



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 8/21/2001

GAIN Report #TU1034

Turkey

Livestock and Products

Annual

2001

Approved by:

Susan R. Schayes, Agricultural Counselor

U.S. Embassy, Ankara

Prepared by:

A. Unal Sarigedik, Agricultural Specialist

Report Highlights:

After the GOT lifted its ban on breeding cattle imports in 1999, about 3,000 breeding cows were imported. However, the Turkish livestock sector, which appeared ripe for investment and development, was seriously affected by the economic crisis which began last fall. In addition to reducing Government funds which might have been allocated to the Livestock Development Project, the Turkish Lira's devaluation has made breeding cattle imports more expensive and the GOT continues to prohibit imports of meat and beef/fattening cattle.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Ankara [TU1], TU

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Executive Summary

Cattle production occurs throughout Turkey. Most cattle are dual purpose animals. However, cattle in eastern Turkey generally are grazed on public rangeland and tend to be raised for beef production, while cattle in western Turkey are fed more grains and mixed feeds and tend to be raised for milk production. Less than half the herd consists of native breeds. About fifteen percent are imported purebred cattle and the remainder comprises a variety of crossbred cattle.

The ban on breeding cattle imports was removed in August 1999. Although all farms can submit applications, the Ministry of Agriculture and Rural Affairs (MARA) is only considering applications from farms which require at least 100 head. The GOT is not providing credits or subsidies to importers who are using other commercial sources. Eighteen farms received import licences since the ban was lifted, for a total of more than 7,000 head of breeding cattle, more than half from Germany. After a long hiatus, a Turkish company recently purchased about 200 breeding dairy cattle from the United States which are expected to arrive in late August.

The long discussed Livestock Development Project started last year. TL 46 trillion (which was about USD 70 million, at the time of the announcement, out of the total budget requirement of USD 1.3 billion) was allocated to the Project. A regulation which defined the program and described how farmers and others would benefit from the program, was published on June 2, 2000, which was revised and the amount of supports was upgraded in 2001. About 700,000 head of pedigreed and certified dairy cattle were given I.D. certificates and ear tagged, according to another regulation which was published on June 4, 2000. By this way, their movement, sale, and slaughter can be monitored.

The Turkish High Planning Board recently approved privatization of State-owned TIGEM farms. Twenty of the total 37 TIGEM farms can be operated under joint ventures with the private industry. The non of these farms' privatization has been completed due to economic crisis in the country. However, four of these farms are expected to be privatized at the first step in the short run.

There are no high quality beef breeding cattle in Turkey, although the demand for high quality beef is increasing in response to a growing tourism sector. To introduce Turkish officials and producers U.S. beef breeds and to demonstrate their productivity under Turkish conditions, USDA has provided a commercial operation with thirty head of U.S. beef breeding cattle through its Quality Samples Program.

There are no duties on breeding cattle imports. Duties have been slightly reduced to 139.5 percent for feeder and slaughter cattle and to 232.5 percent for beef and veal. However, import licences are only available for breeding cattle.

Livestock statistics are the subject of much debate in Turkey, although the declining trend in herd size is clear. It is generally assumed that official statistics (registered slaughter from the large commercial processing facilities) account for about seventy percent of total production and thirty percent for unregistered production. However, since commercial operations have an incentive to under report slaughter to avoid taxes, an even larger percent of meat production may go unregistered. Beef and veal production statistics are equally uncertain. Production estimates used in this report are based on the above assumptions.

(Exchange rate as of 8/16/01 Turkish Lira (TL) 1.0 = US Dollars 1.470 million)_

Production

Cattle production occurs throughout Turkey. Most cattle are dual purpose animals. Cattle in eastern Turkey generally are grazed on public rangeland and tend to be raised for beef production (with milk production used mainly for home consumption), while cattle in western Turkey (where the bulk of the grain is grown) are fed more grains and mixed feeds and tend to be raised for milk production. Less than half the herd consists of native breeds. About fifteen percent are imported purebred cattle and the remainder comprises a variety of crossbred cattle. There has been a trend towards increased purebred and crossbred cattle.

