



The Food and Beverage Market Entry Handbook: TURKEY

A Practical Guide to the Market in Turkey
for European Agri-food Products



*Promotion of
agricultural
products*



The Food and Beverage Market Entry Handbook

TURKEY

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Note: the term EU in this handbook refers to the EU-27 excluding the UK, unless otherwise specified. For product trade stats, data is presented in order of exporter size for reasons of readability. Data for the UK is presented separately where it represents a notable origin (>5% of imports). In case it represents a negligible origin that would not be visually identifiable in a graph, data for the UK is incorporated under “rest of the world”.

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1 The Food and Beverage Market Entry Handbook: Turkey

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering, the Turkish market. This Handbook provides **step-by-step guides** on entering the agri-food market in Turkey including relevant information such as **analysis of the Turkish market** for different product categories, **market access** and **market entry procedures**, **IP protection**, **referrals to professional buyers** and a signposting and referral system providing useful contacts and ways to penetrate the Turkish market.

How to use this Handbook

Depending on your stage of market entry, company profile, and product range, different sections within this Handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Turkish food and beverage market in general, section 2 provides a general country overview; section 3 provides an overview of the agri-food market; and section 4 an overview on market entry. These latter two sections contain information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, intellectual property protection, including the status of geographical indications. The information contained within these sections is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If you want to find out more information relevant for your product, then check out the **Market Snapshots for Selected Products** (section 5). This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Turkish market is where you want to be, but you need some support, then the **Support Services Directory** can point you in the right direction. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Turkish market.

2 Country introduction and overview



Capital:	Ankara
Population:	84 million
Area:	783 000 Km ²
Political structure:	Presidential republic
Major languages:	Turkish (Official language) Kurdish (11% of the population)
Major religions:	Islam (99%)
Life expectancy:	77.6 years (male 76.3 years, female 78.3 years)
Currency:	Turkish Lira (TRY); 1 EUR = 10.11 TRY (2020 average)
GDP growth (real):	1.8 % (2020)
Exports:	32.74% of GDP (2019)
Imports:	29.94% of GDP (2019)
Main exports*:	Vehicles (13%), Machinery including computers (9.9%), Electric machinery & equipment (5.5%), Iron & Steel (5.2%)
Main imports*:	Mineral fuels including oil (13.2%), Gems, precious metals (12.1%), Machinery including computers (11.5%), Electric machinery & equipment (7.8%)
Unemployment rate:	13.6% (February 2020) <i>(Before the outbreak of Covid 19)</i>
Labour force:	44.6% (February 2020) <i>(Before the outbreak of Covid 19)</i>
Main industries:	Agriculture: 6.8 % of GDP Industry: 32.3% of GDP Services: 60.7% of GDP
Average household income (2019):	EUR 16 358
Household expenditure on food and beverages (2019):	EUR 3 450
Food and beverage market size (2019):	EUR 85.9 billion

Sources: Euromonitor International: Economies and Consumers, 2021; IMF; UN, World Bank; WHO, OECD.

* Goods only listed

2.1 Country overview: Turkey at a glance

2.1.1 Past economic and political trends

- *The state of Turkey has been an important crossroads between eastern and western cultures for centuries and continues to act in this position.*
- *The modern Turkish state took its current form in 1923 and became a member of the UN in 1945 and NATO in 1952. The country remains an EU candidate nation.*
- *During the 1980s an opening up of the economy took place which allowed for the expansion of the service, finance and trading sectors.*
- *The economy of Turkey experienced an economic boom during the 2000s, however, has begun to slow down as a result of a debt and currency crisis that began in 2018.*

The location of Turkey between Europe to the west, the middle east to the south and east and the Caucasus countries to the northeast positioned the country as a key crossroads of cultures and ethnicities throughout history and even during the modern day. The city of Istanbul sits in one of the most strategic “choke points” in the world positioned on the Bosphorus strait which allowed the city to manage goods moving between the black sea and the Mediterranean Sea; this also helps to explain why the city today is the largest in Europe by population and accounts for 20% of the Turkish population.

Following the Treaty of Lausanne in 1923, the modern state of Turkey took its present borders as a consequence of the fall of the Ottoman Empire following the end of the first world war. The Turkish state took a largely neutral approach during the second world war and became a member of the UN in 1945. The country joined NATO in 1952 and applied to join the EU in 1987, and currently remains a candidate country. The economy of Turkey benefited from the opening up of the economy during the late 1980s, with the service, finance and trading sectors expanding substantially, which helped to raise GDP levels in the country. The country experienced large levers of GDP growth between 2001 and 2018, however, an ongoing debt crisis continues to impact the economy in its present state.

2.1.2 Current economic situation and mid-term outlook

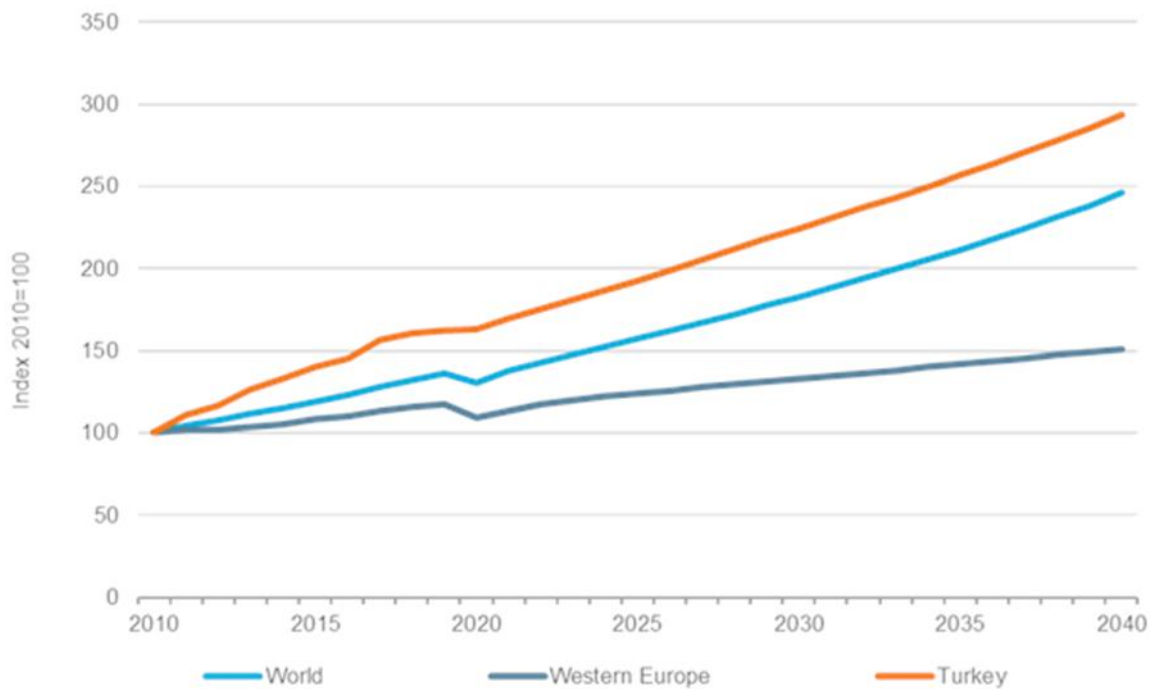
- *The ongoing currency crisis continues to impact the Turkish economy with the Lira currency dropping in value between 2020 and 2021.*
- *Several restrictions in the movement took place in 2020 due to the outbreak of Covid-19 which resulted in economic growth dropping to 1.8% in 2020.*
- *The Turkish economy is likely to benefit in the future from its strategic position between Europe and Asia as the global economy continues to globalise and trade links between Europe and Asia continue to expand.*
- *Turkey is likely to be amongst the largest economies in the world by mid-century and will continue to be positioned as a key economic and political leader in the Mediterranean and middle eastern regions.*

The Lira is Turkey’s official currency and has experienced several crises in recent years which continues to impact the economic development of Turkey. High inflation and

corporate debt defaults have continued to result in the Lira falling in value, with the need to stabilise the currency being key for the future economic development of Turkey. Turkey like most nations was impacted by the outbreak of Covid-19, however, recorded a growth of 1.8% at a time when many nations were registering economic contraction. Turkey’s economy has since rebounded in 2021 and the country will continue to benefit from its strategic location as a crossroads between Europe and Asia. As the economy continues to globalise, it is likely that Turkey’s strategic location will become ever more important and valuable. Turkey is forecast to be amongst the largest economies of the world by 2050 aided by a growing service sector, massive investments into large infrastructure projects and its key location within an increasingly globalised world.

As presented in Figure 2-1, Turkey’s GDP is forecast to continue growing in the future, with a current GDP per capita of EUR 7 330 expected to grow to around EUR 20 000 by 2040. Turkey is categorised as an upper middle-income country by the World Bank and is expected to emerge as one of the larger economies of the world by 2040.

Figure 2-1: Real GDP growth and forecasted GDP growth in Turkey: 2010-2040



Note: Data for 2022-2040 is forecast.

Source: Euromonitor International: Economies and Consumers, 2021

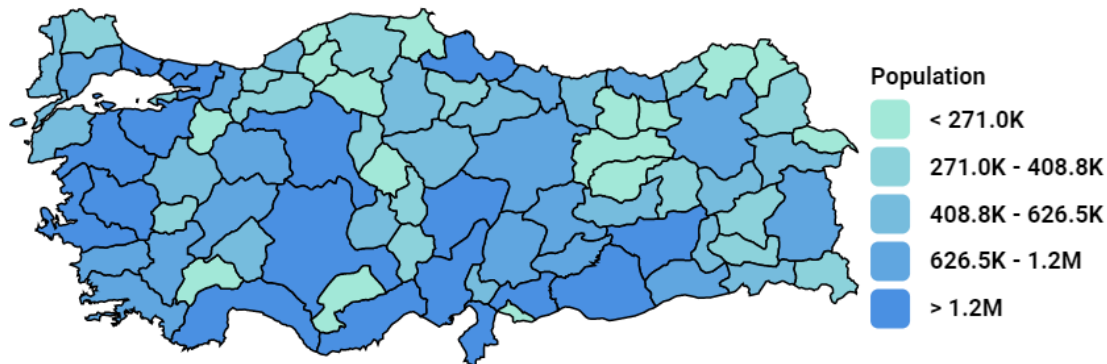
2.1.3 Population trends

- Turkey is the 18th most populous country in the world with a total population of around 85 million. The European side of Turkey accounts for 3% of the total land area but 20% of the country’s total population.
- Turkey’s current fertility rate is at 1.8 children per woman, which is slightly higher than the EU average. The country’s population is forecast to peak at around 95 million in 2050.

- A large number of migrants arrived in Turkey in the past decade, mainly due to political upheaval taking place in Iraq and Syria which both border Turkey. Currently, it is estimated that around 3.9 million migrants are living in Turkey.
- Turkey has undergone a large urbanisation process in recent decades. Turkey had an urban population percentage of 25% in 1950 which today stands at 76%.

Turkey is the 18th most populous country in the world and is distinguished into many provinces. As can be observed in Figure 2-2, the Turkish provinces have very different sizes and climates which plays a large role regarding population levels. The west of the country is the population core of the country while the population becomes smaller towards the east of the country. Many provinces have a core urban centre that accounts for the majority of their population; such examples include Konya, Van and Ankara.

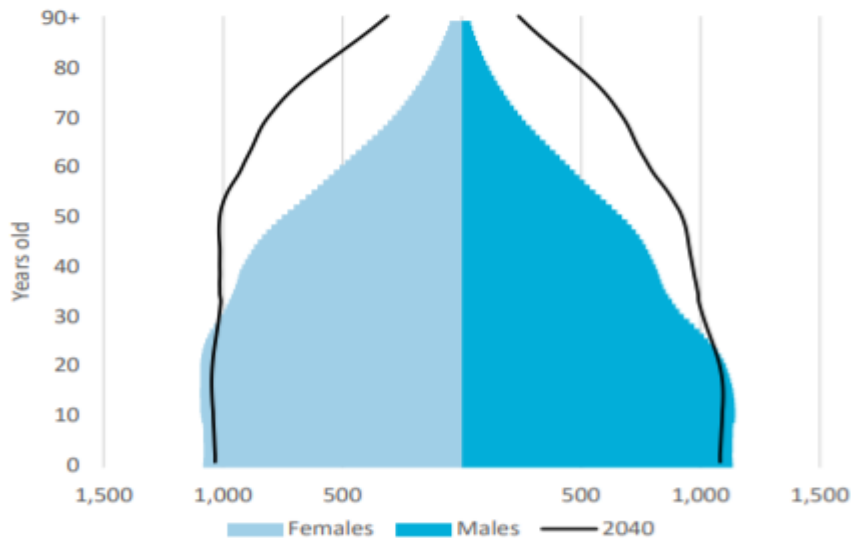
Figure 2-2: Provinces of Turkey by population



Source: Agra CEAS based on various

Turkeys' population has been growing for several decades, from around 21 million in 1950 to around 85 million today. As the country continues to develop economically, there is a notable decline in total fertility levels; as a result, it can be expected that the population will peak at around 95 million in 2050 before beginning to decline. This does not take into account the possibility of more migrants arriving in the country, which has become a common trend in the past decade. As of today, an estimated 3.5 million migrants are living in Turkey with the majority coming from neighbouring Syria and Iraq. Any further upheavals in the middle eastern region could impact the total population of Turkey as the country has become one of the larger recipients of refugees in the region.

Turkey's population is largely urban with 75% of individuals living in urban centres. Istanbul alone accounts for 18% of the total population of the country. Total life expectancy continues to improve in the country, with males expected to live for 76 years and females for 78 years. As seen in Figure 2-3 Turkey's population is rather young. However, by 2030, the number of citizens above 40 years is forecast to increase due to the ongoing ageing of the population and lower fertility rates.

Figure 2-3: Age pyramid in 2019 and 2040 in Turkey

Note: Data for 2040 is forecast

Source: Euromonitor International from national statistics/UN, 2021

2.2 Geography and key markets

Turkey forms a key crossroads bringing together various cultures and ethnic groups between Europe and Asia. The country is large in land mass, being ranked as the world's 37th largest country by land area. The country also incorporates numerous climates and biomes, from the Mediterranean climate on its west to the more continental climate found in the interior and east of the country. Turkey borders a total of eight different countries from both Europe and Asia, including Greece, Bulgaria, Armenia, Syria, Georgia, Iraq, Iran and Azerbaijan. The country is further surrounded by the Mediterranean and Black seas. Most of Turkey's larger urban centres are located towards the west of the country, such as Izmir and Istanbul, although the capital city Ankara is more centrally located. Other large urban centres are located along the Mediterranean coast of the country, such as Bursa and Adana. Within the east of the country, there are fewer large urban centres with the bigger cities being Diyarbakir and Malatya.

2.2.1 Overview of urban markets

Turkey incorporates a total of 81 administrative provinces, which vary in size throughout the country. All but three provinces have the same name as the capital city (Table 2-1).

The country is further divided into seven geographical regions, as shown below in Figure 2-4. The division into geographical regions is merely for demographical, economic and geographic purposes and does not entail any administrative purpose which is handled at the provincial level. Each province is appointed a governor by the Ministry of the Interior.

Figure 2-4: Geographical divisions of Turkey

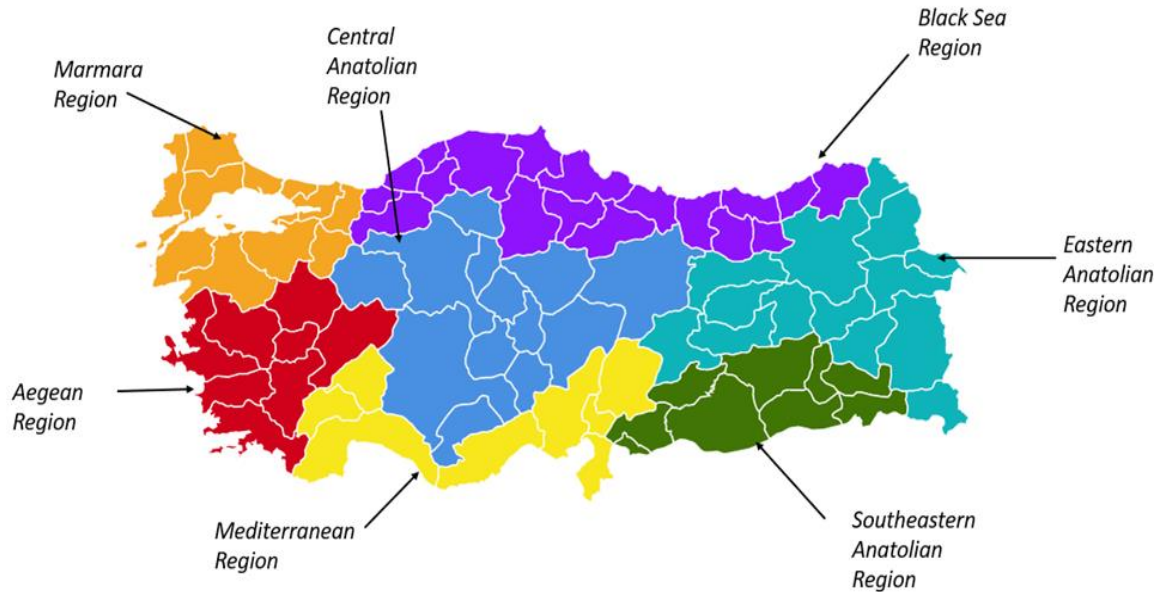


Table 2-1: Federal Subjects of Turkey

Geographical Region	Province	Capital/Administrative centre
Marmara Region	Balikesir	Balikesir
	Bilecik	Bilecik
	Istanbul	Istanbul
	Canakkale	Canakkale
	Edirne	Edirne
	Kirkareli	Kirkareli
	Kocaeli	Izmit
	Sakarya	Adapazarı
	Terkirdag	Terkirdag
	Yalova	Yalova
Mediterranean Region	Adana	Adana
	Antalya	Antalya
	Mersin	Mersin
	Burdur	Burdur
	Hatay	Antakya
	Isparta	Isparta
	Osmaniye	Osmaniye
Central Anatolian Region	Askaray	Askaray
	Kirikkale	Kirikkale
	Kiresbir	Kiresbir
	Nevsehir	Nevsehir
	Ankara	Ankara
	Cankiri	Cankiri
	Eskisehir	Eskisehir
	Karaman	Karaman
	Konya	Konya
	Sivas	Sivas
	Yozgat	Yozgat
	Afyonkarahisar	Afyonkarahisar

Geographical Region	Province	Capital/Administrative centre
	Corum	Corum
	Erzincan	Erzincan
Black Sea Region	Amaysa	Amaysa
	Gumushane	Gumushane
	Bartın	Bartın
	Bolu	Bolu
	Giresun	Giresun
	Kastamonu	Kastamonu
	Karabük	Karabük
	Ordu	Ordu
	Rize	Rize
	Samsun	Samsun
	Sinop	Sinop
	Tokat	Tokat
	Trabzon	Trabzon
	Zonguldak	Zonguldak
	Artvin	Artvin
Bayburt	Bayburt	
Düzce	Düzce	
South-eastern Anatolian Region	Mardin	Mardin
	Sanliurfa	Sanliurfa
	Adiyaman	Adiyaman
	Batman	Batman
	Diyarbakir	Diyarbakir
	Gaziantep	Gaziantep
	Siirt	Siirt
Eastern Anatolian region	Agri	Agri
	Bingöl	Bingöl
	Elazığ	Elazığ
	Malatya	Malatya
	Hakkari	Hakkari
	Iğdir	Iğdir
	Kars	Kars
	Tunceli	Tunceli
Van	Van	
Aegean Region	Aydın	Aydın
	İzmir	İzmir
	Manisa	Manisa
	Uşak	Uşak
	Denizli	Denizli
	Kütahya	Kütahya
	Muğla	Muğla

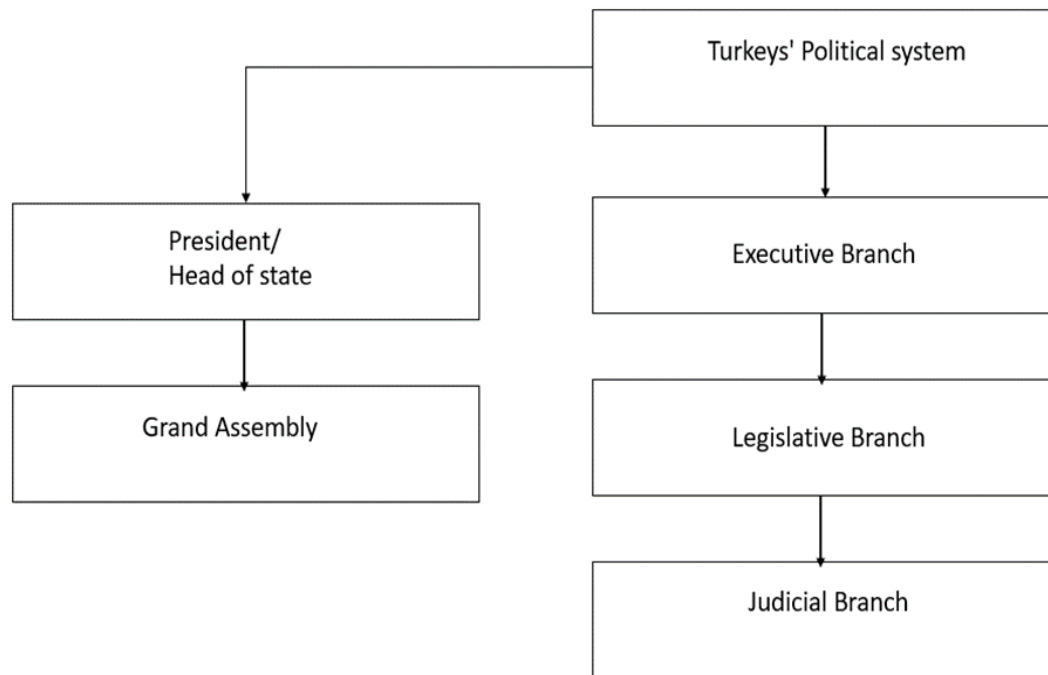
Source: Agra CEAS based on various

The political structure of Turkey takes place within the framework of a presidential republic, with the country's president being both the head of state and the head of government. Executive power is exercised by the council of ministers which is headed by the president. Legislative power is vested by the national grand assembly. The judiciary is independent of both executive and legislative. Figure 2-5 below provides an overview of the Turkish political system.

The current head of state is Recep Tayyip Erdoğan, who has been the president of Turkey since 2014. The next presidential election will take place in 2023. The main parties in

Turkey are the following: AKP (Justice and Development Party); CHP (Republican People’s Party); HDP (Peoples’ Democratic Party); and, MHP (National Movement Party).

Figure 2-5: Overview of the political structure of Turkey

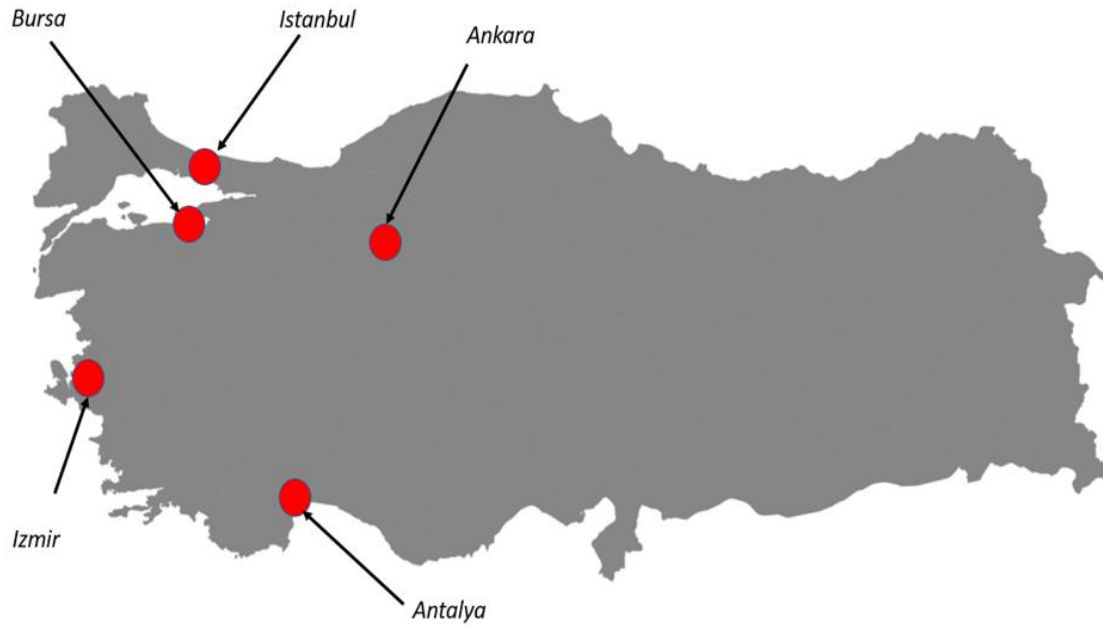


Source: Agra CEAS based on various

2.2.2 Snapshots of important markets

Turkey is home to a number of large urban centres, with six cities having a population above one million, including Istanbul, Ankara, Izmir, Bursa, Adana and Gaziantep. The country’s more prominent target markets for EU goods are located towards the west (Figure 2-6), due largely to logistical, cultural and demographical conditions which help to facilitate the movement of EU agri-food products into Turkey. Within the snapshot of important markets for EU food and beverages in Turkey, the cities of Istanbul, Izmir, Ankara, Bursa and Antalya stand out. These cities are key urban centres in Turkey for EU business, as well as being large tourism hotspots for EU citizens arriving in Turkey.

Figure 2-6: Location of focus markets



Source: Agra CEAS

Istanbul



Key facts:

Total GDP (2020):

EUR 172 billion

Population:

15.7 million (capital region)

Istanbul is the largest city by population in Turkey, accounting for roughly 18% of the country's total population. The city historically and presently remains one of the most strategically placed cities in the world and surrounds a key international choke point between the black sea and the Mediterranean through the strait of the Bosphorus. Istanbul is the premier location for EU food and beverages arriving in Turkey, due to the city's three large airports and ports, railway and roadway connections with the EU, and by far the highest concentration of potential consumers within Turkey.

Istanbul is home to the headquarters of most of Turkey's larger companies including Beko and Tekfen. The city is ranked as the world's 11th largest city by economic output and accounts for roughly 30% of the GDP of Turkey. Istanbul is also home to three large ports, Haydarpaşa, Ambarlı and Zeytinburnu, which facilitates the movement of goods into Turkey. Tourism is a key economic activity in Istanbul, as this is the most visited city in Turkey. Being a prime tourism destination acts as a driver of demand for EU food and beverages, with the presence of Irish bars, French restaurants and Greek cafes being common in the city.

Istanbul hosts a number of key food events throughout the year which can be utilised to showcase EU food and beverages. These events include the WorldFood Istanbul conference held annually, and the Istanbul Street Festival held each year during October. As Istanbul is a key economic centre of activity within Turkey, the purchasing power of consumers is higher in the city than for most of the rest of Turkey, which further aids the ability of consumers in the city to purchase EU food and beverages.

The city is a key transit hub between Europe, Africa and Asia which presents a further opportunity to market, with a large number of consumers visiting the city for a short period of time. On average it is estimated that 12 million individuals transit through Istanbul annually while on route to a third destination.

Sources: Istanbul Travel guide, Insight guides (available at <https://www.insightguides.com/destinations/europe/turkey/istanbul/>), Istanbul city guide, All About Istanbul (available at <http://www.allaboutistanbul.com/>), Geography of Istanbul, Easy Expat (available at <https://www.easyexpat.com/en/guides/turkey/istanbul/overview/geography.htm>).

Izmir**Key facts:**

Total GDP (2019):	<i>16 EUR billion</i>
Population:	<i>4.3 million</i>

The city of Izmir is located in the extreme west of Anatolia and within the proximity of Greece. The city is the third most populous in Turkey and is a key cultural and tourist attraction within the country. Izmir is often identified as one of the more socially liberal cities in Turkey with fewer taboos present regarding alcohol consumption and more western social norms. Due to this, it is far more likely that marketing alcohol in Izmir will be more successful than in other cities in Turkey, particularly cities in the east of the country.

Izmir's location next to the Mediterranean has helped to develop a Mediterranean based culinary diet within the city. Some of the more popular foods consumed in Izmir include *tarhana* soup (made from dried yoghurt and tomatoes) and *mucver* (made from zucchini and eggs). Izmir is an important hub in the region for the entry of goods and individuals, with the port of Izmir being the main port in Turkey used for exports. The port of Izmir facilitates the movement of goods and individuals throughout the Mediterranean Sea including the ports of Athens and Thessaloniki in Greece.

Izmir plays host to a number of events throughout the year including trade fairs, congresses and exhibitions. One of the larger events, the Aegean cuisine summit, is held in the city annually and showcases foods from both Turkey and abroad. The city also has several food bazaars which help to facilitate the distribution of food and beverages to citizens of the city.

Izmir is home to several ancient ruins which reflect the city's historic significance, with monuments dating as far back as the roman empire. Due to this and the city's proximity to other large tourism hubs such as the Greek islands, it receives a large number of tourists every year with a total of 1.2 million tourists in 2019 prior to the outbreak of Covid-19. The large number of visiting tourists each year further acts as a key driver of demand for EU food and beverages in the city.

Sources: Visit Izmir, Aegean food summit (available at <https://www.visitizmir.org/en/Destinasyon/10862>); A brief introduction to Izmir, Root Invest Izmir (available at <https://rootinvest.net/a-brief-introduction-to-the-city-of-izmir/>); All about Turkey (available at <https://www.allaboutturkey.com/izmir.html>).

Ankara



Key facts:

Total GDP (current prices):	<i>EUR 92 billion (estimated)</i>
Population:	<i>5.6 million (city)</i>

Ankara is the capital city of Turkey and the country's second-most populous after Istanbul. In 1920, the Turkish grand assembly assigned the then relatively small settle of Angora as the capital city and renamed it Ankara. Since becoming the capital city, the population of Ankara has grown rapidly, and the city now is a key economic centre within Turkey as the presence of the central government has encouraged investment and settlement into the city.

Ankara is home to some of Turkey's most important strategic organisations, including the country's defence and aerospace organisations. The city is also the base of one of the larger arms-producing activities in the world. Several global automotive companies have also established assembly plants within the city, further acting as a pull factor for citizens to migrate to the city. Employment in the city is centred around the presence of many of the country's key state institutions, including the ministries' subdivisions and the many foreign embassies which have been set up in the city.

Ankara has transitioned from a settlement of roughly 79 000 individuals in 1920 to having a population of 5.6 million today. The city's growth was largely attributed to its position as the country's capital, which has encouraged migration from Turkey's interior amongst citizens seeking employment.

Reasons behind the city being a key market for EU food and beverages include its status as the capital city, the development of the city's industrial and service economy in recent years, and its strategic location within the interior of the country, which allows the city to act as a key economic centre beyond Turkey's more populous western region. Ankara has several small French, Irish and German-themed food and beverage service outlets with the presence of embassy staff from the EU further acting as a market for these food service outlets. Tourism to Ankara is smaller than in other cities of Turkey, with the bulk of visitors arriving at Ankara from the EU likely to be travelling to the city for work-related activities.

Sources: Ankara the city of Turkey, Go Turkey Tourism (available at <https://www.goturkeytourism.com/places-to-go/ankara-city-in-turkey.html>), Ankara travel, lonely planet (available at <https://www.lonelyplanet.com/turkey/central-anatolia/ankara>), Ankara travel guide, Turkey travel planner (available at <https://turkeytravelplanner.com/go/CentralAnatolia/Ankara/index.html>).

Antalya



Key facts:

Total GDP (current prices):

EUR 12.5 billion

Population:

1.2 million (metropolitan)

Antalya is a city located on the southwestern coast of Anatolia surrounded by the Taurus mountains. The city is the fifth most populous in Turkey. Antalya is one of the largest tourism hotspots in Turkey, receiving around 13.6 million tourists in 2019 before the outbreak of Covid-19. Antalya has airline connections with many major EU cities, which further eases the ability of EU citizens to visit the city. It is estimated that roughly 30% of all tourists arriving in Turkey will be going to Antalya.

Tourists are drawn to the city due to the presence of many ancient ruins from the Ottoman era to ancient Greeks. Due to the large number of tourists coming from the EU, there are several EU theme food service outlets located in the city, including Greek restaurants, Italian restaurants and Irish pubs. The major reason behind Antalya being a key market for EU food and beverages revolves around tourism, as consumption of EU food and beverages such as alcohol is more common within the city when compared to the rest of the country.

Antalya has a largely Mediterranean based cuisine with notable popular foods in the city including *piyaz* (made from tahini, garlic and boiled beans) and *sis kofte* (spicy meatballs cooked on a stick). The city has also hosted several events including the Antalya golden orange film festival and the annual Antalya festival hosted in September.

Antalya is expected to see a rebound in tourism once the more immediate effects of Covid-19 have been reversed, which makes the city an attractive future market for EU food and beverages in Turkey.

Sources: Introduction of Antalya, AsiaVtour (available at https://www.asiavtour.com/Turkey_Antalya_Introduction_a575.html), Overview of tourism activities in Antalya, Get Your Guide (available at <https://www.getyourguide.com/destinations/antalya-1172/>), Visiting Antalya, Visit Turkey (available at <https://www.visasturkey.com/antalya-travel-guide/>).

Bursa



Key facts:

Total GDP (current prices):

EUR 20.1 billion

Population:

3 million (metropolitan)

The city of Bursa is located within the proximity of Istanbul and is Turkey's fourth-largest city in terms of population. Bursa was the historical capital of the Ottoman empire and today retains its importance as a key economic counterbalance in the Marmara region to Istanbul. Bursa is the largest base of automotive producers in Turkey, with companies such as FIAT, Renault and Bosch being located in the city. Bursa is also a large dairy producer and is well known throughout Turkey for its high-quality dairy products.

Bursa attracts several tourists due to its proximity to Mount Uludag, which is one of the more popular skiing destinations in Turkey. Agriculture was traditionally the largest economic sector in the city, but this has changed as the city has undergone mass industrialisation in recent years.

This city stands out as a key market snapshot for EU food and beverages due to the size of its population, proximity to the EU, and proximity to Istanbul which encourages cross-city trade. The city is the second most populous in the Marmara region, which borders the EU countries of Greece and Bulgaria, making it an attractive centre for exports of EU food and beverages from these countries and further afield. The city's population continues to grow as overcrowding in nearby Istanbul becomes a growing concern. Due to this, Bursa stands out as a key second market in the Marmara region, which is forecast to continue growing in importance due to the combination of population growth and the presence of large multinational companies in the city.

Sources: Bursa Travel guide, lonely planet (available at <https://www.lonelyplanet.com/turkey/bursa>), Why Bursa Turkey is a must visit, travel awaits (available at <https://www.travelawaits.com/2496241/things-to-do-in-bursa-turkey/>).

2.3 Domestic agricultural production and regions

Agriculture remains one of the key sectors in Turkey, accounting for roughly 7% of the Turkish economy. The country is the 7th largest agricultural producer in the world and a large producer of wheat, sugar beet, milk, poultry, cotton, olives, grapes for wine production, tomatoes and various other fruit and vegetables; it is also the largest producer of apricots, cherries, figs, and hazelnuts. About a third of Turkey's land area is dedicated to agricultural activity. Turkey has a diversified climate, due to the diverse nature of the landscape, particularly the existence of mountains running parallel to the coasts. While coastal regions have milder climates, the inland Anatolia plateau has hot summers and cold winters with limited rainfall. This further results in each of Turkey's seven regions specialising in the production of particular agri-food products. A further breakdown of agricultural activity by region is provided below.

Aegean region

This region is located along Turkey's western coast incorporating the city of Izmir and accounts for 11% of Turkey's total land area. The region has a Mediterranean climate with dry summers and mild winters. It has plentiful fertile soils which allow for the large production of olives, citrus, nuts and fruits. The proximity of the port of Izmir within the region facilitates the production and exportation of agricultural products to other markets in Europe and the Mediterranean.

Black sea region

This region incorporates the provinces located along Turkey's Black Sea coast and includes important cities such as Ordu. The region has an oceanic climate which results in warm summers and wet winters. The region receives the largest volume of rain in Turkey which helps to facilitate the development of agriculture. The area around the city of Trabzon is widely known for its large production of hazelnut, while the region around the city of Samsun is known for its production of citrus fruits and tobacco. The region is also heavily forested with over 7 000 species of plants. Other important agricultural goods produced in the region include corn, kiwi, rice, beans and potatoes.¹

Central Anatolian region

This region incorporates most of inner Turkey and includes the capital city of Ankara. The region is characterised by a semi-arid continental climate resulting in hot dry summers and cold and often snowy winters. It is known for its large production of cereals with wheat and barley being amongst the most important crops in the region. Roughly a third of Turkey's total cereal production comes from this region, with bread wheat and durum wheat some of the most important product categories. The region receives the least amount of rainfall in Turkey which limits the production of certain agricultural products such as vegetables.²

Eastern Anatolian region

The Eastern Anatolian region is located along the east of Turkey and accounts for 20.9% of Turkey's total land area. The region is located far from the sea and has a high altitude which results in a continental climate with long winters and short summers. The most produced agricultural products coming from this region are wheat, barley, sugar beet,

¹ All about Turkey, Black sea region, available at <https://www.allaboutturkey.com/black-sea.html>

² Agrotec Agricultural fair, Central Anatolia: Turkey's "Granary", available at <http://www.agrotecankara.com/en/blog/central-anatolia-turkey-s--granary->

tobacco, apricots, and potatoes. The city of Malatya is world-renowned for its production of apricots, with 80% of Turkey's apricot production coming from the city and its hinterland.³

Mediterranean region

The Mediterranean region is located along the Mediterranean Sea and accounts for 15% of Turkey's total land area incorporating cities such as Antalya and Mersin. The region has a Mediterranean climate which includes hot summers and mild winters. It is rich in fertile soils and the warm Mediterranean climate makes it ideal for the production of citrus fruits, grapes and cereals. Some 80% of Turkey's total mandarin produce comes from this region while bananas are largely only produced in this region of Turkey.⁴

Marmara Region

The Marmara region incorporates the northeast of Turkey including the city of Istanbul and the country's territory in continental Europe. Although the second smallest region by land area, it is the most populous. The region has a hybrid Mediterranean and subtropical climate with warm summers and cold, sometimes snowy, winters. About a third of the region's land area is used for agriculture with wheat, corn, sugar beet and sunflowers amongst the region's most important crops. This region alone accounts for 73% of Turkey's sunflower production. Vineyards are also common in the region and wine from the region is increasing in production.⁵

Southern Anatolian region

The southern Anatolian region is located along Turkey's border with Syria and Iraq and includes the city of Urfa (also known as Sanliurfa). The region represents 9.7% of Turkey's total land area and has a largely continental climate which results in long and very dry summers followed by cold and rainy winters. The main crops produced in this region include wheat and barley while livestock breeding is also common.⁶

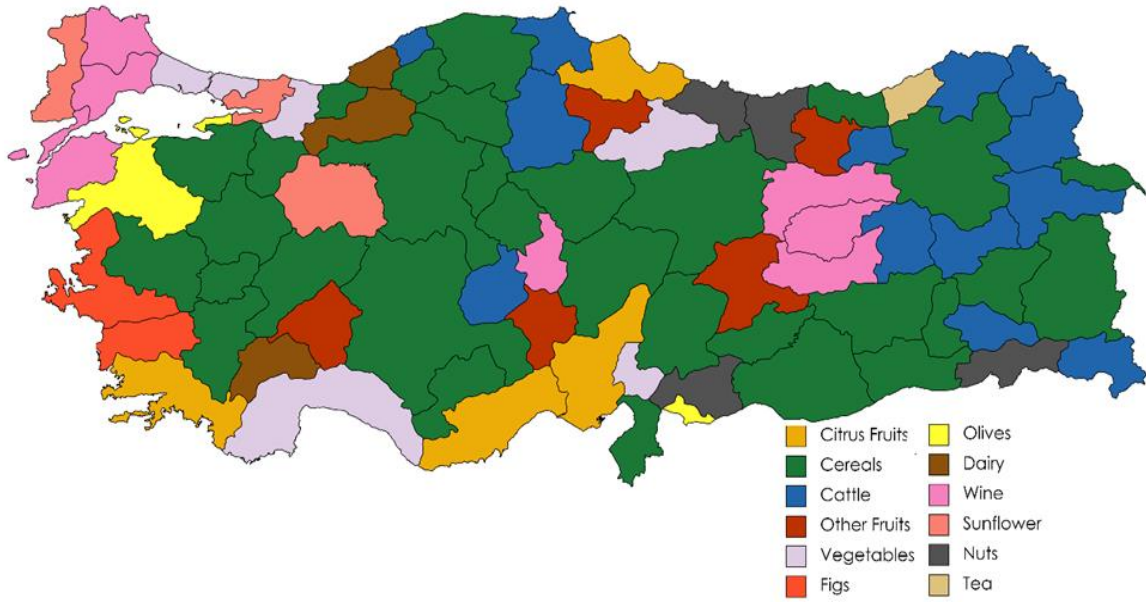
³ Trem Global, Geographical regions of Turkey, available at <https://www.tremglobal.com/articles/geographical-regions-of-turkey-eastern-anatolia>

⁴ All about Turkey, Mediterranean region, available at <https://www.allaboutturkey.com/mediterranean.html>

⁵ Trem Global, Geographical regions of Turkey, available at <https://www.tremglobal.com/articles/geographical-regions-of-turkey-marmara>.

⁶ All about Turkey, Southern Anatolian region, available at <https://www.allaboutturkey.com/southeast-anatolia.html>

Figure 2-7: Commonly produced agricultural products within the provinces of Turkey



Source: Agra CEAS based on various sources.

3 Introduction to the food and beverage market and consumers

3.1 Overview of the food and beverage market and demand for imported products

3.1.1 F&B market summary

As noted in section 2.3, agriculture in Turkey continues to play an important role in the economy despite the rise of the service sector in recent decades. Turkey's geographic position between eastern and western markets, combined with having a wide variety of climates within its borders, has allowed it to become one of the world's largest agricultural producers. Turkey's abundance of fertile soils makes it largely self-sufficient in the production of cereals, vegetables, fruit and animal products. Turkey is also an emerging wine producer and will likely continue to expand its share in the global wine market.

Turkey has a large food and beverage manufacturing sector with the country registering around 51 340 food and 650 beverage enterprises in 2019. The food processing industry comprises approximately 15.3% of all Turkish production companies.⁷ Turkey is a global leader in the processing of products such as hazelnuts, apricots, figs, cherries and olives. Most food producers in the country can be categorised as SMEs (small-medium enterprises) with few large overarching players in the market. Anadolu Efes (Turkish grain board) and Ulker Biskuvi (Turkish multinational biscuits and confectionery manufacturer) are amongst the largest food producers in the Turkish market. It is common for companies to focus on some of the most populated regions of the country - namely the regions surrounding the city of Istanbul, the western regions incorporating the city of Izmir and the Ankara capital region - although the larger companies will tend to have a nationwide approach. The total value of the Turkish food and drink industry is estimated to be around EUR 132 billion.⁸

3.1.2 International trade in F&B

Turkey's top agricultural exports to the world include hazelnuts (63% of worldwide production in 2020), apricots (largest producer in the world) and cereals. The poultry, dairy and olive oil sectors also represent a large share of agricultural exports from the country. In 2019, total exports of agricultural and food products from Turkey reached a value of EUR 15.2 billion.⁹ On the other hand, Turkey is a large importer of live bovine, feed ingredients and soybeans.

The EU has a negative trade balance with Turkey, due to the EU being a large importer of preparations of vegetables, fruits and nuts, tropical fruits and citrus fruits, which are the three largest categories of EU agricultural imports from Turkey. The total value of EU

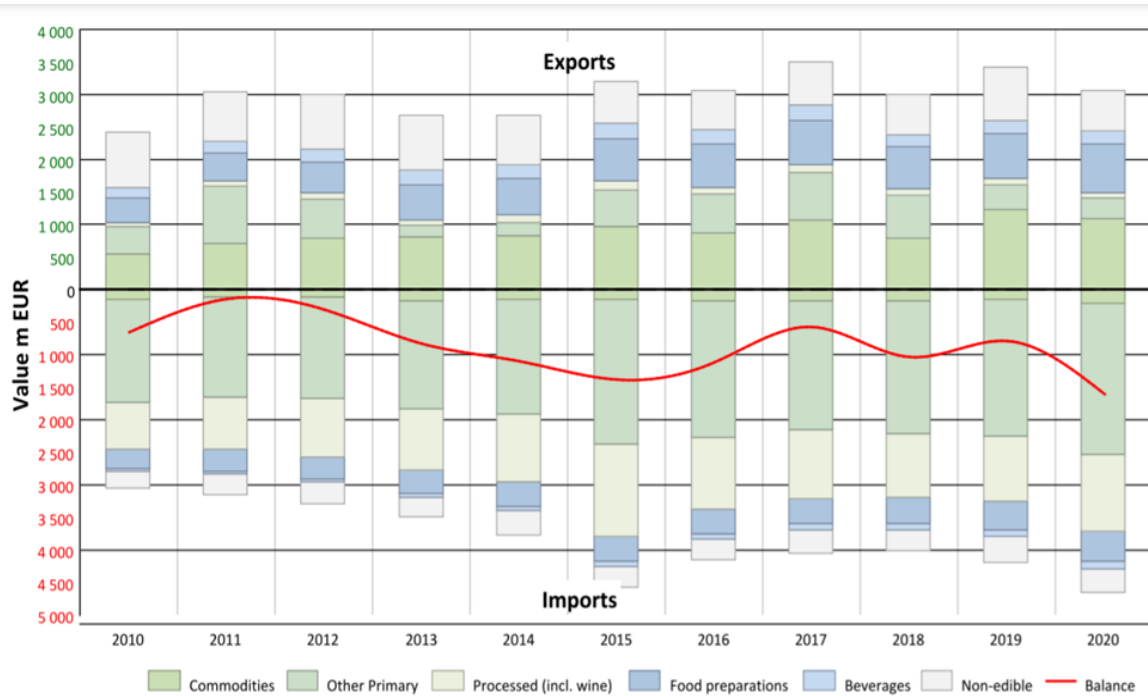
⁷ Turkey: food processing ingredients , USDA , Available at: <https://www.fas.usda.gov/data/turkey-food-processing-ingredients-5>

⁸ Switzerland Global Enterprise , Food production in Turkey and opportunities for Swiss SMEs , available at <https://www.s-ge.com/en/article/global-opportunities/20211-c5-food-turkey-market-overview>

⁹ Agriculture of Turkey: production, trade and policy reforms, Eurasian research institute, available at: <https://www.eurasian-research.org/publication/agriculture-of-turkey-production-trade-and-policy-reforms/>

imports of agricultural products from Turkey reached EUR 4.65 billion in 2020, while total exports from the EU to Turkey amounted to EUR 3.5 billion (Figure 3-1).

