Required Report - public distribution

Date: 2/4/2019

GAIN Report Number: TR8043

Turkey

Exporter Guide

December 2018

Approved By:

Christine Strossman, Agricultural Counselor

Prepared By:

Caglar Erdogan, Agricultural Marketing Specialist

Report Highlights:

The Republic of Turkey has a young population of 81 million people fueling consumption. The country is in a Customs Union with the EU and is the 17th largest economy in the world. An annual average of 3.5 percent GDP growth is forecasted by Economist Intelligence Unit between 2018 and 2023. In 2017 there was a 14 percent increase in total imports of consumer-oriented agricultural products compared to the previous year. Total imports of consumer-oriented agricultural goods have increased 9 percent in the first ten months of 2018 compared to same period in 2017. U.S. food exporters should utilize importers in Turkey to reach the market in most cases. There is still a gap in the market to fill. The food retail sales index is on an upward trend in real terms. The economy has slowed down after summer 2018 and geopolitical challenges continue in the region.

Post:

Ankara

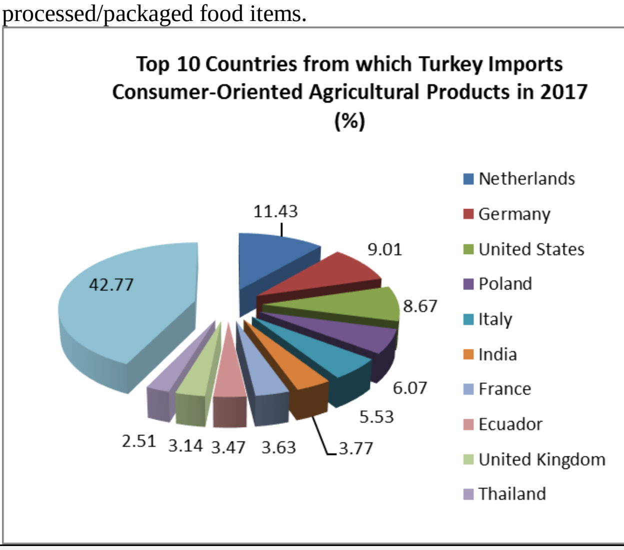
MARKET FACT SHEET: TURKEY   Attachment A

Executive Summary

The Republic of Turkey has a young population of 81 million people fueling consumption. The country is in a Customs Union with the EU and is the 17th largest economy in the world. An annual average of 3.5 percent GDP growth is forecasted by Economist Intelligence Unit between 2018 and 2023. In 2017 there was a 14 percent increase in total imports of consumer-oriented agricultural products compared to the previous year. Total imports of consumer-oriented agricultural goods has increased 9 percent in the first ten months of 2018 compared to same period in 2017. U.S. food exporters should utilize importers in Turkey to reach the market in most cases. The economy has slowed down after summer 2018 elections and geopolitical challenges continue in the region.

Imports of Consumer-Oriented Agricultural Products

EU contries are the major suppliers to Turkey in terms of Consumer-Oriented Agricultural Products. They have the advantage of proximity and the Customs Union. Formerly supplying most agricultural commodities for consumer use from the internal market, Turkey's agriculture and food sector has in recent years become more specialized and export oriented and now also 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

There are 42,030 food processing and 499 beverage producing enterprises in Turkey as of 2015, according to the latest statistics published by TurkStat. Turkey has a modern and developed food processing industry supplying the domestic population and exporting. The food processing industry constitutes 12.53 percent of all manufacturing industries in Turkey. As of the end of 2016, there were 577 foreign direct investments in food and beverage production of which 100 were German, 44 Dutch, 33 French and 31 U.S. Of these 577, 12 were started in 2016.