Turkey used to maintain large numbers of cattle and sheep--about 16.6 million cattle and buffalo, and 65 million sheep, ordinary goats and Angora goats-- in the mid 1970's. Since then, however, their numbers have significantly declined. The primary reason was the unsettled situation in eastern Turkey, where the bulk of the beef, veal, lamb, mutton, and goat meat were produced. Political, economic and social problems in this area led to large scale urban migration and significant disruption to livestock production.

There were several other reasons for the decline in numbers and/or yields. Although most domestic breeds were well-adapted to local conditions and are considered dual purpose animals, the genetic base of domestic breeds could not compete with the meat and milk yields of western breeds. Some sources estimate the cow/calf ratio at 65 percent, meat yields of Turkish cattle at around 150 kilograms, and average cow milk yields at around 2,000 MT. These have been improving in recent years as livestock activities shift to Western Regions, but are still very low. Yield losses were further aggravated by financial difficulties which caused farmers to sell or slaughter calves at a very early age, despite government incentives.

The Turkish herd experiences a high incidence of disease and mortality, and a low fertility rate. Because of its geographical location, Turkey is very susceptible to a variety of the contagious animal diseases due to contacts with cattle from neighboring countries- Foot and Mouth (FMD) disease being the most prevalent. One of the GOT's justifications for banning livestock import was an outbreak of FMD in the Thrace area in the spring of 1996. Imported cattle were considered to be extremely vulnerable and more at risk to infection and to spread the disease more rapidly. Although the FMD outbreak in Thrace was brought under control by December 1996, the ban was extended for three month periods through August 1999. In August 1999, the Minister of Agriculture announced that he would allow breeder cattle imports, but the ban was maintained for feeder and slaughter cattle, and beef imports.

There are eight Veterinary Research Institutes (VRI) in Turkey which test all animal diseases through their laboratories. Pathologic controls are undertaken at all of them, while the Etlik VRI, acting as a reference laboratory, does duplicate tests. Several veterinarians who have been trained in France and Netherlands on BSE work at Etlik and Pendik VRI. The government has initiated projects to support Pendik and Konya VRI for speedy diagnostic technics, especially for BSE. The MARA is hoping to receive some support from the Netherlands for these projects. During the past two years, stricter controls on smuggling cattle at the borders somewhat lessened animal health problems.

The Government has maintained strict controls on imports and will only accept applications for import permits from dairy and meat producers who can import at least 100 head of breeding cattle at a time (reportedly to monitor the imports, prevent disease, and prevent imports of slaughter and/or poor quality stock). The GOT is not providing direct supports, but farmers may use other credit sources, such as GSM-103. Since September 1999, several commercial farms received import licences for a total of about 7,000 breeding cattle. Actual imports were closer to 3,900. To decrease financial requirements from the Treasury, the Ministry of Agriculture

(MARA) is not planning to directly import and distribute breeding cattle, as was done in the past, and was considered was proposed again as recently as last year .

The MARA's General Directorate of Organization and Support Services has continued to provide permits to Village Development Cooperatives (VDCs) for tenders for dairy and/or dual purpose breeding cattle, such as Holstein Friesian, Brown Swiss or Simmenthal. Most of the VDCs have been procuring cattle from local sources, mainly from the members of the National Breeders Association.

Animal nutrition in Turkey is generally poor. Unless fed in commercial feedlots (most livestock are not), rations often are inadequate. Most livestock generally are grazed on public lands on a first-come first-serve basis, and provided with little or no additional supplements. Supplemental feeding of forages is limited because government production policy favors field crop production. Because grazing is unregulated, public lands tend to be severely over grazed which only further aggravates the problem. The GOT has been trying to control the problem. Four years ago it passed a Meadow Law to regulate and improve public pastures and meadows, but funding and implementation has been slow. In recent years there has been a trend toward raising cattle in open-air commercial feedlots in western Turkey.

