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Country: Turkey

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Report Highlights:

Turkey has a young population of 85 million people. The country is in a Customs Union with the EU, has free trade agreements with EFTA and 22 other countries (excluding the U.S.), and is the 23rd largest economy in the world. The International Monetary Fund (IMF) forecasts Turkey's annual Gross Domestic Product (GDP) growth at 3.2 percent between 2022 and 2026. European countries are the major suppliers to Turkey in terms of consumer-oriented agricultural products, paying zero tariffs. There was a significant boost to grocery e-commerce in 2020 and in 2021 due to COVID-19. More recently, shortages of staple foods like sugar and cooking oil have been observed due to price instability caused by inflation and the depreciation of the Turkish Lira (TL).

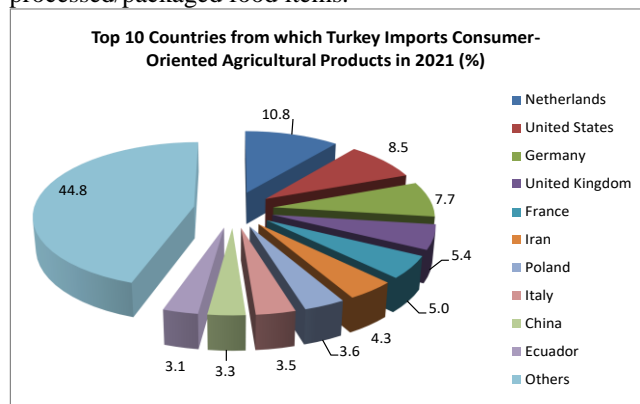
MARKET FACT SHEET: TURKEY

Executive Summary

The Republic of Turkey has a young population of 84.6 million people. The country is in a Customs Union with the EU and is the 23rd largest economy in the world. Though the Turkish economy stagnated recently, an annual average GDP growth rate of 3.2 percent is forecasted by the IMF between 2022 to 2026. In most cases, U.S. food exporters should utilize importers in Turkey to penetrate the market. There is still a gap in the market to fill.

Imports of Consumer-Oriented Agricultural Products

EU countries are the major suppliers to Turkey in terms of consumer-oriented agricultural products. They have the advantage of proximity and the Customs Union with Turkey. As Turkey's food sector has become more specialized and export-oriented, Turkey now imports some consumer-oriented agricultural commodities such as rice, dried beans, walnuts, almonds, bananas, coffee, cocoa, meat, fish and different kinds of processed/packaged food items.



Food Processing Industry

Turkey has a large and sophisticated [food and beverage processing industry](#), which relies on domestic and imported ingredients. As of 2020, there were nearly 53,000 food and beverage manufacturers in Turkey. The industry, which supplies both domestic and export markets, continues to grow in response to strong consumer demand for increased convenience.

Food Retail Industry

Grocery sales were U.S. Dollar (USD) 76 billion as of the end of 2021. Despite the recent political and economic challenges, the food retail industry has been growing due to a young, dynamic population with 77 percent urbanization rates and a growing middle class. Several foreign players in grocery retail have left the market in the last decade but the domestic industry is coming on strong, and investments continue to be fast paced, especially in the hard discount segment. Organized/modern retailers now make up the majority of the grocery market share as traditional retailers slowly exit the market. Online grocery shopping is the new trend thanks to pandemic conditions.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2020 USD 3.5 billion

List of Top 10 Growth Products in Turkey (Imported Consumer Oriented Agricultural Products) 2019-2020

- | | |
|-------------------------------|--|
| 1. Whey & modified whey | 6. Buttermilk; curdled / fermented / acidified milk or cream nesoi |
| 2. Nuts nesoi, fresh or dried | 7. Bulbs, tubers, tuberous roots, coms, rhizomes, in growth or in flowers ; chicory plants and roots |
| 3. Waterpipe tobacco | 8. Guavas, mangoes |
| 4. Tomatoes in Pcs Prep/Pres | 9. Orange juice, frozen |
| 5. Beer without alcohol | 10. Cumin seeds, crushed/ground |