Food Retail Industry

Grocery Sales were US$ 84 billion as of the end of 2017 and inflation/seasonally adjusted Real Retail Sales Index have been increasing during the last 5 years. Despite 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 75 percent urbanization rates and a growing middle class. Organized/modern retailers continue to grow as traditional/unorganized retailers slowly leave the stage.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2017 US$2.6 billion

List of Top 10 Growth of Imported Consumer Oriented Agricultural Products in Turkey 2015-2017

1. Nonalc. Beverages, Nesoi	**6.** Meat, Bovine Cuts With Bone In
2. Wilkings and Similar Citrus	**7.** Citrus Fruit (Inc Mixes) Prep etc.
3. Mandarins	**8.** Tea Or Mate Extracts
4. Roasted Chicory	**9.** Soups & Broths & preparations
5. Nonalcoholic Beer	**10.** Black Tea Fermtd

Food Industry by Channels (Sales Mill. USD) 2016*

Modern Grocery Retailers	**43,385**
- Convenience Stores	1,490
- Discounters	12,960
- Forecourt retailers	813
- Hypermarkets	1,997
- Supermarkets	26,124
Traditional Grocery Retailers	**47,159**
- Food/Drink/Tobacco Specialists	11,167
- Independent Small Grocers (Bakkals)	34,826
- Other Grocery Retailers	1,165
Grocery Retailers Total	**90,543**

Top 10 Host Country Retailers (by Marketshare in 2017)

1. Bim	**6.** M- Jet (a Migros Brand)
2. A 101	**7.** Ekomini
3. Migros	**8.** Hakmar
4. Şok	**9.** Onur
5. CarrefourSA	**10.** Yunus

GDP/Population 2017
Population: 81 millions
GDP, PPP: US$2,133 billion
GDP Per Capita, PPP: US$26,500

*Average FX rate for 2016 used to change into US$(3.020 TRL/US$)
**Average FX rate for 2015 used to change into US$ (2.725TRL/US$)
Sources: CIA The World Fact Book; Euromonitor International; Turkish Statistical Institute; Global Trade Atlas

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Long-term GDP and disposable income growth	Domestic and international political challenges
Large population base: young and growing	Current economic downturn and exchange rate fluctuations
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 affect consumption habits. There is a developed food processing industry.