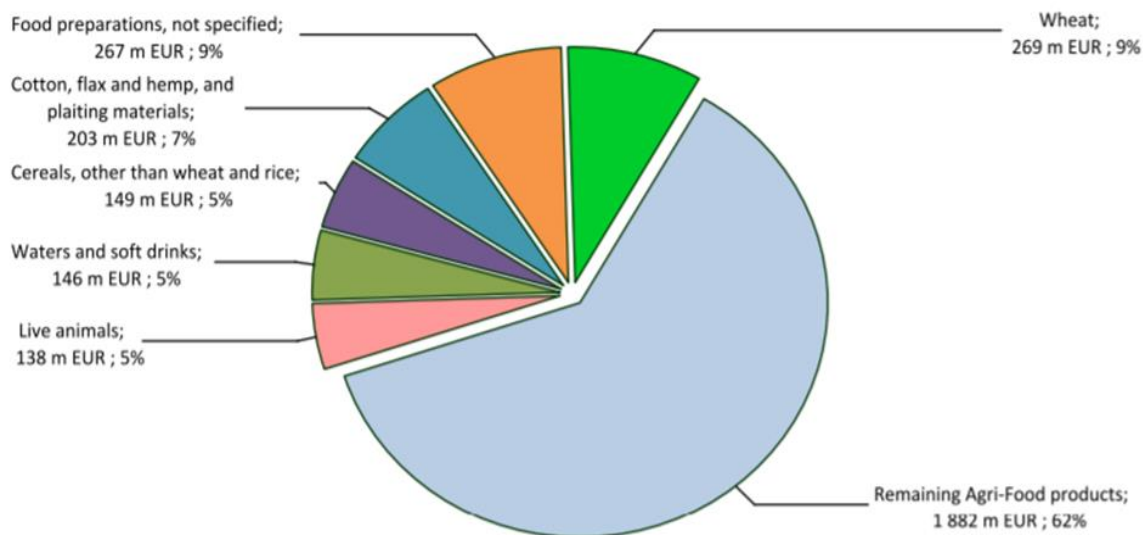
Figure 3-1: Structure of EU-27 (i.e. excluding the UK) agri-food trade with Turkey, 2010 to 2020



Source: European Commission: agri-food trade statistical factsheet, European Union – Turkey. Based on Eurostat-COMEXT data.

The major products exported from the EU to Turkey in 2020, in terms of value, were (Figure 3-2):

- Wheat, at EUR 269 million, accounting for 9% of total agricultural exports from the EU to Turkey.
- Food preparations, at EUR 267 million, also accounting for 9% of total EU agricultural exports.
- Cotton, at EUR 203 million, accounting for 6.6% of total EU agricultural exports.
- Cereals (other than wheat and rice), at EUR 149 million, accounting for 4.9% of total EU agricultural exports.

Figure 3-2: Top EU-27 agri-food exports to Turkey in 2020

Source: European Commission: agri-food trade statistical factsheet, European Union – Turkey. Based on Eurostat-COMEXT data

Major ongoing trade barriers that continue to impact EU exports of agri-food products to Turkey include:

- **Import restriction of live bovine and beef:** Ban on bovine and beef products has been imposed by Turkey since 1998 due to animal health reasons (most notably fears surrounding outbreaks of bovine spongiform encephalopathy (BSE)). This remains a major obstacle in EU-Turkish trade relations, despite EU efforts to resolve it.¹⁰
- **New labelling requirements:** In 2013 a new labelling requirement was introduced across a wide variety of food and beverage products to verify the authenticity of products in a bid to fight counterfeits. Issues surrounding the monopoly status of the label producers have caused concerns amongst EU exporters.

A list of further examples which constrain EU exports for EU agri-food producers is provided in section 4.3, including the background to and rationale behind these barriers to trade.

3.1.3 The market for imported F&B

Turkey produces many products similar to those of EU Member States, particularly within the Mediterranean region. At the same time, it imports a large number of EU agri-food products. Below is a description explaining key reasons behind the three largest EU agri-food export categories to Turkey:

1. **Wheat.** Despite being a large producer of wheat domestically, Turkey is susceptible to droughts particularly in its interior which results in the need to import wheat from abroad, commonly the EU. This helps explain why wheat imports grew

¹⁰ https://trade.ec.europa.eu/access-to-markets/en/barriers/details?barrier_id=10780

by EUR 68 million in 2020 alone, as this year had an abnormally high number of wildfires and drought within Turkey which resulted in a spike in wheat imports. Mainly due to this reason, the value of wheat imports from the EU fluctuates widely, such as from EUR 31 million in 2018 to EUR 269 million in 2020.

2. **Food preparations.** The trade of food preparations has remained consistently around the value of EUR 250 million between 2016-2020. Despite Turkey having a large domestic production of food preparations, the country continues to be a large importer from the EU. Domestic demand for quality EU products is a key driver. Some high-quality EU agri-food products, including infant food, chocolate and confectionery products and pasta, are amongst the most important categories of EU agri-food products imported by Turkey.
3. **Cereals other than wheat and rice.** As is the case for wheat, this product is heavily affected by the occurrence of abnormally high temperatures and/or lack of rainfall which can result in droughts. Due to this, the total value of imports from Turkey can vary widely depending on the domestic production situation, with a notable example of this occurring in 2017 when imports from the EU reached EUR 114 million, more than double their value in 2016 (EUR 52 million).

3.2 Growth drivers and trends

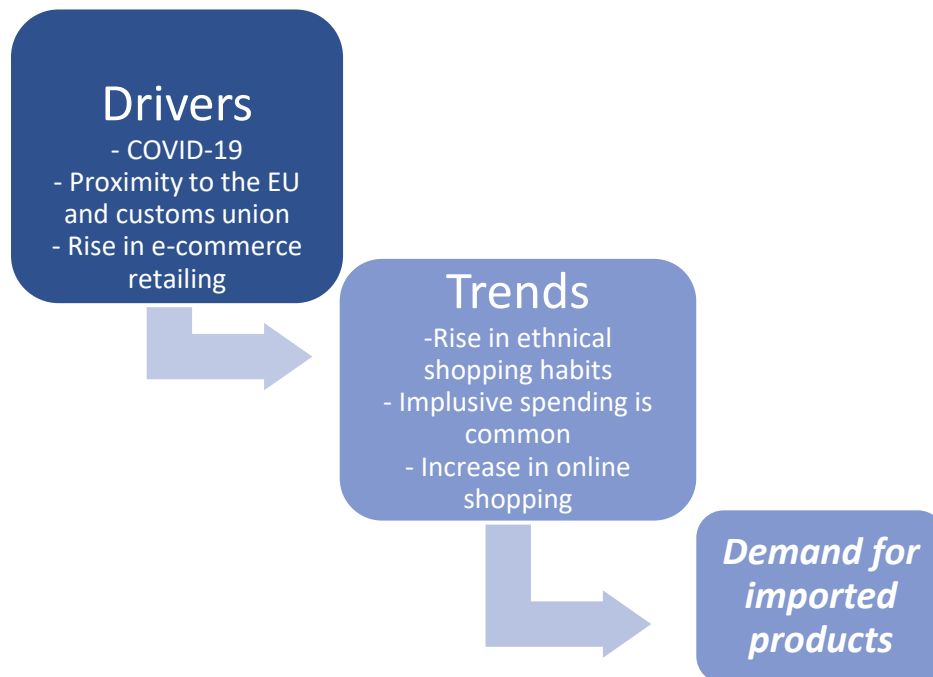
The key factors affecting the presence of EU food and beverages in the Turkish market are:

- **The Coronavirus pandemic:** The impact of Covid-19 in Turkey has been diverse, but overall mainly relates to the falling levels of tourism combined with the rise in online retailing. At the same time, Turks are increasingly concerned about their health and there has been a notable rise in demand for food and beverages which incorporate additional nutritional values. Turkish consumers have always been drawn to fresh foods such as fruit, vegetables and meats, but it became more difficult to procure these foods during the Covid-19 pandemic due to harvest shortages and with consumers less likely to visit on-site retailing outlets. On the other hand, the consumption of long shelf-life foods such as pasta, rice and canned vegetables grew during the pandemic, also driven by some stockpiling of these foods. It can be foreseen that many of these shopping and consumption habits will be retained in a post – Covid 19 economy¹¹.
- **Proximity to the EU and customs union:** Turkey has had a customs union with the EU since 1995 and although this does not cover agricultural products, an agreement is in place and several trade concessions exist for agri-food products. This combined with the country's proximity to the EU means that Turkey is not a particularly difficult market to enter (except for specific barriers, e.g. on beef).
- **Rise in e-commerce:** E-commerce usage became more common in Turkey in 2020 due to the outbreak of Covid-19. Many of Turkey's more common distribution channels such as bazaars involve a lot of social mixing which discouraged consumers from visiting them during the pandemic. Consumers are increasingly becoming more interested in internet shopping, with the country's e-commerce

¹¹ World Bank (2021) - Turkey Economic Monitor: Navigating the Waves. Available at: <https://www.worldbank.org/en/country/turkey/publication/economic-monitor>

market estimated at EUR 10 billion at the end of 2020, the world's 21st largest market in terms of value.

Figure 3-3: Growth drivers and trends – the Turkish food and beverage market



Source: Agra CEAS based on European Commission agri-food factsheet; Euromonitor International, and various (see footnotes).

In terms of current trends, the following stand out¹²:

- **Rise in ethnic shopping habits:** Turkish consumers are increasingly concerned about the ethics behind their shopping habits. There has been a notable rise in demand for products deemed to be more ethnical, which includes GMO-free foods, organic foods and products alternative to meat. Turkish consumers are increasingly concerned about climate-related issues and are now more likely to be curious about the total CO2 footprint of the products they consume and the origin of the products. This can act as a driver for imported food and beverages from the EU, which are perceived within Turkey as being both high quality and largely ethnical in production practices.
- **Impulse spending is common:** Turkish consumers are particularly prone to impulse spending and keeping up with the latest trends and habits. Social media play a large role in this, as they advertise the latest trends to consumers and encourage impulse buying via targeted ads and promotions. Impulse buyers are further driven by lower prices when purchasing larger quantities, which has become more common as the value of the Turkish Lira has depreciated in recent years. This can act as a driver for imported food and beverages as EU producers can focus on marketing their products to encourage impulse buying from Turkish consumers.

¹² Euromonitor International: Economies and Consumers, 2021

- **Increase in online shopping:** The outbreak of Covid-19 in Turkey brought with it the increased need to purchase from online retailers. Although the levels of restrictions in Turkey were not as severe as seen in many parts of the EU, consumers' concern about interacting and mixing too much in social bubbles encouraged online retailing over busier and higher-risk distribution channels such as bazaars and supermarkets. This can act as a driver for imported food and beverages from the EU, as producers now have a new marketing and distribution channel to reach Turkish consumers in a much more convenient and targeted way than previous channels allowed.

3.3 Consumer profiles and preferences

3.3.1 Consumer profiles

Certain aspects of the Turkish population that were touched upon in sections 2.1 and 2.2 are worth bearing in mind when considering Turkish consumers. Most notably:

- **Ethnicity and religion.** While 99% of Turkey's population identifies as Islamic, there are differences in the country concerning the levels of adherence to the religion in its strictest terms. The west of Turkey is generally more liberal and relaxed about some of the taboo aspects of Islam such as alcohol consumption which is viewed as a much bigger taboo in the east of the country. Many larger urban centres are also more liberal on some aspects of Islamic teachings but within the rural areas of Turkey, this is less likely to be the case.
- **Urban and rural divide.** Around 75% of Turkey's population lives in urban centres with 18% of the population living in Istanbul alone. The urban versus rural division becomes more apparent within the interior and eastern regions of the country, where the population is sparser with provinces likely to have only one major city of note within their borders. This division further impacts access to the internet, infrastructure and other utilities, making it particularly difficult to market EU products to citizens living in the rural interior of Turkey. This further explains why the important market snapshot markets for EU products mentioned in section 2.2.2 are all located in the west of Turkey or along the Mediterranean coast, Ankara being the only exception.
- **Youth population.** Demographically, Turkey is home to Europe's youngest population, which presents great opportunities for the country to be a key future market for EU food and beverages. Developing brand loyalty with the younger segments of the population, including the segment aged between 15-24 years old that represents 15.6% of the population, is key towards establishing a long-term business presence in Turkey. This segment of the population is far more likely to be using the internet and actively engaging with social media platforms, which makes this a key channel for product marketing to this segment of the population.

Against the considerations set out above, notable overarching consumer types in Turkey are set out below. It is important to note that, while these overarching types have relevance across the country to some extent, the various aforementioned nuances must be taken into account given that in such a diverse country, the relevance of universal consumer

types is limited¹³:

- **Independent and proud consumers:** Turkish consumers are generally very proud of their country and any brand which acts against the interest of the state will struggle to appeal to consumers in Turkey. Several brands have previously been banned or *de-facto* blacklisted for speaking in a non-favourable manner about Turkey. Turkish consumers appreciate their domestic produce, such as raki, fruits and vegetables, which makes it additionally difficult for EU producers to compete in these product categories. It is important that any packaging sent to Turkey does not include anything which can be perceived as mocking the state or stating a historical standpoint counteractive to standard Turkish perspectives.
- **Appreciation for fresh foods.** Turkey is home to some of the most fertile soils in the world coupled with being within the proximity of the Mediterranean Sea, hence there is a deep appreciation for fresh produce in the country as is common in other Mediterranean countries such as Greece and Italy. Processed foods are less popular in Turkey than in the EU market, even though consumption overall is growing. Turkish consumers will likely be drawn to products that can display their freshness either through a unique label of their origin or through incorporating additional added properties such as sugar-free variants.
- **Strivers:** The depreciation of the Lira has resulted in many Turkish consumers having to seek out additional ways to make their money stretch. This is notable in the rise of bulk buying in Turkey which has grown to become a common practice in the country. The fall in the value of the Lira acts as a barrier for consumers to purchase imported food and beverages as these products have become more expensive. A return in the strength of the Lira to the Euro would act as an incentive for consumers to purchase EU food and beverages, however, this is dependent on external factors.

3.3.2 Cultural sensitivities and other considerations

The modern state of Turkey is relatively new with the country founded in its current state in 1923. The foundation of Turkey followed several key events including the fall of the Ottoman Empire and the rise of secularism in the country. As a result of the country's recent founding, many Turks in Turkey are very patriotic and proud of their country and its founder father Mustafa Kemal Atatürk, with the Turkish flag and statues of Mustafa Kemal Atatürk, found regularly throughout the country. It is important to be aware of the country's cultural sensitivities. Turkey encompasses many different attitudes and cultural norms with the west of the country being generally far more liberal and secular compared to the more conservative east of the country, and this needs to be taken into account. A further breakdown of cultural sensitivities and other considerations is presented below.

Gift giving

Gift giving is quite common in Turkey and at times can be *de-facto* expected, such as when visiting Turkish homes for the first time and during birthdays. Weddings in Turkey are a huge event and will normally draw a large number of people, gifting for weddings is expected with the more common gifts being a gold coin or money presented on a card. It's important to be mindful of the individual you intend to gift to; for example, while alcohol may be acceptable to many Turks as a gift, the more adherent to Islam traditional values will not

¹³ Euromonitor International: Economies and Consumers, 2021

appreciate a gift incorporating alcohol. In the business environment, a gift is not usually expected and, in many instances, unacceptable due to company policy.¹⁴

Festivals and holidays

As Turkey is an Islamic country and Turks are proud of their state, many festivals and holidays in the country celebrate the country and observe Islamic holidays. A full list of important festivals and holidays in the Turkish calendar is found below:

- **New Year's Day** (*January 1st*) This day is a public holiday in Turkey and generally results in several celebrations across the country for the beginning of a new year.
- **National sovereignty and children's day** (*April 23rd*). This day commemorates the founding of the grand assembly of Turkey in 1920 and also incorporates a national children's day celebration. This day is a Turkish national holiday and schools participate in week-long ceremonies marked by performances in all fields in large stadiums watched by the entire nation.
- **Labour Day** (*May 1st*). In Turkey, global labour day is a national holiday and celebrates the achievement of workers in the country.
- **Commemoration of Atatürk, youth and sports day** (*May 19th*). This day is a public holiday in Turkey and commemorates Atatürk's landing at Samsun, which marked the beginning of the Turkish war of independence. The day also includes several sporting events and events celebrating the role of youths within Turkey.
- **Victory day** (*August 30th*). This day is a public holiday in Turkey commemorating Turkey's victory in the battle of Dumlupinar in 1922.
- **Republic day of Turkey** (*29th of October*) This day is a national public holiday and commemorates the proclamation of the modern Turkish state which took place on the 29th of October 1923.

Although these are the larger public holidays in Turkey, several smaller celebrations take place in the country such as the conquest of Istanbul day which sees celebrations taking place in the city. Turkey's minority Christian population will adhere to celebrations such as Christmas and Easter although throughout Turkey these are not significant days. During occasions relating to an important event within the history of Turkey, the presence of Turkish flags will increase and are a common sight.

Important cultural symbols

Many of the more important cultural symbols in Turkey refer to significant symbols of the state such as the flag or a mural of Atatürk. Flora and fauna are also important cultural symbols in Turkey with an apple representing love and commitment. Tulips are also an important cultural symbol and feature commonly within Turkish paintings and textiles.

¹⁴ Turkey gift giving customs, giftopedia, available at http://www.giftopedia.com/Turkey_Gift_Giving_Customs

National Flag

The flag of Turkey is a very important cultural symbol in the country and is featured alongside buildings and busy streets throughout the country. The flag known as *al bayrak* (the red flag) has come to symbolise many aspects of Turkish independence and any defacement of the flag is punishable. During national holidays it's virtually impossible to not encounter the flag at some point when travelling through the country.



Mustafa Kemal Atatürk



Mustafa Kemal Atatürk is regarded as the founding father of the modern Turkish state, and his statues and murals are present throughout the country. His image has come to represent many aspects of Turkish secularism and independence and any defacement will be met with hostility as he remains an important cultural symbol for many Turks.

4 Market access and entry

This section provides details on the necessary requirements for entry into the Turkish market, outlining existing market access restrictions and explaining procedures. A summary of market access and entry is presented in section 4.1, in the form of a SWOT analysis.

4.1 Summary SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Well-developed increased adoption of western style consumption habits in urban centres, coupled with high levels of tourism, means that EU food and beverage products are popular. ▪ Due to the Customs Union and alignment process, Turkey has similar food legislation to the EU: for EU exporters, meeting requirements in the EU means they are generally met to a significant extent in Turkey. Turkish standards are arguably closer to EU standards than those of many other third countries. ▪ The Turkish market is close to Europe, which typically means fast shipping times (generally 3-5 days). 	<ul style="list-style-type: none"> ▪ Turkey is a big producer (and exporter) of most agri-food products, most notably poultry meat, dairy, fruit and vegetables, olive oil, confectionery, pasta, fruit juices and baked goods. ▪ Agriculture is not covered by the EU-Turkey customs union, and tariffs are high, despite some preferential rate quotas under a separate agreement. ▪ Products imported from the EU are likely to be more expensive than those that are locally produced, and consumers in Turkey appreciate domestic products. ▪ Consumption per capita of key EU export categories (fresh meat; dairy; alcoholic beverages) is lower in Turkey than in most EU countries. ▪ Largely Muslim country, therefore prospects for imports of pork are very limited; although consumption of alcoholic beverages is viewed as more acceptable in Turkey compared to other countries in the region, growth prospects are affected. ▪ Population remains geographically dispersed over a fairly large land area, despite increased urbanisation. ▪ Turkey should not be seen as one market but rather multiple markets within one country. Different approaches may need to be taken but care is also needed to ensure that approaches are coherent.

OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Many of Turkey’s major urban centres, including Istanbul, Bursa and Izmir, are in close proximity to the EU with established logistical links. ▪ Consumption of certain products (e.g. fresh beef and poultry; some fruit categories; processed products) is expected to grow. ▪ Increased interest in processed agri-food products, including from the EU; EU products are appreciated due to their high quality, and the different characteristics they possess. ▪ Although the current list of protected EU GIs in Turkey is relatively small, this is a promising growth area. ▪ Despite the high level of production of most agri-food products in Turkey, there is some complementarity between domestically produced agri-food products and EU exports. ▪ Premiumisation trend emerging within the younger and urban population. ▪ Current trends among the more affluent Turkish consumers such as healthiness and sustainability can be pursued by EU producers who are familiar with these trends from the EU market context. ▪ E-commerce emerging as a new and growing channel of distribution in Turkey which presents opportunities for EU agri-food exporters. 	<ul style="list-style-type: none"> ▪ Turkey has been expanding its domestic production of various agricultural goods across the fresh meat, dairy, fruit and vegetable sectors, and processed products. ▪ Value of the Lira currency prone to fluctuate wildly and recent depreciation limits the ability of Turkish consumers to purchase food and beverages imported from the EU. ▪ Generally high levels of controls on imports, not just of livestock and plant-based products, primarily affected by SPS restrictions. ▪ Due to Muslim religion, strict requirements for meat and alcoholic beverages (ban on advertising). ▪ IPR enforcement remains challenging despite new improved IP legal framework since 2017. ▪ Turkey’s strong and expanding economic diplomacy and trade relations with countries in the Balkans and North/West of Africa, including FTA agreements with a number of competitors such as Israel, Serbia and Egypt, may partly displace imports from the EU.

4.2 Food and beverage legislation and regulations

4.2.1 Import requirements/restrictions, customs procedures and documentation

Turkey has a Customs Union with the EU and is also a candidate country for EU membership. The Customs Union grants duty-free entry into Turkey for goods that are in free circulation in the EU, as well as preferential treatment to agricultural products.

The Customs Union with Turkey has been in force since 1 January 1996. Its duty-free coverage is limited to processed agricultural products, i.e. parties may apply the agricultural component in bilateral trade, and excludes agricultural products as defined in Annex I of the Amsterdam Treaty¹⁵, which are nonetheless covered by a subsequent preferential trade agreement. For processed agricultural products, the Customs Union foresees:

- Free movement between Turkey and the EU for products that are either wholly produced or put in free circulation after their importation from third countries in either Turkey or the EU. This implies the elimination of customs duties and quantitative restrictions between Turkey and the EU. The proof of this customs status of 'goods in free circulation' is established by an A.TR. movement certificate; import formalities can be completed in the exporting country by the A.TR. movement certificate. Special conditions are laid down for processed agricultural products.
- Alignment of Turkey with the Community common customs tariff, including preferential arrangements, and harmonisation of commercial policy measures.
- Approximation of customs law, in particular through Decisions of the Customs Co-operation Committee (e.g. Decision No 1/2006 laying down detailed rules for the application of Decision No 1/95) and mutual assistance in customs matters.
- Approximation of other laws (e.g. intellectual property, competition, taxation).

In principle, products in free circulation in the EU with an A.TR. movement certificate have direct access to the Turkish market, except where checks are justified on the basis of a risk analysis. The risk criteria are based on results from past import controls, market surveillance results, a manufacturer/importer's previous record of presenting safe products on the market, the origin of the product, brand and model, price and quantity, customs entry point, exit point, transportation and the trading country.

An agreement on agricultural products exists between the EU and Turkey since 1 January 1998¹⁶ and foresees preferential rules applicable on imports into Turkey of certain agricultural products originating in the Community (Protocol 2). For the purpose of implementing this agreement, products are considered to be of EU origin if they are wholly obtained in the EU or if they are obtained in the EU incorporating imported materials that have undergone sufficient processing in the EU as laid down in Annex II of Protocol 3. However, the list of 'minimal' operations in Protocol 3 has not still been brought into line with the list used in the pan-Euro-Mediterranean system of cumulation which allows for the application of diagonal cumulation between the EU, EFTA States, Turkey, the countries which signed the Barcelona Declaration, the Western Balkans and the Faroe Islands. To this end, the EU is currently in the process of amending the origin protocol with Turkey; until the process is complete, transitional rules are available to facilitate the understanding of how the two sets of rules of origin will apply in parallel, as explained in the Guidance on transitional PEM rules¹⁷.

¹⁵ These include some of the products in the scope of this Handbook, as follows: fresh meat (CN heading 02); dairy (04); fresh fruit and vegetables (07 and 08); live plants (06); fruit juice (2009); wine (2204); spirits (2208); and pet food (2309.10).

¹⁶ Council Decision No 1/98 of the EC-Turkey Association Council of 25 February 1998 on the trade regime for agricultural products (98/223/EC). Protocol 2 of this Decision covers the preferential regime applicable to imports into Turkey of agricultural products from the Union.

¹⁷ The transitional rules of origin are intended for provisional application, on an optional and bilateral basis between the interested parties, which include the EU and Turkey. The latest guidance (v1.0 of 16 August 2021) is available at:

Table 4-1: Preferential tariff quotas for EU imports into Turkey

CN code	Product	Tariff rate quota and applicable import duty
0202 20	Other cuts of bovine meat, with bone in, frozen	5 000 t at 50% MFN reduction with max duty 30% 14 000 t at 30% MFN reduction with max duty 43%
0402 10	Milk and cream in powder, granules or other solid forms, of a fat content by weight, not exceeding 1,5 %	1 500 t at 0 duty (under inward processing scheme)
0402 21	Milk and cream in powder, granules or other solid forms, of a fat content by weight, exceeding 1,5 % not containing added sugar or other sweetening matter	2 500 t at 0 duty (under inward processing scheme)
0405 10 0405 2090 0405 90	Butter and other fats and oils derived from milk; dairy spreads	3 000 t at 0 duty
0406 30	Processed cheese, not grated or powdered	300 t at 0 duty
0406 90	Other cheese: cheese for processing	2 000 t at 0 duty
0602 90	Live plants, other (vegetable and strawberry plants)	3 400 t at 0 duty
0808 10	Apples fresh, other than of the variety golden delicious (except: 0808 10 51; 0808 10 61; 0808 10 71; 0808 10 92)	1 750 t at 0 duty
0809 30 31 0809 30 39 0809 30 41 0809 30 49 0809 30 51 0809 30 59	Peaches, including nectarines, fresh, from 15 July to 31 December	1 000 t at 0 duty
0810 90 30	Tamarinds, cashew apples, lychees, jackfruit and sapodillo plums, fresh	1 000 t at 0 duty
0810 90 40	Passion fruit, carambola and pitahaya, fresh	500 t at 0 duty
0810 90 85	Other fruit, fresh	500 t at 0 duty
2009.11	Orange juice, frozen	1 000 t at 20 duty
2009.12	Orange juice, not frozen	1 000 t at 0 duty
2009.19	Orange juice, other	1 000 t at 15% duty
2009.71/79	Apple juice	1 000 t at 15% duty
2009.90	Mixtures of apple and pear juice	1 000 t at 15% duty
2204 10	Sparkling wines with PDO	750 hl at 35% duty
2309 10	Dog or cat food, put up for retail sale	1 400 t at 0 duty

Source: Council Decision No 1/98 of the EC-Turkey Association Council of 25 February 1998 on the trade regime for agricultural products (98/223/EC); Access to Markets database.

Agri-food products imported into Turkey must comply with several import requirements, including sanitary and phytosanitary provisions. The general documentation requirements for shipments to Turkey are set out in Table 4-2. A summary of specific requirements by food and beverage type covered in this handbook is set out in Table 4-3, with further explanations regarding some points provided thereafter. As a general rule, documents must be prepared in Turkish or English.

Table 4-2: General requirements for goods exported to Turkey (including F&B)

Name	Description (a)	To be prepared by	Language
Bill of Lading	A document containing the details of the international transportation of products by sea; if the carrier is not the owner of the goods, the appropriate document is the Sea Waybill. For goods transported by air, the appropriate document is the Air Waybill; for goods transported by road it is the Waybill; and, for goods transported by rail it is the Rail Waybill. If two or more modes of movement are combined in one transport operation, a Multimodal or Combined Transport Document is required. The information given in this document is used for submitting the Summary Declaration at the (first) customs office of entry for customs clearance (see below: Summary Declaration). (c)	Carrier (or his agent)	EN (Rail Waybill: EN or FR or DE)
Air Way bill	A document containing the details of the transportation of products by air and proving the transport contract between the consignor and the carrier's company. One Air Waybill may be used for the multiple transshipment of products. The information given in this document is used for submitting the Summary Declaration at the (first) customs office of entry for customs clearance (see below: Summary Declaration). (c)	Carrier (or his agent)	EN
Commercial Invoice	A document (e.g. Pro Forma Invoice, freight invoice, consular invoice or legalised invoice) containing the details of the transaction. This is required for customs clearance and needs to provide certain prescribed minimum content though these are fairly standard invoice requirements. Additional information required by the Turkish Customs Regulations includes the Turkish tariff code number and amount per sales units (e.g. kilogrammes, pieces, etc.), unit prices, and number and type of packages.	Exporter	TR or EN or FR
Packing List	A document containing the details of the shipment and serving as a basis for the customs treatment of goods. To be prepared according to standard business practice, including details of the content of the packages, description of the goods, marks and numbers. <i>Only required if this information is not provided in the Commercial Invoice.</i>	Exporter	TR or EN
Certificate of Insurance	A document proving that a contract for the insurance of the goods has been taken out by the exporter. According to the Turkish Customs Regulation, the FOB value of the goods may be increased by 3% for the calculation of the customs value if a valid insurance policy cannot be submitted by the importer.	Importer	EN

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Name	Description (a)	To be prepared by	Language
Summary Declaration	A document containing all particulars necessary for the identification of the goods to be imported. This is required for risk analysis and customs clearance and is to be presented at the (first) customs office of entry. To be submitted within certain time limits (generally, 24 hours of arrival by sea for clearance at the point of entry, or 4 hours of arrival by air, or 2 hours of arrival by rail, or 1 hour of arrival by road). Template forms and information required is provided on Access2Market. (b)	Freight forwarder or another person responsible for taking the consignments to Turkey (e.g. vessel / aircraft operator)	TR or EN
Customs Import Declaration	Official form for the customs clearance of goods: Turkish copy of the European Single Administrative Document. <i>If the Customs Import Declaration contains all required information and is submitted before the time limit for the Summary Declaration expires, it may act as a substitute.</i> (b)	Customs agent	TR
Declaration of Customs Value	A document containing all information for the assessment of the dutiable value of a shipment, which is required for customs clearance if the goods are not duty-free. (b)	Importer	TR
Movement Certificate (A.TR)	A document confirming that the goods covered by it are in free circulation within the customs union of the European Union (EU) and Turkey. (A.TR) does not depend on or state the preferential origin of the goods. It may be used for goods produced within the EU as well as for those imported from third countries that have been cleared for free circulation in the EU. <i>Although only required if the importer applies for the duty-free entry of goods in free circulation, this document is important as it may avoid the double payment of duties.</i>	Exporter	EN
Certificate of Non-Preferential Origin	A document confirming the non-preferential origin of the goods to be imported. This requirement is limited to cases in which its presentation is absolutely necessary due to serious and justified doubts as to the actual origin of the goods in question if these arrive in Turkey with a valid Movement Certificate (A.TR). The A.TR does not apply to agricultural goods. <i>Only required if specifically requested by the importer, by the customs authorities or by other authorities involved in import procedures.</i>	Exporter	EN

Name	Description (a)	To be prepared by	Language
Control Certificate for Agricultural Products	A document certifying that the importation of various agricultural products - including animal products and products used in the feed or food industry - has been approved. Depending on the kind of product, the document is a prerequisite for the Certificate of Conformity for Agricultural Products .	Importer	TR

(a) Template forms and/or information required is provided on Access2Market.

(b) Usually submitted electronically through the BILGE interface (after prior registration with the system), or via an appropriate customs software that is interfaced with BILGE. Paper forms may be accepted under exceptional circumstances.

(c) Freight forwarders may require that the Air Waybill contains the information which is prescribed for the Summary Declaration, e.g. the Tax Identification Number of the consignee and the tariff code of the commodity (see Summary Declaration).

Source: European Commission Access2Market

Table 4-3: Specific market entry requirements mapped to Handbook categories

Name and description (a)	Fresh meat	Fresh F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate/ Confectionery	Processed F&V	Pasta	Baked goods	Breakfast cereals	Fruit juice	Live plants	Pet food (b)
Control Certificate for Agricultural Products. Certifies that import of agricultural products - including animal and plant products used in the feed and food industry - has been approved. For the indicated products, this document is a prerequisite for the Certificate of Conformity for Agricultural Products.	X	X	X	X (2208.70)	X	X	X	X	X	X	X	X (except 0602.9010)	X
Certificate of Conformity for Agricultural Products. Proves conformity with the applicable standards in Turkey. To be applied for by the importer through the Ministry of Agriculture and Forestry. For certain products (indicated above) a control certificate is a prerequisite.	X	X	X	X	X	X	X	X	X	X	X	X	X
Pre-Notification Form for Animals and Animal Products. Pre-notifies the import of	X		X	X (2208.70)		X (?)		X (?)	X (?)	X (?)			X

Name and description (a)	Fresh meat	Fresh F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate/ Confectionery	Processed F&V	Pasta	Baked goods	Breakfast cereals	Fruit juice	Live plants	Pet food (b)
<p>consignments of animal products (which only be imported at designated ports of entry) for inspection. This is the Turkish version of the EU Common Veterinary Entry Document (CVED). This document is to be submitted by the importer to the responsible border station or provincial office of the Ministry of Agriculture; it can be submitted electronically via http://ggbs.tarim.gov.tr (prior registration to this platform is required). Designated animal products (which include products beyond meat and dairy) are subject to sampling and analysis procedures upon their arrival in Turkey. Exporters of such products must furthermore be pre-listed with the above Ministry as only consignments from listed exporters are admitted into the country.</p>													
<p>Veterinary health certificate for animal products. Confirms that an imported product of animal origin has been inspected according to appropriate procedures, does not carry any contagious diseases and is considered compliant with the current Turkish veterinary regulations. Issued by authorities of the country of export. As in the case of the pre-notification form, the veterinary health certificate applies to designated products which include meat/dairy and products incorporating those, and it is issued by the appropriate sanitary authorities of the country of export. Specific certificates exist for exports of</p>	X		X	X (2208.70)		X (?)		X (?)	X (?)				X

Name and description (a)	Fresh meat	Fresh F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate/ Confectionery	Processed F&V	Pasta	Baked goods	Breakfast cereals	Fruit juice	Live plants	Pet food (b)
processed pet food, canned pet food and dog chews.													
Halal Certificate. Confirms that imported foodstuffs comply with the standards required by Islamic rules concerning their contents and their manufacturing process. This document is <u>not officially required</u> but it <i>may</i> be specifically required by the Turkish importer for the import of livestock products. Issued by acknowledged Islamic organisations in the country of export.	X		X										
Pre-Notification for Plant Products. Importers of plants and plant products must notify the relevant authorities within certain time limits prior to the arrival of consignments (which may only be imported at designated ports of entry). To this end, importers must be registered with the international agricultural quarantine management system (UZKA) of the Ministry of Agriculture and Forestry. The certificate of conformity is also necessary for the import of plants, foodstuffs or feed of plant origin, seeds, seedlings, young plants, bulbs and cut flowers; a control certificate may be required for this (see above). In addition, imported plants may be subjected to control and analysis in order to determine if they are infested by harmful organisms; contaminated plants may be fumigated or disinfected at the expense of the importer. Some products are banned from importation altogether (e.g. soil, grass, natural												X	

Name and description (a)	Fresh meat	Fresh F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate/ Confectionery	Processed F&V	Pasta	Baked goods	Breakfast cereals	Fruit juice	Live plants	Pet food (b)
fertiliser, leaves, stem or hay) or under particular circumstances. For specific kinds of plants, a Plant Passport system is also in force (see below).													
Phytosanitary certificate. Confirms that specific designated plants and plant products have been treated and inspected according to appropriate procedures (e.g. the mandatory fumigation treatment has been applied to designated plant produce), are practically free from harmful pests, and are considered compliant with Turkish phytosanitary regulations.		X										X	
Plant Passport. Confirms that specific designated plants have been inspected according to appropriate procedures, are free from quarantine pests, and are considered compliant with the Turkish Regulation on Plant Quarantine. Importers of plants subject to the passport system must be registered as operators with the Ministry of Agriculture. Plant passports issued in other countries are <u>not</u> recognised in Turkey.												X	
Certificate of Quality Conformity. Ensures conformity to Turkish quality standards (other than food safety).		X (?)			X		?		X (?)	X (?)			
Certificate of Analysis. Certifies that microbiological and physical/chemical tests have been carried out by a duly accredited laboratory in the country of export. There is no specific form	X	X	X	X	X	X	X	X	X	X	X	X	X

Name and description (a)	Fresh meat	Fresh F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate/ Confectionery	Processed F&V	Pasta	Baked goods	Breakfast cereals	Fruit juice	Live plants	Pet food (b)
for this, but certain details are required as a minimum.													
Authorisation of foreign foodstuffs manufacturers. A document certifying that food producers have been authorised by the competent authority of the country of export and are HACCP compliant.						X	X (1601 1602)	X	?	X	X		
Age certificate for whisky, cognac and brandy. Certificate confirming the maturation period of the various subcategories of these drinks.				X									
Conformity certificate for alcohol and alcoholic beverages. Required for pure alcohol and high-percentage alcoholic beverages. To be applied for at the Department of Tobacco and Alcohol of the Ministry of Agriculture. All types of alcoholic beverages are furthermore to be notified to the same Department and can only be imported at designated ports of entry.				X									

(a) Template forms and/or information required is provided on Access2Market.

(b) Petfood is included in broad terms – specific requirements are different given its non-food status. Market entry requirements for pet food are set out in 5.12.3

Source: Agra CEAS based on: European Commission Access2Market; MADB; and, Turkish legislation (Product Safety and Inspection No. 2022/5 - Official Gazette of 31/12/2021, No. 31706 4th Repeated; Product Safety and Inspection No. 2021/21 - Official Gazette of 31/12/2020, No. 31351 4th repeated; Product Safety and Inspection No. 2019/19 - Official Gazette of 16/02/2018 No. 30334).

X = required for category; ? = only required for category in specific cases, consult MADB for more details

As noted in the introduction and can be seen from the table above, Turkey has notable **veterinary and phytosanitary (SPS) requirements** intended to protect from external pests and diseases which must be complied with prior to import. The key piece of legislation underpinning the requirements is the Communiqué of Product Safety and Inspection on the import of products that are subject to permission from the Ministry of Agriculture and Forestry (Communiqué No. 2022/5, Official Gazette No. 31706 of 31/12/2021 - 4th Repeated). The purpose of this legislation is to regulate the principles and procedures for the conformity inspection of imported products laid down in Appendices, with the aim to ensure health and safety for humans, animals and plants. A **Certificate of Conformity** is required for all products listed in the Appendices of the legislation. Physical controls and sample analyses may also be required by the relevant authorities. The processing fee for issuing a control certificate is a minimum of 650 TRY; there may be additional costs for laboratory analysis depending on the goods and the analysis required by the Ministry.

More information on this legislation can be found at:

<https://www.resmigazete.gov.tr/eskiler/2021/12/20211231M4-4.htm>

As a candidate country in the process of conducting negotiations for accession to the Union, the Turkey-European Community Association Council has established Sub-Committee No.1 on Agriculture and Fisheries (decision 3/2000 of 11 April 2000). Within the sub-committee, two regular working groups (WGs) have been established (WG on Animal Health and WG on Sanitary and Phytosanitary Trade Issues) which normally meet twice a year. Other WGs may be established and meet depending on the sub-sectoral discussions at the Subcommittee. The sub-committee has held many meetings in which harmonisation with the EU legislation on food safety, veterinary and phytosanitary issues were discussed while working group meetings are held twice a year.

Finally, it should be noted that, in addition to compliance with food safety and SPS requirements, certain imported products are subject to quality certification to verify conformity with Turkish quality and marketing standards. These requirements are laid down for:

- **Alcoholic beverages:** Communiqué on Import Inspection of Tobacco, Tobacco Products, Alcohol and Alcoholic Beverages (Communiqué No. 2019/19, Official Gazette No. 30334 of 16/02/2018). More information on this legislation can be found at: <https://www.resmigazete.gov.tr/eskiler/2018/02/20180216-15.htm>
- Specific categories of **fresh fruit and vegetables** (within CN codes 0701 to 0713 and 0801 to 0814) and **olive oil:** Communiqué on Commercial Quality Inspection on Export and Import for Certain Agricultural Products (Communiqué No. 2021/21). Controls on imports are required for the products listed in Annex 1 and 2. More information on this legislation can be found at:

<https://www.resmigazete.gov.tr/eskiler/2020/12/20201231M4-17.htm>

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>

On the basis of the submitted documents and the potential risks inherent to specific goods, imported foods are classified into four colour-coded risk categories for which the following procedures apply:

- **green channel:** immediate customs release, i.e. issuance of a release authorisation after the payment of duties, taxes and further charges;

- **blue channel:** post-release controls will be conducted (also referred to as deferred control);
- **yellow channel:** customs release after documentary control;
- **red channel:** customs release after documentary and physical inspection of the goods, which may involve sample-taking and analysis procedures.

As part of the modernisation, centralisation and improving transparency of public services, Turkey has gone a long way towards the digitalisation of customs and inspection formalities applied to imports of goods. As indicated above, specific products (including meat, dairy, fruit and vegetables, alcoholic beverages etc.) may be subject to further analysis as regards their safety, quality and standard conformity; these are usually required for most products, except those imported under an A.TR movement certificate. These controls are determined under the risk-based trade control system TAREKS; this is interconnected with the platform to which the documents required for customs declaration can be submitted (BILGE).

Turkey's TAREKS, BILGE and LARA interface

The risk-based trade control system "TAREKS" determines the type of inspections to which imported products may be subjected. Importers need to be registered to use this system: <https://basvuru.dtm.gov.tr>.

TAREKS primarily covers industrial products subject to product safety controls such as personal protective equipment, toys, construction materials, medical devices, radio and telecommunication terminal equipment, battery and accumulators etc. and certain agricultural products that are subject to quality controls on importation or exportation. Product groups that are not on TAREKS (waste, certain chemicals, solid fuels, products of animal and plant origin, certain consumer goods, psychotropic products/narcotics, health products such as diet aids, blood products, vaccines, pharmaceutical substances, toothpaste powder etc.) are subject to a special permission or a control certificate, and/or have to be registered with the implementing Ministry, prior to imports.

Some of the key documents required for customs clearance can be submitted electronically through the BILGE interface – this includes: Summary Declaration; Customs Import Declaration; Declaration of Customs Value. The TAREKS - BILGE interface allows inter-connectivity to the relevant formalities: to the extent that the respective responsible authority enables electronic procedures for the issue of licences, permits, etc., TAREKS issues a 23-digit reference number, which importers/applicants need to insert in field no. 44 (other documents, permits) of the Customs Import Declaration. The submission of the original document for customs clearance procedures is not required in this case, as the authorities are interconnected and can consult the relevant documents electronically.

Turkish customs authorities may also subject specific goods to laboratory analysis in order to verify, for example, the identity of the goods or their customs tariff number. To this end, the system "LARA", which is interconnected with BILGE, is used for the centralised processing and evaluation of the laboratory analyses. Importers/declarants may consult the status and the results of the respective analysis via "LARA".

Using BILGE also requires a prior registration with the system; alternatively, data can be submitted via an appropriate customs software which is interfaced with BILGE. The Customs and Trade Ministry maintains the BILGE interface along with other digital and e-document platforms: <https://ticaret.gov.tr/uygulamalar>

Finally, the Turkish customs legislation allows for potential facilitation and/or simplification of formalities and inspections, leading to reduced times and costs, for authorised economic operators (AEO/s). Companies applying to be granted the AEO status must be in operation for at least three years and be established in Turkey; they must also comply with certain requirements, e.g. adherence to security and safety standards and the use of an appropriate managing system for commercial and transport records. The validity of AEO status is indefinite as long as all criteria are met. The Ministry of Trade may perform periodic controls to verify whether the companies continue to fulfil the requirements. Furthermore, mutual recognition agreements (MRAs) with other countries ensure the mutual recognition of AEO certificates between business partners holding AEO status and facilitate the procedures for the recognised AEOs; however, at present, there is no mutual recognition of AEO status between the EU and Turkey¹⁸.

4.2.2 Food safety and other food certification requirements

In the context of the Customs Union with the EU as well as candidate status for EU membership, the main aim of Turkish food and agricultural policy has been to harmonise the related laws and regulations with the EU *acquis communautaire* in order to facilitate trade. Although the legislation adopted since 2010 is quite detailed and is largely designed in an effort to harmonise with EU rules, there are also many discrepancies from EU rules. The relevant legislation, which lays down rules on food and feed safety, animal health and welfare and plant health, is structured quite similarly to EU food law; it includes two main laws adopted in 2010 and more than one hundred implementing regulations, as well as other legal acts (communiqués, and circulars), which were adopted since 2011¹⁹.

- **Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed** (Official Gazette No. 27610 of 13/06/2010²⁰) is the main base food legislation that aims to protect and ensure public health, food and feed safety, animal health and welfare, plant health, the environment and consumer interests. This Law, which entered into force on 13 December 2010, changed completely the food safety system in Turkey by applying a farm to fork approach and placing all responsibility on the business owner, thus adopting principles that are similar to the EU General Food Law (Regulation (EC) No 178/2002). The Law controls all stages of production, processing and distribution of food, including food additives, food contact materials, animal feed, plant protection products, veterinary medicinal products, contaminants, animal health, plant health, the welfare of animals, as well as import procedures, official controls and sanctions.
- **Law no. 5977 on Biosafety** (Official Gazette No. 27533 of 26/03/2010)²¹. The objective of this Law is to establish and implement a biosafety system in order to prevent the potential risks of genetically modified organisms and products thereof, in order to protect human, animal and plant health, safeguard and ensure the sustainable use of the environment and biological diversity. This Law lays down the procedures and principles governing the control, regulation and monitoring of

¹⁸ https://ec.europa.eu/taxation_customs/mutual-recognition-and-cooperation-other-government-authorities_en

¹⁹ All legislation can be consulted (in Turkish) at: <https://kms.kaysis.gov.tr/Home/Kurum/24308110>

²⁰ The full text of Law No. 5996 can be found at the following link:

<https://www.resmigazete.gov.tr/eskiler/2010/06/20100613-12.htm>

²¹ The full text of Law No. 5997 can be found at the following link:

<https://www.resmigazete.gov.tr/eskiler/2010/03/20100326-7.htm>

genetically modified products. It governs all activities, including processing, placing on the market, imports, exports, transportation, preservation, packaging, labelling, and storage regarding genetically modified products.