Food Retailers by Channel (Sales in Million USD*) 2021

Modern Grocery Retailers	42,975
- Convenience Stores	1,719
- Discounters	17,383
- Gas station/ Forecourt retailers	589
- Hypermarkets	1,011
- Supermarkets	22,273
Traditional Grocery Retailers	27,052
Grocery Retailers Total	70,027

*excl. sales tax

Top 10 Retailers (by Marketshare in 2021)

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

GDP/Population

Population: 84.6 million (TurkStat, 2021)

GDP: USD 808 billion (EIU, 2021)

GDP Per Capita: USD 9,500

Sources: CIA The World Fact Book; Euromonitor International; Turkish Statistical Institute (TurkStat); Trade Data Monitor; Economist Intelligence Unit (EIU)

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Long term GDP and disposable income growth.	Domestic and international political challenges.
Large population base: young and growing.	Economic instabilities such as exchange rate fluctuations, inflation.
Opportunities	Threats
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 affecting consumption habits.

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

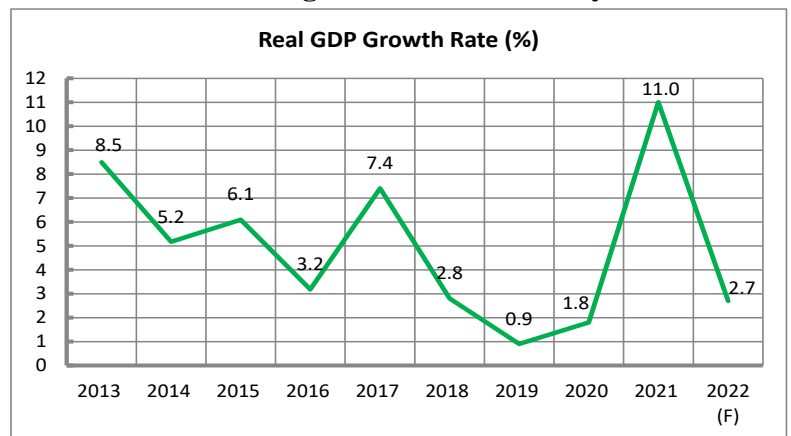
I. MARKET SUMMARY

The Republic of Turkey, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea to the north and the Mediterranean Sea in the south, has a young population of 84.6 million as of 2021. The median age is 33 and 68 percent of the population is between the ages 15 to 64¹. The urbanization rate has reached 77 percent², with rapid urbanization in the last 25 years. These factors, coupled with an increasing household income trend in the last two decades drive the retail industry. The country is an associate member of the European Union (EU) and is in a customs union with the EU. Turkey is the 23th largest economy in the world as of 2022, according to the IMF.

Structural defects in the Turkish economy, diminishing perception of the rule of law, unorthodox domestic policies, tense international relations, security problems on Turkish borders and in the east of Mediterranean Sea, and the lack of independence of Central Bank creates considerable risks for the economy and hinders the much-desired stability.

The average annual real GDP growth rate between 2017 and 2021 was about 4.8 percent and the annual average projected GDP growth rate is 3.2 percent between 2022 and 2026 according to the IMF. After the recession in 2019, with credit energized expansionist policies and strong export demand after the pandemic, the economy started to grow, reaching an unexpected real growth rate of 11 percent in 2021. This high growth rate is unlikely to be sustained since the economic outlook is deteriorating and the domestic demand is expected to drop.

Chart 1: Real GDP growth rate of Turkey



Source: Turkish Statistical Institute. (F) Forecast by IMF.

Inflation continues to be the major challenge for Turkey since 2018. The consumer price index (CPI) increased to 36 percent by the end of 2021 and is 73 percent as of May 2022. Food and beverage inflation was 44 percent by the end of 2021, creating stressors for the living standards of the consumers, especially for the lower income groups. The food and beverage inflation continued to increase during the first half of 2022 reaching 92 percent by May 2022³.

The value of the Turkish Lira has also depreciated rapidly, especially since the summer of 2018 and continues to lose value. This makes purchases of imports in foreign currency less attractive. Because of the price instability, for the first time since the 1970s, there have been short periods of empty shelves observed in supermarkets, especially for sugar⁴ and cooking oil⁵ after the major devaluation of Turkish Lira (TL) in December 2021.