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

Contact: Office of Agricultural Affairs

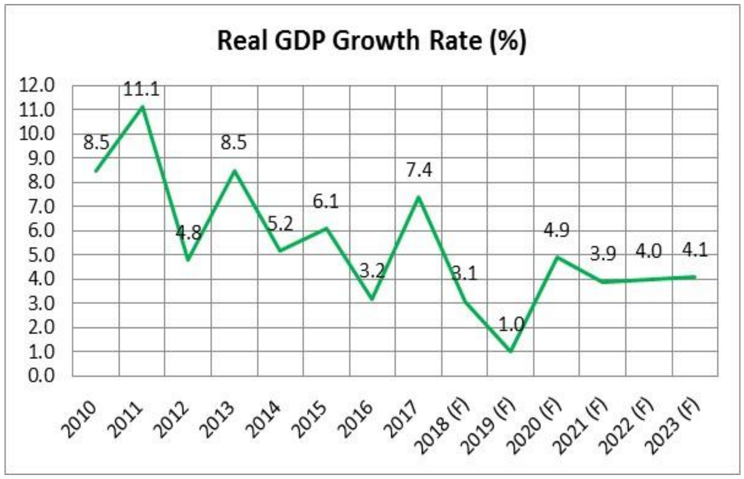
MARKET FACT SHEET: TURKEY Attachment A

U.S. Embassy Ankara

I. MARKET OVERVIEW

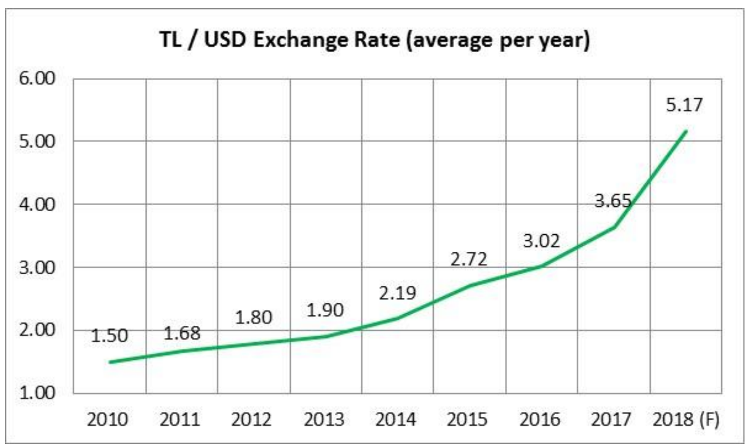
The Republic of Turkey, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea in the north and the Mediterranean Sea in the south, has a young population of 81 million[1] people fueling consumption. The median age is 30.5 and 59 percent of the population is between the ages 15 to 54. The urbanization rate reached 75%, with rapid urbanization since 2000. Along with the young population, high urbanization rate, increasing middle-class household income, broadening base of female participation in the labor force, the 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. In addition, Turkey has Free Trade Agreements with EFTA (European Free Trade Association Countries: Norway, Liechtenstein, Iceland, Switzerland) and 19 other countries. Turkey is the 17th largest economy in the world according to the World Bank in 2017.

The average Gross Domestic Product (GDP) growth between 2013 and 2017 was 6.1 percent and annual average projected GDP growth is 3.5 percent according to Economist Intelligence Unit (EIU) between 2018 and 2023. Turkey has registered the highest GDP growth since 2013 with 7.4 percent annual real growth rate in 2017 after stagnation in 2016 caused by a series of terrorist attacks and an attempted coup against the Government of Turkey (GoT) in July 2016. The strong recovery in 2017 mostly depended on a short-term fiscal stimulus and domestic and geopolitical challenges have since negatively impacted trade, tourism, investment, and growth.



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

The Economist Intelligence Unit (EIU) forecasts about 3 percent and 1 percent GDP growth for 2018 and 2019, respectively. Some institutions are even forecasting a recession for 2019. The annual inflation rate has risen to 21.62 percent as of November 2018 and the Turkish Lira (TL) has depreciated against major foreign currencies quickly. The TL/USD exchange rate was 3.76 on January 2nd, 2018 and 5.28 TL/USD as of December 10, 2018.



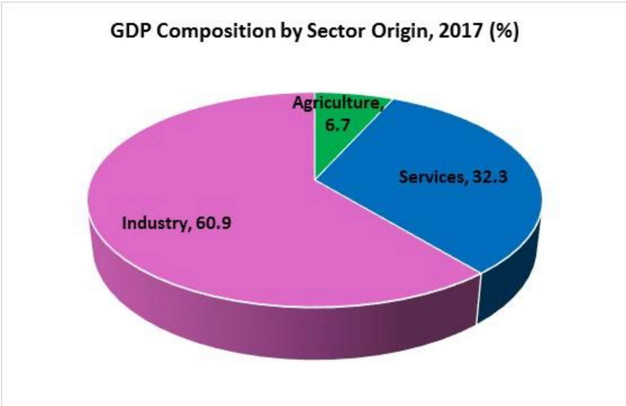
Source: Economist Intelligence Unit (EIU). (F) Forecast by EIU.

As of 2018, some major companies in Turkey have asked for restructuring of their debt, according to news reports. Many of these firms did this by declaring "concordat" which is basically an official permission given to a company, by court order, to restructure its debt. Yildiz Holding, a Turkish conglomerate with major investments in the food sector such as famous Ulker and Godiva brands, asked its bankers for a restructuring of debt. Likewise, Dogus Holding, with large investments in luxury restaurant chains (170 locations in 12 countries) sold 17 percent of its company operating the restaurants called "d.ream" to foreign funds and asked for restructuring of debt as well. Yörsan, one of the largest dairy companies in Turkey is in the same situation, officially declaring concordat. Keskinoglu, being one of the largest poultry firms in the Turkish market, operating since 1963, has also declared official concordat in mid-2018. Saray Farms, Turkey's largest cattle

[1] July 2017 estimate, CIA World Fact Book and Turkish Statistics Institute (TurkStat) 2017.

husbandry company, operating since 1998 with two large facilities and 36,000 cattle, has initiated the process of declaring concordat as of November 2018. The company has both beef and dairy facilities. Agromey, an Izmir based company, which is one of the largest aquaculture producers in Turkey has also recently declared concordat.