With Law No. 5996 most of the services related to food safety were assembled under the Ministry of Agriculture and Forestry (MAF). The Ministry was established in its current form after a significant reorganisation brought about by Presidential Decree on 10 July 2018. The same Decree established nine presidential policy councils, one of which is the Council of Health and Food Policies. The Council has been conducting meetings with stakeholders in the food and agricultural sectors and provides advice on technical and scientific issues to the relevant government agencies. The establishment of a new Council to be in charge of Food, Agriculture, Forestry and Livestock Policies was announced in April 2020; however, at the time of writing, the new Council has not been established yet.

The Ministry of Health is responsible for the principles and procedures relating to the production, sale, import, export, and control of water as well as of dietary foods for special medical purposes and approval of health claims to be used on the labels of foods and food supplements. The approval process and authority for biotechnology approvals is entrusted to the Ministry of Agriculture and Forestry - MAF (which took over in 2018, from the former Biosafety Board established in 2011 for this purpose). There are currently 23 corn events and 13 soybean events approved for feed use in Turkey; no events are approved for food use or cultivation.

Exporters should be aware that there may be changes in the applicable rules: the Turkish government is informing the WTO, Codex Alimentarius and other relevant international bodies about possible or actual regulatory changes, but not all changes impacting trade are notified. Furthermore, there may be some variation among provinces in applying legislation, which in some cases may be due to the lack of guidelines for the enforcement of rules.

The General Directorate of Food and Control (GDFC) within the **Ministry of Agriculture and Forestry (MAF)** is the most important department in charge of policy implementation and legislation on food and feed safety, veterinary and phytosanitary issues, animal welfare, as well as overseeing the relevant official controls and inspections at all stages of processing, distribution and placing on the market. MAF (GDFC) is responsible for applying these rules to food imported into Turkey.

Enforcement is performed by 81 Provincial Agriculture and Forestry Directorates (PAFD) and 922 District Directorates (DD). The public laboratories of MAF are involved in the official control system. These laboratories include: 39 Provincial Food Control Laboratories, one National Food Reference Laboratory, one Bursa Food and Feed Control Central Research Institute Laboratory, nine Veterinary Control Institute Laboratories, eight Plant Quarantine Laboratories and Plant Protection Research Institute Laboratories, as well as 102 authorised private food and feed control laboratories. Auditing of directorates, districts, and laboratories is performed by MAF (GDFC).

In very broad terms, all imported food must comply with **Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed**. Law No. 5996 lays down the main principles on which Turkish food legislation (the Turkish Food Codex) is based. The applicable rules under this Law are set out in more than one hundred implementing regulations (including some key Turkish Food Codex regulations) and other legal acts (communiqués, and circulars).

At the highest level, Law No. 5996 encompasses a total of 50 Articles which are laid down in nine sections, each with up to four chapters. A high-level overview of the sections, chapters and articles is presented in the table below.

Table 4-4: Key provisions of Turkish Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed

Section / Chapter	Articles
Section ONE	
Ch 1: Objective, Scope and Definitions	Art. 1: Objective Art. 2: Scope Art. 3: Definitions (defines 84 terms used in food law)
Section TWO: Animal Health, Animal Welfare and Zootechnics	
Ch 1: Control of Animal Diseases	Art. 4: Control of contagious animal diseases and responsibilities Art. 5: Compensation for animal diseases Art. 6: Animal by-products not intended for human consumption
Ch 2: Animal identification	Art. 7: Identification and registration of animals Art. 8: Health requirements on consignment of live animals and animal products, on the places of sale of animals and on trade
Ch 3: Animal Welfare and Zootechnics	Art. 9: Animal welfare Art. 10: Zootechnics
Ch 4: Veterinary Services	Art. 11: Approval of activities relating to veterinary services
Section THREE: Veterinary Health Products	
Ch. 1: Approval and placing on the market	Art. 12: Approval and production of veterinary health products and responsibilities of their owners Art. 13: Wholesale, retail sale and presentation of veterinary medicinal products Art. 14: Application of veterinary medicinal products
Section FOUR: Plant Health	
Ch. 1: Control of Harmful Organisms	Art. 15: Control of Harmful Organisms and relevant responsibilities Art. 16: Compensation for Plant Diseases and Pests Art. 17: Registration and Plant passport
Ch. 2: Plant Protection Products and Tools/Machinery	Art. 18: Approval and production of plant protection products and plant protection tools and machinery Art. 19: Wholesale and retail sale and presentation of plant protection products Art. 20: Application of plant protection products
Section FIVE: Food and Feed	
Ch. 1: Food and Feed Safety, Labelling and Traceability	Art. 21: Food and feed safety requirements Art. 22: Responsibilities Art. 23: Food Codex Art. 24: Labelling and traceability in food and feed, presentation and advertisement, protection of consumer rights
Ch. 2: Rapid Alert System, Emergencies, Crisis Management	Art. 25: Rapid alert system, emergencies, crisis management Art. 26: Risk analysis, informing the public in the event of risk, precautionary measures
Ch. 3: Water, Food Supplements, Food for Special Medical Purposes	Art. 27: Provisions on water Art. 28: Food supplements, dietary food for special medical purposes
Section SIX: Hygiene	
Ch. 1: Rules, Registration and	Art. 29: Hygiene rules, guidelines for good practice Art. 30: The registration and approval of establishments

Section / Chapter	Articles
Approval of Establishments	
Section SEVEN: Official Controls	
Ch. 1: Domestic Controls	Art. 31: Official controls, the right of objection and official certificates Art. 32: Live Animals and products identified as non-compliant as a result of official controls Art. 33: Laboratories
Ch. 2: Imports and Exports	Art. 34: Official controls in exports and imports, customs and border inspection posts
Ch. 3: Financing of Controls	Art. 35: The financing of official controls, veterinary and plant health services and expenses
Section EIGHT: Penal Provisions	
Ch. 1: Penalties and Sanctions	Art. 36: Penal provisions, the implementation of fines, collection of fines and objections Art. 37: Sanctions relating to Veterinary Health Products Art. 38: Sanctions relating to plant health Art. 39: Sanctions relating to Plant Protection Products Art. 40: Sanctions relating to food and feed Art. 41: Sanctions relating to hygiene and official controls Art. 42: Implementation, collection and objections to the fines
Section NINE: Miscellaneous Provisions	
Ch. 1:	Art. 43: Commissions and cooperation with relevant institutions Art. 44: Exceptional practices Art. 45: Competences
Ch. 2:	Art. 46 to 48: Amended, Repealed and Inapplicable Provisions

Source: Agra CEAS based on Law No. 5966

As already indicated, in addition to the main chapters and articles of Law No. 5996, there are further provisions setting out specific details, such as lists of permitted claims, food additives and labelling requirements. The relevant provisions contained in the Turkish legislation are examined for the key headings in the following sub-sections. The rules relating to labelling and claims are outlined in the following section.

Turkish legislation on food is prepared by MAF within the scope of Turkey's harmonisation to the EU and is based on Law No. 5966, although there are some differences compared to the EU legislation. The legislation typically includes a reference to the relevant EU law for compliance with EU legislation (where this is the case, it is included below).

Preliminary provisions and definitions

These are covered in part 1.1 of Law No. 5996. Article 3 includes a total of 84 key definitions used throughout the Law; this not only includes more general definitions such as food, food supplements, plants and pets; but also, definitions on specific points such as traceability and packaging (substances and materials that come into contact with food), residues and quarantine.

Food additives, processing aids, enzymes, vitamins/minerals

The currently applicable Regulation²² was revised in 2013 and has been amended four times in 2016, 2017, 2018, and 2019. The Regulation provides the list of permitted food additives (Annex II and Annex III), the conditions for their use in foods, and rules for their labelling. Overall, the provisions on food additives are quite detailed and were prepared in an effort to

²² Turkish Food Codex Regulation on Food Additives (Official Gazette No. 28693 of 30/06/2013): <https://resmigazete.gov.tr/eskiler/2013/06/20130630-4.htm>

harmonise with EU rules (Regulation (EC) No 1333/2008). Nonetheless, there are some discrepancies from EU rules, for example relating to the use of additives in traditional products.

In particular, the Regulation sets the food additive functional groups, names of food additives, defines the food categories, and lists maximum amounts and conditions of additives allowed in defined food categories, as well as exceptions and restrictions. It also lists food items in which food additives are not allowed to be used and lists certain food additives which are not allowed to be used for certain traditional foods, such as traditional Turkish cured meat products and beef/poultry specialities. The reason provided for this prohibition is to protect the traditional nature of these products and prevent unnecessary usage of additives (unless considered technically necessary).

The Regulation also specifies general conditions for the inclusion and use of food additives in the list. The National Food Codex Commission operating under DGFC is the authority that decides on the inclusion of additives to the list. The Regulation also covers processing aids, but flavourings and enzymes are outside of the scope.

Enzymes are covered by specific legislation²³, which again refers to EU law (Regulation (EC) No 1332/2008). It includes the list of permitted food enzymes, conditions of use in foods, and labelling rules.

Flavourings are also covered by specific legislation²⁴, which also refers to EU law (Regulation (EC) No 1334/2008).

Pesticide and veterinary medicine residues and other contaminants

The Ministry of Agriculture and Forestry (MAF) is the body responsible for assessing and approving pesticides before these are placed on the market and for preparing and enforcing the legislation regarding Maximum Residue Levels (MRLs) of pesticides. The relevant Regulation²⁵, as adopted in September 2021, covers foods of plant and animal origin to be used as fresh and to processed or composite products obtained from these products; it does not apply to infant formula/baby food (which is covered by specific legislation) and products for non-food use (e.g. plant propagation material). This Regulation refers to EU law (Regulation (EC) 396/2005). The Regulation has five Annexes:

- Annex 1: animal and plant origin foods covered by the legislation
- Annex 2: MRLs of pesticides authorised in Turkey
- Annex 3: MRLs applying to imported products and level of detection (LOD) for some pesticides
- Annex 4: pesticides no longer authorised for usage in Turkey
- Annex 5: list of pesticides that do not need MRL determination in imported products

²³ Turkish food codex on food enzymes (Official Gazette No. 29989 of 24/02/2017): <https://www.resmigazete.gov.tr/eskiler/2017/02/20170224-10.htm>

²⁴ Turkish food codex on flavourings and certain food ingredients with flavouring properties(Official Gazette No. 28157 of 29/12/2011): <https://www.resmigazete.gov.tr/eskiler/2011/12/20111229M3-2.htm>

²⁵ Turkish Food Codex Regulation on Maximum Residue Levels of Pesticides (Official Gazette No. 31611 of 27/09/2021): <https://www.resmigazete.gov.tr/eskiler/2021/09/20210927M1-1.htm>

In addition, for food of animal origin, there is legislation setting the MRLs of veterinary medicines. The current revised Regulation²⁶ dates from 2017 and was amended twice in 2019. The classification of pharmacological active substances of veterinary drugs that can be found in animal foods are provided in Annex 1 of this Regulation, differentiating between substances allowed and their maximum residue limits (Chapter 1) and substances prohibited at any level (Chapter 2). This Regulation also refers to EU law (Commission Regulation (EU) 37/2010 and Regulation (EC) No 470/2009).

Maximum levels of contaminants are laid down in a Regulation²⁷ dating from 2011 and amended once in 2012. It sets the maximum levels of certain contaminants (nitrates, mycotoxins, heavy metals, 3-monochloropropane-1,2-diol (3-MCPD), dioxins and dioxin-like PCBs, Polycyclic aromatic hydrocarbons and erucic acid) in food. Reference again is made to EU law (Commission Regulation (EC) No 1881/2006).

In case some pesticides, contaminants, or pharmacologically active substances are not contained in the Turkish Food Codex, the Regulations refer to the Codex Alimentarius or provisions contained in EU legislation. Given the maximum levels provided in the above legislation can be updated, it is recommended they be periodically consulted.

Irradiation, packaging etc.

There are additional provisions on irradiation, packaging etc., which are based on Law No. 5996. The Turkish food codex on materials and articles intended to come into contact with food refers to EU law (Regulation (EC) 1935/2004). The provisions on food irradiation set out the principles of food irradiation, re-irradiation, requirements and labelling of irradiated foods.

Food standards

Apart from the horizontal legislation which covers aspects common to all food (e.g., additives, contaminants, labelling, hygiene, official controls), there is vertical legislation applying to specific products including most of the products covered by this Handbook (meat and meat products, infant and follow-on formulas, pasta, olive oil, fruit juices, chocolate, frozen foods, beer, wine, spirits). This generally includes definitions of the foods and requirements for them. It is recommended that these rules be consulted²⁸ for the food of interest to confirm the existence of any definitions and requirements.

4.2.3 Labelling Requirements

All food Article 24 of Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed sets out general labelling requirements for food, including traceability, presentation, advertising and the protection of consumers' rights. On this basis, the Turkish Food Codex Regulation on Food Labelling and Information to Consumers²⁹ establishes the general principles and requirements

²⁶ Turkish Food Codex Regulation on Pharmacologically Active Substances and Their Classification Regarding Maximum Residue Limits in Foodstuffs of Animal Origin (Official Gazette No. 30000 of 07/03/2017): <https://www.resmigazete.gov.tr/eskiler/2017/03/20170307-4.htm>

²⁷ Turkish Food Codex Regulation on Contaminants (Official Gazette No. 28157 of 29/12/2011): <https://www.resmigazete.gov.tr/eskiler/2011/12/20111229M3-5.htm>

²⁸ A search for relevant vertical legislation (including periodic Communiqués) issued by MAF can be made here: <https://kms.kaysis.gov.tr/Home/Kurum/24308110>

²⁹ Latest Turkish Food Codex Regulation on Food Labelling and Information to Consumers published in Official Gazette No. 29960 of 26/01/2017: <https://www.resmigazete.gov.tr/eskiler/2017/01/20170126M1-6.htm>

The Ministry of Agriculture and Forestry (MAF) published a new Guide on this Regulation in April 2021; it is available in Turkish at: <https://kms.kaysis.gov.tr/Home/Goster/176969>. For example, the new guide defines food portion size and includes a portion size table for each kind of food; and, details changes made to various nutrition statements/labelling.

on food labelling. Again, overall, there is a strong resemblance to provisions laid down in EU law on food labelling³⁰. The Regulation applies to food business operators at all stages of the food chain and all food and drinks intended for the final consumer, including foods sold through the catering sector. According to the Regulation, food information should be accurate, clear, easy to understand, and should not be misleading the consumer in any of the following manners:

- as to the characteristics of the food, its nature, identity, properties, composition, quantity, durability, country of origin, method of production;
- by attributing to the food effects or properties which it does not possess;
- by stating that the food possesses special characteristics when in fact all similar foods possess such characteristics, by specifically emphasising the presence or absence of certain ingredients and/or nutrients;
- by implying - through the appearance, the description or pictorial representations - the presence of a particular food or an ingredient, while in reality a component naturally present or an ingredient normally used in that food has been substituted with a different component or a different ingredient;
- by claiming that the product can prevent, treat or cure human disease, or refer to such properties (except for derogations laid down in specific rules on foods for nutritional uses).

These rules apply also to advertising and the presentation of foods, including the packaging materials used and how products are displayed. Imported food may maintain its original package, but a permanent “sticker” label, in Turkish, must be attached to the package before it is placed on the market. Information provided through pictures, claims etc. on the original label of the product must comply with the rules set by the Regulation. Labelling requirements are enforced by provincial and district directorates and no exceptions are granted to the Turkish labelling rules.

The label on food packages for retail sale or catering must contain the information in Table 4-5 below (unless it is specifically exempted). This information is to be specified in words and numbers; in addition, it may be expressed through pictorial representations or symbols (optional). Additional mandatory information is required for certain foods or food groups; this is mainly in the form of warning statements (i.e., must be expressed using the exact words), as separately indicated for these foods in the table below.

³⁰ Regulation (EU) No 1169/2011 on the provision of food information to consumers (the ‘FIC Regulation’).

Table 4-5: Summary of compulsory labelling requirements

Requirement	Description / notes
ALL FOODS	
Name of the food	One of the following names should be used: the 'official' name of the food as determined within the scope of the Turkish Food Codex; if the 'official' name is not available, the 'usual' name which is that recognised by the consumers without the need for explanation; if the food does not have a 'usual' name, a 'descriptive' name can be used which should be clear enough to enable consumers to understand the true nature of the food and to distinguish it from other foods with which it may be confused. The name used in the country from where the food is imported is allowed to be used as the name of the food, but if impossible for the end consumer to understand the true nature of the food, information identifying the food should be given near the name of the food (specific rules in Annex 15 of the Regulation).
Ingredients listing	Packaged foods must list all ingredients and compound ingredients (unless specifically exempted). An ingredient means any substance used in food, including food additives, flavours and enzymes. A compound ingredient means an ingredient made up of two or more ingredients. These must be declared in descending order of weight. Ingredients must be declared using the common name or a name which describes the true nature of the ingredient.
Ingredient quantities	The quantity of certain ingredients or groups of ingredients must be indicated on the label: these are typically the main ingredient/s that make up more than 50% of the food or are generally associated with the name of the food by the consumer or are highlighted on the product label with words, pictures or graphics.
Allergies or intolerances	Certain substances causing allergies or intolerances, notably ingredients and processing aids used in the production or preparation of food as listed in Annex 1 of the Regulation, must be indicated on the label in a form (font, style or background colour) that clearly distinguishes this information from the rest of the list of ingredients. If the food does not have a list of ingredients (e.g. single ingredient foods) the substance that causes allergies or intolerances is indicated by using the word " <i>contains</i> " following the name of the substance as indicated in Annex 1.
Weight or measure	The net quantity of the packaged food must be displayed in metric terms. Specific rules and exceptions are laid down in Annex 6.
Date marking / Date of freezing	The use by ('expiry') date and best before ('recommended consumption') date must be indicated on packaged food. The former must be displayed for perishable foods that must be consumed before a certain date for health and safety reasons. The date of freezing must be indicated for frozen food. Detailed rules on when it is appropriate to use each of these dates are laid down in Annex 7.
Special storage conditions and/or conditions of use	These are required if special storage conditions are required to ensure the food will keep till its date marking; if specific use or storage is needed for health reasons (and/or time limit for consumption).

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Requirement	Description / notes
	Instructions for use of the food must also be provided where it would be difficult to make appropriate use of the food in the absence of such instructions.
Trade name, address, and facility registration number	For imported food, the food business operator is indicated as the "importer". The business registration number of the food business where the food is produced or packaged should also be indicated in accordance with the Turkish Regulation on Registration and Approval Procedures of Food Businesses.
Country of origin	All food must be accompanied by country of origin information. Where the country of origin of the food is different to the country of origin of its main component, one of the following rules applies where the information provided would mislead the consumer: a) the country of origin of the main component of the food is also indicated; or, b) it is stated that the country of origin of the main component of the food is different from the country of origin of the food.
Nutrition information	<p>This is required for prepacked foods (with certain exceptions), and must set out the following:</p> <ul style="list-style-type: none"> • Energy value (calculation details are provided in Annex 10 of the Regulation) • Amount of fat, saturated fat, carbohydrates, sugars, protein and salt • Salt: in cases where the salt content is only caused by the sodium found in the nature of the food, a statement regarding this situation may be placed very close to the nutrition declaration • Amount of trans fats (for food containing more than 2% trans fat) <p>A prescribed format and calculations must be used (Annex 11). All information is to be provided per 100 g or 100 mL of the food; in addition, it can be provided as a percentage of the reference intake value. In this case, the expression 'Reference intake (RA) value of an average adult (8400 kJ / 2000 kcal)' should be included very close to this information (in the same field of view). In addition, nutrition information can be provided per portion/unit, provided that the portion/unit size and the number of portions/units contained in the package are indicated on the label in a way that can be easily recognised by the consumer.</p> <p>As an exception to the above mandatory rules, for beverages containing more than 1.2% alcohol by volume and for foods in mass catering, the content of the declaration may be limited only to the energy value.</p> <p>The content of the above mandatory nutrition declaration can be supported by the amount of one or more of the following nutrients (per 100 g or 100 mL of the food, and – as an option - the percentage of the reference intake value and/or per portion):</p> <ul style="list-style-type: none"> ○ Monounsaturated fat ○ Polyunsaturated fat ○ Fibre ○ Polyols or sugar alcohol ○ Starch

Requirement	Description / notes
	<ul style="list-style-type: none"> ○ Vitamins and minerals included in Annex 9 Section 1, which are defined in this Annex in food in significant amounts. In this case, the information is not only to be provided per 100 g or 100 mL of the food but also as a percentage of the reference intake value. <p>All nutrition information is to be provided in the same field of view, using a clear format, and according to the display format and order in Annex 11.</p> <p>There are additional requirements if a specific nutrition claim or health claim is used.</p>
Lot identification	Lot sign or number that enables the identification of the lot to which the food belongs.
SPECIFIC FOODS / FOOD GROUPS	
Alcoholic beverages	Actual alcoholic strength by volume must be indicated for beverages containing more than 1.2% alcohol by volume.
Food containing alcohol	The statement "...contains alcohol" must be indicated on the food label if ethyl alcohol is used as an ingredient in its manufacture or preparation, irrespective of the amount of alcohol.
Food containing pig meat/ingredients	The statement " <i>contains ... obtained from pigs</i> " must be indicated on the food label if the product contains any product/ingredient obtained from pigs, irrespective of the amount of that product/ingredient.
Food packaged in a protective atmosphere	The statement " <i>packaged in a protective atmosphere</i> " must be indicated (packaging gases must be authorised in line with the Turkish Regulation on Food Additives).
Irradiated food	For packaged food, the words ' <i>irradiated</i> ' or ' <i>treated with ionizing radiation</i> ' must be indicated on the label, in addition to the green international food irradiation symbol. For food sold in bulk, these words must be indicated on the package label or the products' commercial documents. Food containing irradiated ingredients must indicate these words next to the ingredient. Detailed rules on the labelling of irradiated foods are laid down in Chapter Four of the Regulation on irradiated food (see the previous section).
Food containing sweeteners	Specific statements must be indicated, depending on the type of sweeteners and whether the food contains both sweeteners and sugars, or just sweeteners or - e.g. " <i>with sweetener(s)</i> " or " <i>contain sweetener(s)</i> " (sweeteners must be authorised in line with the Turkish Regulation on Food Additives). There are specific statements for foods containing aspartame, phenylalanine and more than 10% polyols (" <i>excessive consumption may produce laxative effects</i> ").
Confectionery / beverages	The statement " <i>contains liquorice</i> " must be indicated for confectionery or beverages containing glycyrrhizinic acid or its ammonium salt or liquorice (<i>Glycyrrhiza glabra</i>) at a concentration of ≥ 100 mg/kg or 10 mg/l, unless the term 'liquorice' is already included in the list of ingredients or the name of the food. Confectionery containing such substance(s) at ≥ 4 g/kg, beverages containing them at ≥ 50 mg/l, and alcoholic beverages ($>1,2$ % alcohol by volume)

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Requirement	Description / notes
	containing them at ≥ 300 mg/l, must indicate the statement “ <i>contains liquorice – people suffering from hypertension should avoid excessive consumption</i> ” immediately after the list of ingredients.
Beverages/ food with caffeine	Beverages with caffeine content > 150 mg/l must indicate the statement “ <i>High caffeine content. Not recommended for children or pregnant or breast-feeding women</i> ”; beverages based on coffee, tea or their extracts where the name of the food includes the term ‘coffee’ or ‘tea’ are exempt. The statement must be in the same field of vision as the name of the beverage, followed by a reference in brackets and the caffeine content expressed in mg per 100 ml. On foods where caffeine is added, the statement “ <i>Contains caffeine. Not recommended for children or pregnant or breast-feeding women</i> ” should appear in a similar manner to that indicated for beverages (caffeine content expressed in mg per 100 g / 100 ml).
Food with added phytosterols	The statement “ <i>with added plant sterols</i> ” or “ <i>with added plant stanols</i> ” should be indicated on foods or food ingredients to which such substances have been added, and their amount must be indicated (in % or g per 100 g or 100 ml). Additional statements must be included on the label.
Energy drinks	In line with vertical regulation on energy drinks introduced in 2017, a warning must be included on the label of energy drinks stating: “ <i>Do not use this product with alcohol or by mixing with alcohol. Consumption of this product is not advised for children, people below 18 years old, elderly people, diabetics, people who have hypertension, pregnant or breastfeeding women, people who have a metabolic disorder, kidney problem and those who are susceptible to caffeine. It is not a sports beverage; it should not be consumed before, during and after physical activity. It is advised not to consume more than 500 ml/day.</i> ”
Food additives	Specific labelling rules for food additives are indicated in Chapter Four of the Regulation on Food Additives, including rules for food additives sold to consumers (rather than used in processing).
Genetic modification	Specific labelling rules for food and feed containing/consisting of, or deriving from genetically engineered products, are set in Article 18 of the Regulation on Genetically Modified Organisms and its Products ³¹ . To date, there are no genetically engineered events approved for food use in Turkey, but there are some approved for feed ³² .

Source: Agra CEAS based on Turkish Food Codex Regulation on Food Labelling and Information to Consumers.

³¹ Official Gazette 27671 of 13/08/2010: <https://www.resmigazete.gov.tr/eskiler/2010/08/20100813-4.htm>. This Regulation was amended in 2012 and 2014.

³² As of June 2021, there are 23 corn events and 13 soybean events approved for feed use. Imported feed into Turkey must be labelled “*contains GMO*” if it contains approved genetically engineered content over 0.9 % within a given shipment.

In addition to these overarching compulsory labelling requirements, certain foods - including infant and follow-on formulas, beer, wines, aromatised wines, spirit drinks, food supplements, energy drinks, non-alcoholic beverages, sugar, honey, coffee, meat and meat products, fruit juices, and dairy products - have additional specific labelling requirements laid down in vertical (product specific) legislation. These requirements are available on MAF's website: <https://kms.kaysis.gov.tr/Home/Kurum/24308110>.

Packaging requirements

Specific provisions on packaging and food contact materials are laid down in a specific Regulation dating from 2011, which was revised in 2018³³. Overall, here too, there is a strong resemblance to provisions laid down in EU law on food packaging³⁴. This framework Regulation covers all types of material and articles, including so-called active and intelligent food contact materials, as well as substances/materials in contact with water offered for individual consumption. The Regulation covers substances and materials that are used as coating or preservation, such as materials that preserve cheese, prepared meat products or fruits, that form a part of food and can be consumed with food. Recycled plastics cannot be used in the production of food contact materials and materials. Specific provisions are laid down on labelling requirements for substances and materials within the scope of this Regulation, and a declaration of conformity to the provisions of the Regulation is also required. There are further specific communiques for materials and articles made of regenerated cellulose film, ceramic articles, and plastic materials and articles which set the specific rules for these materials and articles.

Food manufacturers are ultimately responsible for ensuring that the products used for packaging are safe; that the food, after contact with the material, complies with the requirements of the Regulation; and, sanctions are foreseen in case of non-compliance, on the basis of Law No. 5996.

Nutrition and Health Claims

Nutrition and health claims made on the label, presentation, or advertising of foods placed on the market are covered by a specific Regulation³⁵. The Regulation refers to EU law (Regulation (EC) 1924/2006). According to the Regulation, the use of nutrition and health claims should not:

- a. be ambiguous, false or misleading;
- b. cause doubt about the safety and/or the nutritional adequacy of other foods;
- c. encourage excessive consumption of the food bearing the claim;
- d. state, suggest or imply that a balanced and varied diet cannot provide appropriate quantities of nutrients in general;
- e. cause concern to the consumer by referring to changes in bodily functions, either textually or through pictorial, graphic or symbolic representations.

The Regulation also provides details of allowed health and nutrition claims and their requirements. It specifies the requirements to be met for foods and beverages to make

³³ Turkish Food Codex Regulation on Materials and Articles Intended to Come into Contact with Food (Official Gazette 30382 of 05/04/2018: <https://www.resmigazete.gov.tr/eskiler/2010/08/20100813-4.htm>). This Regulation was amended in 2019.

³⁴ Regulation (EC) No 1935/2004 of the European Parliament and of the Council of 27 October 2004 on materials and articles intended to come into contact with food.

³⁵ Turkish Food Codex Regulation on Nutrition and Health Claims (Official Gazette No. 29960 of 26/01/2017): <https://resmigazete.gov.tr/eskiler/2017/01/20170126M1-5.htm>

nutrition claims such as, e.g., “low calorie/energy”, “reduced calorie/energy”, “sugar free”. For health claims to be made a condition is that foods comply with certain nutritional profiles on sodium, sugar and saturated fat content; health declarations are not allowed in beverages containing more than 1.2% alcohol³⁶. It is important to note that the Regulation envisages substantiation with scientific evidence of claims made, which are subject to evaluation and approval by MAF.

New legislation adopted in December 2018 (Law No. 7151), which amended various provisions on health issues, introduced new rules on health claims. Article 31 of this Law abolished the rules on health claims laid down in the Food Codex Regulation on Nutritional and Health Claims and authorised the Medicines and Medical Devices Agency (MMDA) of the Ministry of Health (MH) to lay down new rules related *inter alia* to the assessment, approval and conditions related to health claims for food and food supplements. Products already marketed with the health claims authorised by MAF before December 2018³⁷ can continue to be marketed until new rules and conditions are set by MMDA, but new health claims will not be approved until new rules are set. To date, new rules and conditions about health claims have not yet been set.

Nutritional labelling is mandatory when a nutritional claim and/or health claim is made (except in the case of food supplements). The information to be provided includes energy value, fats, carbohydrates, proteins (where required), fibre, salt/sodium, vitamins and minerals. For vitamins and minerals to be displayed on a label, the amount of vitamin/mineral that should be met is 15% of the reference intake values in 100 g or 100 ml food; for beverages, this amount is set at 7.5% in 100 ml.

Voluntary Front-of-Pack nutrition scoring label

Turkey has been examining in recent years the introduction of a voluntary front of pack nutrition scoring label, similar to a traffic light system. In January 2019, MAF notified the WTO of a draft amendment to the Turkish Food Codex Regulation on Food Labelling and Information to Consumers, following which a period of public consultation opened up to February 2019. The proposed draft introduced provisions on the use of colour-coding (red, yellow, green) on all packaged foods, based on specified nutrient thresholds for salt, saturated fat, oil, and sugar. To date, the related amendments to the Regulation have not been finalised.

Rules on presentation and advertising

Rules on presentation and advertising are laid down in the Regulation on Commercial Advertising and Unfair Commercial Practices³⁸. This Regulation was first adopted in 2015 and has subsequently been amended several times with regards to specific provisions. The rules are established according to the Law on Consumer Protection (Law No. 6502) aimed at protecting consumer interests; this Law also establishes the fines to be applied, and the Board of Advertising is authorised to impose these fines.

It is noted that alcohol advertising is completely banned in Turkey according to the applicable law including advertising on TV/radio and at the point of sales (Law No. 4250 on Alcohol and Alcoholic Beverages; and Regulation on the Procedures and Principles of the Sale and Marketing of Tobacco Products and Alcoholic Beverages). Furthermore,

³⁶ The full list of permitted nutrition claims and their requirements is provided in the Regulation on Nutrition and Health Claims.

³⁷ Until new rules and conditions are set by MMDA, the full list of allowed health claims and their requirements, as well as the list of claims that are prohibited, is that provided in the Regulation on Nutrition and Health Claims.

³⁸ (Official Gazette No. 29232 of 28/12/2018).

alcoholic beverage manufacturers, importers and distributors cannot support or sponsor any activity by using the brand or logo of their alcohol products.

More information on advertising regulations in Turkey can be found in section 6.2. The legislation needs to be monitored as there are frequent changes and amendments. Some of the least developments in the legislation are highlighted in the following box:

Latest rules on presentation and advertising

According to the amended Regulation on Commercial Advertising and Unfair Commercial Practices, as adopted in December 2018, radio and television programs/channels aimed at children are banned from advertising at the beginning, during, or at the end of shows of any foods or beverages that fall under the Ministry of Health's "red list". This list includes a wide range of products targeted to children, such as chips, chocolate, sweets, wafers, energy bars, sweet sauces, biscuits/cookies, desserts, cakes, frozen ice pop snacks, fruit juices, energy drinks, and soft drinks.

The Ministry of Trade published in February 2021 the latest amendment to the Regulation. This amendment has added to the Regulation's Annex on "Example Practices Accepted as Unfair Commercial Practice" new commercial practices relating to packaging that can potentially be considered misleading. For example, according to these latest rules, offering the product for sale by reducing the weight without increasing the sales price to the final consumer, but increasing the unit price, may be deemed contrary to the Regulation.

As the regulatory activity in this area continues to evolve, companies should carefully examine the amendments to the Regulation and take the necessary steps to carry out their commercial advertising activities in accordance with the provisions of the legislation.

More information and updates on the rules on advertising can be found at the website of the Self-Regulatory Board on Advertising (*Reklam Özdenetim Kurulu – RÖK*):

<https://www.rok.org.tr/en/reklam-mevzuati/>.

4.2.4 Protection of intellectual property rights, including geographical Indications (GIs)

The Turkish Patent and Trademark Office (TURKPATENT) is the authority responsible for intellectual property in Turkey, including patents, industrial designs, geographical indications and trademarks. The key relevant legislation is the Law on Industrial Property No. 6769³⁹, which came into force in January 2016 and repealed earlier legislation; with detailed rules laid down in a Regulation adopted in 2017⁴⁰, which has been amended several times.

According to EUIPO-OECD studies⁴¹, Turkey is one of the top three sources of counterfeit

³⁹ Law on Industrial Property No. 6769 (Official Gazette 29944 of 10/01/2017): <https://www.resmigazete.gov.tr/eskiler/2017/01/20170110-9.htm>.

⁴⁰ Regulation on implementation of industrial property law (Official Gazette 30047 of 24/04/2017): <https://www.resmigazete.gov.tr/eskiler/2017/04/20170424-5.htm>

⁴¹ EUIPO-OECD (2018): Why Do Countries Export Fakes?; EUIPO-OECD (2017): Mapping the Real Routes of Trade in Fake Goods.

and pirated goods traded worldwide, and food is amongst the key product categories covered by Turkish counterfeit exports. Law No. 6769 introduced significant improvements to the IPR system in Turkey, including the reinforcement of trademark protection and new criminal provisions on trademark infringements, such as sanctions for importing and exporting counterfeit goods and enhanced power for authorities to destroy counterfeit goods. The Law has also increased the level of alignment of certain provisions on GIs with the relevant EU legislation. An Intellectual Property Academy was also set up by legislation adopted in November 2019, which is responsible for organising various meetings and training on IP issues, for internal coordination and cooperation activities, as well as for providing consultancy services for public and private sector employees in the field of IP.

Despite these significant improvements, Turkey remains on priority list No 2 in terms of IPR protection issues in third countries which are being monitored by the European Commission. The latest Commission Report on this subject (2021)⁴² identified serious systemic problems in Turkey in the area of IP protection and enforcement, causing significant harm to EU businesses; furthermore, compared to previous reports, Turkey has made only limited progress in addressing these concerns. Some of the persisting issues highlighted by the Report include: Turkey remains an important regional transit hub for trade in counterfeit goods; actions taken by customs authorities are not applied as frequently as necessary (despite the increased number of seizures by the police and the customs authorities since 2018), while sanctions and penalties imposed for commercial-scale IP infringements are too low to have a deterrent effect; EU stakeholders have reported Turkey (amongst other countries) for deficiencies in their plant variety rights' regime; IP rights cannot be used to stop the further distribution or resale of counterfeit goods, as Turkey has introduced an international exhaustion regime that is different than the EU regime despite the customs union⁴³. To address the various issues of insufficient or poor IP protection, there is continuous dialogue and technical cooperation between Commission services and Turkish authorities, which aims to improve the understanding of the trading partners on these issues.

Trademark protection lasts for 10 years. This is renewable six months before expiry or up to 6 months after (for an extra fee and subject to conditions). The registering of a trademark is a process; a fee-based pre-application service exists, which aims to perform a quick assessment of whether a trademark application is likely to encounter any problems during public filing. The Turkish Patent and Trademark Institute has continued to expand the development of online applications and call centre services, especially with regard to trademarks, and EU stakeholders report that the enforcement of well-known trademarks has become faster and more effective (European Commission, 2021).

Many organisations are now applying for GI protection of food products in Turkey, and the vast majority of protected GIs are Turkish products. To date, six EU GIs have been protected as follows: Grana Padano, Prosciutto Di Parma, Parmigiano Reggiano, Champagne, Scotch Whisky, and Cognac. Pending EU GI applications in the registration process are for Douro wine and Gorgonzola cheese. GI applications and registered products are published in the Turkish Patent and Trademark Office (TURKPATENT) Bulletin.

⁴² European Commission (2021): Report on the protection and enforcement of intellectual property rights in third countries. Staff Working Document SWD(2021) 97 final. Brussels, 27.4.2021. https://trade.ec.europa.eu/doclib/docs/2021/april/tradoc_159553.pdf

⁴³ Since Turkey is in a customs union with the EU, the application of a different exhaustion regime than that of the EU makes it difficult for right holders to control the exploitation of goods put on the market.

Further information on trademarks and GIs in Turkey

Further information on the process for registering GIs and trademarks (including the different options, forms and fees – as well as more detailed guides on trademarks and patents) can be found at the following link:

<https://www.turkpatent.gov.tr/TURKPATENT/>

The application preparation, submission and registration procedures for Geographical Indications (GIs) and Traditional Product names are explained in a guide published in 2020. The guide is available at:

<https://www.turkpatent.gov.tr/TURKPATENT/resources/temp/68EA9618-BA4A-49C8-A1B5-0DC9A5BCDF36.pdf>

Searching for Geographical Indications (GIs) in Turkey

Geographical Indications registered in Turkey can be searched online through the following portal: <https://ci.turkpatent.gov.tr/>

Searching for trademarks in Turkey

https://online.turkpatent.gov.tr/trademark-search/pub/trademark_search?lang=tr

4.2.5 Relevant authorities for IPR and GI protection and further contacts

Turkish Patent and Trademark Office (TURKPATENT)

Hippodrome Caddesi No:13 (06560) Yenimahalle/ANKARA

 +90 312 303 1 303

 contact@turkpatent.gov.tr

 <https://www.turkpatent.gov.tr/TURKPATENT>

It is possible to subscribe to the Monthly Newsletter of TURKPATENT:

<https://www.turkpatent.gov.tr/TURKPATENT/bulletinsignup/getAddView>

4.3 International trade

4.3.1 Turkey and foreign trade

One of the largest assets of the Turkish economy has been the country's key geographical location between Europe and Asia which has allowed it to become a key transit hub between these regional markets. Turkey has traditionally served this transit hub role in global trade, which continues to be a feature not only of the country's economy but also of its culture. Turkey's position as a facilitator of trade between east and west will continue to boost foreign investment and economic growth in the economy going forward which further helps to explain the government's open approach to international trade, as outlined in more detail below.

4.3.2 Key trade agreements, present, and future

Turkey has a total of 22 free trade agreements (FTAs) currently in place, including with many of its neighbouring countries and the wider regional markets in Asia and North Africa (Table 4-6). Turkey is also in the process of ratifying three additional FTAs with Lebanon, Qatar and Sudan, and of negotiating FTAs with several other countries (list provided below). Turkey’s FTAs operate under the legal framework of the Turkey-EU customs union.

Table 4-6: Chronological list of Turkish trade/economic agreements

Partners	Type of agreement	Entry into force
European Free Trade Area (EFTA)	Free Trade agreement	1992 (rev. 2021)
European Union	Customs Union	1995
Israel	Free Trade Agreement	1997
North Macedonia	Free Trade Agreement	2000
Bosnia-Herzegovina	Free Trade Agreement	2003 (rev. 2021)
Morocco	Free Trade Agreement	2004
Tunisia	Free Trade Agreement	2005
Egypt	Free Trade Agreement	2007
Albania	Free Trade Agreement	2008
Georgia	Free Trade Agreement	2008
Montenegro	Free Trade Agreement	2010
Serbia	Free Trade Agreement	2010 (rev. 2019)
Chile	Free Trade Agreement	2011
Mauritius	Free Trade Agreement	2013
South Korea	Free Trade Agreement	2013
Malaysia	Free Trade Agreement	2015
Moldova	Free Trade Agreement	2016
Faroe Islands	Free Trade Agreement	2017
Singapore	Free Trade Agreement	2017
Venezuela	Free Trade Agreement	2020
United Kingdom	Free Trade Agreement	2021

Source: Agra CEAS based on various

Turkey in recent years has taken a more proactive role in seeking FTAs and these agreements have increasingly been viewed as a way to boost economic growth and leverage its position as a key transit hub between European and Asian markets. Potential future agreements include:

- **Turkey -Qatar FTA** (*under ratification*)
- **Turkey-Sudan FTA** (*under ratification*)
- **Turkey- Lebanon FTA** (*under ratification*)
- **Turkey- Azerbaijan FTA**
- **Turkey-Colombia FTA**
- **Turkey – Democratic Republic of the Congo FTA**
- **Turkey- Djibouti FTA**

- **Turkey- Ecuador FTA**
- **Turkey- Ghana FTA**
- **Turkey-Indonesia FTA**
- **Turkey-Japan FTA**
- **Turkey-Mexico FTA**
- **Turkey-Pakistan FTA**
- **Turkey- Peru FTA**
- **Turkey-Thailand FTA**
- **Turkey-Ukraine FTA**
- **Turkey-USA FTA** (*On-hold since 2019*)

Turkey is also a member of the organisation of Islamic cooperation and the Organization of Turkic States (former Turkic council) which have advocated for tighter trade relations between their member countries going into the future.

4.3.3 EU-Turkey Customs Union

The EU-Turkey Customs Union is an agreement between the EU and Turkey to establish a customs union and remove custom restrictions. The agreement has been in place since 1995. It is noted that while the agreement covers all industrial goods including processed agricultural products, restrictions on agricultural goods remain and are explained below. As Turkey is in a customs union with the EU, it has to adjust its tariffs and duties to match those of the EU. However, the free trade agreements signed by the EU do not extend to Turkey, so the EU's FTA partners can export to Turkey tariff-free while maintaining tariffs on Turkish goods unless they also conclude a separate FTA with Turkey. Turkey has been a long-standing candidate member of the EU, but since June 2018 Turkey's accession negotiations have effectively come to a standstill.

It is recommended that the website of DG TRADE be periodically checked for the latest update on the current situation surrounding the EU-Turkey customs union: [Turkey - Trade - European Commission \(europa.eu\)](https://ec.europa.eu/trade/policy/countries-and-regions/turkey/)

4.3.4 WTO disputes and other trade barriers

Turkey has four agri-food related trade disputes with the EU at present, in relation to certain bilateral concessions concerning the trade of agricultural and food products within the Customs Union. These disputes are:

- **Import restrictions of live bovine and beef:** Turkey has implemented a ban on imports of live bovine and beef meat since 1998 in relation to concerns surrounding outbreaks of BSE (Bovine Spongiform Encephalopathy). This remains a major obstacle in EU-Turkey agricultural trade relations. Thus, effectively Turkey is yet to fully implement its obligations under the EU-Turkey trade agreement for

agricultural products, which require Turkey to open quotas for beef and live animals and to ensure the proper and transparent management of import quotas⁴⁴.

- **Market access problems on alcoholic beverages:** Turkish customs authorities are reported to be carrying out excessive sampling controls whereby at least two bottles of imported spirits are taken away for analysis. This has been described as a key barrier as EU safety standards should ensure that such checks by Turkish customs authorities are not necessary.
- **Import regime regarding the agricultural component of sweetcorn:** In 2016 Turkey increased the agricultural component (EA) applied to imports of sweetcorn products from the EU from EUR 2.91 per 100kg to EUR 23.32 per 100kg. According to the EU, this increase is in contradiction to the customs union, but Turkey argues it has the right to do so. This remains an issue due to the perspective interpretations of the customs union agreement.
- **New labelling requirements:** A new labelling requirement was introduced by Turkey in 2013, to tackle counterfeiting, by requiring that the label displaying the agri-food product in question is genuine. This label is required for specific products, including food supplements, honey, energy drinks, vegetable oil and baby food. Nonetheless, this requirement was not implemented yet, as the authorities in Turkey keep postponing its entry into force.

**Further information, as well as an up to date list of trade barriers,
can be found here:**

[Access2Markets Barriers results page \(europa.eu\)](#)

4.3.5 Summary of key trade barriers

Despite having a Customs Union with the EU, it can be observed that some trade barriers remain in place concerning the trade of certain agricultural and food products from the EU to Turkey. The ban on the importation of live bovine and beef meat stands as one of the most important barriers to trade between the EU and Turkey. Also, Turkish checks of alcoholic beverages entering the country and other restrictions on alcohol advertising in Turkey make it difficult for producers of alcoholic beverages to export to Turkey.

Despite these barriers there remains progress overall in EU-Turkey trade relations, especially considering that Turkey is a candidate country to join the EU, which has required significant efforts in aligning its food safety standards to those of the EU. It is nonetheless noted that since June 2018 Turkey's EU accession negotiations have effectively come to a standstill.

⁴⁴ Latest European Commission Report on Turkey, SWD(2021) 290 final/2, 19 October 2021.