Launched in 2020, and expanding in 2021, the semi-state owned Turkish Agricultural Credit Cooperatives Markets⁶ (ACCM) grew quickly⁷ in all cities of Turkey, especially in lower income neighborhoods, as a

¹ Source for demographic data: Turkish Statistical Institute (TurkStat).

² CIA World Fact Book.

³ Source for all inflation figures is TurkStat. Inflation measured by domestic producer price index (PPI) was 80 percent for 2021 and became 125 percent as of May 2022.

⁴ See FAS Turkey's [Sugar Report](#) for details.

⁵ See FAS Turkey's [report on cooking oils](#).

⁶ Tarım Kredi Kooperatif Market in Turkish, <https://www.kooperatifmarket.com.tr/>

⁷ About 500 stores in 50 provinces

measure to control food and beverage inflation. The stores sell discounted and wholesale agricultural products and basic foodstuffs, with prices generally 10-15 percent lower than competitors and subsidized by the government. Many market sources and competing grocery outlets view the existence of ACCM market chain as an intervention to the free market economy.

Grocery retail sales make up about 55 percent of all retail industry sales through approximately 346,000 chain and independent grocery retailers. Total retail industry sales (excl. sales tax) totaled \$136 billion and grocery sales were \$76 billion in 2021, according to Euromonitor.

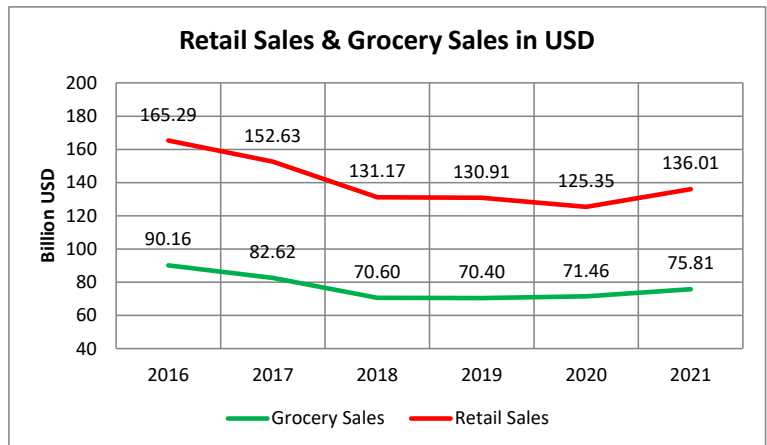
COVID-19 restrictions continued during the first half of 2021, much like 2020. Grocery stores remained opened and operational while shopping malls, restaurants and cafés were closed during much of the pandemic. Weekend and evening lockdowns continued for a major part of the first half of the 2021. Online ordering from major supermarket chains has become very popular in larger cities like Istanbul, Izmir, Bursa, Ankara and even in some smaller cities. Post observed that even the consumers who normally preferred to shop in stores got used to online ordering of grocery items.

When it comes to physical shopping at stores, the discounter model operated by BIM, and then followed by A101 and Şok, has shown a particular ability to meet many Turkish consumers’ preference for proximity shopping and lower prices. International retailers’ focus on larger supermarket formats seem to have reached its growth limit. As the food retail market is very price-sensitive and the profit margins are low, Post forecasts that domestic grocery store chains (vs. international chains) will continue to dominate the Turkish market at least for the near term.

Based on Post analysis of the market, demand for imported higher-value processed food products is expected to increase in Turkey’s urban western centers where consumers are relatively wealthier. The current stagnation in the economy is greatly affecting the disposable income of middle class wage earners which is slowing this process. However, in the long run, with a middle class that travels more than their parents, taste for international flavors will increase.