Livestock Development Program

A massive government project to support all forms of livestock activities had been prepared by the previous Government to revitalize the livestock sector (Livestock Development Project-LDP) and was adopted by the current Administration last year. Production of cattle, for dairy and beef, using locally available and imported animals was the most important component of the project. It was hoped that if this five-year (US\$1.3 billion) program was funded sufficiently, the declining trend of the livestock production would be reversed. Last year, the Minister of Agriculture announced that TL 46 trillion in GOT funds was allocated for the project's first year expenses. A regulation which described the potential benefits and initial program targets to implement the program was officially published on June 2, 2000 and subsequently revised to the following:

- a) Fodder crop production incentives: Approved fodder crop production projects will receive support for up to 30 percent of investment and operation costs (except fertilizer, chemicals, transportation, and value-added tax) for multi year fodder crops, such as alfalfa and sainfoin, (from 2.5 to 100 hectares) and 20 percent for one year fodder crops, such as vetch, Hungarian vetch, corn for silage, triticale, sorghumxSudan grass, and fodder beets, (from 1 to 100 hectares). Certified fodder crop seeds must be used. Farmers will receive the first 50% when the crop is germinated and the second 50% when the harvest is completed for one year fodder crops or when the first cut is done for multi year fodder crops.
- b) Cattle breeding incentives: In 2001, farmers will receive TL 240 million in supports for each pedigreed and TL 120 million for each certified (father, mother, and date of birth known but no milk records) breeding cattle.
- c) Artificial insemination incentives: For each insemination, farmers will receive TL 6 million in less developed regions and TL 3 million in other regions.
- d) Incentives for newly established artificial insemination enterprises: Newly established artificial insemination enterprises will receive TL 800 million if they are established and operating in less developed regions or TL 400 million in other regions..

All of these supports were to continue through 2004 and revised annually. The project, however, is not

expected to operate fully in the short run due to its large financial requirements and the GOT's tight budget policies. An economic and financial crisis, and IMF deflation program which began last fall, has exacerbated the GOT's tightened fiscal program..

Other Development Initiatives

The GOT established a Dairy Council comprised of government and private sector representatives under the Chairmanship of the MARA Undersecretary to develop a plan to eliminate the marketing problems of milk producers. The Council has not been particularly effective. However, to encourage production, milk producers who deliver milk to modern processing facilities are provided premiums of TL 5,000 (currently US\$.0034) per liter. This support increases to TL 10,000 per liter of milk for milk from pedigreed (registered) cows. MARA submitted a study to the Prime Ministry which proposes an increase in supports to TL 10,000 per liter of milk from non-pedigreed cows and TL 20,000 per liter of milk from pedigreed cattle. The Minister has also proposed re-establishing supports for feedlots which were discontinued two years ago. Due to the reduced demand because of concerns stemming from the BSE problem in Europe, and the economic crises in Turkey, beef and veal prices went down from TL 2.9 million in December 2000 to TL 2.6 million per kg. of carcass weight, while the rate of inflation is running around 65 percent per annum.

The uncontrolled movement of animals in Turkey has created many problems and contributed to the spread of diseases to the non affected areas. To combat these problems and monitor movement within Turkey, the GOT had published another regulation on June 4, 2000 which required all large ruminants to have I.D. certificates and ear tags. Once the program was implemented (and this was expected to take time), it would also be easier to trace the cattle when they are sold or slaughtered. Progress has been faster for dairy breeding cattle and 700,000 breeding cattle have been certificated and eartagged so far. There are 100,000 registered (pedigreed) and 1,100,000 certified breeding cattle in Turkey, according to the Ministry of Agriculture officials. Other non pedigreed and non certified dairy breeding cattle are expected to be certified and eartagged in a few years. Other cattle is much slower and it seems it will take several years (if ever possible) to accomplish it. Registration of nondescript dual purpose and beef animals could take much longer.