Concordat is perceived as the last step before bankruptcy in the Turkish business context. It indicates that the company has enough assets and business potential but due to the poor cash flow, debts are not being serviced properly. Debts of a company are restructured so they can make payments. The concordat boom is not limited to the food industry; companies from various industries including but not limited to logistics, construction, shoe making, textiles and more are declaring official concordats with court orders, as a result of the economic slowdown.



Source: Economist Intelligence Unit (EIU).

The agriculture sector represents 6.7 percent of total GDP which is $57 billion as of 2017. The State Department provides information about the investment climate in Turkey which has a lot of business-related information which can be valuable for traders.

Note that some products from the United States currently face additional tariffs, which affects competitiveness of U.S.-origin agricultural goods.

Table 1: Important socio-economic parameters for Turkey

Parameter	Value
Population	80.8 million (2017)
Median Age	31.6 (2017)
Labor Force (ages 15-64)	30.8 million (2017)
Unemployment Rate (ages 15-64)	10.9 percent (2017) [11.4 percent, September 2018]
Unemployment Among Youth* (ages 15-24)	20.6 percent (2017) [21.6 percent, September 2018]
GDP	USD 851 billion (2017)
GDP per Capita	USD 10,597 (2017)
Trade Balance	USD -76.8 billion (2017)
Tourists (# of foreign citizens entering)	32.1 million (2017)
Inflation - CPI	11.92 percent (2017) [25.24 percent, Oct. 2018]
Exchange Rate (end of period)	3.65 TRL/USD (2017) [5.48 TRL/USD, Oct. 2018]
Foreign Direct Investment (FDI)	USD 10.9 billion (2017)
Number of Companies with Foreign Capital	58,418 (2017)
Major Export Markets (all products)	Germany (9.6%); UK (6.1%); UAE (5.8%); Iraq (5.8%); USA (5.5%); Italy (5.4%); France (4.2%); Spain (4.0%); Netherlands (2.5%) Israel (2.2%) (2017)
Major Import Sources (all products)	China (10.0%); Germany (9.1%); Russia (8.3%); USA (5.1%); Italy (4.8%); France (3.5%); Iran (3.2%); Switzerland (3.0%); South Korea (2.8%); UK (2.8%) (2017)
Major Cities	Istanbul (15.0 m), Ankara (5.4 m), Izmir (4.3 m), Bursa (2.9 m), Antalya (2.4 m), Adana (2.2 m), Konya (2.2 m) Gaziantep (2.0 m), 13 other cities over one million population (2017)

Source: TurkStat, CIA World Fact Book, EIU, OECD, Invest in Turkey. * According to OECD criteria.

The security situation in the country has improved in 2018, leading to a resumption of tourist arrivals. The State of Emergency put in place after the attempted coup has been phased out after two years in summer 2018 after snap elections where President Erdogan has been reelected. Travelers are advised to check the U.S. Department of State travel advisory before planning to travel to Turkey.

ADVANTAGES	**CHALLENGES**
GDP growth and disposable income growth despite recent slowdown (Q3 2018 shows negative growth)	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
Unsaturated market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry is requiring a wide range of ingredients and is open to new ingredients, like additives and processing aids.	Importing can be complex: Time-consuming import procedures
Internationally-savvy 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 unfair competition.
Positive perception for products from the USA	No genetically engineered products or ingredients are approved 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.
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 tariffs. Additional taxes were introduced for several U.S.- origin goods in 2018.

II. EXPORTERS BUSINESS TIPS

a. MARKET RESEARCH

It is important to conduct market research before deciding to launch in Turkey, either a detailed analysis or a quick market scan, depending on your product and experience level with Turkey. It is essential to make sure that there is a market for the 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 in some other Mediterranean/Levant cultures, most of the market intelligence and business is conducted based on 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 Neilsen. Getting a reliable local partner/agent is a good way of doing relationship-based market research.