Imported high value food items are mostly sold in hypermarkets, which are located in wealthier urban areas. These include [Migros](#), [CarrefourSA](#), [Metro Grossmarkets](#) and premium grocery chains such as [Macrocenter](#), as well as more regional gourmet chains like [Gourmet Garage](#). Standalone gourmet/premium food stores that are located in major city centers like Istanbul, Izmir, Ankara, Bodrum, Antalya, Bursa, Cesme also sell imported goods. Imported specialty or high value food items are generally not sold in discount grocery chains or in regional grocery chains, though imported commodities such as rice, walnuts, almonds and a few imported fresh fruits like bananas and avocados may be available there.

Chart 2: Retail & grocery sales in Turkey (USD)



Source: Euromonitor International

<u>ADVANTAGES</u>	<u>CHALLENGES</u>
Long-term GDP growth and disposable income growth (with stagnation in 2016-2018, recovery started in 2020 and expected to further continue in 2021).	Domestic and international political and security challenges.
Large population base: young and growing, middle and upper middle class are growing.	High import duties on processed/packaged food and agricultural products.
High and increasing urbanization rate.	Lack of transparency in rules and regulations.
Strong and steady retail market growth expected.	Economic instabilities such as exchange rate fluctuations and on-going currency depreciation.
Unsaturated market, open for new items.	Complex and time-consuming import procedures.
Internationally traveling new generation open to more 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.	Risk of similar products being developed domestically, such as packaged confectionery products and ready to eat meals.
Fast growing modern organized grocery chains.	Unregistered economy can create some unfair competition.
Positive perception for products from the United States.	There is a zero tolerance for genetically engineered products or ingredients for food use in Turkey.
Strong food culture and tradition of gathering for meals in large groups, so new products fitting into 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, new labeling and advertising restrictions are being developed on salt/fat/sugar content.
Many regulations are similar to those of the EU, so the expansion to Turkey can be easier for companies already exporting to Europe.	Competition from many products imported under FTAs or European countries with lower or zero tariffs.

Source: Market analysis of the Post.

II. ROAD MAP FOR MARKET ENTRY

ENTRY STRATEGY

Normally a good way to start selling retail food 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. 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. Turkey straddles southern European and Middle Eastern cultures, and relationships are very important for business. This makes already existing relations and connections in the country especially important.

In very rare cases, some organized retailers may import food items directly, such as high turnover products. But in general, retailers will buy from a Turkish company who is importing the product. Turkey's import processes and regulations can be difficult to navigate, so local agents are vital. For details on the requirements, please refer to FAS Turkey reports on [Food and Agricultural Import Regulations and Standards](#)

and [Required Certificates](#). Please also refer to our [Exporters Guide](#) for an overview of the market and steps for market entry.

MARKET STRUCTURE

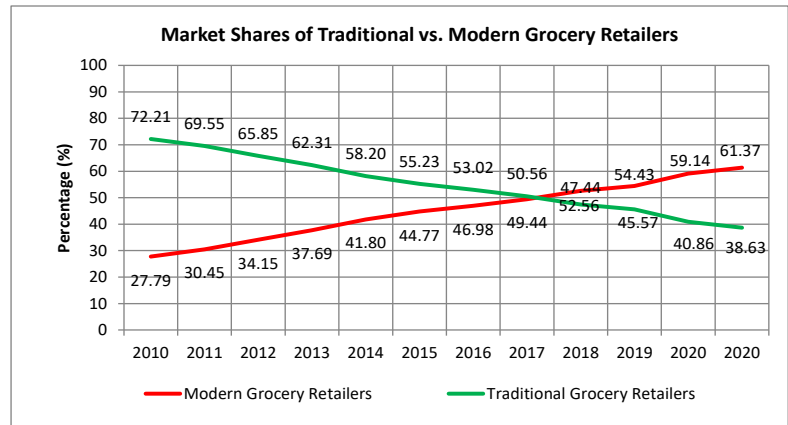
Grocery retailers are classified in two major groups in Turkey: *organized/modern grocery retailers* and *traditional grocery retailers*.

Organized grocery retailers are multi-format retail chains, discount grocery chains, regional grocery chains and gas station convenience stores. The largest chunk of the traditional local grocery retailers are standalone grocery stores which are called *bakkal* in Turkish, are up to 500 square feet in size and selling high-turnover grocery products. Traditionally there are also separate stores in each town or neighborhood specializing in fresh produce, meat, nuts/dried food items, and bread/baked goods.