The Turkish livestock industry as a whole continues to face a combination of natural and man-made challenges. Efforts to support crop production (and particularly the rural farm sector) have resulted in domestic grain prices which are considerably above the world market prices and had a direct impact on feed costs. Also, Turkey's import policy did not encourage the introduction of new technology. As a result, the industry has been slow to modernize. Smuggled cattle from Turkey's Eastern and Southern borders, mainly from Iran, met part of the nations need for beef but, at the same time, kept meat prices lower than they would have otherwise been and discouraged feedlot production. In September 1999, the MARA announced that it would stop all illegal border trade of agricultural commodities and took severe measures to eliminate smuggling. This step was considered essential to develop a profitable domestic industry. The GOT continues to apply this strict policy and, as a result, entrance of smuggled cattle is minimized.

TIGEM Farms

To improve efficiency and yields, the High Planning Board had made a decision to privatize ten TIGEM farms during the first half of last year, and later decided to privatize ten more. Thus, twenty out of the a total of 37 TIGEM farms are available for privatization through joint ventures with private industry. Progress has been very slow, primarily due to the economic crisis. Several companies made offers for these farms and some offers were accepted by TIGEM. Four TIGEM farms are expected to be jointly operated with the private sector in the near future. Other farm contracts remain under discussion.

TIGEM farms account for less than one percent of the total dairy population, and were designed to serve as a model for dairy production through use of modern production techniques, high energy and protein feed mixes that take advantage of locally produced and imported products, and track each animal's performance. If the Government follows through on its announced plans to privatize these farms, they may offer the best platform for bringing Turkish private sector dairy production up to Western norms. A USA-funded study, produced two years ago, identifies the TIGEM farms which could be developed to produce beef cattle following a U.S. production model. After the BSE outbreak throughout Europe, there were suggestions that these farms could serve as a base to produce BSE-free beef for EU markets.

Consumption

According to the 2000 census, more than 65 percent of Turkey's population now lives in urban areas and less than 35 percent in rural areas. The meat consumption pattern has shifted over time from lamb, mutton, and goat to greater consumption of beef, veal and poultry due to changing tastes and costs. Although the migration pattern was mostly from the main sheep-raising areas in eastern Turkey to the large urban areas of western Turkey, including Istanbul, Ankara, and Izmir, increases in beef consumption were limited by a high rate of inflation and constrained incomes.

Most of Turkey's commercial slaughter houses and packing plants are now privately owned. The Meat and Fish Corporation (EBK), the only remaining public sector company, was a major player in the past but now handles less than five percent of production. Most of EBK's plants have been privatized and the remainders are expected to be privatized in the future.

PS&D for beef consumption for 2002 is forecast to increase parallel to the population increase. Consumption in 2001 was revised slightly downward to reflect reduced demand.

Beef prices did not increase significantly during the last year in TL terms, even though the rate of inflation was around 65 percent. The retail prices of deboned beef is about TL 4,500,000 (\$3.25) per kg, chopped beef is about TL 5,250,000 (\$3.85) per kg, and tenderloin and other higher grades of beef are around TL 6,000,000 (\$4.4) and TL 7,000,000 (\$5.1) per kg (USD1.00 = TL 1,470,000 as of August 16, 2001). A year ago, these prices in USD terms were about USD 7.15, USD 7.95, and USD 8.95 per kg, respectively and USD 1.00 was TL 630,000. Meat prices did not increase significantly last year because of reduced demand for beef due to the BSE problem in EU, and especially the economic crisis in Turkey which lowered disposable income.

Trade

Prior to the economic crisis in Turkey, investment in livestock appeared promising, and a couple of new dairy farms, with European cattle, were opened. Germany was the most significant supplier of breeding cattle to Turkey. After the BSE outbreak, the Ministry of Agriculture banned imports of livestock from Germany and subsequently extended the ban to all European countries. This should have given an big opportunity to U.S. suppliers, but the economic crisis adversely effected proposed and actual investments, including the livestock sector. Many companies which were considering new investments in dairy or beef operations are now unable to raise the necessary capital. Most put their projects on hold until the current economic downturn is reversed although a few are still considering nearer term investments. High prices for U.S. cattle and the TL's depreciation are problems (The lira depreciated by over 100 percent against the dollar in the past six months). Also, the need to ship larger numbers of U.S. cattle to reduce ocean transport costs, makes smaller shipments difficult. The GSM-103 export credit guarantee program is available to help finance U.S. breeding cattle imports and somewhat mitigate the above mentioned problems.