b. LOCAL BUSINESS CUSTOMS & TRENDS

After conducting market research determining that there is a potential market in Turkey for the food/agricultural item that you are dealing with, it is important to develop a good strategy for market entry considering the local business customs. The Turkish business community is very open to doing international business. 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. 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 but 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, so it is important to understand your counterpart. In most cases, a local business partner is very useful to understand the 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 does not observe daylight savings time since 2016.
- Take Turkish and Islamic holidays in consideration. Although business is conducted at all times, it might be smart to consider the Islamic holy month of Ramadan. It is important to judge how much value your counterpart attaches to these days.
- 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 history.
- Turkish people are also are 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 when offered, or ask for a glass of water.
- Business lunch and dinners are rather important to build relations/connections; it is a good sign when invited. Try to accept when possible. These relations will affect the business done.
- Turkish businesspeople prefer to do business with people whom they trust on a personal level; lunch and dinners might serve as very good platforms to build a personal connection and trust.
- 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 very good sign 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 to Turkey in the last two decades such as Italian restaurants, sushi places, Mexican restaurants, Indian restaurants, Thai kitchen, Chinese 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 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/consultant in Turkey is useful as these brokers/consultants often understand the complex import processes better than a new to 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 into 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 look at the Section V of our Food and Agricultural Import Regulations and Standards 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 on it in the Turkish language[2].

c. TARIFFS and 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 Ministry of Trade web page by HS code

[2] Having said this, each product should be examined and a decision of packaging and labeling should be given separately.

(Tariffs for the US 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 19 other countries. Among these 19 countries the FTA with Syria is on hold for a period of time. Furthermore, FTA negotiations with Qatar and Venezuela have been concluded (but not signed yet).

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

d. TRADEMARKS and PATENTS

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 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 75 percent urbanization rates and a growing middle class. The grocery retail sector has been growing for the past five years in terms of both number of outlets and real sales index. Grocery retail sales were $83.8 billion, which constituted 55% of all retail sales through approximately 360,000 organized and unorganized grocery retailers in 2017. 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. Please read our Retail Foods Report for detailed analysis of the sector.

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

There has been an increase in incoming tourists in 2017 and 2018 compared to 2016 when there were several security problems. Fast food restaurants have been performing better compared to full service and fine-dining outlets. There are approximately 140,000 food service outlets in Turkey in all segments. The industry is very fragmented with mostly small stand-alone restaurants. 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

There are 42,030 food processing and 499 beverage producing enterprises in Turkey as of 2015, according to the latest statistics published by TurkStat. Turkey has a modern and developed food processing industry supplying the domestic population and exporting. The food processing industry constitutes 12.53 percent and the beverage industry constitutes 0.15 percent of all manufacturing industries in Turkey. As of the end of 2016 there were 577 foreign direct investments in food and beverage production of which 100 were German, 44 Dutch, 33 French and 31 U.S. Of these 577, 12 were started in 2016. Please read our Food Processing Ingredients for detailed analysis of the sector.

V. AGRICULTURAL and FOOD IMPORTS

a. AGRICULTURAL & FOOD IMPORT STATISTICS

Table 1: Consumer Oriented Agricultural Products Imported from the United States to Turkey (2013 - 2018*)

	Thousands of USD	2013	2014	2015	2016	2017	2018*
	Total	231,146	238,703	198,269	225,982	220,200	235,534
1	Almonds, Fresh Or Dried, In Shell	46,164	31,987	18,083	40,710	56,599	25,853
2	Walnuts, Fresh Or Dried, In Shell	55,637	70,903	62,297	64,741	51,652	94,291
3	Almonds, Fresh Or Dried, Shelled	32,728	37,572	48,484	49,772	47,799	62,025
4	Food Preparations Nesoi	48,271	41,953	38,817	37,904	32,642	28,897
5	Tea Or Mate Extracts/Essences/Concentrates & Preps	666	766	877	1,340	3,218	2,774
6	Vegetables Nesoi & Mixtures, Dried, No Furth Prep	1,099	1,323	931	1,787	2,716	569
7	Bread, Pastry, Cakes, Etc Nesoi & Puddings	2,009	1,444	930	1,020	2,055	1,378
8	Grapes, Dried (Including Raisins)	1,238	2,181	3,663	2,516	1,794	131
9	Coffee, Roasted, Not Decaffeinated	295	907	1,217	1,421	1,605	1,011
10	Sauces Etc. Mixed Condiments And Seasonings Nesoi	1,242	1,682	997	1,130	1,050	1,171
11	Orange Juice, Not Frozen,Of A Brix Value Not Ov 20	933	1,537	1,007	1,562	1,001	0
12	Apple Juice, Nesoi,Nt Fortified W Vitamins, Unferm	0	0	62	0	990	0
13	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	204	444	646	757	929	477
14	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	29	14	0	28	850	1,157
15	Cocoa Preparations, Not In Bulk Form, Nesoi	2,429	2,400	1,789	1,025	828	306
	Others Consumer Oriented Agricultural Products	38,202	43,592	18,469	20,269	14,473	15,496