The other major channel in the traditional market structure is open-air bazaars/markets (*pazar* in Turkish) where fresh produce, nuts, fish, and even some textiles are sold by producers and traders. These are weekly farmers markets and are held on streets in different neighborhoods.

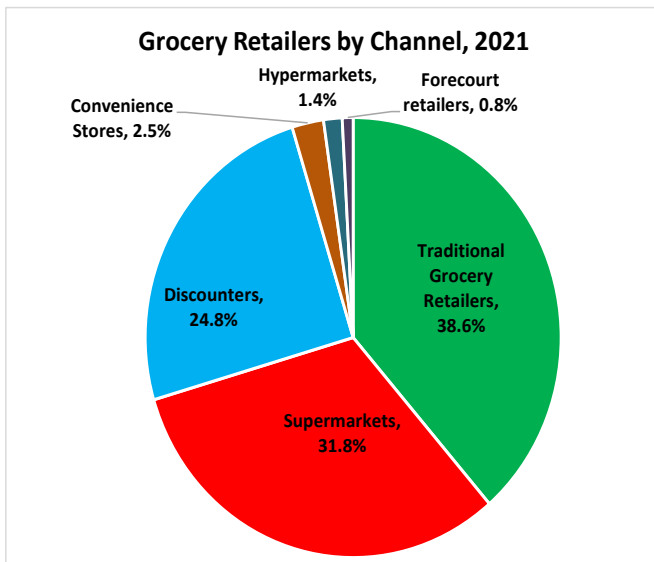
Although modern organized grocery chains are increasing their presence, traditional grocery retailers such as bakkals and pazars are still a major way of grocery shopping in Turkey. The market share of the modern organized grocery retailers is increasing, eating up the share of the traditional grocery retailers as expected, like in other developed markets.

Chart 3: Traditional vs Modern Retailers



Source: Euromonitor International

Chart 4: Grocery retailers by channel



Source: Euromonitor International

Another useful classification of grocery retail stores in Turkey is *regional grocery chains*, *national grocery chains* and *international grocery chains*. Regional grocery chains have stores in one or a few cities in Turkey; they are all domestically-owned companies. They rarely carry any imported food except agricultural commodities such as rice, popcorn, bananas, lentils, and dried beans. They are a large and important part of the retail picture in general, but **not for imported processed goods**, with a few exceptions. National grocery chains are supermarket chains with stores across Turkey in almost all cities. They can be discount, regular, or premium stores. International grocery chains are companies with international ownership and international presence of stores; there are very few still in Turkey. They have stores around Turkey, but usually not east of Ankara. In total there are more than 200 grocery chains in Turkey having more than five stores.

TOP FOOD RETAILERS IN TURKEY & COMPANY PROFILES

Table 1: Top 10 Grocery Store Chains by Number of Stores

	Grocery Chain	Chain Type	Number of Stores	Number of Stores	New Stores
			2020	2019	in 2021
1	A 101	National Discount	9,522	9,000	522
2	BIM	National Discount	8,047	7,438	609
3	Sok	National Discount	7,661	7,215	446
4	Migros (M, MM, MMM, 5M, M-Jet)	National	2,299	2,177	122
5	Ekomini	National Convenience	2,063	1,935	128
6	Sec*	National Convenience	1,017	673	344
7	CarrefourSA (CarrefourSA, Carrefour Express)	National (Int. JV)	444	421	23
8	Hakmar	Regional - Istanbul & vicinity	585	563	22
9	Onur	Regional - Istanbul & vicinity	150	147	3
10	File**	National	115	93	22
Total of Top 10			31,903	29,662	2,241

Source: Euromonitor International

* Sec and Sok markets are owned by same company.