4.4 Operating in the Turkish food and beverage market

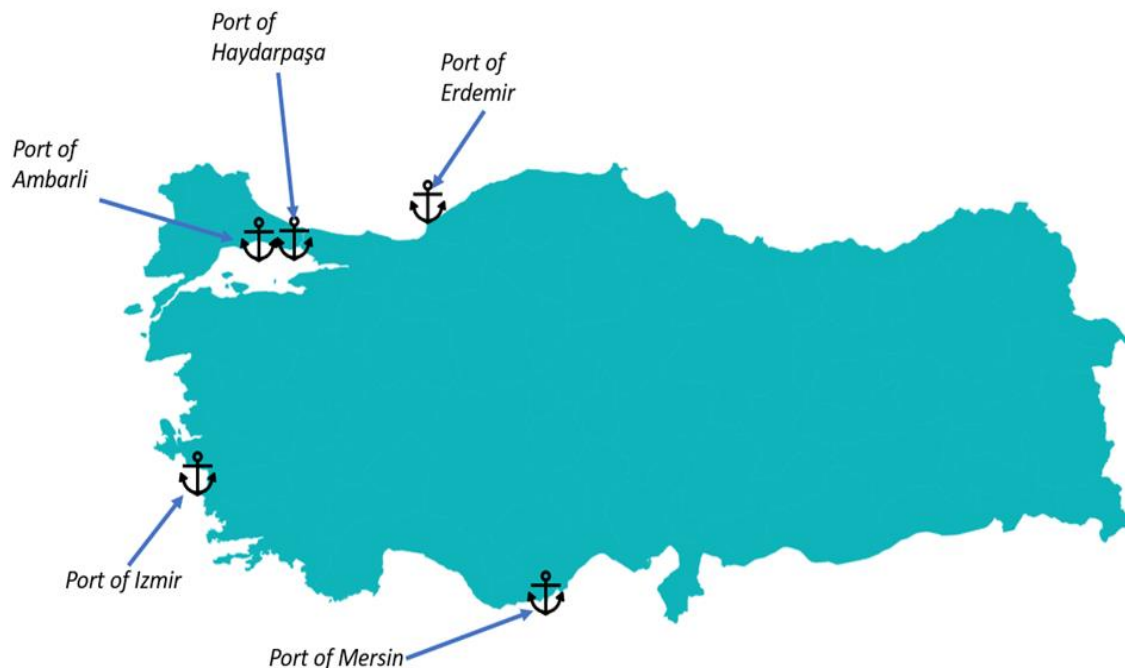
4.4.1 Logistical services and transportation infrastructure

Due to Turkey being a country that acts as a transit hub for the movement of people and goods travelling between Europe and Asia the country has invested in the wide-scale development of its infrastructure system in recent years. The development of several new ports, airports and an ever-expanding motorway system has been welcomed as key indicators that the economy of the country is growing and will further solidify Turkey's status as a transit hub between Europe and Asia.

Shipping

Turkey has a significant presence within international shipping as the country lies on the natural border of Europe and Asia as well as its position as the gatekeeper of the Mediterranean Sea for countries wishing to enter from the Black Sea region. The average handling of cargo at the port of Haydarpaşa is roughly 60 million MT which makes it the largest port within the Istanbul city region. The port of Mersin located along the southern coast of Turkey handles on average 2.2 to 2.5 million TEUs of cargo followed by the port of Izmir with 1 million TEUs of cargo, Ambarli which handles 950 000 TEUs of cargo and finally the port of Erdemir which handles 140 000 TEUs of cargo on average.⁴⁵ The ports of greater interest to European companies are illustrated in Figure 4-1.

Figure 4-1: Major Ports in Turkey



Source: Agra CEAS based on various

⁴⁵ 6 major ports of Turkey, Marine insight, available at: <https://www.marineinsight.com/know-more/6-major-ports-in-turkey/>

Airfreight

Turkish airports are within five hours of major markets in Europe, Asia and Africa which positions them as a key transit hub for the movement of both people and cargo. The Istanbul Atatürk airport recently closed for passenger traffic and now acts principally as a cargo airport for the city and region surrounding Istanbul. Istanbul Sabiha Gökçen Airport, Ankara Esenboğa Airport, İzmir Adnan Menderes Airport and Antalya Airport are also airports of major importance for the movement of cargo that goes through and into Turkey.

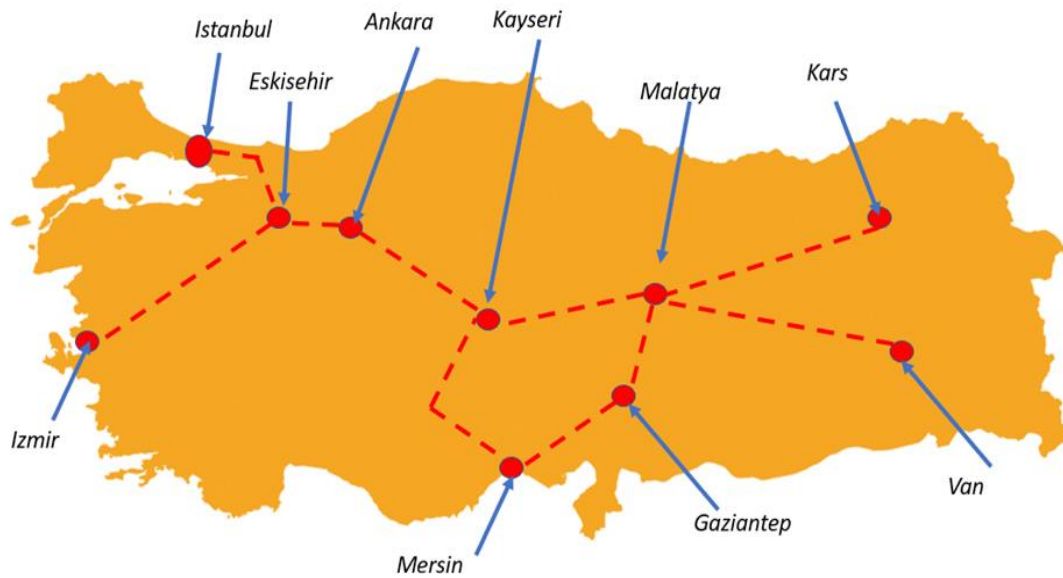
Figure 4-2: Major International Cargo Airports in Turkey



Source: Agra CEAS based on various

Rail freight

Rail freight is growing in importance in Turkey as the country has invested in a thorough expansion and modernisation of the network in recent years. The movement of rail freight goods from Europe to Asia has been highlighted as a key priority in recent years, to the benefit of Turkish rail infrastructure which often acts as a facilitator due to the geographic location of Turkey. Turkey's rail infrastructure is connected to most of its neighbours, including the EU Member States of Bulgaria and Greece.

Figure 4-3: Major rail connections in Turkey

Source: Agra CEAS based on various

Road Freight

Road freight like rail is also likely to benefit from an increase in investment and the position of Turkey as a key transit hub for the movement of goods between Europe and Asia. Currently, the Turkish motorway system (known as the Otoyol in Turkey) reaches a total length of 3 253 KM, with the government setting a target of 9 312 KM by the year 2035. The current system connects the major cities of Istanbul, Izmir and Ankara and most of the expansion will take place towards the interior and east of the country. Currently, Turkey has the largest truck fleet in Europe with an estimated 90% of domestic freight volume being handled by trucking and road transport.⁴⁶

Waterway freight

Water freight represents a small amount of freight movement in Turkey. Despite being located within the strategically important Bosphorus straight, most major cargo movements in this area will be destined for external markets and will be transiting through Turkey. The largest rivers in Turkey, Euphrates and Tigris, both flow through Iraq into the Persian Gulf, which means their use as a means to transport freight within Turkey is limited.

4.4.2 Distribution – retail channel overview

The retail sector of Turkey was estimated to be worth EUR 128 billion in 2020 despite the outbreak of Covid-19. Turkey has a younger population than other major EU markets, which encourages the usage of new channels of distribution such as e-commerce. There were an estimated 458 shopping centres located across the country by the end of 2019, most of which were located in the major urban centres of Istanbul, Izmir and Ankara. A further breakdown of the Turkish retail sector is provided below.

⁴⁶ Road transport report (January-July 2020), Tirport, available at: [https://tirport.com/blog/1140/road-transport-report-\(january-july-2020\)](https://tirport.com/blog/1140/road-transport-report-(january-july-2020))

Hypermarkets and Supermarkets

The hypermarket and supermarket model has been long established within the Turkish market, with the largest chains being Migros, Yildiz holdings and A101. One of the larger EU founded supermarket and hypermarket chains found in Turkey is Carrefour SA (French). Despite the continued popularity of traditional outlets for the purchasing of food and beverages, such as at bazaars and smaller outlets, it can be expected that hypermarkets and supermarkets will continue to grow their market share in upcoming years as the population continues to have increased access to these outlets.

Traditional outlets (Bazaars)

Bazaars and farmer markets are common throughout Turkey and are often the major outlet that distributes food and beverage products within a smaller urban centre. The Grand Bazaar in Istanbul is often referred to as the first-ever shopping mall in the world. The grand bazaar today remains a large tourist attraction and one of the primer outlets offering local food and beverages within Istanbul. It is far more likely for bazaars to offer domestically-produced goods as they often do not have the capacity to import foods from abroad for re-sale, especially within smaller towns and settlements throughout Turkey's interior and east.

Convenience Stores

Convenience stores in Turkey have yet to become as popular as hypermarkets and supermarkets and struggle to compete with comparably cheaper traditional outlets such as bazaars and food markets. Currently, the larger convenience store outlets include M-jet and Hakmar. The market share of convenience stores in the Turkish retail sector is around just 2%.⁴⁷

E-commerce

E-commerce has been growing in Turkey in recent years aided by a growing youth population and increased internet penetration throughout the country. Some of the larger e-commerce platforms concerning food and beverages in the country include Trendyol, Gitti Gidiyor and Hepsiburade. Turkey's eCommerce market is valued at around EUR 10.3 billion.⁴⁸

4.4.3 Intermediaries

As Turkey has a Customs Union with the EU, a number of trade harmonisation regulations are in place. Although imports of goods from the EU Member States are not subject to customs duties or levies, imports of agricultural goods and coal and steel products are not within the scope of the Customs Union and are subject to separate preferential agreements which do provide some, more limited, trade concessions. Despite being a large country by land size, most of the population and economic centres of relevance for

⁴⁷ Retail Foods: Turkey, USDA Gains Report. Available at:

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Ankara_Turkey_06-30-2020 .

⁴⁸ E-commerce DB: The eCommerce market in Turkey. Available at:

<https://ecommercedb.com/en/markets/tr/all#:~:text=Turkey%20is%20the%2021st%20largest,rate%20of%2029%25%20in%202020..>

EU food and beverage exporters are located along the western coast of the country in cities such as Istanbul, Izmir and Antalya.

Turkey is prone to changing legislation; although legislative changes tend to be mainly adaptations to align closer to EU rules, they can be difficult to keep track of. This further acts as a reason to have a distribution partner on the ground in Turkey who can keep EU exporters up to date with any changes in the market.

In terms of the intermediaries involved for EU exports to Turkey, these can be described as follows by end market:

- **Retail:** Imported foods are generally not found in local supermarkets or discount stores due to their usually high prices. Most of the bigger importers of foods in Turkey are large multinational supermarkets such as Carrefour, Migros and Metro which generally cater to higher-income consumers. Normally, a good way of exporting food to Turkey is through a local agent in the country. This agent is sometimes an importer, distributor, wholesaler, commission-based trader, or a combination. Local representatives will have experience in market development and contact information of potential buyers, such as organised grocery retailers. A good representative can guide exporters in the market, including import rules and regulations, which ports to utilise, local business practices, conducting market intelligence formally or informally, starting sales calls, etc. Turkey's import processes and regulations can be challenging to navigate, so local agents are vital.
- **Food processing:** Large food processors in Turkey have direct access to ingredient suppliers, and they are generally direct importers. On the other hand, small and medium-sized processors, as well as the service sector (i.e. hotels, restaurants, catering companies) receive their products/ingredients from importers who are also the wholesalers/distributors of these products. These importers prefer to make exclusive distributor agreements with foreign brands and act as the representatives or agents of such international companies in Turkey.⁴⁹
- **Food service:** The Turkish food service sector is large and highly fragmented; it can be divided into commercial and institutional food services. Commercial food service consists of full-service restaurants, self-service restaurants, cafes/bars, and street stalls/kiosks. Agents in Turkey are sometimes importers, distributors, wholesalers, commission-based traders, or a combination. Local representatives will have experience in market development and the contact information of potential buyers, such as the food processors that are likely to use imported products. Finding a local agent is a safe approach for entry into the market, especially for medium and small enterprises keen to start exporting to Turkey.

Specific guidelines are provided below per product sector:

- **Beer:** Companies usually work with one partner, a global distributor or a local distributor. Large distributors know which retailing/regional areas consume which type of products. Imported beer is most bought in supermarket chains and some niche independent specialist shops, so they have better deals with the supermarkets.
- **Chocolate and confectionery:** Multiple partners work well if the importer company communicates directly with the distributor. Geographically distributing to

⁴⁹ Turkey country profile, Export.gov , available at: <https://www.foodexport.org/export-insights/market-and-country-profiles/turkey-country-profile> .

big cities is one strategy, and another is selling via supermarket chains. Some brands can sell to just one supermarket chain, which may be widespread in the country. The distributor and the producer decide on several strategies. Supermarket chains are the best retail channel for imported chocolate because they attract higher-income consumers more than independent outlets.

- **Cheese:** Companies tend to adopt two business models: either directly export their packaged products to Turkey; or export their unpackaged bulk products without a brand name as a private label. The consensus is that the private label works better because it is cheaper. Price is an important barrier with packaged branded products as they are already more expensive, but bulk products are cheaper. Potential partners could be the importer companies that directly import the products.
- **Wine and spirits:** Importer companies should have a customs agency, a law firm, a distributor, and a marketing agency to import and sell. The best model for import requires a multi-partner model. The distributor is the most important partner because they know the market well and can help with pricing and marketing. However, producer companies are suggested to have an office in Turkey to manage all of these partnerships.

Some general tips for working with importers are:

- It is necessary to check that the importer is active in the geographical area being targeted, or that they have good partners/distributors who are active in the region. Many importers are only active in one part of the country due to the logistical challenges involved in carrying out business activities across Turkey.
- It is recommended to put down directly in writing the supply agreement that regulates the details of an exporter's relationship with an importer. Having detailed written documentation is particularly important in sales relationships with Turkish companies because the latter (as well as local authorities and state courts) tend to take a more formal approach, based on a literal interpretation of the written documentation, than is common among their Western European counterparts.
- Turkey still suffers from a certain degree of currency instability and rather high inflation, which can affect the ability of Turkish business partners to meet their payment obligations under supply agreements.
- Exporters are recommended to pay close attention to changes in government regulations and key political and cultural viewpoints within the country as they can affect the market for products – the most notable example of this in recent years being alcohol.
- Exporters should be aware of Turkey's religious adherence divide, with the west of the country being generally more socially liberal than the east. It is important to note that during the month of Ramadan many Turks fast, and the pace of business is slower.
- Turkish businesspeople prefer to work with people they know and trust on a personal level. In-person meetings and business lunches and dinners are important to build personal and business relationships; it is a good sign when invited. Try to accept when possible. These relations will affect business opportunities.

Finally, an important issue in doing business in Turkey in recent years has been the fluctuation of the country's domestic currency. The Lira has depreciated rapidly in recent years and while this does make doing business in the country via the Euro currency cheaper, it does have the knock-on effect of making it difficult for Turkish businesses and consumers to purchase and consume products from abroad. The currency situation is a persisting issue that must be acknowledged before the undertaking of a large scale business transaction in the country.

Business Contact Database:

A database of importers, wholesalers, retailers, and distributors can be found in section 8.5.

N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms, and no corresponding responsibility or liability is accepted by the authors.

4.4.4 Business environment

The business environment of Turkey follows many parallels to that of other European countries with the need to dress formally and the need to be punctual. Turkey has undergone many economic shifts in recent decades which has seen the growth of a new and varied service sector. Despite rapid economic growth in recent years, many regions particularly within the interior and eastern regions of the country have lower standards of infrastructure and economic development compared to the more prosperous regions surrounding Istanbul and Izmir. As the economic core of Turkey is located along its western coast from Istanbul to Izmir it is likely that most business meetings will take place in this region of the country.

4.4.5 Key operational considerations and challenges: summary

Key challenges to bear in mind when operating in the Turkish market are:

- English, French and German may be spoken by some Turks particularly in Istanbul and other tourist hotspots, despite this however make sure to bring an interpreter.
- The economic and population core is centred around the city of Istanbul which is home to 19% of the population and accounts for 31% of Turkey's GDP.
- It must be remembered that the country is majority Muslim, and this impacts both export opportunities and requirements.
- The local currency, the Turkish Lira, has been prone to large shifts in value in recent years which makes it a difficult currency to operate with in the long term.
- The standard of infrastructure and economic development is much higher in the west of the country compared to the east which needs to be respected.
- Turkish consumers are still likely to visit traditional grocery outlets such as a food market of the bazaar, and this is a more prominent pattern within the interior and eastern regions of the country.

4.4.6 Other relevant information

Methods of payment in Turkey

Card-based payments are currently the predominant method of payment in Turkey which has been accelerated following the outbreak of Covid-19 in the country. The official currency of the country is the Turkish Lira (TRY), and this will be accepted by all retail outlets in the country. It is possible to use Euros in tourist hotspots or some larger outlets in Istanbul, however, the use of the Lira is always easier. All major credit cards will work in Turkey and there will be plenty of exchange kiosks available at most points of entry in the country. Yapi Kredi is the most commonly used domestic Turkish credit card however should only be obtained if a prolonged trip in Turkey is planned. Remember to check the exchange rate of the Euro to the Lira which has a history of changing rapidly.

Travel from the EU to Turkey

All EU citizens except for Latvia and Cyprus can enter Turkey visa-free for 90 days. Latvian citizens can enter Turkey visa-free for 30 days while citizens from Cyprus have to apply for an eVisa which will then be valid for 90 days. Turkey has many points of entry for EU citizens from its border with Greece and Bulgaria in which the process of entering Turkey is relatively easy, provided a national ID is available to be presented to Turkish officials.

5 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information covers three main categories:

- **Consumption:** data on the evolution of consumption; consumer profiles and any notable consumer trends;
- **Offer:** domestic production; imports and exports; the competitive landscape; relevant specific customs procedures/import considerations;
- **Distribution:** main distribution channels used; domestic and imported offer.

Furthermore, each category contains a SWOT analysis and a key takeaways message.

Fresh meat	Fresh fruit and vegetables	Dairy
Wine	Spirits	Olive oil
Chocolate and confectionery	Beer	Pasta
Processed cereals	Processed fruit and vegetables	Pet food
Fruit juice	Baked goods	Live plants

5.1 Fresh meat

5.1.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Consumption of both fresh beef and poultry is expected to grow between 2021 and 2025. ▪ Poland has been the largest overall exporter of fresh meat to Turkey by quantity in recent years. ▪ Fresh meat is incorporated into many well-known Turkish dishes such as <i>Kofte</i> and <i>Islak burgers</i>. 	<ul style="list-style-type: none"> ▪ Consumption per capita of fresh meat in Turkey is lower than in most EU countries. ▪ Restrictions in place regarding EU exports of live bovine animals and beef to Turkey. ▪ Pork is essentially not consumed in Turkey due to adherence of Islam, which bans the consumption of pork. ▪ Turkey is a major producer and exporter of poultry meat, directly competing with EU poultry exports.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Premiumisation trend emerging within the younger and urban segments of the population. ▪ Rising incomes will allow a wider segment of the population to afford imported fresh meat from the EU. ▪ Some possible opportunities in the beef segment if market access is reopened. 	<ul style="list-style-type: none"> ▪ Serbia and Bosnia have market access to export live bovine animals presently. ▪ Poultry production in Turkey is growing despite the pressures currently in place concerning purchasing feed products from abroad. ▪ Vegetarianism is a growing trend amongst the younger urbanised population. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

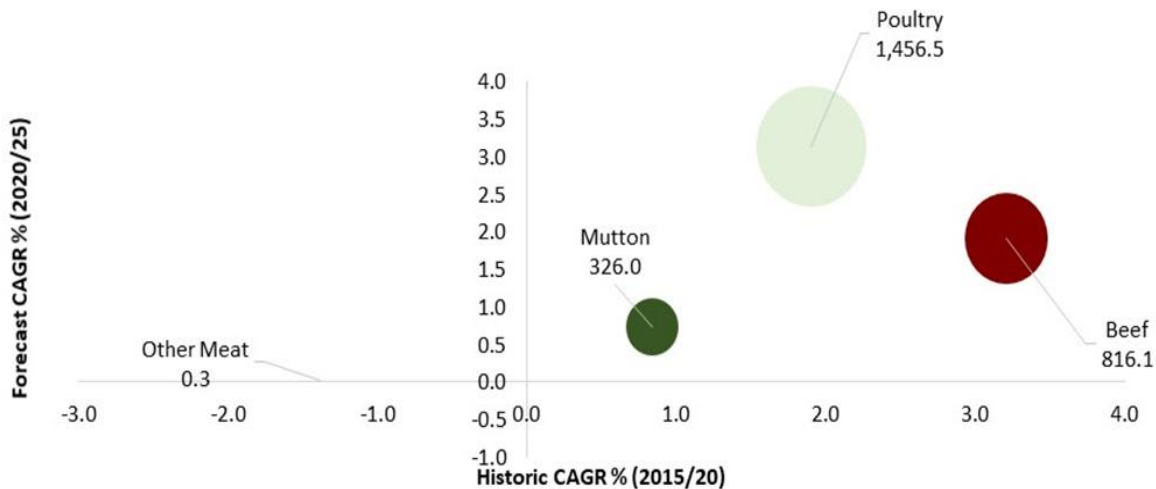
5.1.2 Consumption

Evolution of consumption

Figure 5-1 shows that poultry is the most consumed fresh meat product in Turkey with a total volume of nearly 1.5 million tonnes. Poultry is forecast to be the fastest-growing fresh meat product in Turkey between 2021 and 2025 with a predicted CAGR of 3.1%. Beef has been the fastest growing fresh meat category in recent years between 2015-2020 with a CAGR of 3.2% however this CAGR will decline to 1.9% between 2021 and 2025. The current volume of beef consumption in Turkey is estimated to be around 816 000 tonnes making it the second-largest fresh meat product in Turkey by volume. Mutton has a total consumption volume of 326 000 tonnes and is expected to grow by a CAGR of 0.7% between 2021 and 2025 which will see it remain the third largest fresh meat product by volume in Turkey.

Pork and the ‘other meat’ category have a far smaller presence in the Turkish market and are not expected to grow further between 2021 and 2025. Reasons for pork consumption being essentially zero in Turkey include the large adherence to Islam which forbids pork consumption and explains why historically the product has never been consumed to any considerable amount within Turkey.

Figure 5-1: Evolution and forecast of fresh meat market in Turkey, 2015-2025 (000 tonnes)



Source: Euromonitor International: Fresh Food, 2021.

Consumer profile and purchase criteria

Consumers

The consumption of fresh meat in Turkey is common with notable dishes in the country incorporating fresh meat including *Köfte* (Turkish meatballs), *Islak burgers* (Turkish hamburgers), and mini ravioli. Poultry is the most commonly consumed meat in Turkey aided by its large production in Turkey and relatively low cost which appeals to cost-sensitive consumers in the country. It is important to note that overall meat consumption in Turkey is quite low by EU standards, with the average consumer consuming around 35 kg of fresh meat per capita. Consumption of pork is virtually zero in Turkey due to the predominantly Islamic population that abstains from pork consumption; due to this, pork has never been a culinary dish within Turkey or significantly produced in the country, making it difficult for non-Islamic adherents to obtain pork in the country. Overall, in 2019 prior to the outbreak of COVID-19, roughly 50% of Turkish households consumed red meat regularly, while this figure increases to 70% for poultry. It is estimated that 10% of households in the country follow a vegetarian diet.⁵⁰

Drivers and method of consumption

Drivers of fresh meat consumption include costs, availability and the incorporation of fresh meat with other foods as part of a wider dish. In Turkey poultry is the more preferred fresh meat product, which typically means it will be part of a larger dish such as *perde pilac* (rice-based dish) poultry also is perceived as a healthier alternative to red meat which further drives demand. Beef consumption is aided by its incorporation in traditional dishes such as *inegol kofte* (grilled meatballs) and *pide* (pastry dish). Mutton is commonly consumed as part of a *kebap* or *Iskender* (a meat dish comprised of doner). Fresh meat is commonly consumed as a part of a diner dish, which is typically consumed together with family at the end of the day. Consuming foods as a collective is normal in Turkey and

⁵⁰ Household meat consumption patterns in Turkey: The impact of income and demographic factors, University of Van , available at <http://www.yyusbedergisi.com/dergi/turkiyede-hanehalklarinin-et-tuketim-kaliplari-gelirin-ve-demografik-faktorlerin-etkisi20201004072923.pdf>

encourages the need to purchase a wider variety of meats to appeal to all members of the household.

Purchase criteria

Meats such as beef, chicken, duck and goat can be sold and consumed; although not officially required or necessarily important for all Turkish consumers, some importers may ask for halal certification. The production and consumption of meats forbidden in Islam such as pork is small and largely non-existent in Turkey. Price is another factor, driving demand for poultry meat being generally the cheapest fresh meat category in Turkey and helps to explain why poultry is the most consumed by volume in the country. Meat is often chosen according to its fat content. For example, when it comes to beef, consumers prefer homogeneous meat with low-fat content, such as *sokum* (rump). When it comes to minced meat, some consumers prefer a mixture of lamb and beef, while some prefer only beef. Barbecues and kebabs usually use lamb. Pork is a niche product not available throughout the country (largely only available in larger retail markets); as a result, this product is particularly expensive in the country.

Recent market trends

Poultry will be the fastest growing fresh meat product by total volume between 2021 and 2025 as sales of beef begin to slow down. Poultry benefits from relatively lower prices compared to other meats and growing production in Turkey which further brings down its cost. Prices of beef have been increasing which has put pressure on price-sensitive consumers' ability to purchase beef; this has been further compounded by the fall in the value of the Lira currency which limits the ability of consumers to purchase imported meat such as beef.

Vegetarianism has been growing in Turkey, especially in the country's larger urban centres such as Istanbul and Izmir; as a consequence, there has been a rise in demand for alternative meats in the country which should be observed. Despite this, the total level of vegetarians in the country is lower than other countries in the region.

While pork consumption remains negligible in Turkey, the small domestic production of this product means that the country relies on imported pork products which commonly come from the EU.

Fresh meat on retailers' shelves in Turkey

The price of imported fresh meat depends on various factors, including the type of meat, the cut, the exchange rate (given the currently widely fluctuating Lira currency) and whether meat is frozen or not. Generally:

- **Chicken** is priced at 49 TRY (EUR 3.25) per kg. Chicken sold through modern retail outlets is likely to be in plastic packaging, due to the durability and labelling benefits these types of packages bring.
- **Beef** is priced at 105 TRY (EUR 6.90) per kg and is most commonly sold in packages of 200-300 grams.



Pictures: © Agra CEAS / Euromonitor International, 2022.

5.1.3 Offer

Domestic production

Domestic production of fresh meat in Turkey is influenced by feed prices which is the main input cost for the production of poultry; a weaker Lira currency further puts pressure on the ability of producers to purchase feed from abroad to sustain production. Broiler chicken is the predominant meat produced in Turkey and is largely produced in Manisa, Balıkesir, Sakarya and Mersin. In 2019, before the outbreak of Covid-19, Turkey produced roughly 1 million tonnes of beef, but low prices have impacted the sector making it difficult for producers to justify the costs of raising an animal for slaughter in the country. Production in Turkey will remain influenced by external factors, such as the value of the Lira, the price of feed imported from abroad and finally the level of product prices in the country.

Some of the larger domestic producers by meat type are:

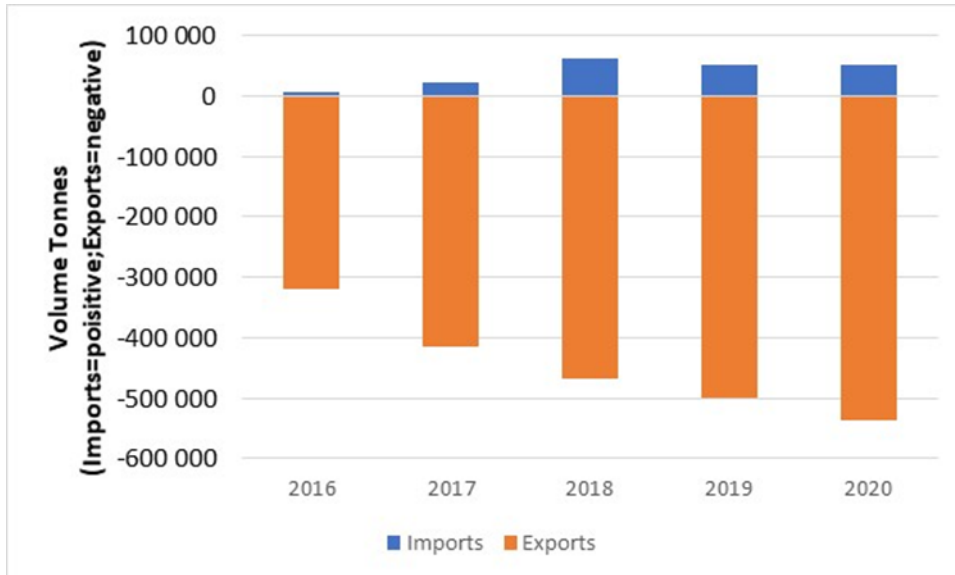
- Beef: Namet
- Poultry: Şenpiliç

Imports and exports

Figure 5-2 shows that Turkey is a net exporter of fresh meat, with the country exporting 520 000 tonnes of fresh meat in 2020 and importing just 51 000 tonnes. Total exports have

been growing in recent years and the figure in 2020 represented a five-year high. Total imports peaked at 63 000 tonnes in 2018 and have fluctuated around 50 000 ever since.

Figure 5-2: Trade balance (imports and exports) of fresh meat in Turkey, 2016-20 (total volume, tonnes)

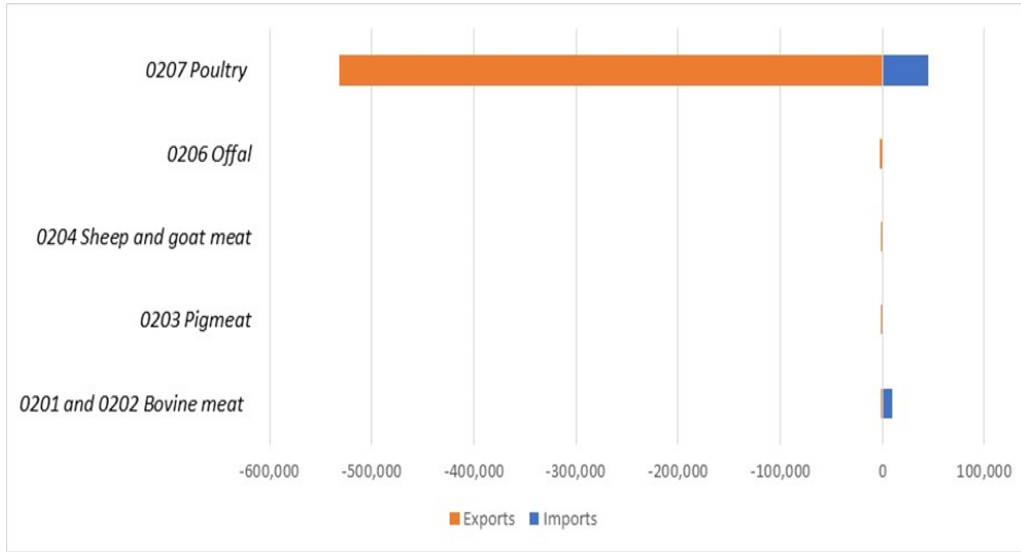


Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-3 shows poultry is the dominant fresh meat exported by Turkey accounting for around 96% of total fresh meat exports; this further explains why the production of poultry in Turkey is the highest within the fresh meat sector. At the same time, poultry imports are by far the largest fresh meat category as consumers seek out different and often higher quality chicken meats from abroad. Total imports of offal, sheep, goat and pig meats are minimal. Also, while Turkey imports a small volume of live bovine animals and beef, these are largely from outside of the EU as since 1998 there are restrictions on imports from the EU which continue to be applied by Turkey due to concerns over BSE (see section 4.3.5).

Figure 5-3: Trade balance (imports and exports) of fresh meat in Turkey by type, 2020 (volume, tonnes)

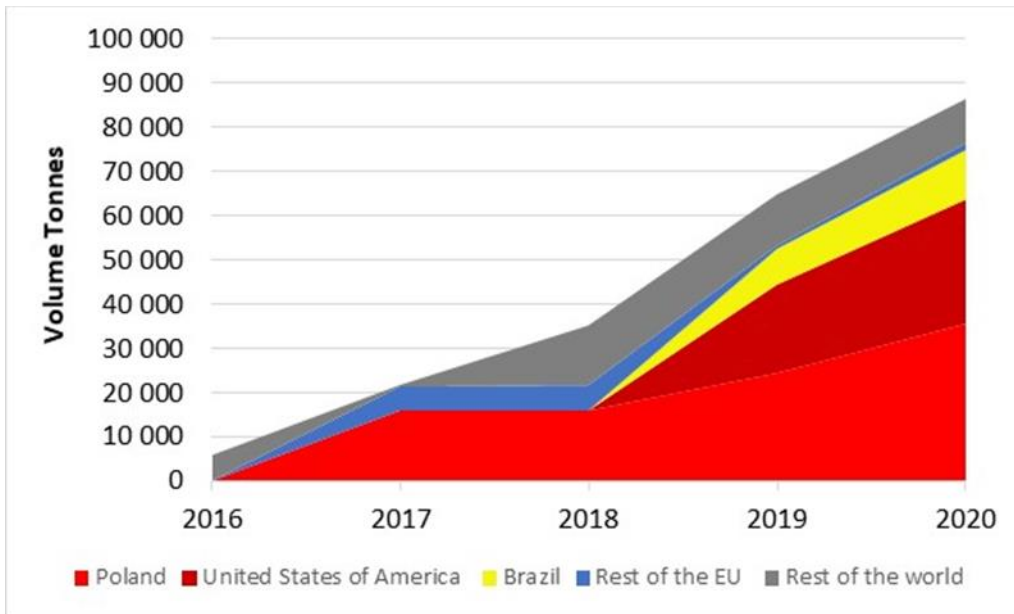


Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-4 shows that Poland is the largest exporter of fresh meat to Turkey, followed by the United States and Brazil. Other EU Member States that export fresh meat to Turkey include the Netherlands and Spain.

Figure 5-4: Turkey imports of fresh meat by origin country, 2016-20 (volume, tonnes)



Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for fresh meat have been identified as having been registered.

Main competitors

The main competitors for EU fresh meat products in Turkey are Serbia, Brazil, Bosnia-Herzegovina and the US. Serbia, Bosnia-Herzegovina and the US are large bovine exporters while Brazil is a large poultry exporter. Domestic production of poultry within Turkey is a large barrier for EU exporters; EU exporters principally focus on the exportation of poultry meats due to ongoing bans in place for the exportation of other meats.

5.1.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for fresh meat imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products, a pre-notification form for inspection purposes (Turkish version of the common veterinary entry document - CVED), and a veterinary health certificate for animal products. There are additional specific requirements (e.g. certificate of analysis). This is in addition to general import requirements. Halal certification, although not officially required, may be requested by some importers.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, fresh meat products are generally subject to tariffs. Although preferential tariffs are foreseen for fresh beef (CN 0202.20) within certain quantitative limits (see Table 4-1), these have not yet been put in place due to Turkey's concerns over BSE (see below).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – beef category (0202 20) from France to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=02022010&origin=FR&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for fresh meat. The Turkish food codex for meat, prepared meat and meat products was published in January 2019 (Communiqué No. 2018/52). This specific legislation, which contains various definitions for certain types/cuts of meat, can be found here: <https://www.resmigazete.gov.tr/eskiler/2019/01/20190129-4.htm>

Meat imports are tightly controlled. As is normally the case, it is necessary for a country to have negotiated a protocol before specific meat products from that country can be exported to Turkey. The terms of this protocol may determine additional requirements. Furthermore, the situation may change due to e.g. disease outbreaks. Exporters of designated animal products must be pre-listed with the Ministry of Agriculture and Forestry (MAF) as only consignments from listed exporters are admitted into the country. MAF maintains a database with the lists of countries, butchering and processing facilities that are permitted to conduct import procedures with updated requirements per product and it is strongly recommended that the lists be consulted for the latest updates:

<https://www.tarimorman.gov.tr/Konular/Veteriner-Hizmetleri/Ihracat-Ithalat/Ithalat>

As noted in section 4.3.4, there are import restrictions of live bovine and beef due to BSE. Lists of approved slaughterhouses for beef exports are currently established for Belgium, France, Hungary, Latvia, Poland, Romania and Spain. There is also a lack of transparency and delays for approval procedures for animal products. It is recommended that the various restrictions in place be consulted for updated details:

<https://yasakli.tarimorman.gov.tr/>

Labelling

As Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. According to this Regulation:

- For products containing any product/ingredient obtained from pigs the statement "*contains ... obtained from pigs*" must be indicated on the label.
- For frozen meat and meat preparations, the date of freezing (or the date of first freezing) must be indicated on the label.

It should be remembered that the rules include compulsory country of origin labelling. The above-mentioned Turkish food codex for meat, prepared meat and meat products contains specific requirements for labelling of certain types of meat (e.g. mince), as well as for nutrition and health claims. This legislation should be consulted for details on labelling.

5.1.5 Distribution

In the retail sector, the two main channels to buy fresh meat in Turkey are supermarkets and local butchers. Combined, these two channels made up 99% of fresh meat sales in Turkey in 2020, with butchers capturing a larger share than supermarkets. There are nearly 30 000 butchers in Turkey; however, their sales have decreased over the past decade. On the other hand, the number of supermarket outlets that sell fresh meat has been rising with the top 5 supermarket chains (Carrefour, Migros, BIM, A101, SOK) currently having more than 10 000 outlets. Online channels began to gain traction 3-4 years ago; however, sales were mainly in the organic meat sector, and the online channel held a negligible share in total meat sales. In Turkey, the fresh meat segment revenue amounted to EUR 9.7 million in 2021.⁵¹

⁵¹ Euromonitor International: Fresh Food, 2021.

5.1.6 Challenges for EU products

The main challenge for EU producers comes from an ongoing ban on the exportation of live bovine animals and beef products to Turkey from the EU, which has been in place since 1998 and remains a significant barrier to trade between the two markets. On the demand side, the relatively low per capita consumption levels of fresh meats in Turkey (e.g. in comparison to EU countries), as well as the fact that the bulk of fresh meat consumed in Turkey is domestically produced poultry, restrict opportunities for EU exporters. Some Turkish consumers may expect fresh meats to be Halal certified which is an additional challenge for EU exporters; Halal certification, although not officially required, may be requested by some importers. Turkey's growing population nonetheless presents some opportunities in the market, should all the aforementioned challenges be addressed.

Market Takeaway: Fresh meat

Consumption: Consumption of poultry is the highest in the country followed by beef and mutton. Overall, per capita consumption is lower than in other European countries.

Competition: Domestic poultry is the biggest competitor directly for EU producers followed by imports from Brazil. Bovine competition comes largely from Serbia, Bosnia-Herzegovina and the US.

Distribution: In the retail sector, the two main channels to buy fresh meat in Turkey are supermarkets and local butchers. Combined, these two channels made up 99% of the sales in Turkey in 2020.

Challenges: An ongoing ban on live bovine imports is also another significant challenge for EU producers seeking to enter the Turkish market. Also, Halal meat certification, although not an official requirement, may be expected by some importers and some Turkish consumers.

Opportunities: Premiumisation of fresh meat is emerging within the larger urban centres of the country which may aid in the consumption of EU fresh meats in Turkey, particularly organic poultry meats.

5.2 Fresh fruit and vegetables

5.2.1 SWOT analysis

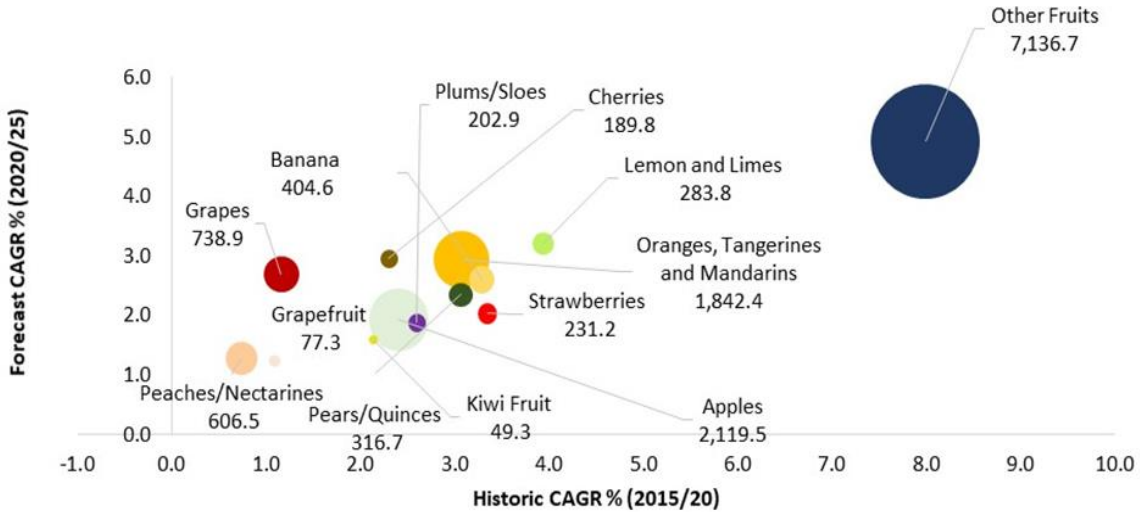
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Consumption per capita of fruits and vegetables in Turkey is higher than in the EU and higher than most other countries in the region. ▪ Fruit and vegetables are key components of many traditional Turkish foods such as <i>pilav</i> and <i>hoşaf</i>. ▪ Turkish consumers are readily exposed to a diversity of fruit and vegetables throughout their lives via bazaars and fruit and vegetable stalls. 	<ul style="list-style-type: none"> ▪ Turkey is amongst one of the largest fruit and vegetable producers in the world. ▪ Domestic fruit and vegetables are of good quality and relatively cheap and affordable for consumers. ▪ Many of the most important fruit and vegetables produced in the EU - such as potatoes, apples and citrus fruits - are also produced on a large scale within Turkey.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Cranberries and blueberries are forecast to be the fastest-growing fruit category in Turkey between 2021 and 2025. ▪ Growing demand (albeit from a low base) for imported fruit and vegetables, fuelled by a curiosity trait that has emerged among urbanised consumers in the country. 	<ul style="list-style-type: none"> ▪ Turkish production of fruit and vegetables is forecast to continue growing, while the country has the appropriate conditions to produce a diverse range of fruit and vegetables. ▪ Canadian vegetables are the biggest threat for EU vegetable exports; imports of fruit from the US and Ecuador are the biggest threat for EU producers. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.2.2 Consumption

Evolution of consumption

Figure 5-5 below shows that the 'other fruits' category is the largest in Turkey with a total consumption volume of 7.1 million tonnes. This category grew by a CARG of 8% between 2015 and 2020 and is further forecast to grow by a CAGR of 4.9% between 2021 and 2025, which will see it remain the largest fruit category consumed in Turkey by volume. Apples are the largest single fruit category consumed in Turkey with a total volume of 2.1 million tonnes. Apples are forecast to grow at a CAGR of 1.9% between 2021 and 2025 and will remain the second-largest fruit category by volume. Oranges, tangerines and mandarins have a total consumption volume of 1.8 million tonnes and are forecast to grow by a CAGR of 1.9% between 2021 and 2025. Grapes (739 000 tonnes), peaches/nectarines (606 000 tonnes) and bananas (405 000 tonnes) are the next biggest fruit categories by volume. The fastest-growing fruit category between 2021 and 2025 will be cranberries/blueberries which are forecast to grow at a CAGR of 6.5%.

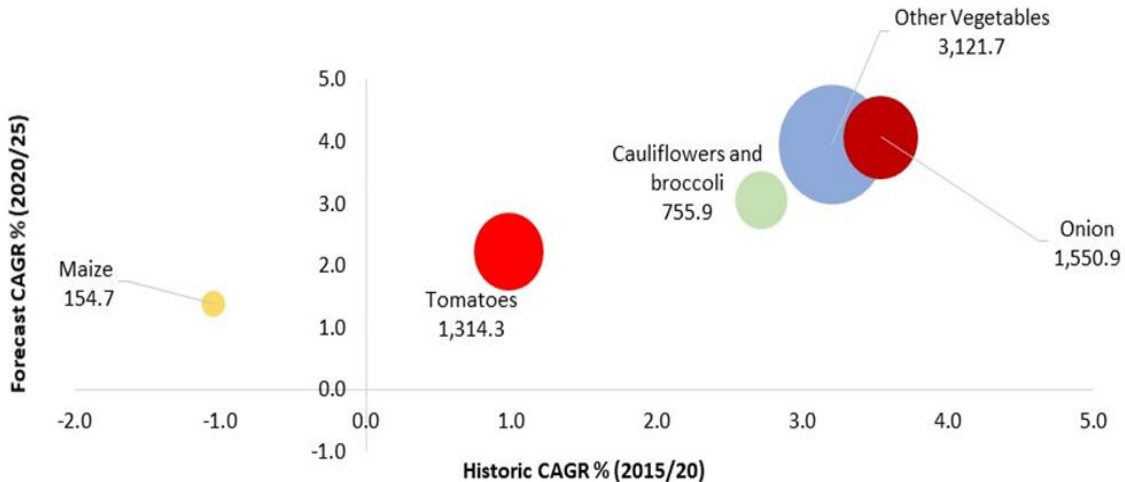
Figure 5-5: Evolution and forecast of fruits market in Turkey, 2015-2025 (000 tonnes)



Source: Euromonitor International: Fresh Food, 2021.

Figure 5-6 below shows that the other vegetable category is the largest in Turkey with a total consumption volume of 3.1 million tonnes. This category is expected to grow by a CAGR of 3.9% between 2021 and 2025 which will see it remain the largest vegetable category consumed in Turkey. Onions are the largest single vegetable category consumed in Turkey with a total volume of 1.5 million tonnes, as well as being the fastest-growing vegetable category between 2021 and 2025 with a predicted CAGR of 4.1%. Tomatoes have a total consumption volume of 1.3 million tonnes and are the third-largest vegetable category. Cauliflowers and broccoli follow with a total volume of 755 000 tonnes. Maize is the smallest category consumed in Turkey with a total volume of 154 000 tonnes.

Figure 5-6: Evolution and forecast of the vegetable market in Turkey, 2015-2025 (000 tonnes)



Source: Euromonitor International: Fresh Food 2021.

Consumer profile and purchase criteria

Consumers

The total consumption of fruits in Turkey in 2020 was around 173 kg per capita⁵², placing the country globally amongst the largest consumers of fruit and ahead of other countries in the region such as Greece and Bulgaria. Reasons behind the large consumption of fruit in Turkey include the availability of domestic production, which is high as the country ranks amongst the top ten largest fruit producers in the world, combined with the relatively low cost of fruits in Turkey and their incorporation in many popular traditional dishes such as *hoşaf* (dessert dish) and *pilav* (rice dish). The rich flora of Turkey has meant that fruits have been popular traditionally in the country so that consumers of all ages are readily exposed to and consume fresh fruits. The outbreak of Covid-19 in the country further emphasised the need for a healthy and balanced diet which in turn benefited fruit consumption. The presence of bazaars and other food markets throughout Turkey helps to expose consumers particularly in urban areas to fresh produce with further benefits fruit consumption.