Source: Global Trade Atlas
* 2018 data is for the first ten months only (Jan. – Oct.).

Table 2: All Agricultural & Related Products* Imported from the United States to Turkey (2013 - 2018)**

	Thousands of USD	2013	2014	2015	2016	2017	2018*
	Total	2,244,385	2,116,735	1,571,289	1,482,837	1,805,624	1,517,853
1	Cotton, Not Carded Or Combed	870,806	913,973	527,768	518,834	734,546	683,278
2	Soybeans, Nesoi	216,062	270,225	334,668	174,746	175,194	90,326
3	Brewing Or Distilling Dregs And Waste, W/Nt Pellet	115,387	65,329	61,646	151,618	276,063	210,163
4	Wood In Chips Or Particles, Coniferous	78,460	81,727	134,753	110,592	91,042	83,044
5	Tobacco, Partly Or Wholly Stemmed/Stripped	40,839	47,862	41,618	56,645	51,511	56,286
6	Residues Of Starch Mfr And Similar Residues	32,172	29,528	5,681	45,834	42,594	19,492
7	Rice In The Husk (Paddy Or Rough)	41,407	68,877	51,981	26,034	33,397	713
8	Soybean Oilcake & Oth Solid Residue, Wh/Not Ground	215,645	98,981	24,909	23,789	28,947	11,149
9	Whiskies	19,656	20,377	21,849	15,198	20,205	12,292
10	Animal Feed Prep Except Dog Or Cat Food, Retail Pk	12,900	11,317	9,963	15,094	12,158	10,066
11	Tallow Of Bovine Animals, Sheep Or Goats, Nesoi	4,559	18,041	17,411	13,037	10,197	6,128
12	Cattle, Live, Purebred Breeding	56,992	26,803	13,602	11,005	4,416	8,708
13	Vegetable Seeds For Sowing	6,347	7,401	7,254	7,308	7,039	5,415
14	Enzymes And Prepared Enzymes, Nesoi	4,905	5,912	6,627	6,261	6,797	5,297
15	Veneer Sheet Etc, Not Ov 6Mm, Nonconiferous Nesoi	8,116	9,841	9,431	5,927	4,449	4,468
	Other Agricultural & Related Products	520,131	440,543	302,127	300,914	307,072	311,030

Source: Global Trade Atlas.
* Data for Consumer Oriented Agricultural Products are not shown in the table since they have been listed in Table 1 above. However, the total includes Consumer Oriented Agricultural Products too.
** 2018 data is for the first ten months only (Jan. – Oct.).

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

Tree nuts, sun flower 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/agent/distributor companies typically attend large shows such as Anuga in Germany, Sial in France, Gulfood in Dubai and Seafood Expo Global in Belgium. Food trade shows in Turkey can be helpful to visit before deciding to enter the market and promote a product. Anfas Food Product, World Food Istanbul, CNR Food Istanbul, IbaTech, Ekoloji Izmir Exhibition, Gourmet Izmir OliveTech Exhibition, Future Fish EuroAsia and Food Ingredients Fi Istanbul are good shows to visit and 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 market analysis must be done thoroughly 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 Services (FAS) offices listed below may assist with connecting U.S. food exporters and Turkish importers.

Office of Agricultural Affairs	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: aganakara@usda.gov	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

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)