** File is owned by BIM.

Table 2: Top Gas Station Grocery Convenience Shops (Forecourt Retailers) by Number of Stores

	Gas Station Grocery Convenience	Number of Stores	Number of Stores	New Stores
		2021	2020	in 2021
1	Petrol Ofisi Gas Station Markets	1,700	1,800	-100
2	Opet Gas Station Full Markets	957	1,039	-82
3	Shell Gas Station Shops & Shell Select Shops	1,160	1,150	10
4	Total Gas Station Stores	395	405	-10
5	BP Gas Station Shops	355	324	31
Total		4,567	4,718	-151

Source: Euromonitor International

Table 3: Market Shares of Organized Grocery Retailing in Turkey: Top 10

	Grocery Chain	Chain Type	Market Share (%)*	Sales (mill. USD)
			2021	2021
1	BIM	National Discount	18.7	8,025
2	A 101	National Discount	12.9	5,560
3	Migros**	National Discount	9.2	3,992
4	Sok	National	8.3	3,557
5	CarrefourSA ***	National (Int. Owned)	2.6	1,115
6	Sec****	National Convenience	1.0	443
7	Ekomini	National Convenience	0.9	401
8	Hakmar	Regional - Istanbul & vicinity	0.8	351
9	MacroCenter	National Convenience	0.6	239
10	Onur Market	Regional - Istanbul & vicinity	0.6	238
Total of Top 10			55.60	23,920

Source: Euromonitor International

* The market shares are in the organized grocery retail category; traditional grocers are not included.

** M, MM, MMM, 5M, M-Jet Stores of Migros are displayed together. M-Jet is a convenience market.

*** CarrefourSA and Carrefour Express are displayed together. Carrefour Express is a convenience market.

**** Sec and Sok markets are owned by same company.

BIM is the hard discounter of Turkey that sells 80 percent of products as private label. It is present in all large cities in Turkey and in most smaller towns as well. Stores are usually 3000–6000 square feet.

A101 is a hard discount market chain with the greatest number of stores in Turkey and is a major competitor of BIM with similar type of stores in similar locations. Similar to BIM, they only sell some imported commodities – they do not sell imported packaged or processed foods.

Migros is a multi-format supermarket chain. Migros has stores in many different sizes. The smallest format is a convenience store designed to compete with discounters and *bakkals* called M-Jet. The small supermarket format is called M Migros, the larger supermarket format is called MM Migros and hypermarket formats are called MMM Migros and 5M Migros. Their **MacroCenter** brand stores are gourmet stores selling a premium shopping experience.

Şok (pronounced *shock*) is also a discount market chain. Şok is owned by **Yildiz Holding**, which is the most prominent packaged food and packaged confectionery producer of Turkey, under the famous brand Ülker. Thirty five percent of all the products in Şok are private label and the rest are typically Yıldiz Holding’s own well-known brands.

CarrefourSA is a joint venture of Carrefour of France and Sabanci Holding of Turkey. Fifty-one percent is owned by Sabanci, which may be the reason this international chain has survived in Turkey unlike many other foreign chains that left the market.

III. COMPETITION

According to Post’s market observations, imported processed food products face strong competition from local products in the food retail sector. Turkey has a well-developed food processing sector that is producing good quality food items for the Turkish market and to export overseas. Approximately four to five percent of all grocery sales is imported consumer-oriented agricultural products. In addition to local production, products from European countries are also important. The EU has a customs union with Turkey so European processed food items face low or no customs tariffs. Furthermore, proximity is a major benefit for lower freight and shorter delivery times from Europe. Trucks are often used for transportation between Europe and Turkey. European Free Trade Association (EFTA) countries which are Switzerland, Norway, Iceland, and Liechtenstein also have a joint FTA with Turkey, giving them preferential customs advantages as well. In addition, Turkey has [FTAs with 22 other countries](#) with many including preferential tariff rates on food and agriculture products.