Farmers and dairy producers who have facilities and want to import 100 head or more of the breeding cattle can apply to the MARA for import permits. During the last two years, 18 commercial farms were issued permits for a little over than 7,000 head of breeding cattle and about 3,900 cows (3,550 from Germany and 350 from Denmark-- before the BSE outbreak announcement) were actually imported since September 1999. After a long break, an Aegean Company bought and shipped 231 pedigreed dairy heifers from the United States which are expected to arrive in late August. The low rate of imports reflects reduced investments due to the economic crisis. Also, under the current Livestock Development Program, the GOT did not provide importers with the incentives or subsidies to support their import/distribution programs which they had come to expect based on previous programs.

Both the IMF and the World Bank have economic support programs and agreements in place with the GOT which could effect livestock production, both directly and indirectly. The World Bank is actively supporting a trial program of direct income supports for small farmers to decouple agricultural supports from domestic purchase prices. Following its IMF agreement and anti-inflation efforts, the Government announced slightly lower increases in domestic support prices for grains during the last two marketing years. Both organizations are also promoting the privatization of State Enterprises and Banks.

Stocks

Stock levels are limited because of the Turkish preference for fresh meat. Official statistics are not available and PS&D estimates were therefore derived from the “best” estimates from a wide variety of sources.

Policy

Production Policy

(See also Production Section)

Meat marketing in Turkey has been in transition as new government programs and regulations were phased in, aimed at increasing private sector involvement in marketing and pricing. Some of these programs addresses basic production problems which included subsidized production credit for improving animal nutrition and genetics as well as encouraging joint ventures and technology transfer through various incentives. The Government has continued to facilitate efforts to eradicate diseases and directly is involved in subsidizing fodder crop and breeding cattle production and artificial insemination activities.

GOT efforts to play a more expansive role in assisting the development of the industry have been hampered by funding problems. Recent governments have tried hard but were not successful in allocating funds for the massive Livestock Development Project which was initially announced as a \$1.3 billion/five year project. The Minister of Agriculture started a new LDP and TL 46 trillion (about USD 70 million at that time) from the budget was set aside for the project last year. However, continuation is very difficult under the current economic crisis.

The GOT also decided to provide funds to the Village Development Cooperatives (VDCs) to support tenders for dairy and/or dual purpose breeding cattle, such as Holstein Friesian, Brown Swiss or Simmenthal. There are two scenarios for this project: Up to 100 farmers will be provided two breeding cattle each, or, according to the second scenario, fifty farmers will receive four cattle each. Funding for this purpose is very limited, and very few VDCs are procuring cattle. When the VDC are able to purchase, they generally source the cattle locally from members of the National Breeders Association.

Trade Policy

The GOT has historically “encouraged” the development of the domestic meat and dairy product sectors by maintaining non tariff barriers and very high duties on imports of meat and dairy products. Turkey charges much lower duties on inputs that it considers as vital to these industries, such as breeding cattle and genetics which are zero.

The EU and Turkey implemented a bilateral agreement in May, 1998 under which Turkey would provide the EU with improved access for cattle, beef and dairy products. Under the agreement, Turkey would provide the EU with permanent zero duty access for breeding cattle, 19,000 MT in beef tariff rate quotas at an eventual duty of 42 percent, and small tariff rate quotas for various dairy products. However, under pressure from Turkish private sector interests, and to the chagrin of EU member countries, the MARA refused to issue the import permits. Observers believe that this is one of many concessions that Turkey will have to make to gain full membership in the European Union.

With the BSE outbreak in many countries, the EU stopped putting heavy pressures on Turkey to lift the ongoing beef import ban. Turkey had also signed, but not implemented, trade agreements with Romania (1,000 MT reduced duty TRQ for beef and 5,500 head reduced duty TRQ for feeder cattle) and Hungary (500 MT TRQ for beef and 4,000 head TRQ for feeder cattle).

Slaughter male or infertile female cattle (local breeds weighing an average of 225 kilograms and crossbreeds weighing an average of 300 kilograms) may be exported any time with an export license from the Ministry of Agriculture.

