF)

[All Foods Foreign Trade Association](#) (TUGIDER)

[Turkish Federation Retailers](#) (TPF)

[Food Retailers Association](#) (GPD)

[Istanbul Retailers Association](#)

[Turkish Restaurant and Entertainment Association](#) (TURYID)

[Istanbul Food Industrialists Association](#) (IYSAD)

[Out of House Consumption Association](#) (ETUDER)

[Turkish Tourism Investors Association](#) (TTYD)

[Hotel Association of Turkey](#) (TUROB)

[Turkish Small Hotels Association](#)

[All Restaurants and Restaurant Suppliers Association](#) (TURES)

[Association of Turkish Travel Agencies](#) (TURSAB)

[Turkish Statistics Institute](#) (TurkStat)

### **Attachments:**

No Attachments