Vegetable consumption in Turkey is also quite high with a total per capita consumption level of 269 kg⁵², which is ahead of many other European countries and other countries in the region. Reasons for this, as in the case of fruit, include the wide production of vegetables in Turkey which has allowed them to be readily affordable to the majority of consumers, and their availability to purchase in bazaars and food markets which are common sight within urban centres of the country. Due to the variety of climates found within Turkey, a wide number of vegetables are native to the country and grown there including cucumbers, asparagus and carrots.

Imported fruits and vegetables are most commonly consumed by high-income groups and, within them, are most commonly purchased by middle-aged consumers that are more open to new tastes than older age groups. In rural areas, imported produce is less common and more expensive, unlike in large cities such as Istanbul, Ankara, and Izmir.

Drivers and method of consumption

As indicated, key drivers of fruit and vegetable consumption in Turkey include their wide availability as the country is a large producer of both products, the price which is generally cheap due also to a large production base and finally the consumer desire to consume healthier food products which has grown since the outbreak of Covid-19. It is common for Turkish consumers to meet roadside fruit and vegetable sellers throughout travelling the country, particularly in areas of high production such as central Turkey, and consumers will also be exposed to fruit and vegetables in most bazaars and modern grocery outlets, as well as fruit and vegetable stalls throughout urban centres offering consumers a quick and healthy snack product, even in larger cities such as Istanbul and Izmir. Fruit and vegetable production in Turkey is a source of pride for many consumers who regard the quality to be high, which acts as an incentive to purchase fruit and vegetables from local trades in a bid to support domestic production. Consumption can occur at any point in the day as both products can be incorporated into meals consumed during the day. Notable examples include breakfast when slices of fruit and vegetables served on a platter is common, lunch (e.g. *Mercimek Kofte*, the vegetarian version of the more meat-based Kofte dish), and dinner when vegetables can often be the main dish and fruits likely to be consumed afterwards as a dessert.

⁵² Daily news Turkey, available at: <https://www.hurriyetdailynews.com/173-kg-of-fruit-269-kg-of-vegetables-consumed-per-person-annually-in-turkey-in-2020-163191>

Purchase criteria

Consumers have plenty of outlets to choose from for the best price and best quality. Niche fruits within Turkey such as cranberries can command a higher price, but this is a rare example in a country well accustomed to the wide production of a variety of fruit and vegetables. Consumers seeking to prepare a well-known local dish will be incentivised to purchase fresh fruit and vegetable products which are often a segment of a wider dish. It is a common practice to purchase fruits on the go in Turkey to be consumed as a snack product between work and other activities. Overall, the main purchase criteria for fresh fruits and vegetables in Turkey are quality and price. Quality relates to freshness, flawlessness, taste, colour, and smell. For example, the quality of tomatoes can be detected from their firmness and colour. Consumers prefer tomatoes that are firmer and redder. Low-quality produce usually comes with a lower price tag; however, many fruits and vegetables found off-season are of low quality but have high prices.

Fresh fruit and vegetables on retailers’ shelves in Turkey

Fresh fruit and vegetables are grown across Turkey and as such are readily available in retailers throughout the country and prices are relatively cheap. Good quality local fruit and vegetables are generally priced at around 15 TRY (EUR 1.00) per kg. Imported fruit and vegetables are more expensive and often viewed as premium products. Consumers of fresh fruit and vegetables imported from the EU are likely to be working mid-aged higher-income individuals.



Fresh fruit and vegetables displayed separately next to each other

Fresh fruit and vegetables are mainly sold without any packaging in stores in Turkey. Yet, imported fruit and vegetables are more likely to come in plastic packaging. Retailers usually have separate shelves for fruit and vegetables; however, these are usually situated next to each other. Special offers and promotions are available from time to time.



Vegetables in plastic packaging (left) and special offers (right)

Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

Across all previously mentioned fruit and vegetable categories, only maize recorded a decline in consumption growth between 2015-2021, which may be explained by a fall in domestic production in 2019-20. Going forward, it is forecast that all fruit and vegetable categories will register a positive CAGR with cranberries and blueberries being the fastest growing. A fall in the value of the Lira has impacted the ability of Turkish consumers to purchase imported food and beverage products, and this acts to the benefit of demand for fruit and vegetables which are largely domestically produced. The outbreak of Covid-19 in the country shined a spotlight on the need to have a balanced and healthy diet which resulted in a small rise in fruit and vegetable consumption, although consumption per capita before the outbreak of Covid-19 in Turkey was already quite high. The presence of fruit and vegetables in many popular Turkish dishes coupled with a large production sector which is forecast to continue expanding have helped to ensure that fruit and vegetable consumption in the country remains high by EU standards.

Fruit and vegetables which stand out for their gain in popularity in Turkey in recent years include sweet potatoes and Aronia fruit (also known as Viking fruit), due to their perception of being healthy products within the Turkish market. The perception that organic products are healthier motivates consumers to purchase more organic products, especially among the younger consumers, whose desires for healthy food options and concerns about the potential effects of pesticides, hormones, GMOs is a key emerging trend. Artichokes from Cyprus stand out as a key imported organic vegetable product present in Turkey.⁵³

5.2.3 Offer

Domestic production

As stated, Turkey is a large fruit and vegetable producer: on the global stage, the country

⁵³ Euromonitor International: Fresh Food 2021.

ranks as the world's 10th largest fruit producer and the world's fourth-largest vegetable producer. Turkey is the largest producer of apricots, cherries and figs, and a large producer of apples, oranges and lemons. The country is also a large producer of vegetables such as tomatoes, potatoes and cucumbers.

Turkish farmers have invested in recent years in new orchards which has led to a total production of 4.3 million tonnes of apples, 550 000 tonnes of pears and 4.2 million tonnes of grapes.⁵⁴ According to Turkish official data, total peach and nectarine trees came to around 21.7 million which is a significant rise from the 13.4 million recorded in 2011. It is estimated from Turkstat that Turkey in 2021 will produce 31.1 million tonnes of vegetables and 25.3 million tonnes of fruits which, compared to 2020, represents a decrease of 0.3% for vegetables and an increase of 7.3% for fruits.⁵⁵ Fruit and vegetables are produced almost every season and in every region in Turkey, unlike most countries where production is limited to specific areas or seasons.

Imports and exports

Figure 5-7 shows that Turkey has a large trade surplus in fruits. In value terms, the country exported a total of EUR 4.2 billion in 2020, which represents a growth of around EUR 700 million since 2016. Total fruit imports came to a value of EUR 792 million in 2020, which also represents a growth of around EUR 300 million since 2016.

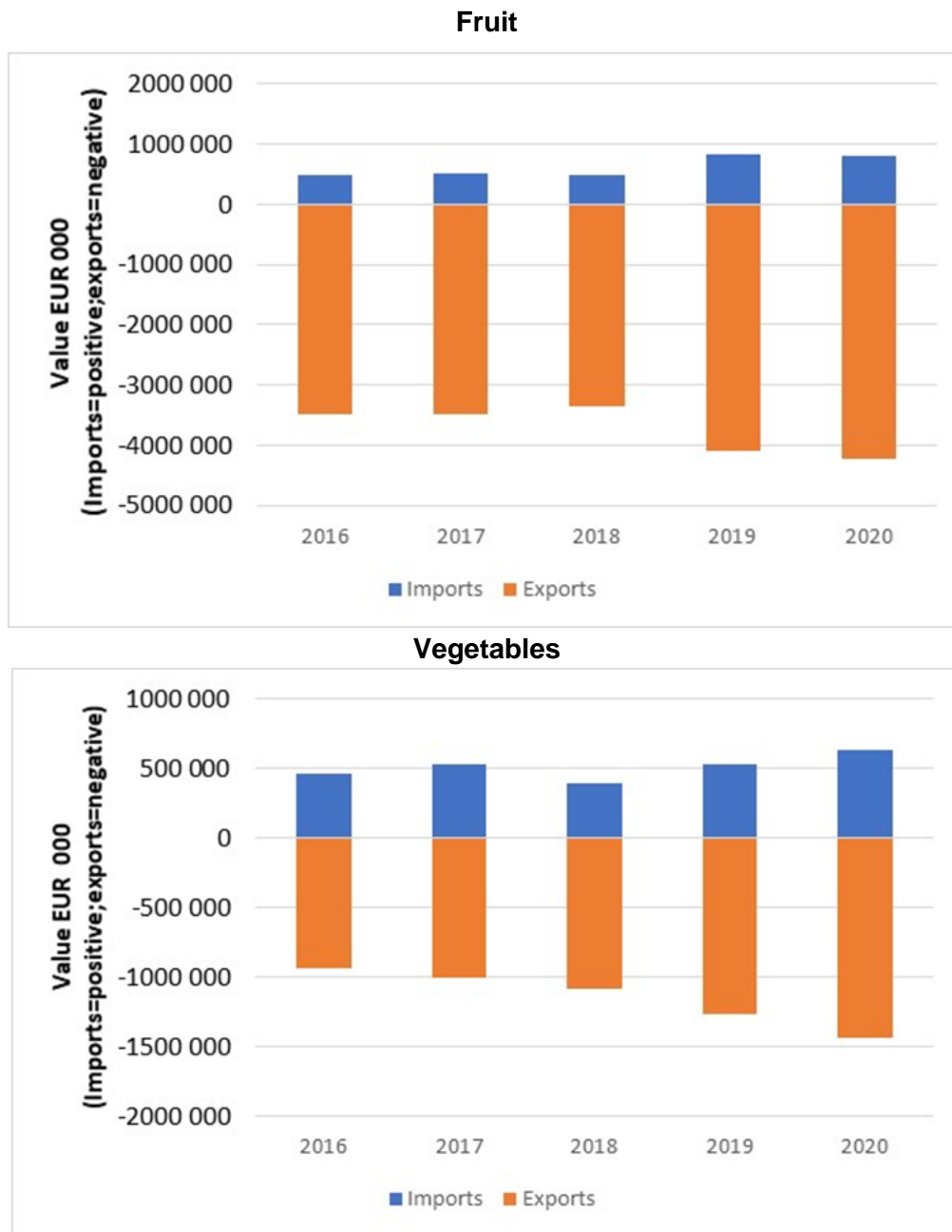
Turkey also has a substantial trade surplus in vegetables. In 2020 Turkey exported fruit to a total value of EUR 1.4 billion, which represents a growth of around EUR 350 million since 2016. The country imported a total of EUR 552 million worth of vegetables in 2020, which represented the highest total value of imports in the past five years.

⁵⁴ Fresh deciduous fruit annual, Turkey, USDA, available at:

[https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Fresh%20Deciduous%20Fruit%20Annual Ankara Turkey 11-01-2020](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Fresh%20Deciduous%20Fruit%20Annual%20Ankara%20Turkey%2011-01-2020)

⁵⁵ Crop products 1st estimation 2021, Turkstat, available at: <https://data.tuik.gov.tr/Bulten/Index?p=Crop-Production-1st-Estimation-2021-37247&dil=2>

Figure 5-7: Trade balance (imports and exports) of fruit and vegetables in Turkey, 2016-20 (total value, EUR 000)



Data for CN code 07 and 08.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-8 below shows the breakdown of trade for each fruit and vegetable category in value terms. It can be observed that bananas are the largest fruit category imported by the country, worth a total of EUR 148 million in 2020. Dates, figs and pineapples were the second-highest imported fruit category, worth a total of EUR 80 million in 2020. Grape imports came to a value of EUR 50 million followed by citrus with a total value of EUR 28 million. Onions, shallots, garlic and leeks were the largest vegetable products imported by the country with a total import value of EUR 18 million. Turkey’s largest exported fruit is

also citrus, worth a total of EUR 824 million in 2020, while the largest exported vegetable is tomatoes, worth around 270 million.

Figure 5-8: Turkish trade balance of fruit and vegetables by type, 2020 (000 EUR; selected types only)



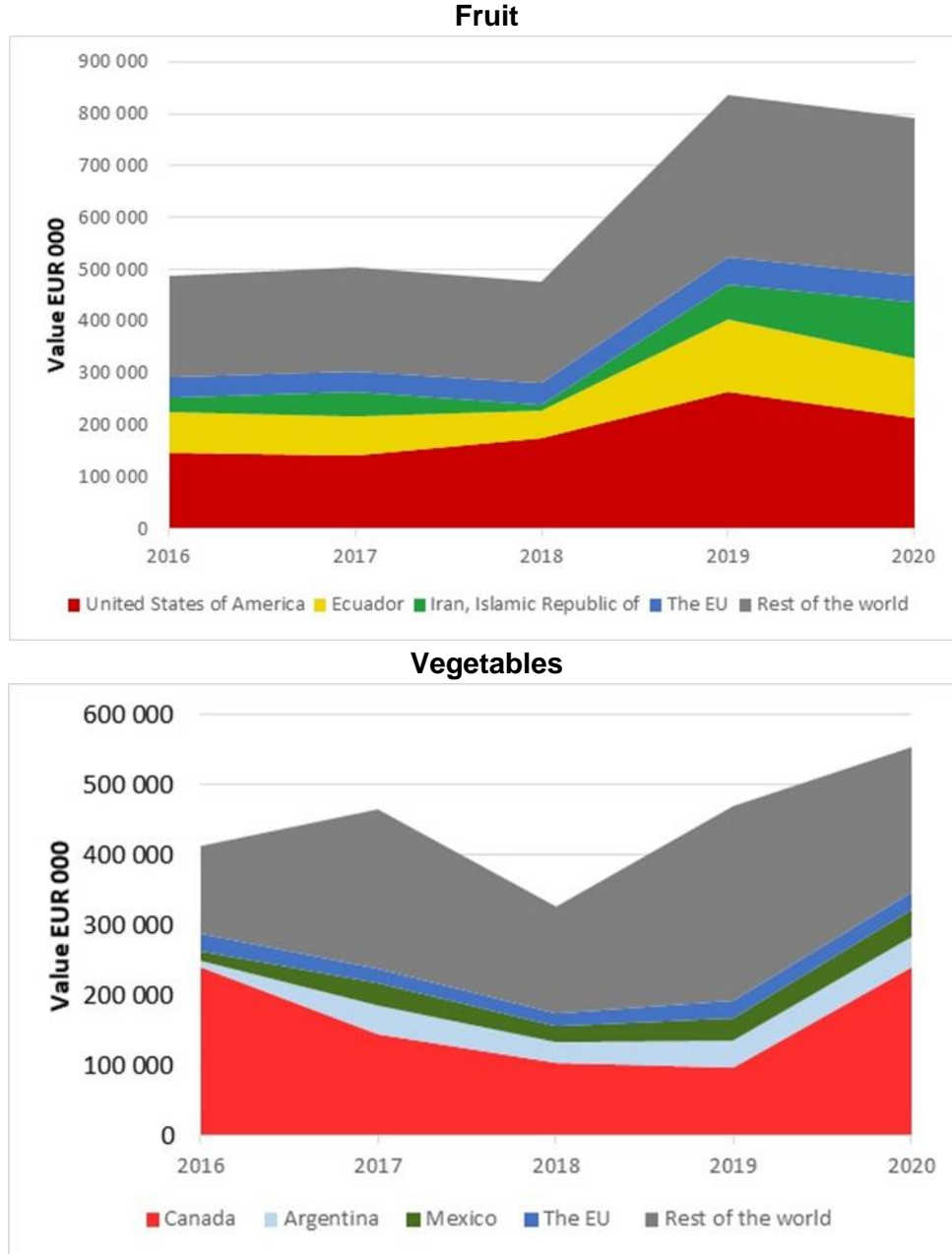
Note: names for CN codes are abbreviated in most cases. Only indicated CN codes are presented here. 6 codes for fruit and 7 codes for vegetables are missing, which is why individual figures do not add up to totals in previous graphs.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

In terms of origin (Figure 5-9), the US is the largest fruit exporter to Turkey in value terms, with exports worth EUR 213 million. Ecuador is the second-largest fruit exporter to Turkey with exports worth EUR 116 million, followed by Iran with EUR 106 million. The largest EU fruit exporter is Cyprus, with exports worth EUR 24 million, mainly citrus fruits. Canada is by far the largest vegetable exporter to Turkey with a total value of EUR 240 million.

Argentina is the second largest with a total export value of EUR 43 million followed by Mexico with a total export value of EUR 39 million. The largest EU exporter of vegetables to Turkey is the Netherlands, with exports worth EUR 9 million, mainly potatoes.

Figure 5-9: Turkish imports of fruits and vegetables by country, 2016-20 (000 EUR)



Data for CN code 07 and 08.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for fresh fruit or vegetables have been identified as having been registered.

Main competitors

The main competition for EU producers comes from domestic producers in Turkey, which are the largest supplier of vegetables and fruits into the Turkish market. Turkey is one of the larger fruits and vegetable producers in the world which in turn makes domestic producers a major competitor. Outside of Turkey, Canada is the largest vegetable competitor while the USA and Ecuador are the largest fruit competitors for EU producers.

5.2.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for fresh fruit and vegetables imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products, a pre-notification form for plant products for inspection purposes, and a Phytosanitary certificate for designated plant products. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements:

- General import requirements (all foods):
<https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>
- Specific import requirements for food products of vegetable origin:
<https://www.tarimorman.gov.tr/Konular/Gida-Ve-Yem-Hizmetleri/Ithalat-Ihracat/Bitkisel-Kokenli-Gida-Ve-Yemlerin-Ithalati>

In terms of tariffs, fresh fruit and vegetable products are generally subject to tariffs, but preferential tariffs are in place for certain fresh fruit (apples, peaches, tamarinds and other fruit) within certain quantitative limits (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – – citrus fruit category (0808 10) from Poland to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=08081010&origin=PL&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based. This legislation covers aspects that are common to all agri-food products, including fresh fruit and vegetables, such as those relating to additives, contaminants, labelling, hygiene and official controls.

Specific standards also apply in wholesale and retail trade of various agri-food products including fruits and vegetables, which is under the control of the Ministry of Industry and

Trade. The base legislation dates from 2010⁵⁶, with details for implementation laid down in subsequent specific legislation; the latest provisions, specifically for fruit and vegetables, were adopted in 2021 and cover packaging, transport and storage conditions: <https://www.resmigazete.gov.tr/eskiler/2021/06/20210629-13.htm>

Fruit and vegetable imports are tightly controlled. As is normally the case, it is necessary for a country to have negotiated a protocol before specific products from that country can be exported to Turkey. The terms of this protocol may determine additional requirements.

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling.

5.2.5 Distribution

Supermarkets and discounters are the most popular retail channels for imported fruit and vegetables because they offer a wide variety of imported fruits and vegetables at competitive prices. As of 2020, there are more than 40 000 supermarket chains in Turkey, and almost all of them sell fresh fruits and vegetables. Green shops are grocers that sell only fruits and vegetables and are widespread in Turkey, with at least one to two green stores in every neighbourhood. These retailers sell all varieties of fruit and vegetables, including imported varieties. The most popular imported fruits found on the shelves are avocados, bananas, coconuts, pineapples, and dragon fruits. The most commonly found vegetables are peppers, sweet potatoes, and horseradish. Open bazaars are also a popular retail channel for fruit and vegetables, as the product variety is large, and the prices are competitive. The online retail channel for fresh fruits and vegetables is currently very small, and the market share it captures is negligible; however, this channel is growing, especially for imported, exotic fruits and vegetables like dragon fruit, mango, and papaya.

5.2.6 Challenges for EU products

The main challenge for EU products includes competing with domestically produced fruit and vegetables within Turkey which are typically widely available across the country via bazaars and food stalls. Consumers in Turkey also expect fruit and vegetables to be inexpensive which means that many premium fruit and vegetables imported from the EU will mainly appeal to consumers of a middle or higher income. Nonetheless, Turkish fruit and vegetable products are also of a high quality which means that EU products will have to undergo additional marketing techniques to help stand out from Turkish fruit and vegetable products. Beyond competition from Turkish products, competition from Canadian vegetables and American and Ecuadorian fruits are the biggest challenges for EU fruit and vegetables.

⁵⁶ Law No. 5957 on Trade in Vegetables and Fruits and Other Goods with Sufficient Depth of Supply and Demand (Official Gazette No. 27533 of 26-032010). <https://www.resmigazete.gov.tr/eskiler/2010/03/20100326-1.htm>

Market Takeaway: Fresh fruit and vegetables

Consumption: Consumption of fruit and vegetables is high in Turkey and above the rates of consumption per capita of neighbouring states in the region. Turkish consumers across all income and ethnic classes will readily consume fruit and vegetables.

Competition: Domestic production of fruit and vegetables is high, and Turkey ranks amongst the highest producers in the world in many product categories. Outside of Turkey, Canada is the biggest vegetable competitor while the US and Ecuador are the biggest fruit competitors.

Distribution: Supermarkets and discounters are the most popular retail channels for imported fruit and vegetables specifically while green shops and open bazaars are popular retail channels for fresh fruit and vegetables in general.

Challenges: Competition with good quality domestically produced fruit and vegetables is a key challenge. Many consumers will expect fruit and vegetables to be cheap as they are widely available which further acts as a challenge for EU fruit and vegetable products in the market.

Opportunities: Total imports of fruit and vegetables have consistently over the past five years. Rising per capita incomes will allow a wider segment of the population to purchase imported fruit and vegetables.

5.3 Dairy

5.3.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ The dairy market is forecast to grow. ▪ The EU is an important exporter of dairy products to Turkey. ▪ Many dairy products are viewed to be healthy. 	<ul style="list-style-type: none"> ▪ Products imported from the EU are likely to be more expensive than locally produced ones. ▪ Turkish consumers are not necessarily used to the taste of EU dairy products. ▪ Even though per capita consumption is relatively high and increasing, it is below EU levels.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Cheese has the biggest market size and is forecast to grow at a quite high CAGR compared to other categories; other dairy is a small category but is forecast to grow the most. ▪ Products that are in line with the health and wellness trend include natural, less processed dairy products, and dairy products with added health benefits or less sugar (e.g. yoghurts). ▪ Convenient products such as shelf-stable desserts, as well as affordable products. 	<ul style="list-style-type: none"> ▪ Turkey is the world's eighth-biggest milk producer and exported four times more dairy products in 2020 than it imported, while product prices are typically below the EU price point. ▪ Some important competitors are Iran, the United Arab Emirates, the UK, the US as well as Uruguay. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

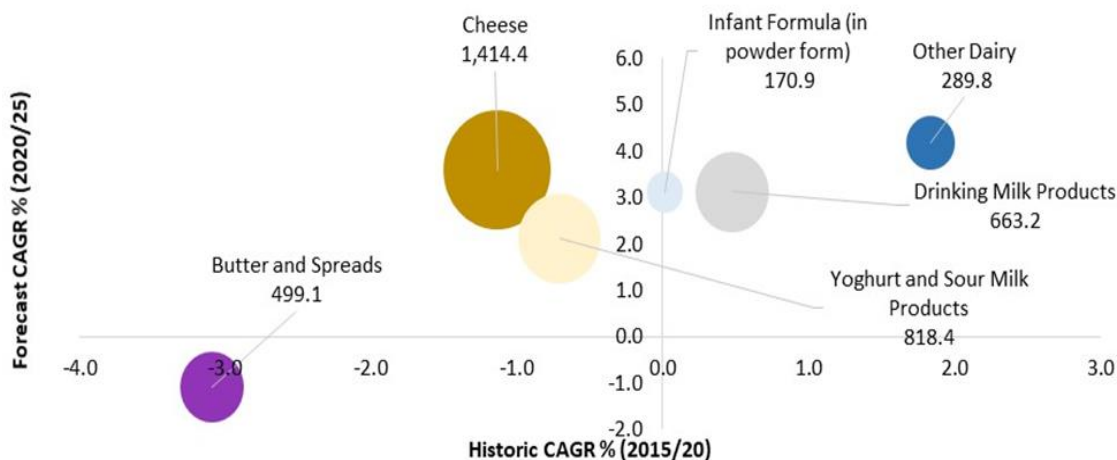
5.3.2 Consumption

Evolution of consumption

The dairy market in Turkey was worth about EUR 3.85 billion in 2020 (Figure 5-10). Cheese is the biggest category, worth about EUR 1.4 billion, followed by yoghurt and sour milk products with a value of around EUR 818 million and drinking milk products with EUR 663 million. The market size of butter and spreads was around EUR 499 million and 'other dairy' was worth approximately EUR 290 million. The market for infant formula was the smallest in 2020 with about EUR 171 million.

Historically, between 2015 and 2020, the other dairy section grew at the highest CAGR of around 1.8%, followed by drinking milk products with 0.5%. The market size of all other categories declined: yoghurt and sour milk at a negative CAGR of -0.7%, cheese at -1.1%, and butter and spreads at -3.1%. The butter and spreads category is forecast to continue shrinking between 2020 and 2025, with a negative CAGR of -1.1%. All other categories are forecast to grow. The other dairy category is likely to keep the highest growth rate and is forecast to grow at a CAGR of about 4.2%, followed by cheese with 3.6%. Drinking milk products, as well as infant formula, are both forecast to grow at a CAGR of 3.1%, whereas yoghurt and sour milk products are forecast to grow at a CAGR of around 2.1% between 2020 and 2025.

Figure 5-10: Evolution and forecast of the dairy market in Turkey, 2015-2025 (retail value, EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Consumption of dairy products is common in Turkey, although at a lower level than in the EU (which is one of the largest dairy product consumers in the world). Yet, these products are forecast to become increasingly popular with consumers in Turkey within the coming years and per capita consumption is forecast to grow. According to the Ministry of Health's "Turkey Health and Nutrition Research" data, the per capita per day consumption of milk and dairy products (milk, cheese, yoghurt) among people over the age of 15 in Turkey reached 188.2 grams in 2020. According to the same data, milk consumption per capita was 34.5 millilitres per day (12.5 litres per year), and yoghurt consumption per capita was 112.7 grams per day (41.1 kilograms per year). Whilst per capita cheese consumption is 39 grams per day and 14.2 kilograms per year. Turkish consumers mainly consume cheese, which currently has the biggest share of all categories. This trend is likely to continue as consumption of cheese is likely to grow at one of the highest rates in the coming years. Yet, consumers are also more and more interested in other dairy products that are currently less consumed, such as 'other dairy' (e.g. cream, chilled dairy desserts and snacks, fromage frais) and infant formula, as well as already more popular products including drinking milk, yoghurt and sour milk products. With this background in mind, notable consumer characteristics are set out below⁵⁷:

- Milk:** Generally, all age and social groups in Turkey consume milk. Although due to the pandemic Turkish consumers are more price-sensitive than before and might choose other options to fit their budget, all groups continue to consume milk overall. One of the main consumer groups are children, who are consuming milk at school and at home. Overall, milk is viewed as a healthy drink, which is why parents make sure their children consume it, as consumers are becoming increasingly health-conscious and pay even more attention to their children's nutrition. Younger consumers might be less of a consumer group than older

⁵⁷ Euromonitor International: Packaged Food, 2021

generations because they are becoming increasingly environment-friendly, and the number of vegans in the country is growing, in particular within the more affluent middle class.

- **Cheese:** Historically, cheese consumers were mainly from the Turkish affluent middle class as cheese is more expensive than most other dairy products. However, today cheese is the biggest dairy category and is consumed by all different social and age groups of Turkish society. Consumers are becoming increasingly health-conscious and interested in ethical matters and thus choose their cheese products accordingly, such as organic cheeses, if they have the needed disposable income to buy such products as these tend to be more expensive. Organic cheese has emerged as increasingly popular amongst middle income and younger consumers owing to its perception as a healthier option compared to conventional cheeses. Imported cheese is also more likely to appeal to middle income and higher consumers.
- **Butter and spreads:** Butter is more expensive than margarine and thus more likely to appeal to consumers of higher incomes. In line with the health trend, consumers of organic butter are often from the higher-income urban middle class. However, lower-income health-conscious consumers might also choose butter over margarine and maybe even organic butter over normal butter depending on how important these health considerations are to them.
- **Yoghurt:** Turkey has one of the highest per capita consumptions of plain yoghurt in the world. Yoghurts are mainly consumed by adults from different social classes. During the Covid-19 pandemic, parents increasingly have been giving yoghurt to their children too due to growing health concerns. Yoghurts are perceived as healthy due to their probiotics which make them a functional product.
- **Other dairy:** Different products of this diversified category are consumed by different consumer groups. Children for example are the main consumers of chilled dairy snacks. Prior to the Covid-19 pandemic, the working population also consumed chilled snacks as they are an easy on the go snack. However, as people spend more time at home since the Covid-19 pandemic, children remain the main consumer group for chilled dairy snack products. Adults on the other hand are the main consumer group of coffee whiteners and cream for baking.

Drivers and method of consumption

In recent years, improvements in milk yields and the cold chain distribution network, combined with population growth and better availability, drove the milk market. Prior to the pandemic drinking milk products have been mainly consumed by people at work or on the go. Due to the Covid-19 pandemic, consumers spend more time at home where they also take their meals which further drives retail milk sales. Stockpiling at the beginning of the pandemic drove retail sales even further. On-trade food service sales on the other hand declined due to closures and restrictions; these sales are expected to grow again after most restrictions are taken away, however they might not go back to pre-pandemic levels. The so-called School Milk Project was implemented several years ago with the aim to increase children's milk consumption; although due to this project, the consumption of milk by children has increased, since the pandemic children consume milk mostly at home.

The speeding up of growth of the **cheese** market in 2021 is mainly caused by the lasting effects of the Covid-19 pandemic restrictions in Turkey. Consumers increasingly spend time at home due to lockdowns, quarantine, food service and retail restrictions, closure of workplaces, schools and universities, social distancing and working from home is

encouraged. All this has led to an increase in cooking meals at home. Cheese is a typical and commonly used product in many dishes served in Turkish homes and thus the home cooking trend drives cheese consumption. Taste is a key driver of cheese consumption in the country. The on-trade food service sales declined due to the effects of the Covid-19 pandemic in particular because of the lack of tourism in the country. Once food service outlets reopen, sales via this channel are expected to go back to pre-Covid 19 levels as well, yet consumers are likely to keep on cooking at home more than before. The health trend is likely to boost cheese consumption further, as cheese is viewed to have health benefits such as boosting the immune system due to its high levels of vitamin D. Cheese, in particular soft cheeses, are typically eaten for breakfast in Turkey. Due to lockdowns and restrictions, consumers had more time to eat breakfast which often includes cheese, rather than just grabbing a snack while going to work.

The retail sales of **butter**, much like for the previous products are also driven by the effects of the Covid-19 pandemic. Since more people spend time at home and are now cooking and eating all of their meals at home, there is an increased demand for the use of butter in home cooking. Turkish producers are unable to meet the increased demand, and thus more butter is imported than prior to the pandemic. The lack of domestic butter supplies increased its price point. Some companies mix domestic butter with imported butter to reduce the price point and to also achieve a similar taste to local butter. Furthermore, the increasing health-consciousness of consumers and their interest in products with better nutritional value drives butter consumption, as it is viewed to be more beneficial to health than margarine products. Butter is used for cooking different dishes in Turkish cuisine as well as a spread on bread.

Improvements in the cold chain distribution network, in combination with increased milk production and a growing population within the last years, has driven growth in **yoghurt** production and consumption. After liquid milk, yoghurt has the second biggest production quantity in Turkey and can be viewed as a staple food. Yoghurt is consumed all over the country. For many centuries, yoghurt has already been a significant element in Turkish tables. It is either eaten plain, as a side dish or is already an important ingredient of the main dish. Yoghurt is for example used to cook soups, bake sweets or make the favourite drink of Turkish consumers which is *ayran*⁵⁸. The growth of **yoghurt** consumption in the last couple of years can also be largely attributed to the effects of the Covid-19 pandemic.

The **other dairy** category is boosted by the effects of the Covid-19 pandemic, too. As the popularity of home cooking has increased since the pandemic, retail volume sales are increasing, while food service sales declined. The demand for condensed milk and cream for cooking purposes is growing as these products are common ingredients of homemade recipes in Turkey. Dairy desserts have a long tradition in Turkey and because food outlets are closed, many consumers turn to chilled dairy desserts for home consumption instead. The closure of schools led to an uptake in demand for chilled snacks for at-home consumption for children. These products are purchased by parents as a healthy and convenient snack for their children as health awareness is on the rise. Chilled dairy snacks are likely to continue to grow since children are used to their consumption which is approved by their parents.

Purchase criteria

Price, nutrition and convenience are frequent considerations for consumers of dairy products. Looking more specifically on a product-by-product basis:

⁵⁸ Culinary Arts, Cuisine, <http://www.turkishculture.org/culinary-arts/cuisine/yogurt-304.htm>

- **Milk:** cow milk is the preferred choice of Turkish consumers. Shelf-stable milk is the most commonly bought milk product in Turkey. This is due to the fact that the longevity of milk products is an important purchase criterion of Turkish consumers. In particular at the beginning of the Covid-19 pandemic when consumers purchased products to stockpile their longevity gained importance. Consumers moreover place an importance on the pack size of milk products. Bigger packs and multipacks are often cheaper and easier to stockpile so have been the more popular choice recently. Due to the increased time consumers spend at home on the go product sizes are less popular. As consumers are becoming increasingly health-conscious, interest in healthy and nutritious food has increased including natural and organic milk products. Even though full-fat milk could be considered less healthy than other options, many health-conscious consumers prefer it due to it being more natural and less processed than other types of milk. Health-conscious consumers often also prefer to purchase lactose-free milk. Overall, consumers are price-sensitive which is why they prefer to purchase cheaper private label products because of their lower price point, in particular when it comes to more expensive types of products such as lactose-free or organic milk. Flavoured milk is the third most popular choice after shelf-stable milk and fresh milk. Turkish consumers' favourite flavours are banana, strawberry and chocolate, and new launches of healthier options such as flavoured milk without added sugar are becoming more popular. Parents are most likely to purchase flavoured milk because many children enjoy drinking it and it is viewed to be a healthy drink.
- **Cheese:** the price of cheese is an important purchase criterion, especially since the recession in 2019 and the economic difficulties due to the Covid-19 pandemic, as consumers are becoming increasingly price-conscious. Cheese is expensive compared to other dairy products, which is why consumers pay attention to the price even more. The type of cheese is another important criterion. Consumers currently prefer spreadable cheese, followed by hard cheese and soft cheese. Soft cheese is a staple product in Turkish cuisine as well as being the cheapest cheese category and thus is a popular choice. The perception of product hygiene plays an increasingly important role as well. The Covid-19 pandemic made many people feel more anxious about hygiene than before the pandemic. As a result, consumers prefer to purchase packaged cheeses even though unpackaged cheese is generally less expensive. Consumers that have enough time to shop and compare prices are more likely to try new and different cheeses. Consumers like to purchase new cheese variants in particular for breakfast. The more popular EU cheese types are Gouda, Roquefort, Danish Blue, English Cheddar, Italian mozzarella, Italian Parmesan and Emmental. Consumers that are willing to pay more for EU cheese have to pay three times more, and they usually consume this cheese on special occasions like with wine for celebrations.
- **Yoghurt:** plain yoghurt is the most bought type of yoghurt by Turkish consumers. Amongst flavoured yoghurts, most consumers prefer fruity flavours with strawberry, apricot and peach being the most favourite. The average consumer mainly purchases yoghurt from well-known trusted brands, whereas a minority of consumers also starts to be more interested in smaller brands. Health-conscious consumers opt for the most nutritious yoghurt that they perceive as healthier than other options. When it comes to drinking yoghurt, *ayran* is the preferred choice of Turkish consumers as it has a long history in the country and is popularly consumed throughout the country as an inexpensive option. The main purchase criterion, however, remains the price. Affordability is key since the Covid-19

pandemic and the recession limited disposable incomes and consumers need to be more price-conscious. Drinking yoghurt is the cheapest product in the yoghurt category and thus often the prominent choice for lower-income consumers.

- **Butter and spreads:** the price point is also important when it comes to butter and spreads. Price-sensitive consumers are more likely to opt for margarine than butter as it is the cheaper choice. Thus, margarine and spreads are still more popular than butter. Health-conscious consumers on the other hand, generally prefer butter which they view as the healthier option because it is natural and has a better nutritional value. The price point of imported butter is even higher than locally produced butter and thus consumers are likely to switch to local butter if available. If not available because of supply shortages, consumers might still choose imported butter over cheaper margarine depending on their values and preferences. Higher-income consumers, who are interested in trying new varieties might prefer imported butter in general. Even though organic butter is not yet popular, it may appeal to a small niche of high-income health-conscious consumers also culinary enthusiasts often prefer imported brands.
- **Other dairy:** different products have different purchase criteria, however, the price remains an important purchase criterium for all other dairy products, and so does the quality and taste. As the quality and taste of some packaged formats increase and are on the same level as some food outlet products, consumers now increasingly choose cheaper retail packaged formats over food service products. Health and nutrition are other important purchase criteria as consumers are becoming increasingly health-conscious. Convenience is important for parents that purchase chilled dairy snacks for their children. Chilled dairy desserts and chilled snacks overall are the main choices in this category followed by fromage frais and quark.

Dairy products on retailers' shelves in Turkey

In Turkey, it is common for a variety of dairy products such as cheese, milk, butter, yoghurts etc. to be displayed together on retail stores' shelves. Imported cheese is more likely to be displayed separately from Turkish domestic products in a bid to stand out. The price of imported cheese is around 100 TRY (EUR 6.45) per kg. Imported cheese is packaged in flexible plastic packaging with a unique design that relates to its place of origin. Imported butter and spreads are packaged in plastic packaging containers which appeal to Turkish consumers that often keep the packaging for further use once finished with the butter and spread product.



Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

The market for **milk** as a whole continues to grow. Health concerns increase the sales of drinking milk products as well as the demand for organic products. Full-fat products are expected to grow as they are seen as healthy, less processed and more natural than other options. In line with the health and wellness trend, the demand for lactose-free milk is forecast to grow as well, because consumers believe that lactose-free milk is easier to digest. Other health-related launches include protein milk and fortified milk. Flavoured milk launches included products with no additional sugar, while vitamins and proteins are added. The share of private label companies is forecast to grow and make up around one-third of sales by 2026⁵⁹. Milk alternatives, almond milk being the favourite, are expected to grow in the coming years as well as consumers increasingly aim to reduce their dairy intake for dietary reasons. Turkish consumers are open to innovation and new product launches in the drinking milk sector including recent innovative releases such as latte drinks, which combine coffee and milk.

As noted above, **cheese** is an important product in Turkish cuisine. Consumers are likely to increasingly consume cheese as it is viewed to be a healthy and nutritious food choice. In particular soft cheeses are expected to become more demanded as they are a breakfast staple. Due to the health trend as well, organic cheese is forecast to be demanded more in coming years, albeit growing from a smaller base. As the number of vegans increases, plant-based cheese will become more popular as well, although it currently is still in its infancy. Some consumers perceive plant-based diets to be healthier and more natural, which further boosts the demand. Consumers of plant-based cheese are not necessarily vegan but rather health-conscious and trying to improve their overall diet.

With regards to **butter**, a recent trend that stands out is the increase in use at home due to home baking and cooking during the pandemic. Even though butter is perceived to be healthier and more natural than other spreads such as margarine, the demand is expected to decline after the pandemic is over.

In the **yoghurt** market, sales are also forecast to return to pre-pandemic levels once consumers go back to work and school. In both the retail and food service channels, the health trend is likely to influence sales. Organic yoghurt is expected to benefit from the health trend as well, even though it is more expensive than other options. Children might be good to target, given that yoghurt is viewed by parents as a healthy product, and parents place product quality over price when it comes to their children's health. Health and nutrition demands come hand in hand with green trends such as eco- and ethically friendly products. Products that have health benefits and are liked because of their good flavour are likely to perform well in the future.

Amongst '**other dairy**' the increase in demand for chilled dairy desserts is forecast to slow down after the end of the pandemic as consumers are expected to purchase such products more often from the food service channel again. Yet, chilled dairy desserts will remain in demand at retail point, as convenience becomes increasingly important to consumers and the quality of desserts improves, thus driving demand for packaged foods and ready-made snacks.

⁵⁹ Euromonitor International: Packaged Food, 2021

5.3.3 Offer

Domestic production

Turkey's milk production has nearly doubled in the last decade. Production of milk is centred in the west side of Turkey, the Aegean and Central Anatolia. More than one-tenth of production takes place in the provinces of Konya and Izmir. Due to its overall high milk production and supporting government policies, Turkey is the third biggest milk producer in Europe and the eighth biggest in the world. Turkish dairy exports doubled between 2009 and 2020, with the country mainly exporting cheese, whey products and milk powder.⁶⁰

In total, Turkey produced around 9.8 million tonnes of cow milk in 2020. In the first nine months of 2020, Turkey produced 1.1 million tonnes of yoghurt and close to 590 million tonnes of *ayran* (a typical salty Turkish yoghurt drink), as well as about 36 000 tonnes of milk powder, 79 000 tonnes of butter and over 41 000 tonnes of cream. During the same period, 1.6 million tonnes of drinking milk was produced, representing an increase of nearly 10% on an annual basis.⁶¹ More than 200 types of cheese are locally produced in the country and cheese production from cow milk continues to increase.

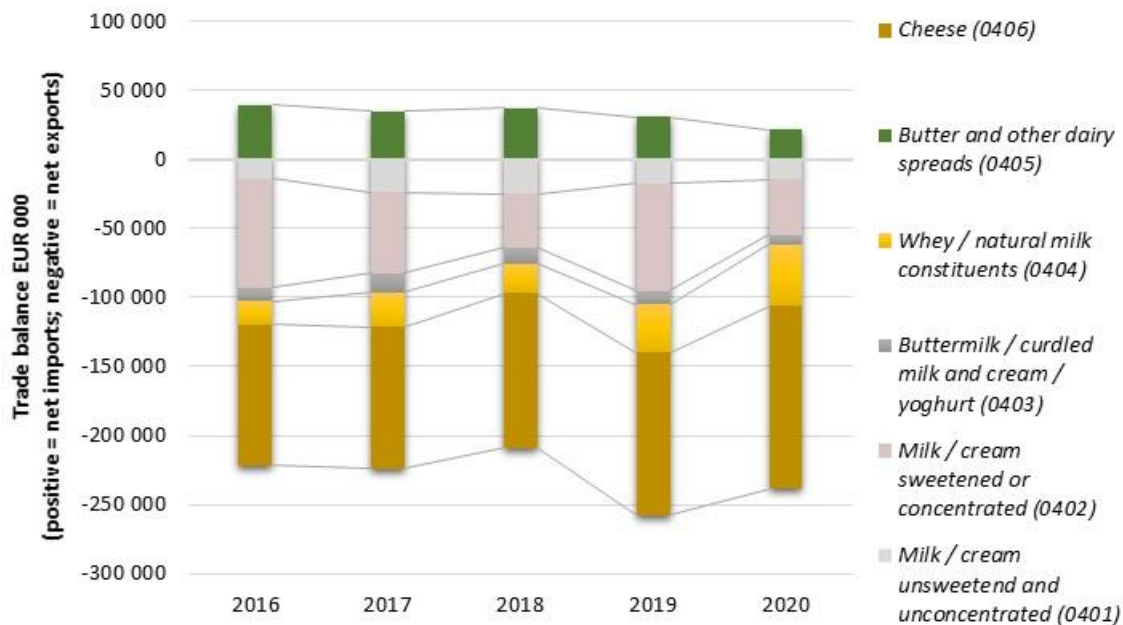
Imports and exports

As shown below in Figure 5-11, overall, Turkey is a net exporter of most dairy products reflecting the country's expanding dairy sector which already caters to most of the demand within the country. Butter and other dairy spreads were the largest imported dairy product in the past five years, with the country importing a total of EUR 31 million in 2020. Across all other major dairy categories, Turkey is a net exporter with cheese being the country's largest exported product. As Turkey is a large dairy producer, most demand for imported dairy products comes from the country's middle-higher income class.

⁶⁰ Discover Turkish Dairy Sector, available at: <https://ulusalsutkonsevi.org.tr/en/discover-turkish-dairy-sector/>

⁶¹ Turkey collects over 9.8M tons of cow milk in 2020, available at: <https://www.aa.com.tr/en/economy/turkey-collects-over-98m-tons-of-cow-milk-in-2020/2141111#>

Figure 5-11: Trade balance (imports and exports) of dairy in Turkey, 2016-20 (EUR 000)



CN codes in brackets.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

In terms of the origin of imports, Cyprus is an important origin for multiple categories. More specifically, as shown in Figure 5-12:

- **Unsweetened/unconcentrated milk/cream:** Cyprus accounted for around 80% of imports of this category. Austria is next with around 13%, followed by Germany and Belgium. Thus, the EU clearly dominates imports in this product market.
- **Sweetened/concentrated milk/cream:** Iran and the United Arab Emirates are the main exporters of these products. The Netherlands is the biggest EU exporter. The EU in total accounted for around 20% of the Turkish import market value for this product in 2020.
- **Buttermilk, curdled milk and yoghurt:** Germany is the most important exporter accounting for 86% of the total Turkish import market in this product category in 2020. Exports from Switzerland and the Netherlands follow far behind.
- **Whey and natural milk constituents:** France accounted for more than half of imports into Turkey in 2020, followed by the UK and Germany. The EU in total accounted for 60% of Turkish imports in this product category.
- **Butter/dairy spreads:** Ireland accounts for half of the imports into Turkey, followed by Poland and Uruguay. The EU in total accounted for about 76% of Turkish imports in this product category in 2020.
- **Cheese:** Cyprus is the biggest exporter of cheese to Turkey and accounted for more than 40% of Turkish imports in this product category. Italy ranks second,

followed by the USA, the UK and Ireland. The EU in total accounts for more than 70% of Turkish imports in this product category.