The official import duties for breeding, feeder, and slaughter cattle and beef in 2001 follow:

Tariff Number	Product Description	Import Duty	Other Information
0102.10	Breeding cattle	0	For all origins
0102.90	Feeder and slaughter cattle	139.5 % of the CIF value	70% for Lithuania and 115% for Estonia.
0201 & 0202	Fresh, chilled or frozen bovine meat	232.5 % of the CIF value	The rate is 165% for Lithuania and 200% for Estonia.

Official import duties for feeder and slaughter cattle and beef were reduced slightly in 2001. However, no permits were issued since these imports are banned.

Marketing

The ban has been removed and large farmers and producers are eligible for livestock imports.

If the economic picks up and sufficient funds are provided for the LDP, market opportunities for cattle, genetics and feed would greatly improve.

There are no beef breed cattle in Turkey, but the demand for high quality beef is growing because of the growing tourism sector. Under a U.S. Quality Samples Program, U.S. beef breeds were introduced and 27 females and three bulls were delivered to a potential importer last year.

The FY 2000 GSM-103 program for Turkey was announced at USD 5 million, but could expand to meet

additional demand . Turks are generally familiar with the quality of U.S. cattle and growing numbers of producers are becoming interested in U.S. livestock, not only because of their genetic superiority but also due to concern over BSE problems in Europe.

U.S. cattle exporters and associations were active in promoting sales of the U.S. cattle to Turkey, although there have been fewer visits during the current year. The U.S. Grains Council, American Soybean Association, and National Renderers' Association organize programs which assist the livestock sector. The Cochran program also funds short term training opportunities for the sector. Turkish officials and importers are interested in visiting livestock producers and farms.

Statistack Tables**PSD Table Animal Numbers, Cattle**

PSD Table						
Country	Turkey					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Total Cattle Beg. Stks	11500	11500	11350	11350	11200	11250
Dairy Cows Beg. Stocks	4150	4150	4100	4100	0	4100
Beef Cows Beg. Stocks	3200	3200	3200	3200	0	3150
Production (Calf Crop)	4250	4250	4200	4200	0	4150
Intra EC Imports	0	0	0	0	0	0
Other Imports	5	4	25	0	0	5
TOTAL Imports	5	4	25	0	0	5
TOTAL SUPPLY	15755	15754	15575	15550	11200	15405
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Cow Slaughter	0	0	0	0	0	0
Calf Slaughter	2100	2100	2100	2100	0	2050
Other Slaughter	2050	2050	2050	2000	0	2000
Total Slaughter	4150	4150	4150	4100	0	4050
Loss	255	254	225	200	0	155
Ending Inventories	11350	11350	11200	11250	0	11200
TOTAL DISTRIBUTION	15755	15754	15575	15550	0	15405
Calendar Yr. Imp. from U.S.	0	0	5	0	0	3
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table Meat, Beef and Veal

PSD Table						
Country	Turkey					
Commodity	Meat, Beef and Veal				(1000 MT CWE)(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Slaughter (Reference)	4150	4150	4150	4100	0	4050
Beginning Stocks	52	52	47	47	47	52
Production	625	625	640	635	0	640
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	677	677	687	682	47	692
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	630	630	640	630	0	640
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	630	630	640	630	0	640
Ending Stocks	47	47	47	52	0	52
TOTAL DISTRIBUTION	677	677	687	682	0	692
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Export Trade Matrix for Animal Numbers, Cattle

Export Trade Matrix					
Country	Turkey		Units:	Head	
Commodity	Animal Numbers, Cattle		Partial Begin		
			Partial End		
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.					
Others					
Total for Others	0	0	0	0	0
Others not Listed					
Grand Total	0	0	0	0	0

Import Trade Metrix for Animal Numbers, Cattle

Import Trade Matrix					
Country	Turkey		Units:	Head	
Commodity	Animal Numbers, Cattle		Partial Begin		
			Partial End		
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.	30	231			
Others					
Germany	3517				
Denmark	350				
Total for Others	3867	0	0	0	0
Others not Listed					
Grand Total	3897	231	0	0	0