Table 4: Top Countries supplying Turkey’s Imported Consumer-Oriented Agricultural Products

Thousands of USD		Imports	Imports	Imports	% Share
Product		2019	2020	2021	2021
1	Netherlands	379,444	366,245	425,601	10.83
2	United States	391,297	359,873	332,543	8.46
3	Germany	287,852	254,276	303,854	7.73
4	United Kingdom	186,471	183,524	213,777	5.44
5	France	137,946	137,186	196,267	5.00
6	Iran	92,637	148,845	167,869	4.27
7	Poland	109,671	96,956	142,263	3.62
8	Italy	124,764	122,334	136,334	3.47
9	China	92,514	120,614	129,169	3.29
10	Ecuador	161,287	137,401	121,300	3.09
Others		1,683,564	1,571,372	1,759,934	44.79
Consumer-Oriented Agricultural Total from All the World		3,647,448	3,498,627	3,928,911	100.00

Source: Trade Data Monitor

IV. BEST PRODUCT PROSPECT CATEGORIES

Turkey is a highly competitive and very price sensitive market for many items. Prospective exporters should look at Turkey as a long-term market opportunity and be persistent. A recognized brand has an advantage in the market, with Oreo Cookies being an example. Although similar and good quality cheaper substitutes are available in the market, Oreo has maintained its presence on store shelves. Exporters should be sensitive in brand positioning and be prepared for sufficient marketing activities and advertising.

a. PRODUCTS PRESENT IN THE MARKET THAT HAVE GOOD POTENTIAL

- 1. Walnuts and Almonds:** Turkey is traditionally a nuts, dried fruits, and dried vegetables consuming culture. Local production exists, but imports are required to meet the large and growing demand. Walnuts and almonds from California are dominant in the Turkish market, sold packaged or unpackaged by local importers and liked by consumers. For further information see the [Turkey Tree Nuts Annual Report](#).
- 2. Dates:** Dates are culturally important in Turkey, and often eaten as part of religious rituals during Ramadan. Turkey doesn't grow any dates but imports mainly from Israel, Saudi Arabia, and Tunisia, according to contacts in the sector. There have been date imports from the United States in the past, but not very recently. Positioning in the market, a focus on quality, and brand recognition work would be important for building the market. California dates have sparked the interest of potential importers. Finding the right time to enter the market is important, as well as finding strategies for reducing refrigerated transportation costs.
- 3. Cranberries and Dried Fruits:** There is also some potential for other dried berries which are not produced in Turkey, such as blueberries or cranberries. They also can also be imported in frozen forms. Dried cranberries have entered the market in recent years and have become popular among consumers as a snack food, and there is growth potential for expanding the uses.
- 4. Spices:** Turkey is traditionally a spice consuming country and produces many kinds of spices and herbs but does rely on some imports as well. In recent years, high quality U.S.-branded spices have gained the attention of well-traveled higher income consumers in Turkey. For example, cayenne pepper, crushed red chili peppers, black pepper, and some other niche spices have a potential in Turkey with high-end customers in premium outlets and specialty/gourmet stores.
- 5. Functional foods:** Functional food consumption is increasing. There is a healthy eating trend among high end and even middle-class consumers. Gluten-free and diabetic products are available, but much more variety is needed to fill the gap in the market. Diet products are also increasing with health consciousness. Baby foods and kid-focused foods that are 'enriched' are in the market in limited varieties and have potential to grow. See [FAS FAIRS reports for requirements](#) limiting what claims can be made on labels.
- 6. Gourmet/Ethnic Food Ingredients:** With increasing disposable income, a new generation of Turkish consumers in upper-middle and upper classes tend to be more open to international food as they engage with more international leisure and business travel. Tex-Mex, Chinese, Japanese, Indian, Thai, Italian, Lebanese, and Syrian restaurants are in the market. Gourmet and ethnic food ingredients have potential for home consumption as well as hotels and restaurants.
- 7. Wine:** Although there are a variety of local and imported wines in the market, there is a potential for wine imports from the United States for wine enthusiasts that are keen to taste different wines. There is market potential for high end consumers who are less price sensitive. There are opportunities for beer as well, but it is more price sensitive. To note, Turkey has high consumption taxes and import tariffs for alcoholic beverages and there are also marketing restrictions to be aware of. There is 218 percent tax (incl. customs

tariffs, special consumption tax and VAT) on U.S. origin wines and 192 percent tax on EU and Chile origin wines. See our [reports](#) for details.