EU GI products

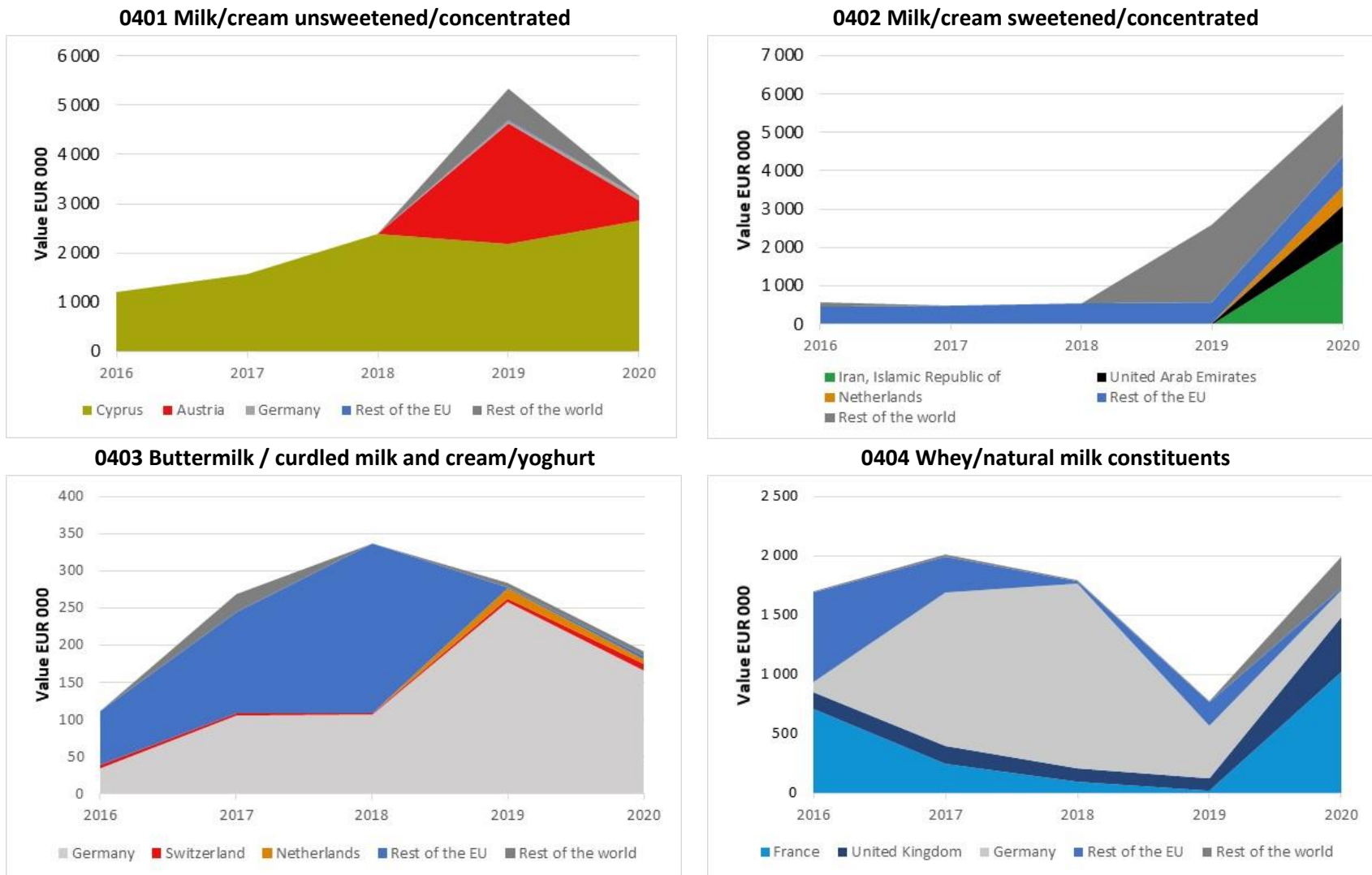
As noted in section 4.2.4, there is a system for the protection of GIs in Turkey. Parmigiano Reggiano and Grana Padano have been registered as trademarks, and an application is pending for Gorgonzola cheese.

Main competitors

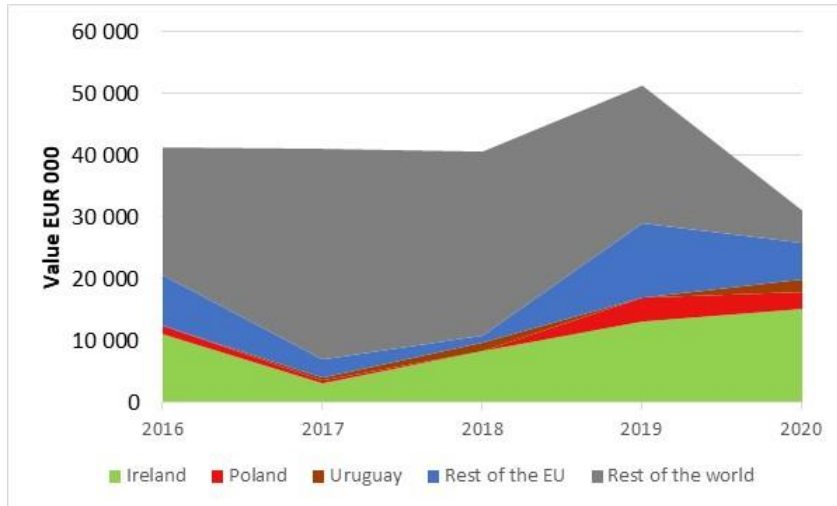
The EU is dominating most dairy product categories that are imported into Turkey. However, it is not leading the sweetened/concentrated milk/cream category. The main competitors in this market are Iran and the United Arab Emirates. Overall, the UK, the US as well as Uruguay are competitors that need to be taken seriously in some other categories as well.

Turkey's local dairy production is the main competitor for EU products as Turkish dairy products are often cheaper and more widely available. Turkey is the eighth biggest milk producer in the world and even ranks third in Europe. It is particularly prominent in producing drinking milk, yoghurts and *ayran*.

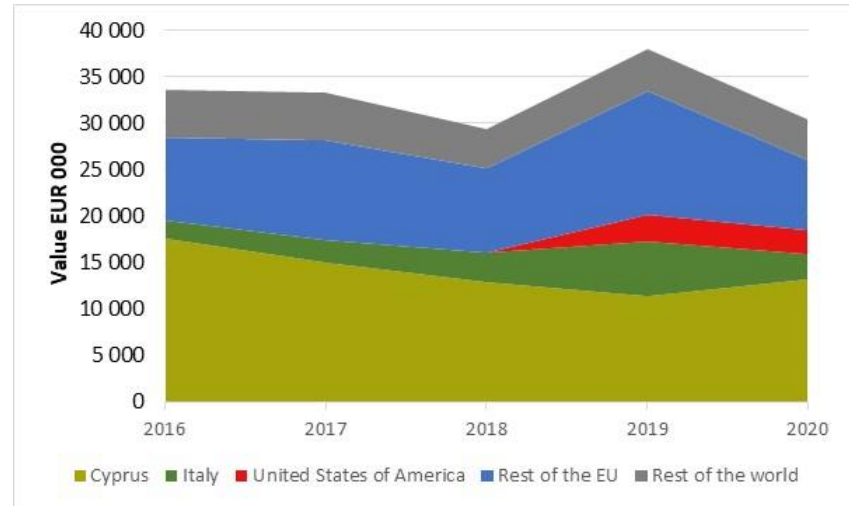
Figure 5-12: Turkish imports of different dairy product categories by country, 2016-20 (EUR 000)



0405 Butter/dairy spreads/



0406 Cheese



CN codes are indicated above graphs.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

5.3.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for dairy products imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products, a pre-notification form for inspection purposes (Turkish version of the common veterinary entry document - CVED), and a veterinary health certificate for animal products. There are additional specific requirements (e.g. certificate of analysis). This is in addition to general import requirements. Halal certification, although not officially required, may be requested by some importers.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>

In terms of tariffs, dairy products are generally subject to high tariffs, but preferential tariffs are in place for certain products such as milk/cream in powder, butter and processed cheese within certain quantitative limits (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – cheese for processing category (0406 90) from Germany to Turkey:

<https://trade.ec.europa.eu/access-to->

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for dairy products. Within the dairy product category, there are product-specific standards for drinking milk; condensed milk and milk powder; butter and dairy spreads; and, yoghurt and other fermented dairy products. This legislation sets definitions, product features including specific content composition such as milk fat and dry matter, as well as the substances which can be added to each product. A summary of the definitions is provided here: <https://www.esk.gov.tr/tr/10882/Turk-Gida-Kodeksine-Gore-Sut-ve-Sut-Urunleri-Tanimlari>.

It is recommended that the corresponding standard be consulted for full details – a list of the standards is available here: <https://www.esk.gov.tr/tr/10881/Sutle-Ilqili-Mevzuat> .

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling.

The above-mentioned Turkish food codex legislation for each category of dairy products contains specific requirements for the labelling of certain types of products. This legislation should be consulted for details on labelling.

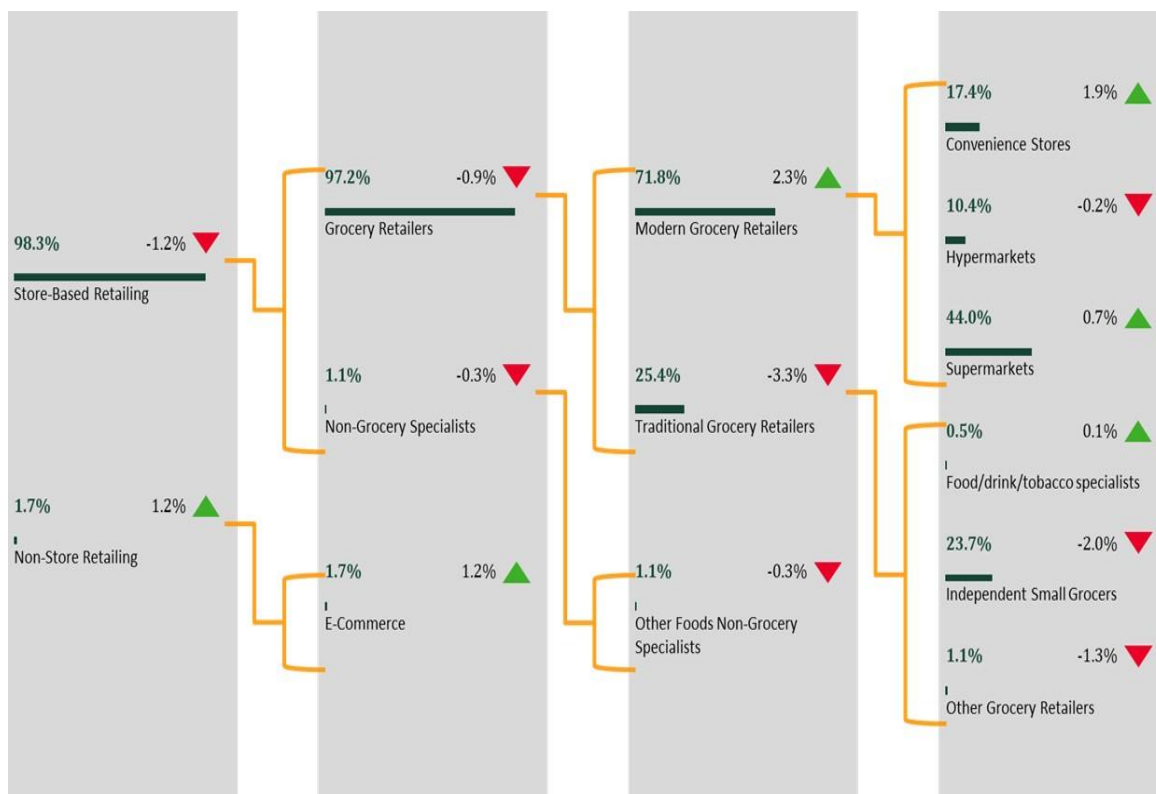
5.3.5 Distribution

Modern grocery retailers account for more than 70% of the distribution of dairy products; with traditional retailers accounting for the remaining 30%. Non-store retailing accounts for 1.3% of the distribution of dairy products as a whole, with e-commerce the main channel within this (Figure 5-13). However, this overarching picture for dairy masks significant differences between products, based on their shelf stability / chilling requirements and the profile of consumers who purchase the product (which itself is impacted by the former factor). More specifically:

- **Drinking milk:** modern grocery retailers account for over 70% of distribution mainly through discounters and supermarkets. Their popularity is growing. Independent small grocers are the main traditional grocery channel. E-commerce is a minor but growing channel, accounting for 1.6% of sales.
- **'Other dairy':** modern grocery retailers account for over 80% of distribution with mainly discounters and supermarkets. Their popularity is increasing. Modern retailers, in particular, independent small grocers account for most of the rest. E-commerce is growing but still minor at around 1.3%.
- **Butter and spread:** even though the popularity of modern grocery retailers is declining, supermarkets and discounters account for close to 70% of the total retail sales. Independent small grocers which are a traditional channel gain popularity. E-commerce is very low at 0.5% and shows a small decline from previous years.
- **Cheese:** distribution is nearly equally shared between modern and traditional grocery retailers, with the popularity of independent small grocers growing. Also, e-commerce has a more significant share compared to other dairy product categories, at 2.6% of all cheese sales.
- **Yoghurt:** modern grocery retailers dominate distribution, accounting for close to 80% of all retail sales, mainly through discounters and supermarkets. However, independent small grocers are popular too and account for nearly the rest of the distribution. Only a minor part of sales is done via e-commerce (0.7%).

Imported dairy products of all types are much more likely to be found in modern retail channels (hypermarkets and supermarkets in particular) and, to some extent, through e-commerce channels.

Figure 5-13: Distribution channel overview of dairy products in Turkey (2020), % share



Source: Euromonitor International: Packaged Food, 2021.

5.3.6 Challenges for EU products

Dairy products are commonly consumed in Turkey. Turkey is the world's eighth-largest milk producer and a big producer of yoghurt and drinking yoghurt (*ayran*). The country is a net exporter of dairy products, having exported around four times more than it imported in 2020. Thus, there is only limited space available on the market for imported EU products. However, the EU is one of the main exporters to Turkey in most product categories and thus still plays an important role. Even though consumption of dairy products is relatively high, it is still below EU levels. It is a challenge for EU producers to keep up their exports to Turkey while there are other important players in the Turkish market including domestic producers. EU products are often more expensive than locally produced Turkish dairy products or imported products from other areas of the world. As consumers are becoming increasingly price-conscious with the fall in the Lira and the negative effects of the Covid-19-pandemic this poses another challenge. Yet, there always remains a niche for more expensive products that are often still bought by higher-income consumer groups and consumers that are attracted to more premium products. Taste can also be a challenge, to the extent that the taste of dairy products from the EU can differ from products made in Turkey and thus consumers might be less inclined to purchase them.

Market Takeaway: Dairy

Consumption: *The dairy market in Turkey was worth about EUR 3.85 billion in 2020 and is forecast to grow.*

Competition: *Turkey is the world's eighth-biggest milk producer and a net exporter of dairy products. The EU dominates the import market in most product categories, however, Iran and the United Arab Emirates as well as the UK, the US and Uruguay are competitors.*

Distribution: *Mainly through modern grocery channels including discounters and hypermarkets, but also independent small grocers. E-commerce is a minor but growing channel and is more prominent for cheese.*

Challenges: *Overall high competition including from domestic producers, lower consumption compared levels per capita compared to the EU, price-sensitive consumers, the taste difference between local and EU products.*

Opportunities: *There are opportunities for healthy, affordable and convenient products. Cheese has the biggest market size and is forecast to grow at a fast pace. EU dairy products are perceived as being high quality and often consumed to celebrate special occasions such as weddings or birthdays.*

5.4 Wine

5.4.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ The wine market is forecast to grow at very strong rates. ▪ Since 2020, Turkey is a net importer of wine. ▪ The five biggest EU exporters accounted for around 73% of Turkey's import value in 2020. 	<ul style="list-style-type: none"> ▪ Only 20% of the Turkish population is estimated to consume alcohol on a regular basis. ▪ The higher price point of EU wines compared to new world wines or local wines. ▪ Alcohol advertising and promotion, including wine, is forbidden in Turkey.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Targeting tourists as well as younger curious consumers and higher-income earners. ▪ All categories are forecast to grow and thus can be targeted, in particular white and rosé wine for health-conscious consumers. ▪ Good quality wines with affordable price points (mid-priced segment). 	<ul style="list-style-type: none"> ▪ Moldova and Chile are the two biggest non-EU exporters to Turkey. ▪ Turkey is the world's fourth-biggest producer of grapes for wine production (even though only about 5% of grapes are currently used for wine making). ▪ Per capita consumption is very low compared to EU levels, and part of consumers prefers to drink other alcoholic beverages such as raki and beer. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

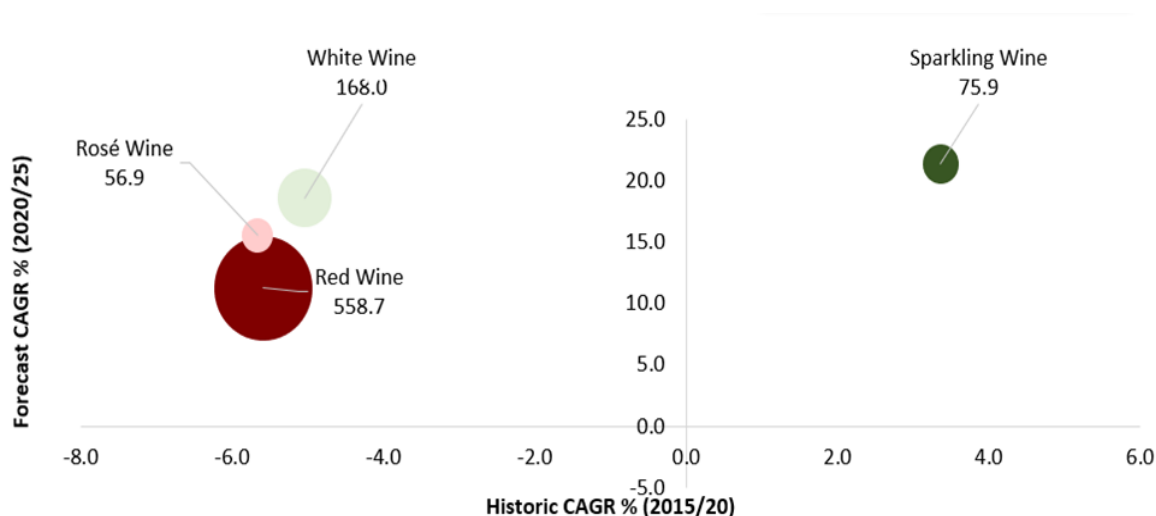
5.4.2 Consumption

Evolution of consumption

In 2020 the total wine market in Turkey was worth about EUR 860 million. As shown in Figure 5-14, red wine is leading the market. In 2020 the red wine market was worth close to EUR 559 million, followed by white wine with a market worth around EUR 168 million. These two categories together made up close to 85% of the total wine market value in 2020. The remaining 15% are made up of sparkling wine, which accounted for approximately EUR 76 million and rosé wine with about EUR 57 million.

Between 2015 and 2020, the wine market size in Turkey has been decreasing. Sparkling wine was the only category to show positive growth rates at about 3.4%. White wine fell at a CAGR of -5%, followed by red wine with a CAGR of -5.6%. The market size of the smallest category rosé wine declined the most, at a CAGR of -5.7%. However, the forecast looks much more positive with all categories forecast to grow at very strong rates. Between 2020 and 2025 sparkling wine keeps the highest growth rate of all categories and is forecast to grow at 21.3%. White wine has the second-highest forecast growth rate of about 18.6%, while rosé wine is forecast to grow at 15.5%. The biggest category, red wine, is forecast to grow at the lowest but still very high rate of 11.2% between 2020 and 2025.

Figure 5-14: Evolution and forecast of the wine market in Turkey, 2015-2025 (EUR million)



Source: Euromonitor International: Alcoholic Drinks, 2021.

Consumer profile and purchase criteria

Consumers

The majority of the Turkish population is Muslim with some consumers following the rules of Islam more strictly than others. Muslims are forbidden to consume alcohol, which is why wine consumption is comparatively low at a total of around 2.6 litres per capita in 2020, almost ten times less than the average per capita consumption of close to 25 litres in the EU. Some consumers that do consume alcohol prefer e.g., raki or beer to wine, and thus consume wine less or not at all. However, Turkish consumers increasingly acquire knowledge about wine and the interest in wine from other areas of the world grows. In particular, the younger generation is often less strict in applying religious convention, more influenced by the west and thus more curious about wine culture.⁶²

Another highly important group of consumers are tourists who account for about 40% of wine consumed on trade in Turkey. As tourists are often coming from non-Islamic countries, they are more open to consuming wine than most of the Turkish population. Similarly, the expat community in Turkey is another important consumer group for wine. Consumers of EU wine are likely to come from higher-income groups because EU wines are often priced higher than new world wines or local Turkish wines.⁶³

Drivers and method of consumption

A big portion of the wine in Turkey is consumed on trade and thus Covid-19 related lockdowns, restrictions and social distancing measures, as well as the closure of the food service sector, decreased the on-trade consumption. Even after the food service opened again, consumption remained low as consumers remained cautious about their social interactions. As a large consumer group of wine in Turkey are tourists, the wine market decreased even more due to travel restrictions and the number of tourists drastically

⁶² Turkish Wine, available at: <https://www.wine-searcher.com/regions-turkey>

⁶³ In Turkey, Wine Producers Face a Turning Point, <https://www.foodandwine.com/wine-regions/turkey-wine-future>

declining. However, Covid-19 positively affected off-trade sales because some consumers stockpiled wine at the beginning of the pandemic for at-home consumption.

Drinking wine at home with family and friends to enjoy time together is common practice in Turkey, for those Turks who do consume alcohol and do not strictly follow the no-alcohol rules of Islam. Drinking is particularly common in western as well as coastal areas.⁶⁴ In particular sparkling wine is consumed on special occasions such as weddings or birthdays. Due to social distancing, the number of special events celebrated with different people decreased and so did the consumption of sparkling wine⁶⁵. However, Turkish producers cannot do much to try to increase consumption, because since the introduction of stricter legal provisions in 2013, advertising alcohol is forbidden. Consumption is further hampered by the increasing health consciousness of consumers that view alcoholic drinks to be unhealthy.⁶⁶

Purchase criteria

First of all, preferences depend on whether consumers are consuming alcohol or not. Secondly, those that consume alcohol will choose their alcoholic beverages according to their preferences. Some might prefer raki or beer, while others opt more likely for wine.

Besides these overall preferences, the price plays an important part. The devaluation of the Lira and increasing prices, as well as economic uncertainty that influenced disposable incomes, made consumers more price sensitive. As a result, consumers increasingly choose cheaper wines from the mid-priced range. Although quality of wine is also a criterion, in the current situation, consumers place less importance on the variety of grapes used and other quality parameters. Yet, consumers are still looking to find good quality wines at decent prices. Health-conscious consumers are more likely to choose white wine over red wine because it is deemed to be a healthier choice. Consumers prefer if the imported wine has the region of the vineyards and unique points of the winery mentioned on the bottle labels. Turkish consumers of wine from EU countries, in particular, will seek this out on the labelling of wine bottles and products.

Wine on retailers' shelves in Turkey

Wine in Turkey is sold in normal supermarkets as well as special wine stores. Prices are usually displayed in supermarkets but it might not be the case in wine stores.

Imported wine commonly retails at the following prices:

- Economy – under 70 TRY (5 EUR) per 750ml
- Mid – 100TRY – 200 TRY (6.50-12.91 EUR) per 750ml
- Premium – 350 TRY – 500 TRY (22 – 32 EUR) per 750ml

Consumers who purchase mid to premium imported wines are usually educated and working mid-aged higher-income individuals. The majority of wine is sold in glass bottles of 750 ml in Turkey; although smaller bottles exist on the market they are rather rare. Promotions and offers do exist but mainly for the economy wine segment. To stand out, certain wines are sometimes displayed in special pop-up stands.

⁶⁴ Do Turkish People Drink Alcohol? Our Laws, History, and Culture, available at: <https://visitlocalturkey.com/do-turkish-people-drink-alcohol/>

⁶⁵ Euromonitor International: Alcoholic Drinks, 2021

⁶⁶ In Turkey, Wine Producers Face a Turning Point, <https://www.foodandwine.com/wine-regions/turkey-wine-future>



Wine section displaying more expensive bottles on top shelves and lower-priced bottles on low shelves



Wine shelf organised by type of wine

Wine is often stocked in separate aisles in retail outlets. In some shops, the shelves used for displaying wine are of higher quality than those used for other grocery items. Most mid to premium-priced wine in modern outlets is displayed mainly in the consumer's eyesight. Cheaper wine is usually placed on lower shelves. Many shops organise their wine shelves according to the type of wine e.g. they put all red wines on one shelf and white wines on another, while other shops group brands together.



High-quality shelving and lighting in the wine section



Special pop up stand to promote brands

Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

Recent trends in the Turkish wine market include:

- **Mid-priced wine:** Given the economic situation and the devaluation of the Lira in combination with other negative effects of the Covid-19 pandemic consumers are becoming increasingly price-sensitive and thus more often purchase mid-priced wines. Even though quality remains somewhat important, the price often is the deciding factor. This trend will grow the market for mid-priced wine in the following years.
- **Still, light grape wine remains dominant:** Red wine is the most consumed wine in Turkey currently, although white wine is growing faster partly because of its lower price point and because it is viewed to be the healthier option by health-conscious consumers. Fruit wine was the only category that grew its market in recent years, whereas sparkling wine had the strongest decline. In the coming years, white and rosé wines are likely to have the strongest growth potential. Fruit wine is expected to be demanded more as well; however, it will grow from a lower base than the other categories.⁶⁷

5.4.3 Offer

Domestic production

Turkey is one of the oldest wine-making regions in the world. Due to its long history, Turkey has a diverse grape gene pool with over 600 indigenous varieties. Yet, today most grapes grown for wine production in the country are popular international varieties.⁶⁸ Turkey is the fourth biggest producer of grapes for wine production in the world with more than 500 000 ha of land under vine, which is 10% more than the USA. However, only a small share of grapes go into wine making, with approximately 95% of all grape production being consumed as table grapes and going into the production of raki, which is a local liqueur.⁶⁹ The country produces around 615 000 hectolitres of wine per year in around 150 wineries. Its main wine-producing regions are the Aegean Coast, Marmara, and Anatolia.

There are several reasons for the low use of grapes for wine production in Turkey, including the lack of a domestic consumer market as well as the influence of the Muslim culture. As most Turks follow Islam, they are not allowed to consume alcohol. However, in recent years the country developed more of a taste for wine due to an increase in domestic consumer demand paired with the growing tourism industry. Consumers are getting accustomed to wines from other areas in the world and become more knowledgeable and curious. Moreover, the quality of Turkish wines improved since the state monopoly has been privatised, while Turkish wine gains popularity in many regions such as the USA, the EU, Australia and the UK due to growing popularity in trying new indigenous grapes.⁷⁰

⁶⁷ Euromonitor International: Alcoholic Drinks, 2021

⁶⁸ LAYOVER 7: Turkey. Despite many challenges, wine is on the rise, <https://www.jeanleon.com/en/layover-7-turkey-despite-many-challenges-wine-is-on-the-rise/>

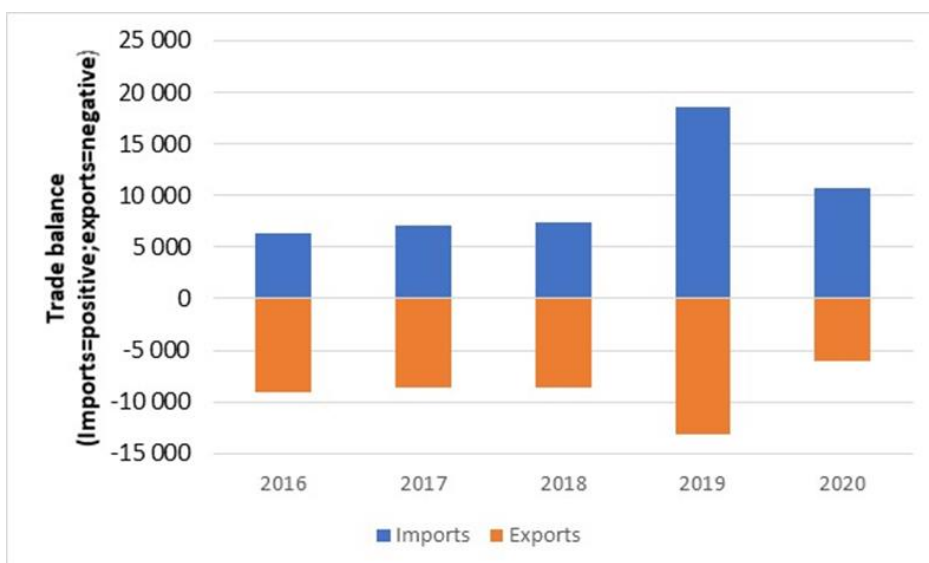
⁶⁹ Turkish Wine, <https://www.wine-searcher.com/regions-turkey>

⁷⁰ What You Need to Know About Turkish Wine, <https://daily.seventy.com/what-you-need-to-know-about-turkish-wine/>

Imports and exports

As shown in Figure 5-15, Turkey has been a net exporter of wine between 2016 and 2018 but became a net importer of wine in 2019. In 2020 the country imported wine worth about EUR 10.7 million, whereas it exported about EUR 6 million of wine in the same year. Imports and exports remained more or less stable between 2016 and 2018 but increased significantly in 2019. Between 2016 and 2020 the value of wine imports overall increased by EUR 4.4 million, which is an increase of more than 40%, whereas exports decreased by EUR 3.1 million, which represents a decrease of around 34%.

Figure 5-15: Trade balance (imports and exports) of wine in Turkey, 2016-20 (EUR 000)

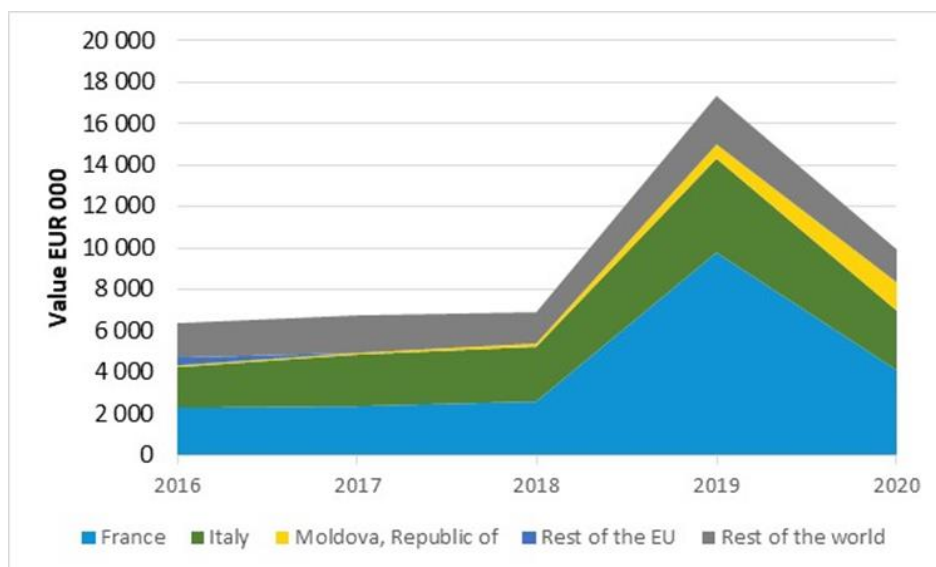


Data for CN code 2204.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Five out of the most successful ten exporters of wine to Turkey are from the EU, namely France, which ranks first, Italy, which ranks second as well as Spain, Portugal and Germany. In 2020 France exported a total value of about EUR 4.1 million and Italy around EUR 2.9 million. These two countries together accounted for around 65% of the total value of wine imports into Turkey in 2020. The Republic of Moldova was the third biggest exporter to Turkey in 2020 with around EUR 1.3 million, followed by Chile with EUR 1.1 million. The five most important exporters from the EU together accounted for about 73% of the Turkish import market, with approximately EUR 7.8 million (Figure 5-16).

Figure 5-16: Turkish imports of wine by country, 2016-20 (EUR 000)

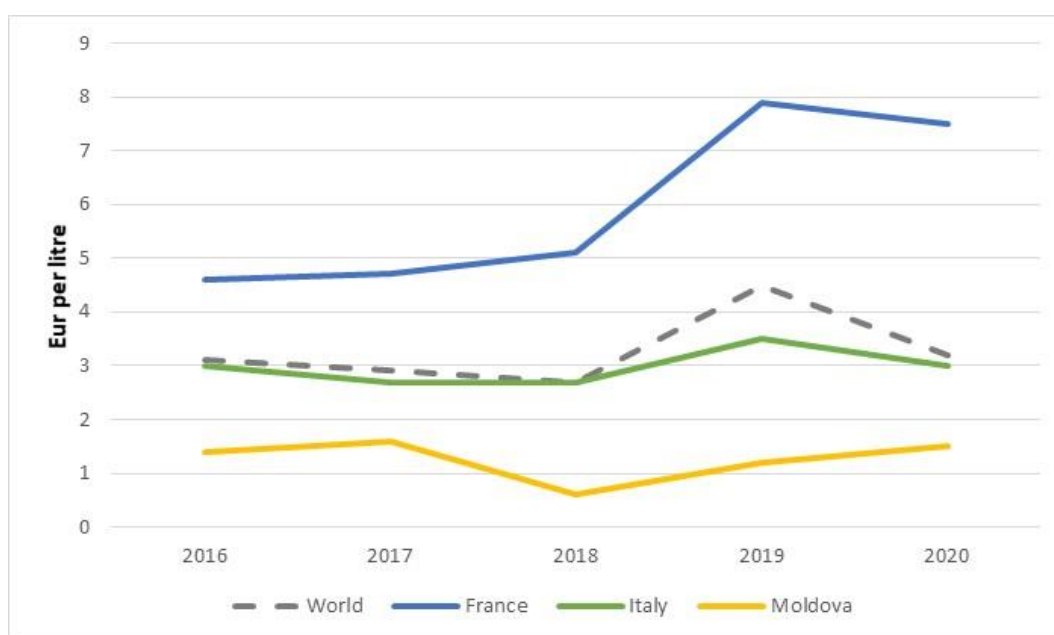


Data for CN code 2204.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

The unit value of French wines has fluctuated in recent years in Turkey, from EUR 4.6 per litre in 2016 peaking at EUR 7.9 per litre in 2019 before reaching EUR 7.5 per litre in 2020. French wine is by a considerable distance the most expensive wine in Turkey per litre. Italian wine was priced at EUR 3 in 2020 which is slightly behind the global average of EUR 3.2 per litre. Moldova is the third-largest exporter of wine to Turkey and Moldovan wine was priced at EUR 1.5 per litre in 2020.

Figure 5-17: Turkish imports of wine by country, 2016-18 (EUR per litre)



Data for CN code 2204.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is a system for the protection of GIs in Turkey. Champagne has been identified as having been registered as a trademark; and, there is a pending EU GI application in the registration process for Douro wine. Section 4.2.4 provides details on how to check if other wine GIs have also been registered.

Main competitors

The EU is leading the wine import market to Turkey, accounting for around 73% of total imports in 2020. Even though competition in the wine import market is limited, Moldova and Chile need to be taken seriously as they are the third and fourth biggest exporters of wine to Turkey and together accounted for around 22% of the market value in 2020.

Even though EU wines are generally higher priced than local wines or new world wines, they are also known to be of very high quality and thus still popular on this very small market. The unit value of French wine is around 60% higher than the world's average price, making France the biggest wine exporter to Turkey by value. Despite their relatively higher price high-quality EU wines are still very appreciated by a small group of high-income consumers in Turkey (including tourists and the expat community).

Turkey is the world's fourth-biggest producer of grapes; however, it only uses a small portion of these to produce wine. Nevertheless, Turkey could easily ramp up its wine production if it decided to do so and thus is a potential competitor as well.

5.4.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, a certificate of conformity and certificate of analysis is required for wine imported into Turkey. All types of alcoholic beverages are furthermore to be notified to the Department of Tobacco and Alcohol of the Ministry of Agriculture and Forestry and can only be imported at designated ports of entry. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>

In terms of tariffs, wine is generally subject to a 50% tariff. Preferential tariffs are in place for a small quantity of certain sparkling wines (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – sparkling wines (2204 10) from Italy to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=22041093&origin=IT&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for wine and aromatised wines. The Turkish food codex for wine was published in February 2009 (Communiqué No. 2008/67) and a separate code for aromatised wines was published in July 2006 (Communiqué No. 2006/28). This specific legislation, which contains various definitions, product features, transport, storage and other provisions can be found here:

- wine: <https://www.resmigazete.gov.tr/eskiler/2009/02/20090204-12.htm>
- aromatised wines: <https://www.resmigazete.gov.tr/eskiler/2006/07/20060707-10.htm>

It is understood that draft legislation on fruit wine has recently undergone a consultation process.

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. According to this legislation, the statement “...contains alcohol” must be included on the label of alcoholic drinks and any other food if ethyl alcohol is used as an ingredient in its manufacture or preparation, notwithstanding the amount of the alcohol. It should be remembered that the above-mentioned Turkish food codex regulations include detailed rules on the packaging and labelling of wine and aromatised wines.

There are also specific rules on declaring alcohol by volume on the label of alcoholic beverages – this covers all drinks containing more than 1.2% alcohol by volume (Communiqué No. 2003/06). This legislation has been prepared within the framework of harmonisation with EU legislation and takes into account Commission Directive 87/250/EEC on “Determining the Amount of Alcohol by Volume in Labelling of Alcoholic Beverages Offered to the Consumer”. As already noted, alcohol advertising and promotion are completely banned in Turkey according to the applicable law, forbidding advertising on TV/radio and at the point of sales (see section 6.2).

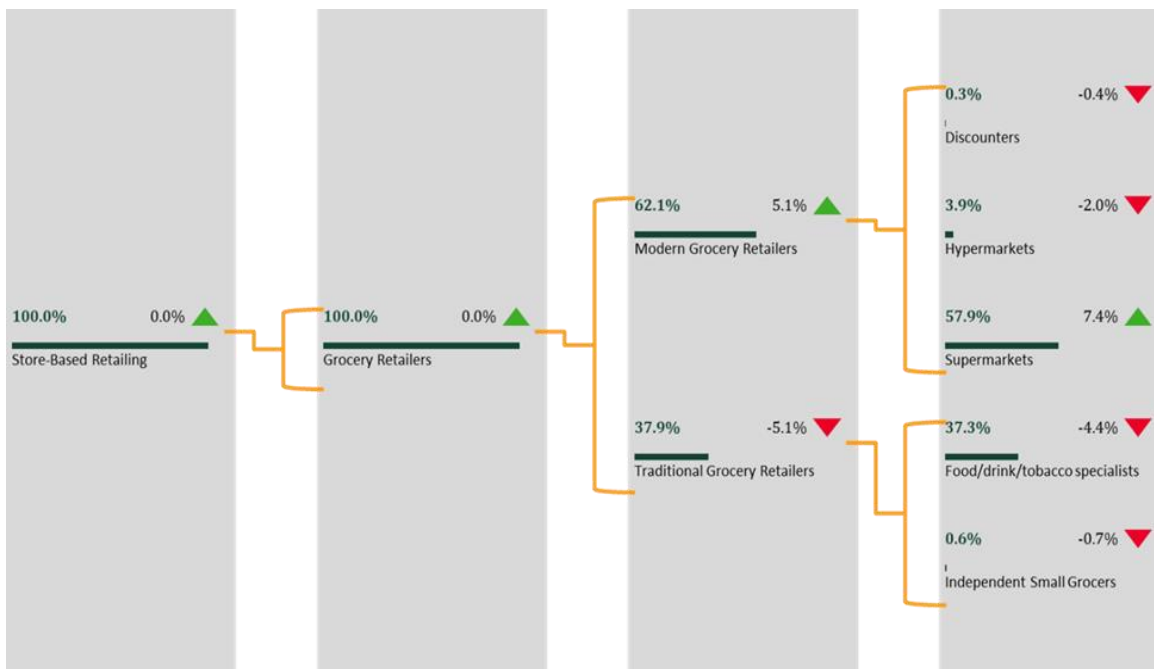
5.4.5 Distribution

In Turkey, around 57% of the wine is sold off-trade and the remaining 43% is sold on-trade.

Figure 5-18 shows the off-trade distribution channels. All wine in Turkey is distributed through stores and none through e-commerce. Modern grocery retailers account for 62% of the off-trade sales and thus are more popular than traditional grocery retailers with 38%. The one modern grocery channel that stands out are supermarkets which account for 58% of the total off-trade wine sales. Their popularity has been increasing by more than 7% since 2017, whereas the popularity of all other modern, as well as traditional grocery channels, has decreased. Yet, food and drink specialists remain the second biggest and most important traditional channel with 37%. Before the pandemic, food and drink specialists were open longer than regular supermarkets and thus had an advantage. However, in the Covid-19 pandemic, these stores also had to follow the lockdown rules

and thus were closing early as well, which might be one reason why they lost popularity so that supermarkets have become the more popular choice.

Figure 5-18: Distribution channel overview of wine in Turkey (2020); off-trade sales, % share



Source: Euromonitor International: Alcoholic Drinks, 2021.

5.4.6 Challenges for EU products

The number one challenge to selling wine in Turkey is that the majority of the population follows Islamic tradition restricting the consumption of any kind of alcohol. However, an estimated 20% of the Turkish population consumes alcohol on a regular basis including wine and the expat community, as well as Turkey’s many tourists, drive demand for wine. During Ramadan (the fasting month in Islam) alcohol is still sold but should be consumed with care. When in public or non-touristic places it is important to be respectful to people who fast and do not consume alcohol.⁷¹

Another challenge is to combat the increasing price sensitivity of Turkish consumers, which drives them to purchase cheaper wine options such as new world wines or local products. Yet, EU wines are often perceived to be of higher quality than other wines and thus have a small consumer base with Turkey’s higher-income consumers, including tourists as well. It is important to find a proper niche for wine products to be successful in this market. Another challenge for the promotion of EU wine is that, since the introduction of a law in 2013, the advertising of alcoholic drinks is forbidden in Turkey.

⁷¹ Can You Drink Alcohol in Turkey? Available at: <https://turkeynomad.com/drinking-alcohol-in-turkey/>

Market Takeaway: Wine

Consumption: *The total wine market in Turkey was worth about EUR 860 million in 2020, with the markets for red wine and white wine being the biggest. All categories are forecast to grow at strong rates.*

Competition: *Cheaper wines, in particular from Moldova and Chile, as well as the demand for locally produced raki spirit. Locally produced wine can potentially become a competitor, as Turkey is a significant producer of grapes.*

Distribution: *43% on-trade and 57% through off-trade channels by value. Off-trade wine is sold in store-based retailing, in particular in supermarkets and food/tobacco/drink specialists.*

Challenges: *A high share of the population follow Islamic tradition to abstain from drinking alcohol; cheaper wines from competitors; ban on advertising of alcoholic drinks.*

Opportunities: *All wine categories are forecast to grow at a fast pace, however, white wine is forecast to grow at the highest rate, and both white and rosé wine stand out for health-conscious consumers. The mid-priced segment presents an opportunity over premium wines as consumers become more price sensitive. Tourists, the curious younger segment of the Turkish population as well as high-income earners are good targets.*

5.5 Spirits

5.5.1 SWOT analysis

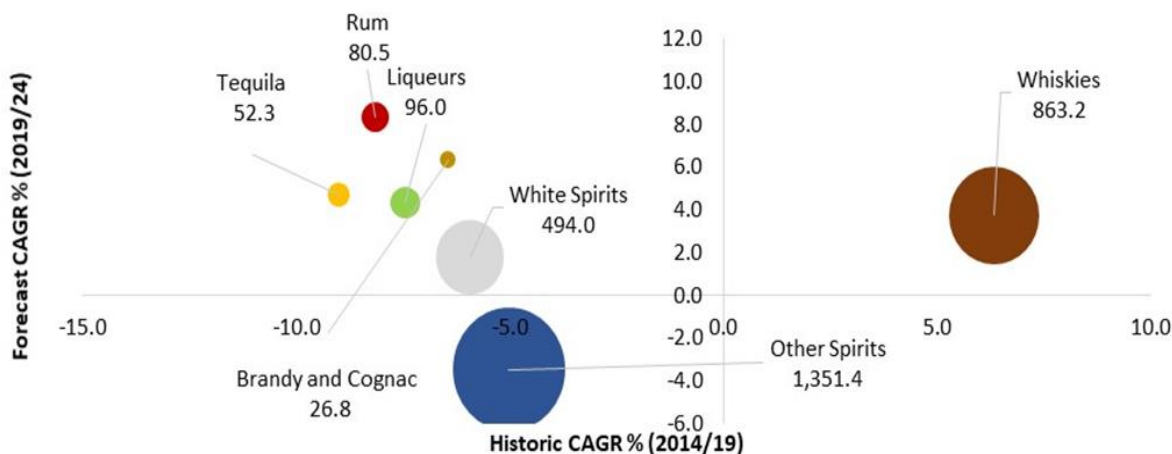
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Outside of raki, Turkey is not a major producer of spirits. ▪ Seven EU Member States are amongst the top ten spirit exporters to Turkey, with Ireland being the fourth largest exporter at a value of EUR 5 million. ▪ Despite being an overwhelmingly Islamic country, alcohol consumption is largely accepted in the country, even if it is not practised by a large segment of the population. 	<ul style="list-style-type: none"> ▪ Only 20% of the Turkish population is estimated to consume alcohol on a regular basis. ▪ Tax hike in 2010 has made spirits too expensive for lower-income earners. ▪ Turkish customs authorities' excessive sampling controls whereby at least two bottles of imported spirits are taken away for analysis pose a challenge.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Once tourism returns to pre-Covid levels in Turkey, this is expected to be a key driver in the consumption of imported spirits. ▪ The re-opening of on-trade establishments, which accounted for 27% of total spirit distribution sales in 2019 and were forced to close as a result of the Covid-19 pandemic. ▪ Turkish consumption of raki is expected to decline between 2021 and 2025 while all other categories of spirits, including imported variants, are expected to see a growth in total value. 	<ul style="list-style-type: none"> ▪ The Turkish government has implemented several restrictions in recent years to limit alcohol consumption such as a tax hike and an advertising ban. ▪ British and American whisky as well as rum and tequila from Mexico are important competitors. ▪ Raki is the most popular spirit in Turkey and is often considered an important cultural beverage in the country. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.5.2 Consumption

Evolution of consumption

As shown below in Figure 5-19, 'other spirits' is the largest spirits category in Turkey, with a total value of EUR 1.35 billion in 2020. The category is expected to decline by a CAGR of -3.5%, however, will remain the largest spirit category in Turkey by total value by 2025. Whiskies are the second-largest spirits category, with a total value of EUR 863 million, which is expected to grow by a CAGR of 3.7% between 2021 and 2025. White spirits have a total value of EUR 495 million and are forecast to grow by a CAGR of 1.8% between 2021 and 2025. Rum will be the fastest-growing spirit product in Turkey between 2021 and 2025 with a predicted CAGR of 8.3%. Thus, across all spirit categories there is forecast growth, except for 'other spirits' which is forecast to decline.