Export Trade Matrix for Meat, Beef and Veal

Export Trade Matrix					
Country	Turkey		Units:	Metric Tons	
Commodity	Meat, Beef and Veal		Partial Begin		
			Partial End		
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.					
Others					
Serbia	52				
United Arab Em.	1				
Total for Others	53	0	0	0	0
Others not Listed	6				
Grand Total	59	0	0	0	0

Import Trade Matrix for Meat, Beef and Veal

Import Trade Matrix					
Country	Turkey		Units:	Metric Tons	
Commodity	Meat, Beef and Veal		Partial Begin		
			Partial End		
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.					
Others					
Total for Others	0	0	0	0	0
Others not Listed					
Grand Total	0	0	0	0	0

Feed Demand

Strategic Indicator Table of Turkey

FEED DEMAND				
STRATEGIC INDICATORS- TURKEY				
MEAT PRODUCTION				
		Last Year	Current Year	Forecast
Calendar Year:	1999	2000	2001	2002
Poultry				
Poultry Meat:	675,000	766,000	650,000	720,000
Eggs:	10,500,000	7,600,000	7,500,000	8,250,000
Pork:				
	0	0	0	0
COMPOUND FEED SECTOR				
		Last Year	Current Year	Forecast
Calendar Year:	1999	2000	2001	2002
Compound Feed Capacity	11,714,000	12,300,000	12,500,000	13,000,000
Total Compound Feed Produced	10,000,000	10,000,000	8,000,000	9,000,000
----- by integrated producers	1,000,000	1,000,000	800,000	1,000,000
----- by commercial producers	9,000,000	9,000,000	7,200,000	8,000,000
FEED GRAIN USE				
		Last Year	Current Year	Forecast
Marketing Year:	1999	2000	2001	2002
Corn (Domestic consumption: feed)	2,500,000	2,200,000	2,000,000	2,300,000
Other (Barley)	5,900,000	6,000,000	6,000,000	6,000,000
Other(Wheat)	1,000,000	1,000,000	1,200,000	1,000,000

PROTEIN - ENERGY USAGE				
		Last Year	Current Year	Forecast
Marketing Year:	1999	2000	2001	2002
Total Protein Meal (feed waste domestic consumption)	1,890,000	1,591,000	1,787,000	1,920,000
Soy Bean Meal (feed waste domestic consumption)	543,000	486,000	532,000	560,000
Other prot.meal- sun, cottonseed	1,301,000	1,065,000	1,205,000	1,300,000
Fish Meal	46,000	40,000	50,000	60,000
Palm Crude Oil (feed waste domestic consumption)	0	0	0	0
TRADE (Metric Tonnes)				
		Last Year	Current Year	Forecast
Calendar Year:	1999	2000	2001	2002
Corn				
Imports:	839,096	1,286,000	900,000	1,200,000
Exports:	6,205	3,963	4,000	4,000
Soy Beans				
Imports:	353,267	387,000	390,000	420,000
Exports:	0	0	0	0
Soy Bean Meal				
Imports:	520,549	539,000	500,000	530,000
Exports:	5,035	12,000	15,000	17,000
Fish Meal				
Imports:	58,874	30,730	45,000	55,000
Exports:	120	1,500	2,000	2,500
Palm Crude Oil				
Imports:	120,670	165,680	220,000	240,000
Exports:	0	0	0	0

PROTEIN PRODUCTS TARIFFS AND TAXES		Bound Rate	Applied Rate	Other
	Product	(%)	(%)	Import
Report Year:	Description 1/			Taxes/Fees
0505.90	FEATHER MEAL	"30.8	4	
1501.00.00.60	YELLOW GREASE	"15.6	4	
1502.00.00.40	INEDIBLE TALLOW	"31.2	4	
1511	PALM OIL	"31.2	12	
1518	ANML/VG FTS & OILS	"28.8	"21.7	
2301.10	MEAT AND BONE MEAL	"4.3	2	
2301.20	FISH MEAL	"4.3	2	