8. **Non-alcoholic beverages:** There is a growing market for other beverages, such as teas or juices, with a focus on natural, plant based, organic beverages according to Post's retail market observations. There is an increasing demand for healthier beverages. They are sold in cafés and restaurants in addition to supermarkets. There are restrictions on health claims and on energy drinks to consider, see [FAIRS reports](#) for details.

b. PRODUCTS NOT PRESENT IN SIGNIFICANT QUANTITIES BUT WHICH HAVE GOOD SALES POTENTIAL

1. **Nutrition bars:** Nutrition bars promoting a healthy lifestyle are trendy in Turkey. There are some locally produced ones, but it is limited. Imported products with specific attributes like a vitamin, protein, etc. have potential in the market. These products are for the high-end consumers and should be promoted as such, including the choice of the stores in which to be sold.
2. **Pecans:** Pecans have made some progress in Turkey in the last few years, but because they are perceived as substitutes to walnuts and have a higher tariff, the high price limits consumption. There are targeted opportunities for growth, including high-end consumer confectionary and specialty baked goods.
3. **Ready-made meals:** Ready-to-eat and ready-to-cook meals have an increasing sales potential in Turkey as the structure of households evolves. Dual-income households and urban single households are on the rise.
4. **Processed organic food:** There is an increasing demand for organic food as household incomes increase in Turkey and health consciousness rises. The market for organic packaged food in Turkey reached \$160 million in 2021 and is expected to reach \$335million by 2025. Organic dairy, baby food, and snack items are the most consumed organic retail products in Turkey. Please take look at [the report prepared by our office](#).

c. PRODUCTS NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS

1. **Food Items from Genetically Engineered Crops:** Any food item that is genetically engineered or contains any trace amounts of genetically engineered content is not currently allowed for import to Turkey for human consumption. No genetically engineered/GMO products have been approved for food use in Turkey. This barrier impacts all food categories and import processes and testing is rigorous and complex. Please see the [Turkey Agricultural Biotechnology Annual Report](#) for more information on the situation.
2. **High Quality Beef Products:** There is a potential demand for high quality and variety of beef products, especially for the luxury market, including for the new beef/steak restaurants that have grown in popularity. However, the complex import requirements that include having Turkish inspectors visit the production plant during slaughtering essentially exclude U.S. meat exports from the market. Please see our [report](#) on the livestock sector or contact our office with additional questions.
3. **Organic Sugar:** The industry specialists indicate that there is a demand for organic sugar, but there are regulatory barriers to import it into Turkey.

V. KEY CONTACTS AND FURTHER INFORMATION

Republic of Turkey, [Ministry of Agriculture and Forestry](#) (MinAF)

[Turkish Statistics Institute](#) (TurkStat)

[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 Importers Association](#) (TUGIDER)

[Food Retailers' Association](#) (GPD)

[Turkish Federation of Retailers](#) (TPF)

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

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

For other agricultural industry reports on Turkey and other countries in the world, visit the Foreign Agricultural Service (FAS)' [internet page](#). FAS Turkey's [Food and Agricultural Import Regulations and Standards Report \(FAIRS\)](#) and [Food and Agricultural Import Regulations and Standards Export Certificate Report](#) provide detailed resources on regulations and import requirements for companies that wish to export food to Turkey.

Contact the FAS Turkey offices via the information below:

Office of Agricultural Affairs Unites States Department of Agriculture U.S. Embassy Ankara 110 Ataturk Bulvari, Kavaklidere, 06100 Ankara, Turkey Telephone: +90 312 457 7393 E-mail: agankara@usda.gov	Office of Agricultural Affairs Unites States Department of Agriculture U.S. Consulate General Istanbul Ucsehitler Sokak No:2, Istinye, 34460 Istanbul, Turkey Telephone: +90 212 335 9068 E-mail: agistanbul@usda.gov
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Attending food industry trade shows in Turkey can be helpful to better understand the market and competition. Major shows include [Anfas Food Product](#), [World Food Istanbul](#), [CNR Food Istanbul](#), and Food Ingredients [Fi Istanbul](#). Additionally, a high percentage of large Turkish buyers usually visit [Anuga](#) in Germany, [Sial](#) in France, [Seafood Expo Global](#) in Spain, and [Gulfood](#) in Dubai.

Attachments:

No Attachments