Figure 5-19: Evolution and forecast of spirits market in Turkey, 2015-2025 (EUR million)



Source: Euromonitor International: Alcoholic Drinks, 2021.

Consumer profile and purchase criteria

Consumers

Although the majority of Turkish consumers identify as Muslim, alcoholic beverages are widely available everywhere with raki being the most popular spirit product in the country. In Turkey raki is the national drink and consumers across all income categories will be readily exposed to and consume raki. Known as “Lion’s milk”, a metaphor for strength and courage, raki is more consumed by men in Turkey. Most western spirits, such as whiskey or brandy, are imported. Whisky is consumed mostly by males, mid to older age groups and higher-income groups. Liqueur is mainly consumed by older age groups, females, higher educated and higher-income groups. Gin is more consumed by higher-educated, higher-income groups regardless of gender. Consumers who drink vodka are mid to higher income groups and younger consumers, mostly men due to its high alcohol content.

It is estimated that the consumption of spirits in Turkey is around 2 litres per capita, which is quite lower than in other European countries. Despite alcohol being freely available throughout the country, a sizeable percentage of the population abstains from alcohol consumption due largely to Islamic adherence; it is estimated that only 20% of the population consume alcohol regularly⁷². Consumption of imported spirits is more likely to occur within urban centres and amongst consumers of higher income, typically also seeking quality spirit products. Such urban centres include Istanbul (which has several Irish bars that act as a channel of distribution for EU spirits) and Izmir (which is a favourite tourist hotspot for Europeans visiting Turkey). Tourists, the middle- and upper-income earners and young urbanised consumers are the segments of consumers in Turkey that are more likely to consume imported spirits from the EU.

⁷² Turkey clamps down on alcohol as Erdogan pushes islamist agenda, Nikkei Asia. Available at <https://asia.nikkei.com/Politics/Turkey-clamps-down-on-alcohol-as-Erdogan-pushes-Islamist-agenda>

Drivers and method of consumption

Raki is the most popular spirit product in Turkey and the product has enjoyed several advantages compared to other spirits such as a cheaper price and altogether its association with Turkish social life. Turkish consumers typically consume raki with chilled water or mixed with chilled water, alongside meze (a selection of small dishes usually served as an appetizer) or seafood. The founder of the modern Turkish state Mustafa Kemal Atatürk was known to enjoy consuming raki which further accelerated its popularity throughout the state.

Drivers of imported spirits include the desire for high-quality spirits, curiosity about non-raki spirits and the ability to afford imported spirits. Whisky is often associated as a spirit that symbolises success which further incentivises consumers of a higher income class to purchase whisky over other spirits. Whisky is very often consumed in bars and restaurants. In the last 5 years, many cocktail bars have opened in big cities, making cocktail culture trendy in Turkey. In regard to liquor, the best occasion for liquor consumption is usually with coffee or a side drink. Sometimes consumers have liquor sips just after dinner.

Purchase criteria

The price of spirits in Turkey is a key purchase criterion and further helps to explain the popularity of raki which is largely affordable to most consumers, instead of imported spirits which are typically only affordable for consumers of a middle- or higher-income class. Imported spirit products are expected to be of high quality, especially those imported from the EU. Due to this, consumers will pay more attention to the packaging of imported spirits and will have higher expectations in regard to flavour and taste when compared to domestic spirits. Turkish consumers will mainly consume spirits as part of a wider social setting which further encourages the desire to purchase larger spirit bottles of a 1.5L or above size. The most popular promotions happen at the point of sales by making special stalls and corners for the products. Otherwise, advertising and online sales of alcohol are banned in Turkey.

Spirits on retailers' shelves in Turkey

Typical retail price ranges for imported spirits are as follow:

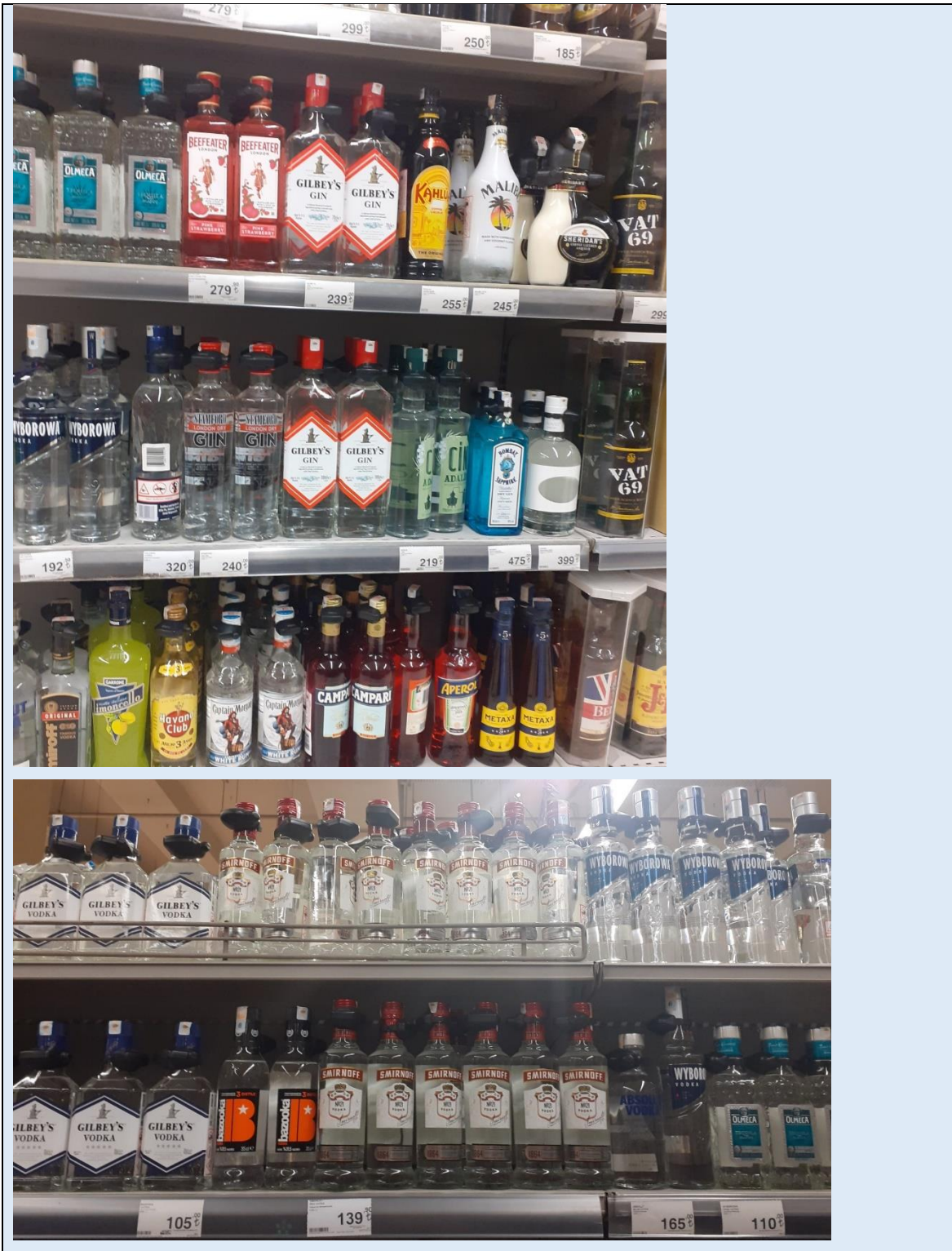
- Economy: between TRY 100 (6.50 EUR) per bottle
- Medium: between TRY 150-250 (10 – 16 EUR) per bottle
- Premium: above TRY 280 – 400 (18- 25 EUR) per bottle

Most spirit bottles contain 700ml, however, smaller (such as 200ml) and bigger (such as 1l) bottles exist as well.

Imported spirits are generally stocked together and within the eyesight of the consumer, with only the cheaper spirits being more likely to be stocked on the bottom shelf. Packaging plays a large role in the marketing of these products and Turkish consumers will resonate with spirit products that display iconography or pay homage to their origin region.

Increasingly it is common for producers to offer gift products with spirits bottles such as a shot glass or company memorabilia products.

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Some particular brands of a premium price may be stocked individually, as shown above, in a bid to stand out and to emphasise that these brands are premium, thus justifying the higher price associated with premium spirits.

Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

Over the past years, the Turkish government has implemented several laws which seek to curb alcohol consumption, despite the country having a relatively low level of per capita alcohol consumption compared to other European countries. Such actions include a ban on alcohol advertising and promotion since 2013 and a high alcohol tax (known as the special consumption tax or *Özel Tüketim Vergisi* in Turkish) which saw a spike in 2010 and remains a key factor impacting the ability of poorer consumers to purchase spirits. The government has also implemented a restriction on the opening hours of alcohol distribution in the country which is now only allowed between 06.00-22.00 in licensed establishments that must be located at least 100 meters away from a school or mosque. Despite the implementation of these restrictions, total consumption of spirits across all categories except 'other spirits' is forecast to grow. Reasons behind the decline in consumption of other spirits (which includes raki) include an increasing desire from consumers to seek out non-raki spirits and the rising availability of imported spirits within urban areas.

5.5.3 Offer

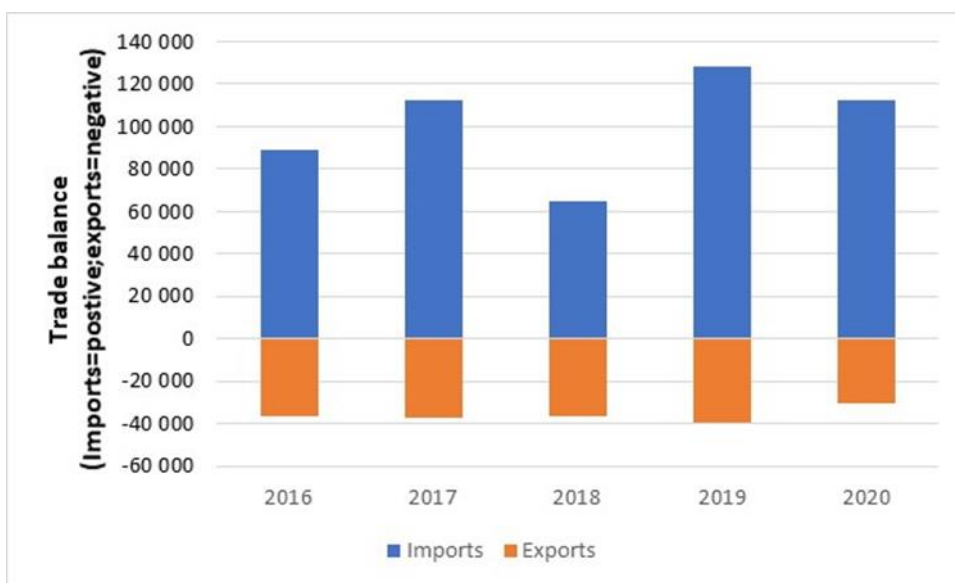
Domestic production

Raki is the most popular spirit in Turkey and, as a result, is also the most produced spirit product in the country. Standard raki is produced from grapes or figs. In southern Turkey, the production of raki from figs is quite common while production from grapes is common elsewhere and largely associated with standard Turkish raki. Turkey did produce a small amount of whisky from a distillery located in Ankara however this has long been discontinued. The domestic production of spirits in Turkey is largely concentrated within one company, Mey İçki San ve Tic AS (owned by Diageo), which has a 73.9% share of the domestic spirit market and mainly focuses on the production of raki.

Imports and exports

Turkey is a net importer of spirits, importing a total of EUR 112 million worth in 2020 which is a slight decline from EUR 128 million in 2019 (Figure 5-20). Turkish exports reached a value of EUR 30 million, with Germany being the biggest destination for Turkish spirits.

Figure 5-20: Trade balance (imports and exports) of spirits in Turkey, 2016-2020 (EUR 000)

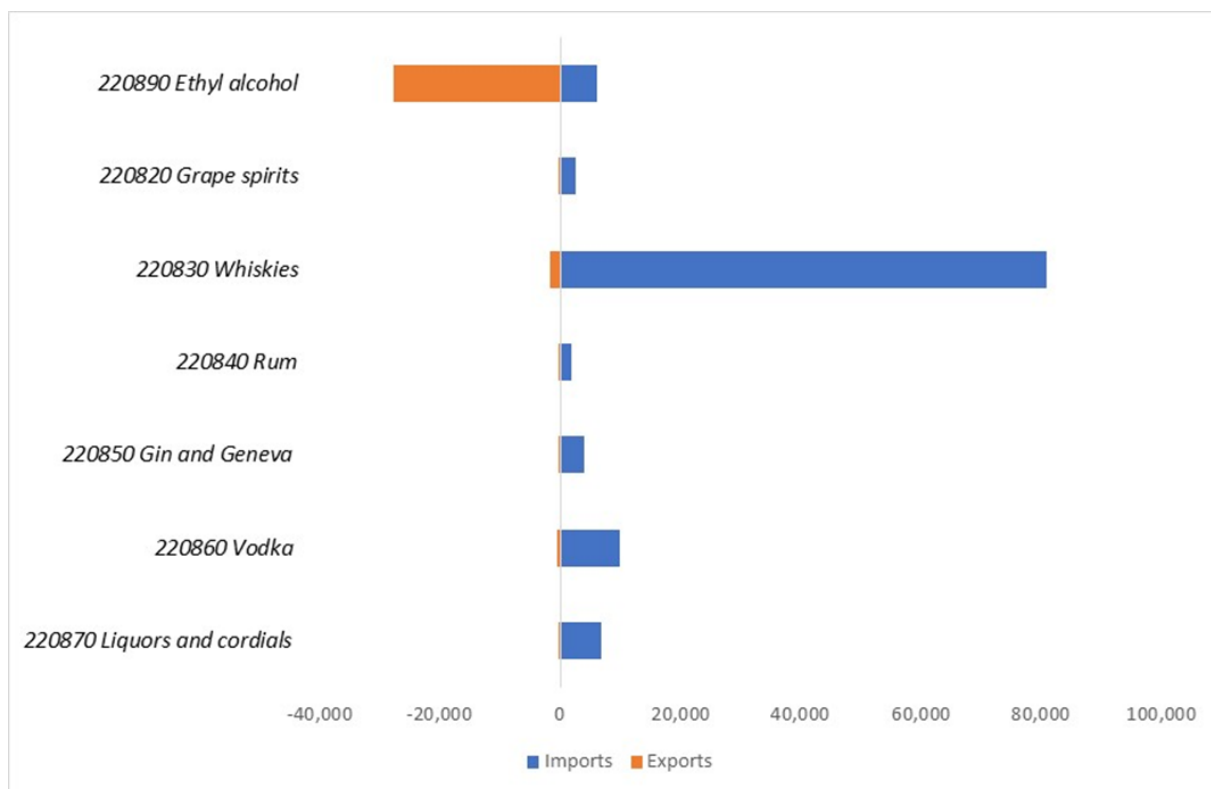


Data for CN code 2208.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

As shown below in Figure 5-21, spirits of an alcohol strength above 45% (raki is included in this category) are the most exported by Turkey, with exports worth EUR 27 million in 2020 (or close to 90% of total spirit exports). Turkey's biggest imported spirit is whisky, with imports of whisky worth EUR 80 million in 2020, followed by vodka with a total import value of EUR 9.8 million and liquors with a total import value of EUR 6.7 million.

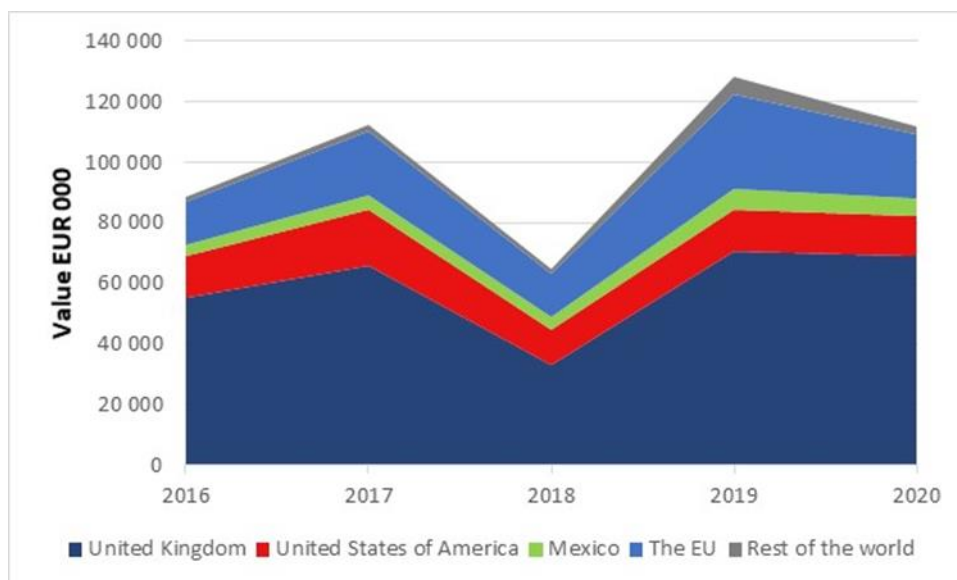
Figure 5-21: Trade balance (imports and exports) of spirits in Turkey, by type, 2020 (EUR 000)



Spirit names shortened. CN codes before spirit name.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-22 shows that the United Kingdom is the largest exporter, exporting EUR 69 million worth of spirits to Turkey in 2020. The US is the second-largest exporter to Turkey with a total export of EUR 13 million and Mexico follows third with a total export of EUR 5.5 million. Ireland (EUR 4.4 million), Sweden (EUR 3.9 million), France (EUR 3.8 million) and Italy (EUR 2.4 million) are also important exporters of spirits to Turkey, with several other Member States also included in the top ten such as Germany and Poland.

Figure 5-22: Turkish imports of spirits by country, 2016-2020; EUR 000

Data for CN code 2208

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. Scotch Whisky and Cognac have been registered under this system.

Main competitors

The largest competition in Turkey for EU spirits comes firstly from domestically produced raki which remains the most preferred spirit and is an important cultural product in the country. Raki is largely inexpensive and readily available across the country. Within the imported spirits market, British spirits are the biggest competitor for EU spirits in Turkey as the UK remains the largest exporter of spirits to Turkey, particularly of whisky and gin which make up the majority of their exports to the country. The US is another large competitor in the whisky and liquor market, while Mexico is the largest competitor in the tequila and rum sector.

5.5.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, a certificate of conformity and certificate of analysis is required for spirits imported into Turkey. For brandy, whisky and cognac, an age certificate must be provided to confirm the maturation period of the various subcategories of these drinks. All types of alcoholic beverages are furthermore to be notified to the Department of Tobacco and Alcohol of the Ministry of Agriculture and Forestry and can only be imported at designated ports of entry. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and->

[technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey](#)

Turkey applies a zero tariff on imports of spirits.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – – cognac and brandies (2208 20) from France to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=22082012&origin=FR&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for spirits. The Turkish food codex for distilled alcoholic beverages dates from 2005 and was updated in 2016 (Communiqué No. 2016/55). This specific legislation, which contains various definitions, product features, transport, storage and other provisions for all distilled alcoholic beverages can be found at:

<https://www.resmigazete.gov.tr/eskiler/2017/03/20170321-11.htm>.

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. According to this legislation, the statement “...contains alcohol” must be included on the label of alcoholic drinks and any other food if ethyl alcohol is used as an ingredient in its manufacture or preparation, notwithstanding the amount of the alcohol. It should be remembered that the above-mentioned Turkish food codex regulation on distilled alcoholic beverages includes detailed rules on the packaging and labelling of these products.

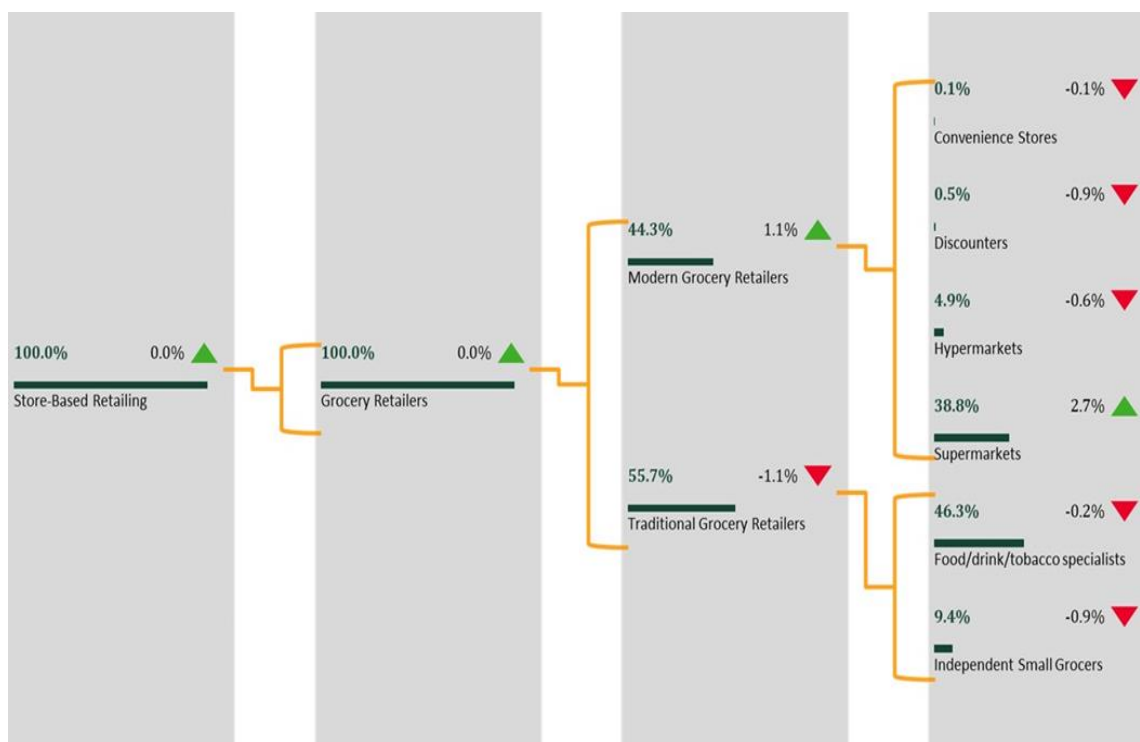
There are also specific rules on declaring alcohol by volume on the label of alcoholic beverages – this covers all drinks containing more than 1.2% alcohol by volume (Communiqué No. 2003/06). This legislation has been prepared within the framework of harmonisation with EU legislation and takes into account Commission Directive 87/250/EEC on “Determining the Amount of Alcohol by Volume in Labelling of Alcoholic Beverages Offered to the Consumer”. As already noted, alcohol advertising and promotion are completely banned in Turkey according to the applicable law, forbidding advertising on TV/radio and at the point of sales (see section 6.2).

5.5.5 Distribution

Traditional grocery retailers account for the majority of off-trade sales of spirits in Turkey with this channel having a share of 55.7%, a figure which has declined by 1.1% in recent years. Food, drink and tobacco specialists account for the largest sole share of sales in Turkey with a share of 46.3% in the market. Modern grocery retailers account for 44.3% of sales with supermarkets further accounting for 38.8% of this trade. Hypermarkets

account for just 4.9% of sales which is a further reflection of their rather small presence in the overall retail sector of Turkey, at least compared to other European countries. Prior to the outbreak of Covid-19 and consequent lockdowns in Turkey, on-trade sales of spirits accounted for 26.6% of all sales.

Figure 5-23: Distribution channel overview of spirits in Turkey (2020); off-trade sales, % share



Source: Euromonitor International: Alcoholic Drinks, 2021.

5.5.6 Challenges for EU products

Challenges for EU products include penetrating a market that has a low consumption of alcohol in comparison to other European markets, and competition from raki the traditional Turkish domestically produced spirit which remains the most popular in the country particularly for consumers of a lower income. The government of Turkey in recent years has implemented several measures intending to restrict the sale and promotion of alcohol in the country, including a tax hike in 2010 and a ban on the advertising of alcohol since 2013. Competition from British and American whisky and Mexican rum and tequila also stands out as an important challenge for EU exporters to Turkey.

Market Takeaway: Spirits

Consumption: Spirit consumption at an estimated 2l per capita is low in comparison to European levels. Only 20% of the Turkish population are estimated to consume alcohol regularly, due to adherence to Islamic rules, thus creating a limited market in the country.

Competition: Domestically produced raki is the biggest competition for EU spirits as the product is cheap and considered a national traditional spirit. EU spirits face further competition from US and British whisky and Mexican rum and tequila.

Distribution: On-trade sales accounted for 26.6% of spirit distribution before the outbreak of Covid-19 however this share has declined greatly as a result of lockdown restrictions. Traditional grocery retailers such as food, drink and tobacco specialists account for the majority of off-trade sales in Turkey with a share of 55.7%, while modern grocery retailers account for 44.3% of all sales.

Challenges: A small market due to low alcohol consumption levels combined with competing with domestically produced raki are the biggest challenges for EU spirits. A ban on alcohol advertising and competition from the UK, USA and Mexico are also considerable challenges for EU spirit producers seeking to enter the Turkish market.

Opportunities: A rebound in tourism to Turkey post-Covid-19 combined with a forecast decline in the overall value of the raki market is expected to have positive consequences for imported spirits in Turkey.

5.6 Olive oil

5.6.1 SWOT analysis

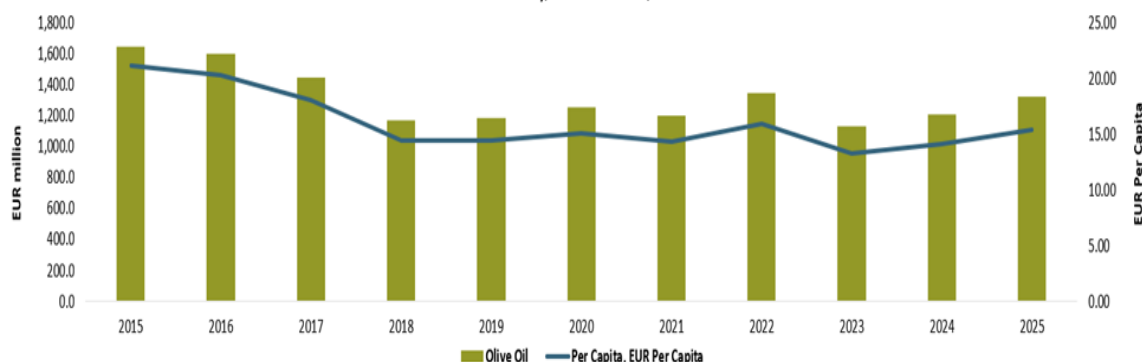
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Olive oil is the second most popular edible oil in Turkey by retail value. ▪ The market size is forecast to increase as well as olive oil exports to Turkey. ▪ Consumers are increasingly knowledgeable about and interested in olive oil and its varieties. 	<ul style="list-style-type: none"> ▪ Turkey is a net exporter of olive oil. ▪ With Covid-19 and the devaluation of the Lira, consumers are increasingly price-sensitive. ▪ The Turkish olive oil market is already quite mature and thus has fewer opportunities to grow strongly.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ High-quality interesting niche oils that also tap into the health and wellness trend. ▪ Large pack sizes and promotions due to their cheaper price point. ▪ E-commerce, although a niche, is growing. 	<ul style="list-style-type: none"> ▪ Turkey is the fourth-largest producer of olive oil in the world. ▪ Sunflower oil remains by far the most popular edible oil in Turkey. ▪ The Syrian Arab Republic is by far the biggest exporter to Turkey. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.6.2 Consumption

Evolution of consumption

The consumption of olive oil in Turkey showed a general downward trend in recent years, falling at a CAGR of -5.2% between 2015 and 2020 when the market size reached close to EUR 1.26 billion. Nonetheless, the market is forecast to grow between 2020 and 2025 at a CAGR of 1.1% per year. As a result, the market is forecast to increase by about EUR 70 million to a total of approximately EUR 1.26 billion by 2025. The Turkish olive oil market is quite mature with a per capita consumption of around 2.3 kg in 2020, which is forecast to increase to 2.8 kg by 2025 (Figure 5-24).

Figure 5-24: Evolution and forecast of the market for olive oil and olive oil consumption per capita in Turkey, 2015-2025 (value in EUR)



Note: figures for 2020 to 2025 based on forecasts

Source: Euromonitor International: Packaged Food, 2021

Consumer profile and purchase criteria

Consumers

Olive oil is the second most-consumed edible oil in Turkey. However, the most popular edible oil remains sunflower oil, which is consumed over five times more than olive oil, probably mainly due to its generally much lower price point. This suggests that most olive oil consumers are less price-sensitive than sunflower oil consumers and thus have higher disposable incomes. However, some consumers with less disposable incomes are also willing to purchase olive oil as they believe it is healthier than other edible oil options and thus a preferable choice. Overall, consumers that are knowledgeable about olive oil and the different olive varieties are more likely to prefer it. The share of knowledgeable consumers is steadily increasing in line with the ongoing health and wellness trend and thus the olive oil consumer base is expected to grow.⁷³

Drivers and method of consumption

The Covid-19 pandemic is a strong driver of olive oil consumption at home because people had to spend an increasing amount of time at home during lockdowns. Even after the lockdowns consumers remain careful and continue to spend more time at home. This trend led to an increase in home cooking and thus increased the use of olive oil. Since the beginning of the Covid-19 pandemic consumers started to stockpile main ingredients with long shelf lives, which further seems to drive demand for olive oil in the country.

As olive oil is a staple edible oil in Turkish cuisine and an integral part of many Turkish dishes, its consumption increased due to the home cooking trend. Olive trees are grown in many different regions of Turkey but mainly in western Turkey. The production of local olive oil in these regions led over time to the development of numerous traditional dishes using olive oil. Up to today, olive oil is commonly used for different kinds of dishes throughout the day starting with breakfast. A traditional breakfast for example includes fresh bread topped with paprika, thyme and olive oil. Olive oil dishes are often associated with being a starter, however, in Turkey, they are often main meals as well.⁷⁴

⁷³ The Turkish olive oil sector <https://www.oliofficina.it/en/knowledge/economy/the-turkish-olive-oil-sector.htm>

⁷⁴ Vegetables and Olive Oil in Turkish Cuisine, <https://istanbulonfood.com/olive-oil-in-turkish-cuisine/>

Purchase criteria

The main purchase criterion is the price, with more than 70% of Turkish consumers considering olive oil to be expensive.⁷⁵ During the last years, the Lira lost some of its value which in turn increased the cost of raw materials and products. Olive oil is one of the higher-priced edible oils, which is why price-sensitive consumers are more likely to choose cheaper substitute oils, in particular sunflower oil. Higher-income consumers are less affected by the devaluation of the Lira and thus more likely to choose olive oil over other edible oils for reasons such as quality and taste⁷⁶.

The packaging size plays an important role as well. Following the outbreak of the Covid-19 pandemic, consumers prefer to purchase products in larger pack sizes because this means they have to go grocery shopping less often and thus follow social distancing rules. Another reason why consumers choose to buy in bulk rather than smaller olive oil bottles is the often more advantageous price point of such packs due to discounts and promotions which mostly do not apply to smaller packs.

Even though the price point is highly important to many Turkish consumers, importance is also increasingly placed on the quality of a product. One reason for this is that consumer knowledge and interest in quality issues is increasing. Olive oil is not merely seen as one of the staple edible oils in Turkey but is classified into many different quality categories such as cold press, flavoured, unfiltered, and early or late harvest. Some consumers are even interested to know olive oils from different geographical origins or want to try different monovarietal olive oils, while others demand high-quality olive oil for health and wellness reasons.⁷⁷

Olive oil on retailers' shelves in Turkey

Imported olive oil is perceived as a premium product in Turkey, as the country is a large producer of olive oil. Imported olive oil is roughly 30% more expensive than the domestic variant (TRY 70/ EUR 4.50 for bottles containing 500 ml), but certain high-quality products are priced even higher. As a result, the main consumers of imported olive oil from the EU are working mid-aged higher-income consumers. Some imported olive oils have unique labelling patterns to stand out from Turkish olive oil products which generally promote their location of origin. Premium olive oil products can be found higher rather than lower on the shelves. Imported products are often plain but sometimes also include extra ingredients such as spices or garlic.

On retailers' shelves, olive oil mainly can be found in glass bottles, yet some olive oil is packaged in metal containers or plastic bottles. The type of glass mainly found on shelves in Turkey for packaging olive oil is either tinted dark or see-through. Olive oil bottles or metal containers can be found in different sizes, mainly ranging from 250 ml to 1 litre, however, larger as well as smaller sizes are usually available as well.

⁷⁵ Turkish People Love But Not Consume Olive Oil, <https://www.turkeyresearchcompany.com/turkish-people-love-but-not-consume-olive-oil/>

⁷⁶ Euromonitor International: Packaged food, 2021

⁷⁷ The Turkish olive oil sector <https://www.oliofficina.it/en/knowledge/economy/the-turkish-olive-oil-sector.htm>



Grouped olive oil products on retailers' shelves in Turkey



Close up of olive oil shelf displaying different sized bottles

Most of the time shops will cluster together all olive oil products they sell on a shelf and have them placed next to other edible oils. Sometimes, olive oil has its own shelf. Purchasing olive oil online is an option in Turkey as well.



Olive oil shelf with glass bottles and metal containers

Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

The following recent market trends are visible in the Turkish market:

- **E-commerce:** Even though e-commerce remains a niche in Turkey it increased strongly during the Covid-19 pandemic when consumers preferred to stay at home and limit their physical activities including in-store grocery shopping. Another driver

of e-commerce is consumer interest in larger pack sizes. These are heavy to carry home and consumers tend to order them online at different platforms or delivery services offered by discounters, supermarkets, etc. to be delivered to their doorstep.

- **Health and wellness trend:** Consumers are becoming increasingly health-conscious and interested in treating themselves. Olive oil fits this trend very well because it is perceived to be a high-quality edible oil that is healthier than many other edible oils. As a result, olive oil is forecast to be the leader in retail volume growth in the coming years and gain even more popularity. The Covid-19 pandemic further pushed the popularity of olive oil because it further boosted the health awareness of many consumers. Consuming nutritious food and getting a healthy immune system are important goals of consumers who tend to purchase olive oil as it is perceived to be a quality edible oil choice to achieve these health goals.
- **Preference for well-known brands:** The hygiene sensitivity of Turkish consumers increased during the outbreak of Covid-19. Consumers pay more attention to purchasing products they know are hygienic and safe to consume and as a result, often opt for products from well-known brands that are trustworthy. Thus, many consumers do not tend to purchase unregistered, too cheap or unknown products because they fear that these might not be as hygienic and safe as others. In this context, creating a good brand image and following safety standards is important for producers. Private label products are forecast to become less popular than branded products over the coming years.

5.6.3 Offer

Domestic production

Olive trees have a long history in the Mediterranean region including Turkey. South-east Anatolia is known to be the gene centre of the olive. Olive oil is an important edible oil that has long been used in Turkish cuisine. Currently, Turkey is the world's fourth-biggest olive oil producer and thus ranks among other famous olives oil-producing countries such as Spain, Italy and Greece.⁷⁸

Several different olive varieties are native to the country and are grown in different areas. Most olive trees are grown in areas including the Aegean coast, Marmara and south-east Anatolia mainly close to the following towns: Aydın, İzmir, Muğla, Balıkesir, Bursa, Manisa, Çanakkale, Gaziantep and Mersin. Back at the beginning of this century, around 100 million olive trees have been planted in Turkey. The number of olive trees grew up to 169 million in 2015 and since then continued to increase. Approximately 1 100 olive processing facilities exist in Turkish rural areas. Thus, olives and olive oil are important agricultural products in the country and influence the Turkish economy.

In 2020/21 the country's olive oil production is forecast to reach between 180 000 tonnes and 210 000 tonnes.⁷⁹ This is slightly lower than previous years because of hot and dry weather conditions in part of the country that negatively affected olive growth. These climatic trends in combination with issues related to Covid-19 such as problems in

⁷⁸ Global Experts' Expectations for Olive Oil in 2020-2021. Available at:

<https://www.greekliquidgold.com/index.php/en/news/414-global-experts-expectations-for-olive-oil-in-2020-2021>

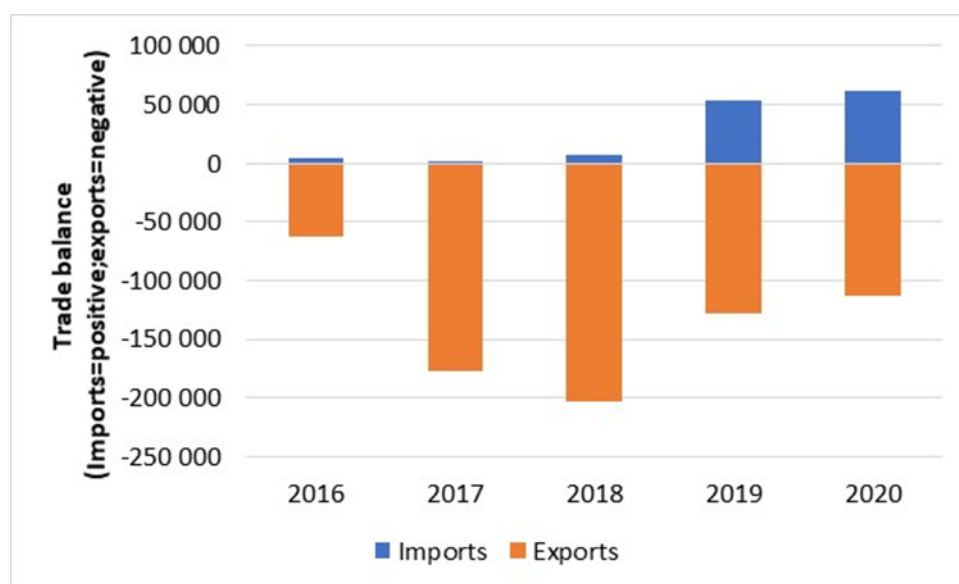
⁷⁹ The Turkish olive oil sector, <https://www.oliofficina.it/en/knowledge/economy/the-turkish-olive-oil-sector.htm>

transporting harvests to mills or having to produce olive oil with fewer workers than usual because of social distancing measures are the main reasons for the lower production levels. Yet, producers are certain that the overall upward trend in production is going to continue partly because many recently planted trees will mature soon.⁸⁰

Imports and exports

As can be seen in Figure 5-25, Turkey is by far a net exporter of olive oil. In 2020, Turkey exported olive oil with an approximate value of more than EUR 113 million, whereas it imported about EUR 62 million. However, imports increased drastically since 2016, when Turkey imported olive oil only at a value of around EUR 4.4 million. On the other hand, even though olive oil exports are nearly double as high as imports, they decreased severely since 2018.

Figure 5-25: Trade balance (imports and exports) of olive oil in Turkey, 2016-2020 (EUR 000)



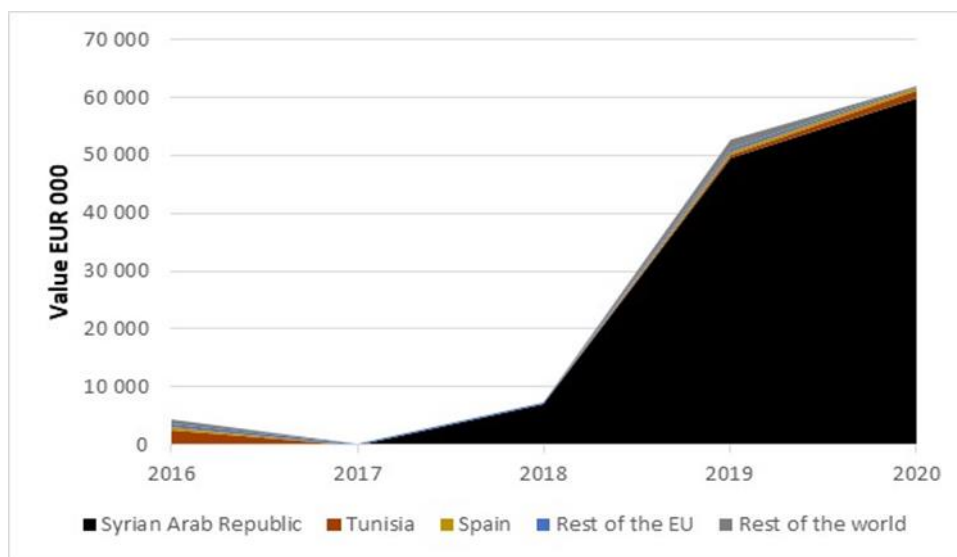
Data for CN code 1509.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

The Syrian Arab Republic is by far the biggest exporter of olive oil to Turkey (Figure 5-26). In 2020 the country exported around EUR 59.8 million, accounting for more than 96% of all imports of olive oil into Turkey. Tunisia ranked second with olive oil exports worth approximately EUR 1.5 million in 2020. Of the top ten exporters, five are from the EU namely Spain, Germany, Italy, France and Greece. However, since the market is dominated by the Syrian Arab Republic, the EU only accounted for about 1.1% of all olive oil exports to Turkey with about EUR 665 000. Spain is the biggest EU olive oil exporter to Turkey.

⁸⁰ 2021 Turkey harvest report, <https://bestoliveoils.org/turkey>

Figure 5-26: Turkish imports of olive oil by country, 2016-2020 (EUR 000)

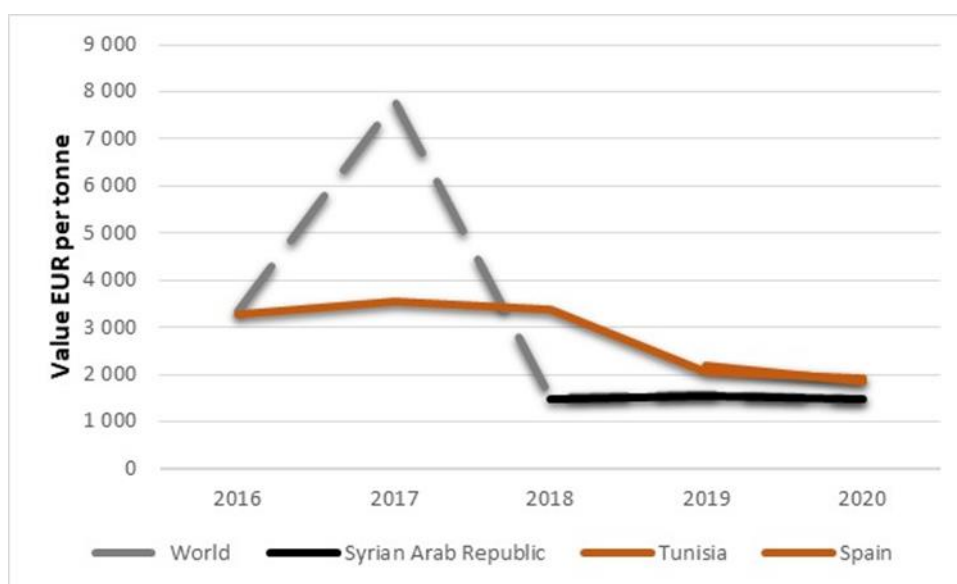


Data for CN code 1509.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

In 2020, the world’s average unit value of olive oil exports to Turkey was around EUR 1 480 per tonne, which is lower than in previous years. The unit value of the main exporter, the Syrian Arab Republic, was a little bit lower than the world average at EUR 1 460 per tonne as shown in Figure 5-27. On the other hand, the unit value of Tunisian olive oil was generally higher than the world’s average, at more than EUR 1 840 per tonne in 2020. The unit value of Spanish olive oil exports was even higher, at around EUR 1 920 per tonne. The unit values of the remaining EU exporters (Germany, Italy, France and Greece) were all much higher than the world’s average in 2020.

Figure 5-27: Unit value of Turkish imports of olive oil by country, 2016-2020 (EUR 000 per tonne)



Data for CN code 1509.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for olive oil have been identified as having been registered

Main competitors

The competition in the Turkish olive oil sector is strong. When it comes to imports, the Syrian Arab Republic nearly has a monopoly and the EU only accounts for around 1.1% of total exports. Besides the Syrian Arab Republic, Tunisia is exporting more than the EU as a whole as well. However, Turkey does not need to import a lot of olive oil in the first place because it is a net exporter of olive oil. It is the fourth biggest olive oil producer in the world and its production has a long history and tradition.

5.6.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for olive oil imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products, a pre-notification form for plant products for inspection purposes, and a Phytosanitary certificate for designated plant products. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements:

- General import requirements (all foods):
<https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>
- Specific import requirements for food products of vegetable origin:
<https://www.tarimorman.gov.tr/Konular/Gida-Ve-Yem-Hizmetleri/Ithalat-Ihracat/Bitkisel-Kokenli-Gida-Ve-Yemlerin-Ithalati>

In terms of tariffs, olive oil is generally subject to a 31.2% tariff.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general olive oil category (1509) from Spain to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1509&origin=ES&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for olive oil. The Turkish food codex for olive oil was published in 2010 and updated in September 2017 (Communiqué No. 2017/26). This specific legislation, which contains

various definitions, product features, transport, storage and other provisions can be found here: <https://www.resmigazete.gov.tr/eskiler/2017/09/20170917-9.htm>

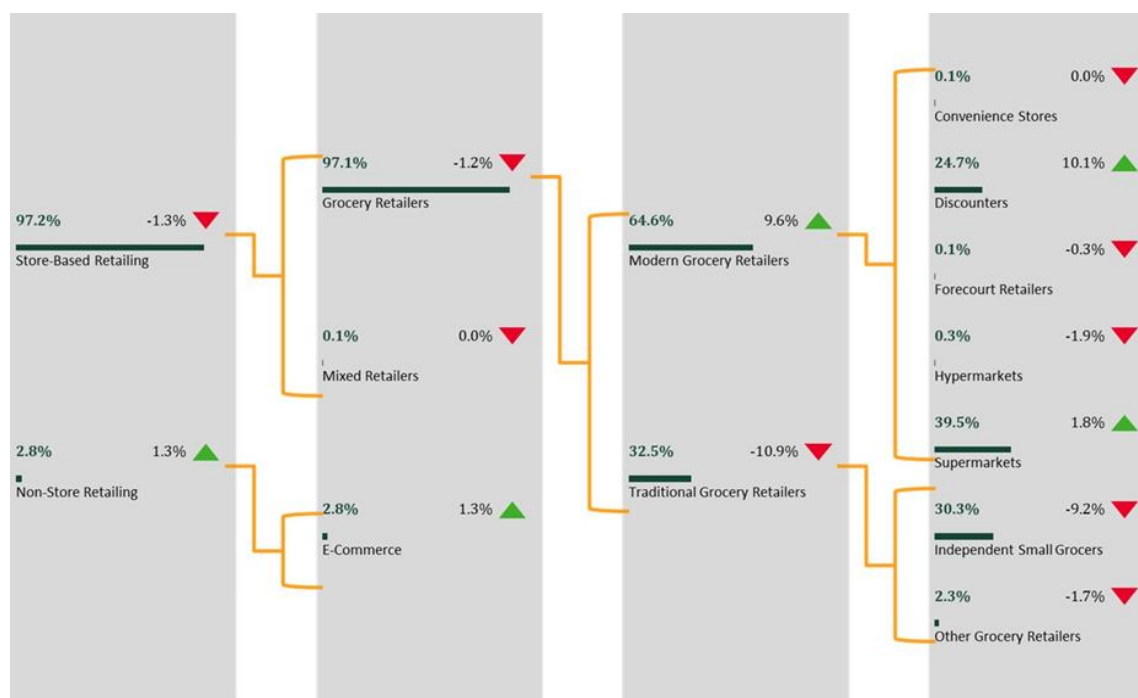
Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling. The above-mentioned Turkish food codex for olive oil contains specific requirements for labelling of certain types of olive oil (e.g. natural extra virgin olive oil). This legislation should be consulted for details on labelling.

5.6.5 Distribution

Figure 5-28 shows distribution channels of retail sales for edible oils as a whole in Turkey. Grocery retailers are the main distribution channel and account for 97.1% of all sales. Modern grocery retailers account for about two-thirds of these sales and traditional grocery retailers for one-third. Supermarkets are by far the most popular modern grocery retail channel with 39.5%, followed by discounters with 24.7%. The main traditional grocery retail distribution channels are independent small groceries which account for 30.3% of the total retail sales. E-commerce is still a niche but growing and accounts for 2.8% of retail sales. Since 2017 the e-commerce channel increased by 1.3%. Nonetheless, it must be remembered that food service channels are also important for olive oil distribution. Olive oil currently accounts for only 34% of the retail sales of all edible oils in Turkey.

Figure 5-28: Distribution channels overview of edible oils (including olive oil) in Turkey (2020); % share



Source: Euromonitor International: Packaged Food, 2021.

5.6.6 Challenges for EU products

The olive oil market in Turkey is quite mature and olive oil is the second most used edible oil after sunflower oil. However, the sunflower oil market has more than five times the size of the olive oil market and its lower price point makes it a challenge to convince more price-sensitive consumers to switch to olive oil. As EU olive oil is even more expensive than local olive oil it can mainly target high-income earners which only make up a small part of the population. The high price point might also explain why currently not much olive oil is exported from the EU to Turkey and why most of the imported olive oil is coming from the Syrian Arab Republic as it is much cheaper. However, even though the competition is strong and domestic production is at a high level, imports of olive oil into Turkey are increasing. Turkish consumers increasingly gain knowledge about olive oil and thus are more interested in trying olive oils from different geographic areas, which is an asset for EU olive oils; in particular also because EU olive oils are perceived to be of high quality which is something many consumers are looking for.

Market Takeaway: Olive oil

Consumption: After a period of negative growth the olive oil market contracted to EUR 1.26 billion in 2020. However, it is forecast to grow until 2025. The current consumption is about 2.3 kg per capita.

Competition: Turkey is the world's fourth-biggest producer of olive oil and thus local production is at a very high level. Moreover, imported olive oil nearly almost exclusively comes from the Syrian Arab Republic and partly from Tunisia.

Distribution: Olive oil is mostly sold through supermarkets, discounters and independent small groceries. E-commerce is a minor, but growing distribution channel.

Challenges: To convince price-sensitive consumers that more expensive EU olive oil is worth its price, to find a proper niche for EU olive oil product in the mature Turkish market, to compete with local production and the major exporter the Syrian Arab Republic, as well as to compete with the more prominent and cheaper sunflower oil.

Opportunities: The e-commerce market is growing and offers new possibilities for EU exporters. Perception of the EU product as a quality, healthy product. Large pack sizes and promotions due to cheaper price points. High-quality interesting olive oil variants (e.g., monovarietal) for the knowledgeable consumer.

5.7 Chocolate and confectionery

5.7.1 SWOT analysis

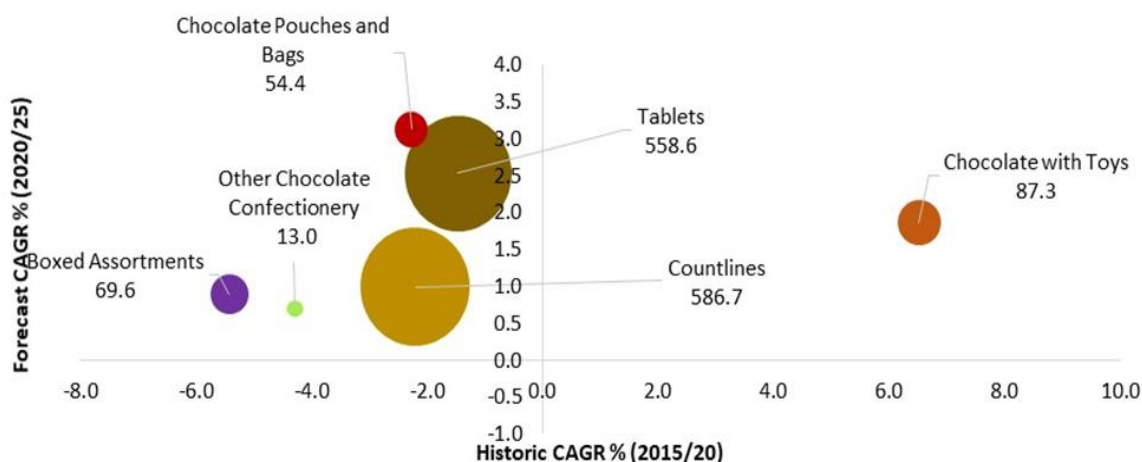
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Consumption per capita of chocolate in Turkey is amongst the highest in the world, while sugar confectionery consumption is also relatively high. ▪ EU Member States currently make up the majority of the top ten largest exporters of both chocolate and sugar confectionery products to Turkey by value. ▪ The majority of chocolate and confectionery products in Turkey are forecast to record a positive CAGR between 2021 and 2025. 	<ul style="list-style-type: none"> ▪ Domestic production in Turkey is comparably higher than other countries in the region and the market is made up of several small producers across both chocolate and sugar confectionery products. ▪ Turkey is a net exporter of both chocolate and sugar confectionery products. ▪ Internet retailing, a key channel of distribution for imported chocolate and sugar confectionery products remains small.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The act of gifting around major holidays in Turkey such as Ramadan is increasing and particularly aids the sale of imported variants of these products. ▪ Turkish consumers increasingly seek luxury products from outside of the country. ▪ Demand for high cocoa chocolate and sugar confectionery products of a healthier variety is increasing. 	<ul style="list-style-type: none"> ▪ India poses the biggest competition in the chocolate market while China and the UK are the biggest threat in the sugar confectionery market. ▪ Availability of domestic chocolates and sugar confectionery in the market which is usually cheaper than imported variants. ▪ The total production of chocolate and sugar confectionery products has grown in recent years in Turkey. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.7.2 Consumption

Evolution of consumption

The total value of the chocolate confectionery market in Turkey in 2020 was estimated to be around EUR 1.36 billion. As shown below in Figure 5-29, countlines ranked as the largest chocolate confectionery product in the Turkish market in 2020 with a total value of EUR 586 million. This product is expected to grow by a CAGR of 1% between 2021 and 2025 and will therefore remain the top chocolate confectionery product in Turkey by 2025. Tablets are the second-largest chocolate confectionery product with a total value of EUR 558 million and a forecast CAGR of 2.5% between 2021 and 2025. After countlines and tablets, there is a notable decline in market size with the third-highest valued chocolate confectionery product in Turkey being chocolate with toys which has a total retail value of EUR 87 million, followed by boxed assortments with a total retail value of EUR 69 million. Chocolate pouches and bags are forecast to be the fastest-growing chocolate and confectionery product in the Turkish market between 2021 and 2025 with a predicted CAGR of 3.1% in this period.

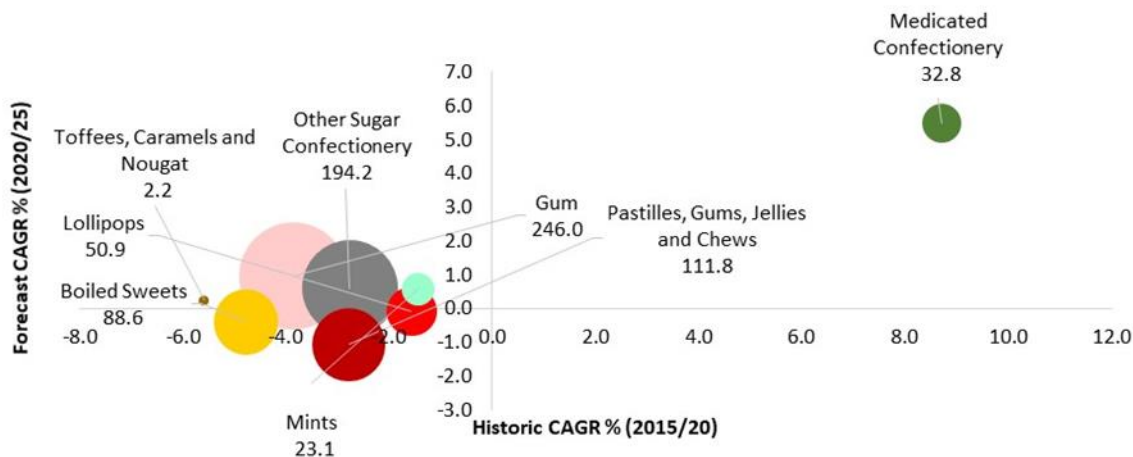
Figure 5-29: Evolution and forecast of the chocolate confectionery market in Turkey, 2015-2025; total retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Gum is ranked as the highest sugar confectionery product in Turkey, with a total value of EUR 246 million; this product is forecast to grow by a CAGR of 1% between 2021 and 2025, so it is expected to remain the largest sugar confectionery product in the Turkish market by 2025 (Figure 5-30). The ‘other sugar confectionery’ category has a total value of EUR 194 million and is the second-largest product category by total value; this category is forecast to grow by a CAGR of 0.6% between 2021 and 2025. Pastilles, gums, jellies and chews have a total value of EUR 111.8 million, followed by boiled sweets with a total value of EUR 88 million and lollipops with a total value of EUR 50.9 million. Medicated confectionery is forecast to be the fastest-growing sugar confectionery product between 2021 and 2025 with a predicted CAGR of 5.5%, which follows up its position as the fastest-growing sugar confectionery product in Turkey between 2015 and 2020 when this product recorded a CAGR of 8.7%.

Figure 5-30: Evolution and forecast of the sugar confectionery market in Turkey, 2015-2025; total retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Turkish consumers have a sweet tooth, ranking as the fifth-highest consumer of chocolate in the world at 3.1 kg per capita in 2020. Sugar confectionery products are also consumed to a high level in Turkey owing in a large part to the popularity of the product as a gift for weddings or during religious holidays. Consumers across Turkey are accustomed to the consumption of chocolate and confectionery products which has been common in the country ever since the Ottoman empire. This has allowed chocolate and, to a lesser extent overall, sugar confectionery products to become a staple luxury food for many Turks. Consumers from any income class can readily afford the most basic of chocolate and sugar confectionery products which are visible throughout the country. As luxury chocolates which extend to imported chocolates are often gifted as presents during important holidays, consumers of a lower income will likely only purchase these products during times of celebration or gifting rather than on a day-to-day basis. Imported sugar confectionery is less present in the Turkish market; however, as is the case with chocolate confectionery, consumers of a lower income will likely purchase this product around holidays to celebrate or as a gift. Middle- and higher-income earners living in urban centres are more likely to purchase imported chocolate and sugar confectionery products throughout the year because they can afford them, and they have more accessibility to these products when compared to consumers from more rural areas of Turkey.

Drivers and method of consumption

Standard chocolate is often consumed as a snack product or as a small treat throughout a busy day in Turkey, while chocolate consumption alongside tea and to a lesser extent coffee is also common. Turkish consumers are large consumers of tea which benefits the consumption of chocolate as a complimentary product. Sugar confectionery sales are driven by a demand for goods catering both to children, and consumers seeking a quick sugary treat product. Holidays and celebrations are an important driver of sales across both categories, with boxed assorted chocolates and boiled sweets recording roughly 70% of their annual sales during the celebrations of Ramadan and other religious holidays in Turkey. There has been a notable rise in demand in Turkey for chocolate with a high cocoa content as this is increasingly perceived as a healthier option amongst Turkish consumers. Consumers during the Covid-19 outbreak increasingly baked snacks and desserts at home, which further incentivised producers to launch products that complement this trend such as butter cookies for baking by Ülker (a famous domestic producer); home-baking further emerged as a driver during 2020.

Purchase criteria

The purchase criteria revolving around chocolate and sugar confectionery products follow many parallels also present in other European countries, namely the desire for a quick snack, to compliment the consumption of other goods such as tea which is very popular in Turkey and finally as a gift. The desire for quick snacks results in consumers seeking chocolate and confectionery products of a small quantity which are available throughout Turkey via small independent grocers or modern retailers. Consumers seeking to gift chocolate and sugar confectionery products are more likely to purchase imported variants of these products; imported chocolate and sugar products from the EU, in particular, are perceived as luxury product that is appropriate for gifting. Boxed assorted chocolates from EU Member States such as Belgium are particularly popular around the time of Ramadan and other religious holidays as a gift. Consumers are slowly seeking healthier variants of sugar and chocolate confectionery products which has led to a notable increase in demand

for high cocoa and sugar alternative confectionery products in the country; this trend will likely increase as the population grows more health-conscious in the future as a result of Covid-19 which highlighted the need to have a healthy and balanced diet.

Confectionery on retailers' shelves in Turkey

Even though Turkey is a large producer of chocolate and sugar confectionery products, and retailer shelves are dominated by Turkish products, imported products from big brands are visible nearly everywhere as well. However, imported chocolate and confectionery products from smaller brands occupy only a small share of the shelf space in Turkish retail outlets. Imported chocolate is priced at around 45 TRY (EUR 3) per item, which is significantly more expensive than domestic products which are priced around 15 TRY (EUR 1) per item. Chocolate tablets are mainly sold in packs of around 100 grams, while chocolate bars are smaller.

Most chocolate and confectionery products are packed in flexible plastic packaging and some in folding cartons, with imported variants displaying unique designs in a bid to stand out in the market. Chocolate and confectionery products are often displayed separately from each other as they are two different groups of products. However, they can often be found right next to each other, in the same aisle or at least close by. Imported chocolate and confectionery products are often displayed together with domestic products or in dedicated aisles which sell both chocolate and confectionery products, as well as other imported products of a wider variety such as soft drinks, cereals and spices. High-quality products or special offers or promotions are sometimes presented separately in pop-up stands.



Chocolate bars and tablets on retailers' shelf



Pop-up stands of imported chocolate tablets

Younger consumers are mainly interested in bars, whereas the female working population in particular is interested in chocolate bars. Overall consumers of imported chocolate and confectionery are working, higher-income consumers.



Imported and domestic confectionery products, with Turkish products having the prime shelf location

Products from Turkish brands often seem to be located in the prime spots such as at eye-level or slightly higher, while products from imported brands seem to be positioned lower or very high on the shelf. However, in general, mid-priced to premium products such as most imported products are positioned at eye level or a stretch away.

Pictures: © Agra CEAS / Euromonitor International, 2022.

Recent market trends

The act of gifting chocolate and sugar confectionery products around special holidays within Turkey such as Ramadan has helped to sustain the growth of boxed assortments of these products in recent years. The outbreak of Covid-19 in Turkey resulted in consumers largely staying within the home, which aided the sales of snack-based products including chocolate and confectionery products; producers have noticed this trend and the offering of bulk chocolate and mixed chocolate assortments packages increased in 2020. Demand for high cocoa-based chocolate has increased in recent years as chocolate with a high cocoa content is perceived as a healthier option amongst a growing number of consumers in the country. Looking ahead, all chocolate confectionery products are forecast to record a positive CAGR between 2021 and 2025, except the seasonal chocolate category which has never had a major presence in Turkey.

Concerning sugar confectionery products, medicated confectionery products have been the fastest-growing segment by value in recent years, and this is forecast to continue between 2021 and 2025. This product has grown its presence in Turkey and is increasingly used as an ailment for sore throats and colds. Chewing gum is a normalised practice in Turkey which will likely be further aided by the overall reopening of the economy post-Covid 19, as consumers begin to socialise in-person to a higher degree.

5.7.3 Offer

Domestic production

Chocolate production in Turkey is high but held back by the relatively high cost of imported cocoa, which raises the total cost of production for domestic producers. Total Turkish chocolate output is estimated to be around 237 000 tonnes annually. Platis LTD, Eti Gıda San ve Tic and Sölen Cokolata Gıda currently have the largest share of the Turkish chocolate market, although there are several other smaller producers within the country. The sugar confectionery market is also competitive in Turkey with Koska Helvacisi, Kent Gıda Maddelerleri San and Pamir Gıda Sanayii being the three largest companies in the market followed by a large number of smaller producers. The annual production of sugar confectionery is estimated to be around 240 000 tonnes annually.⁸¹

Imports and exports

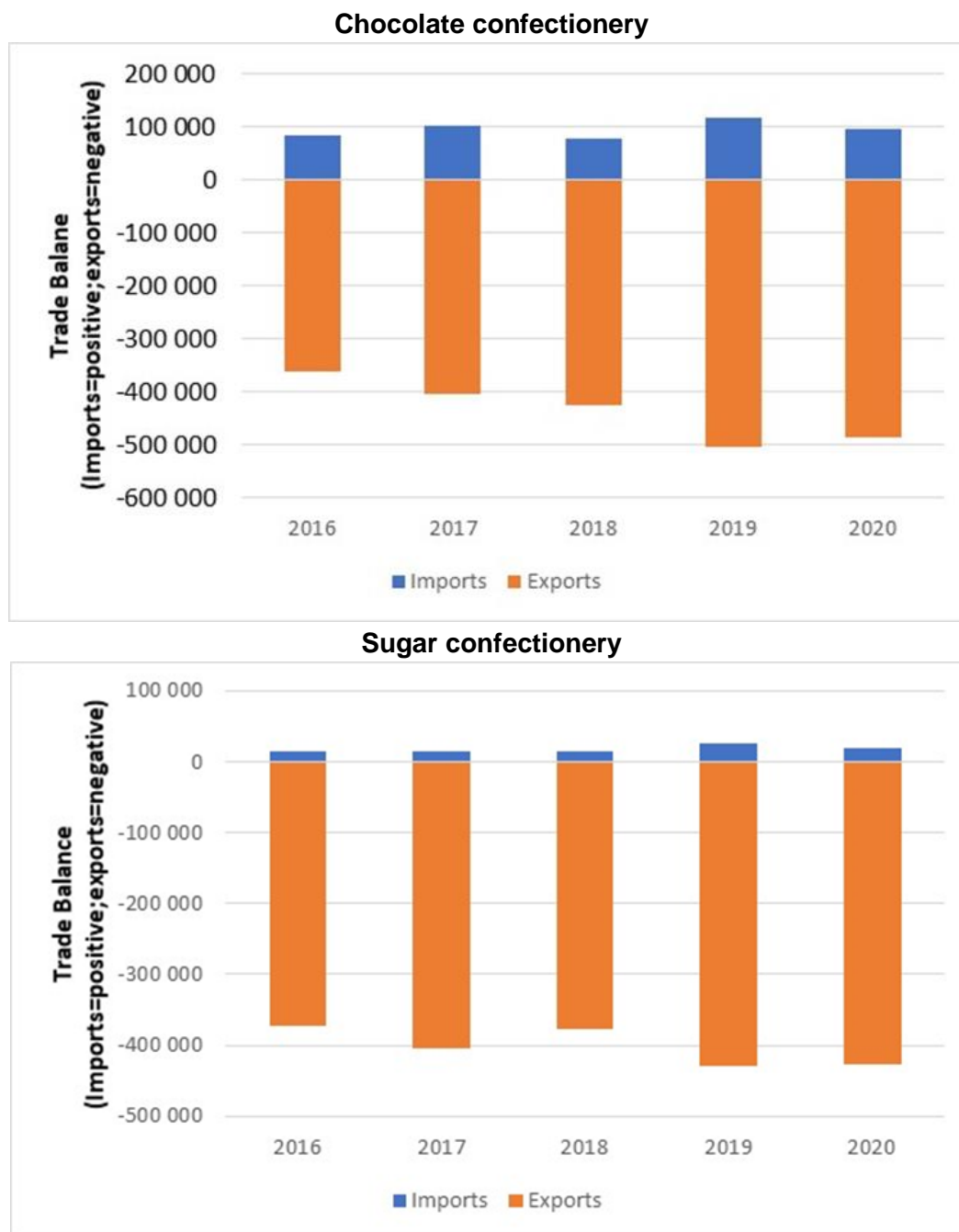
Figure 5-31 below shows that Turkey is a net exporter of both chocolate and sugar confectionery products. Total exports of chocolate from Turkey were valued at EUR 486 million in 2020 while sugar confectionery exports reached a value of EUR 426 million. Total imports of chocolate came to a value of EUR 94.3 million in 2020 while total imports of sugar confectionery products came to a value of EUR 20 million.

In 2020 the three main exporters of chocolate confectionery to Turkey were Germany, Belgium and India (Figure 5-32). German exports came to a value of EUR 23 million in 2020 but fell from the EUR 34 million figure that occurred in 2016. Belgian exports of chocolate to Turkey came to a value of EUR 10.3 million, closely followed by India with a total value of EUR 10.2 million. Italy, Luxembourg, The Netherlands, Poland, Hungary and Bulgaria are also amongst the top ten largest exporters of chocolate to Turkey by value. The main exporters of sugar confectionery to Turkey are China, Belgium and the UK, with

⁸¹ Turkey's sweet tooth: examining the Turkish confectionery market, World food Istanbul. Available at: <https://worldfood-istanbul.com/Articles/turkeys-sweet-tooth-examining-the-turkish-con>

Chinese total exports coming to a value of EUR 3.3 million followed by Belgium with a value of EUR 3.1 million and the UK with a value of EUR 2.9 million. The Netherlands, Germany, Poland, the Czech Republic and France are also amongst the top ten exporters of sugar confectionery products to Turkey.

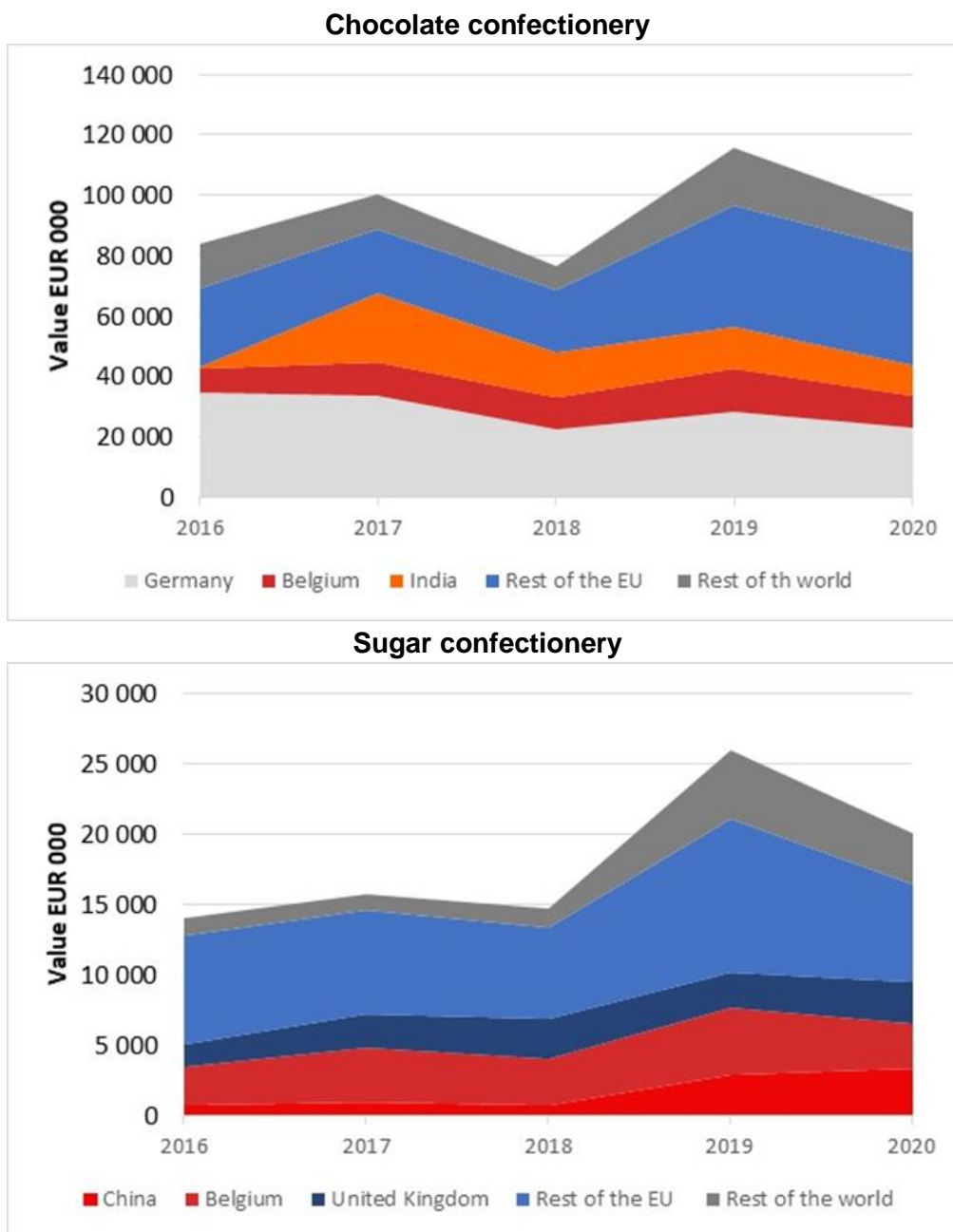
Figure 5-31: Trade balance (imports and exports) of confectionery in Turkey, 2016-20 (EUR 000)



Data for CN code 1806 and 1704.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-32: Turkish imports of confectionery by country, 2016-20 (EUR 000)



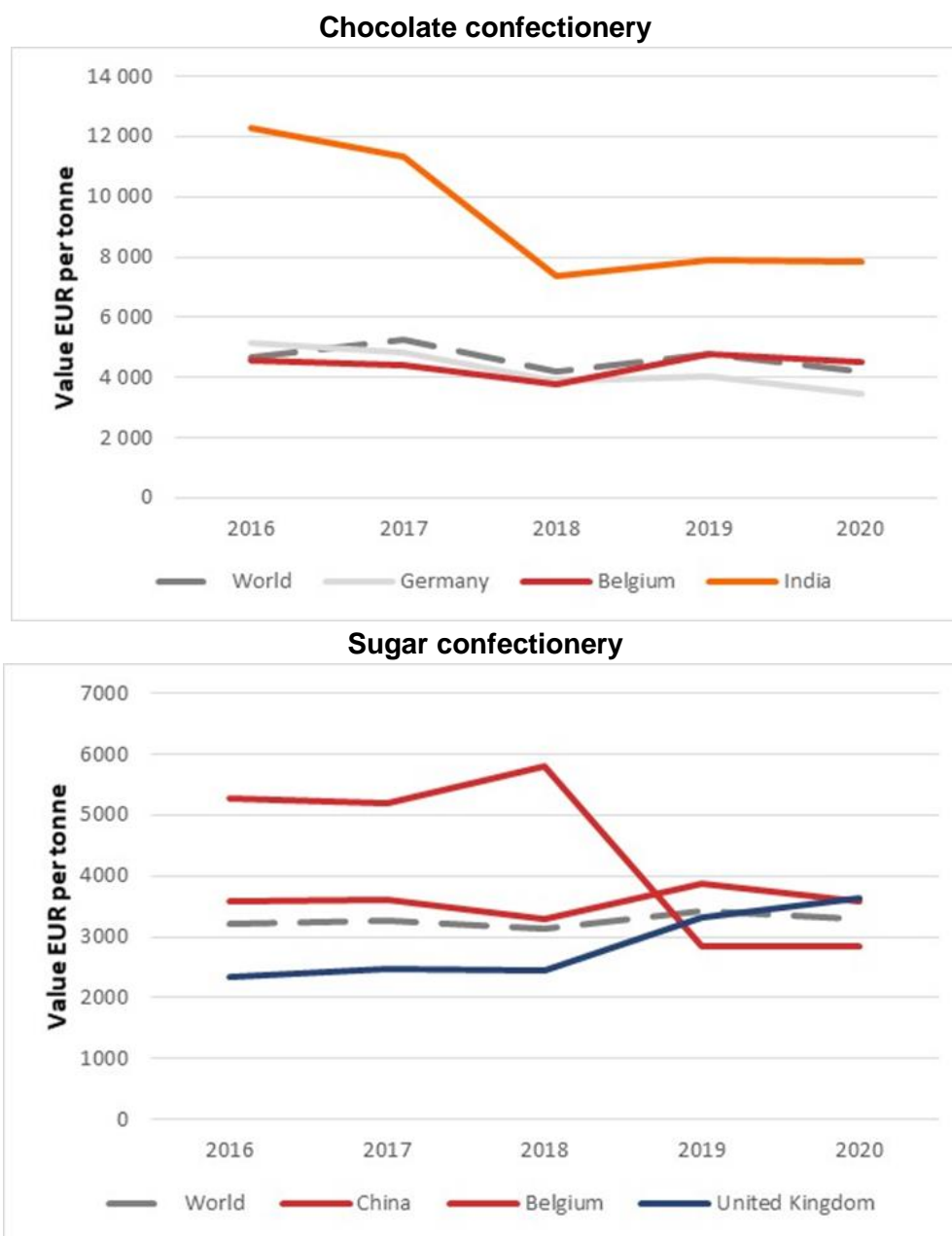
Data for CN code 1806 and 1704.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

The world's average unit value of chocolate confectionery exports to Turkey was about EUR 4 190 per tonne in 2020 as depicted in Figure 5-33. Chocolate exported from India had by far the highest unit value of about EUR 7 820 per tonne. The unit value of chocolate from Germany was below the world's average at approximately EUR 3460 per tonne while chocolate from Belgium was at EUR 4 490 per tonne.

The world's unit value for sugar confectionery in 2020 was around EUR 3 290 per tonne (Figure 5-33). The value of Chinese exports was below the world average at about EUR 2 830 per tonne. The unit value of Belgian exports on the other hand was much higher than the average at approximately EUR 3 570 per tonne. Exports from the UK had a unit value of about EUR 3 630 per tonne in 2020.

Figure 5-33: Per unit value of Turkish imports of confectionery for selected countries, 2016-20 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1806 and 1704.

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for

confectionery have been identified as having been registered.

Main competitors

The main competition for EU chocolate and sugar confectionery products in the Turkish market comes from domestic producers who largely cater to the demand for standard day to day chocolate and sugar confectionery products. The domestic market for both products is highly competitive and no large company stands out as having a significant market share. Beyond domestic producers, India is the biggest supplier to the Turkish chocolate confectionery market despite its relatively high price point (Figure 5-33), while China and the UK are the biggest suppliers within the sugar confectionery market.

5.7.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for chocolate and confectionery products imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products. Depending on the product's ingredients, a pre-notification form for ingredients of animal origin for inspection purposes, and a veterinary certificate may also be required. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, EU sugar and chocolate confectionery face an ad valorem tariff on imports into Turkey. Certain products can be imported at zero tariff, e.g. chocolate preparations containing 31 % or more by weight of cocoa butter/milkfat (1806 20) or filled chocolate (0806.31), but an additional duty is applied which is calculated on the basis of the product's agricultural components (e.g. milk content).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general sugar confectionery category (1704) from Germany to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1704&origin=DE&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for chocolate and chewing gum:

- The Turkish food codex regulation for chocolate and chocolate products dates from 2003 and was updated in 2017 (Communiqué No. 2017/29). The regulation has been prepared taking into account Directive (EC) No. 2000/36 on Cocoa and Chocolate Products. This specific legislation contains various definitions, product features, transport, storage and other provisions:
<https://www.resmigazete.gov.tr/eskiler/2017/11/20171103-10.htm>
- There is also specific legislation on chewing gum dating from 1999.

Sweeteners contained in chocolate and confectionery products must be authorised pursuant to the Turkish Food Codex Regulation on Food Additives:

<https://www.resmigazete.gov.tr/eskiler/2017/09/20170922-4.htm>

Labelling

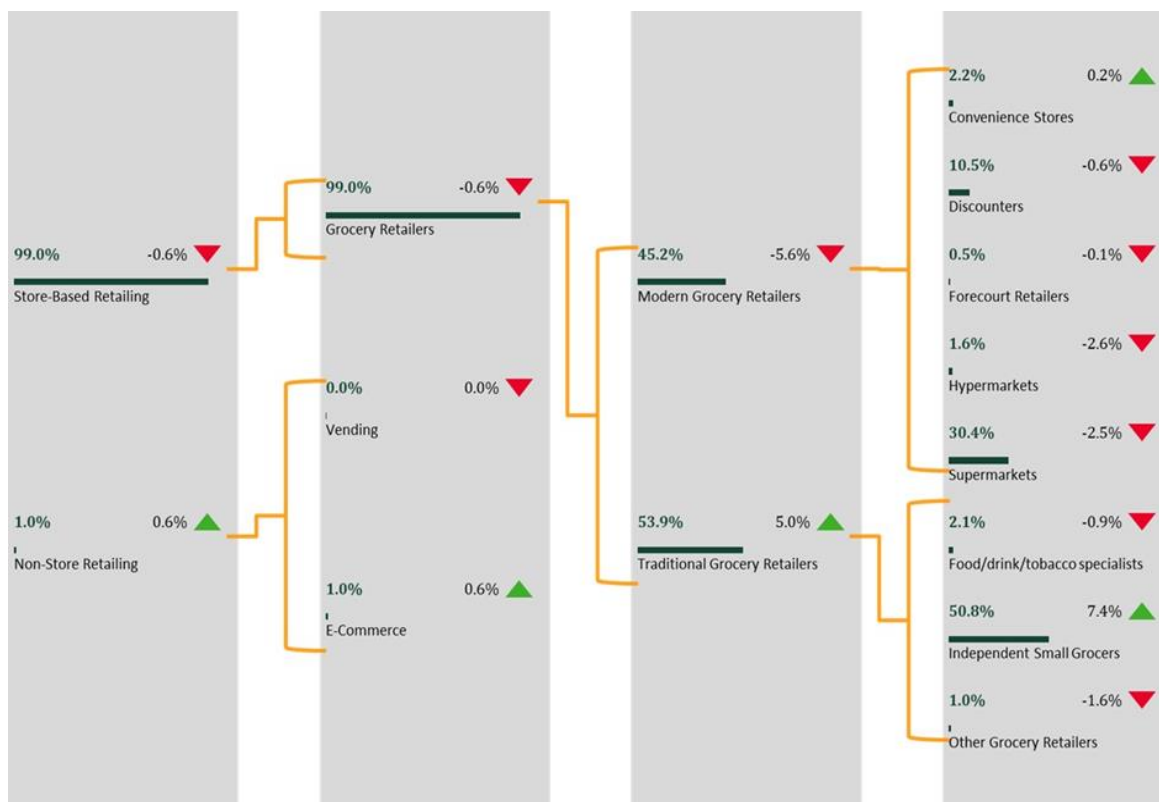
Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling. For products containing sweeteners, specific statements should be added on the label ("*with sweetener(s)*" or "*contain sweetener(s)*" or "*contains sugar(s) and sweetener(s)*"; and warning statements for certain sweeteners (polyols; aspartame). There are specific provisions for the labelling of confectionery products containing glycyrrhizinic acid to carry the statement "*contains liquorice*" on the label unless this is already indicated, and a warning statement if contained at a concentration of ≥ 4 g/kg.

The above-mentioned Turkish food codex regulation for cocoa and chocolate products contains specific requirements for the labelling of certain types of products (e.g. dark chocolate, milk chocolate, filled chocolates). For example, in chocolate products containing vegetable oil other than cocoa butter, this should be stated on the label as "*It contains vegetable oil in addition to cocoa butter.*" This legislation should be consulted for details on labelling.

5.7.5 Distribution

As shown in Figure 5-34 chocolate confectionery is still almost exclusively sold through store-based retailing (which accounts for 99% of total retail sales), with only 1% of total retail sales coming from non-store-based internet retailing. Even though its retail value remains very low, the importance of internet retailing is increasing. Modern grocery stores accounted for 45.2% of the retail sales in 2020, while traditional grocery retailers accounted for the remaining 53.9%. The most important modern grocery retailers were supermarkets, which accounted for 30.4% of the retail sales in 2020, and discounters which accounted for 10.5%. Independent small grocers have retained a slight majority in the market with these stores accounting for 50.8% of all sales of chocolate confectionery products.

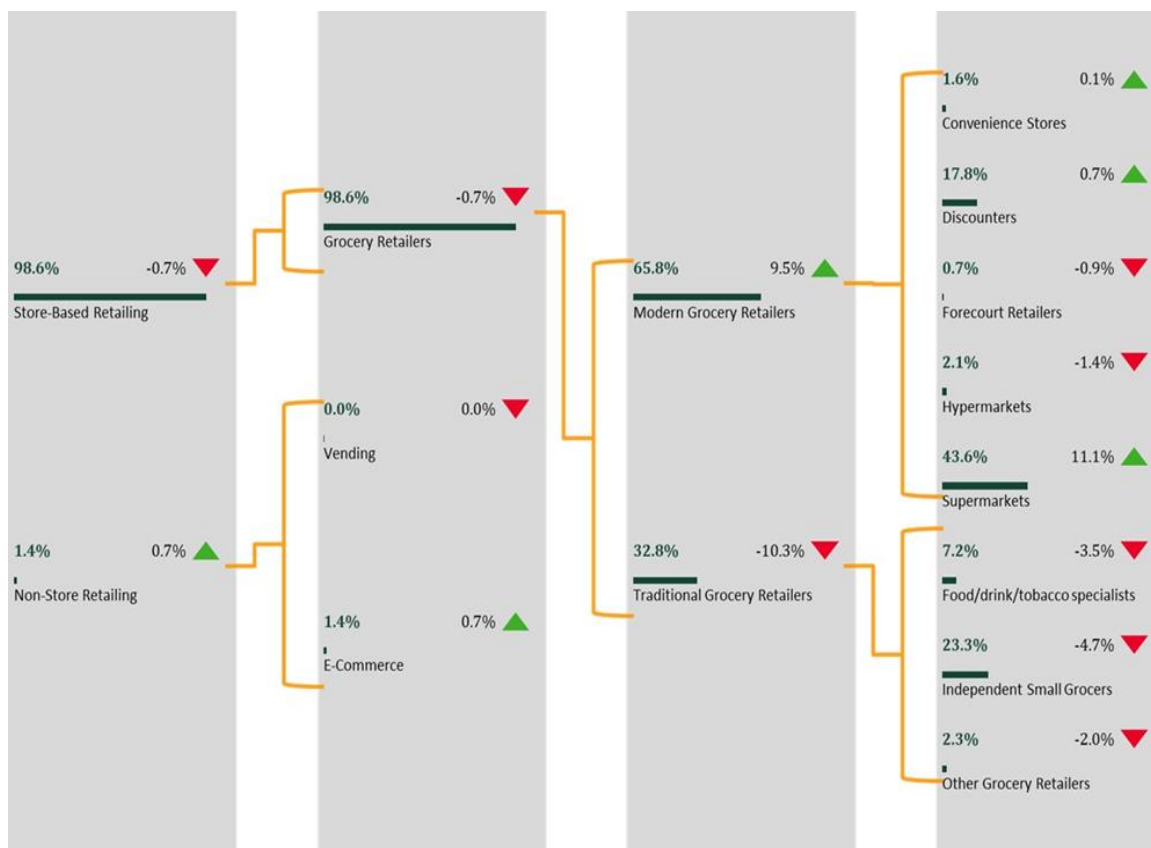
Figure 5-34: Distribution channel overview of chocolate confectionery in Turkey (2020); % share



Source: Euromonitor International: Packaged Food, 2021.

Figure 5-35 shows the distribution channel overview of sugar confectionery in Turkey. As is the case for chocolate confectionery, retail sales are mainly store-based (98.5%) and only about 1.4% of the retail value in 2020 came from non-store-based internet retailing. Even though the rate is very low, e-commerce is increasingly popular. With 65.8% of the share of distribution, modern grocery retailers are the most popular channels followed by traditional grocery retailers which currently account for 32.8% of sales. Supermarkets were the main channel of traditional grocery retailers and accounted for 43.6% of the retail value in 2020 followed by independent small grocers with 23.3%.

Figure 5-35: Distribution channel overview of sugar confectionery in Turkey (2020); % share



Source: Euromonitor International: Packaged Food, 2021.

5.7.6 Challenges for EU products

Challenges for EU products include competing with domestically produced Turkish chocolate and sugar confectionery products in a competitive and fragmented market for both products. Marketing chocolate and sugar confectionery products is of particular importance around religious holidays such as Ramadan, leading to a notable spike in sales due to a mixture of consumers celebrating and also purchasing these products to be used as a gift. EU producers need to keep this in mind when entering the market as not seizing on this opportunity will result in missing out on one of the more promising aspects of the Turkish chocolate and sugar confectionery market.

Market Takeaway: Chocolate and confectionery

Consumption: Consumption of both chocolate and sugar confectionery products in Turkey is common, with chocolate consumption per capita being amongst the highest in the world. Turkish consumers of imported chocolate and sugar confectionery products are more likely to purchase them as a gift and/or to be from a middle-higher income class.

Competition: Domestic production is the biggest competition for EU products, as the Turkish chocolate and sugar confectionery market is highly fragmented and competitive. Outside of Turkey, the biggest competition comes from India for chocolate (despite a relatively higher price point) and China and the UK for sugar confectionery.

Distribution: Chocolate and sugar confectionery products are nearly exclusively sold through store-based retailers such as supermarkets and independent small grocers. E-commerce retailing is currently very low but is likely to keep growing.

Challenges: To compete with domestic companies is a key challenge as domestic producers will readily offer cheaper variants of chocolate and confectionery products compared to EU suppliers. Due to this, demand for EU chocolate is focused around times of increased gifting such as Ramadan and other religious holidays, and an appropriate marketing campaign should be considered during these periods in the country.

Opportunities: Turkish consumers are well accustomed to the consumption of chocolate and sugar confectionery products. A rise in consumers curious about imported products combined with the act of gifting becoming more common around religious holidays stand as the bigger opportunities in the Turkish market.

5.8 Beer

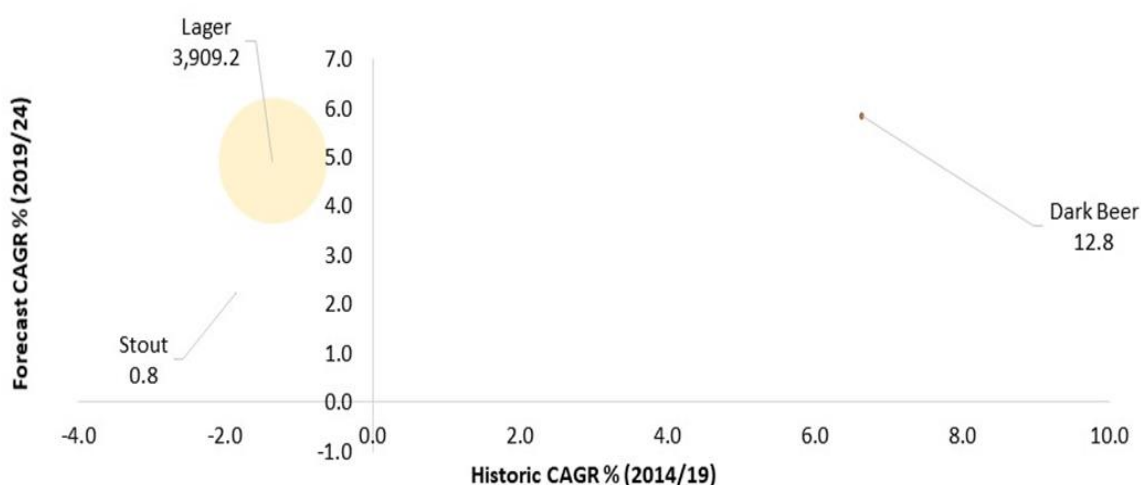
5.8.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Eight EU Member States are amongst the top ten exporters of beer to Turkey in 2020. ▪ Beer consumption in Turkey is far more common than in other countries in the region with an equally high Islamic population. ▪ High levels of tourism from the EU to Turkey are expected to rebound post-Covid 19, which in turn will revive a consumer base more likely to seek out imported beers. 	<ul style="list-style-type: none"> ▪ Domestic producer Efes has a 51.7% share of the Turkish beer market. ▪ Beer consumption is still viewed as taboo in certain regions of Turkey. ▪ Imported beer is more expensive than domestic beer, which has become a greater weakness following the implementation of a tax rise on alcohol in 2010.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The celebration of European events such as St Patrick's day in Turkey is growing in popularity and aids the consumption of EU beers. ▪ Part of the younger population increasingly views the consumption of beer as a social norm. ▪ Consumers are increasingly curious about beers beyond the dominant domestic Efes brand, which in turn aids the consumption of EU beers. 	<ul style="list-style-type: none"> ▪ The government has implemented several restrictions in recent years aimed at limiting the consumption of alcohol in the country. ▪ Mexico and Serbia are the biggest competitors from outside of Turkey. ▪ Craft beer production has grown domestically in recent years with niche beers such as IPAs and blonde beers being the more commonly produced beers within domestic craft brewers. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.8.2 Consumption

Evolution of consumption

As observed below in Figure 5-36, lager is by far the largest beer category in Turkey, with a total value of EUR 3.9 billion. Lager is expected to grow by a CAGR of 4.9% between 2021 and 2025 to remain, by a considerable distance, the largest beer category in Turkey by total value. Other beer categories are by far smaller in total value when compared to lager with the second-largest category of dark beer having a total value of EUR 12.8 million; nonetheless, dark beer is forecast to be the fastest-growing beer category in Turkey between 2021 and 2025 with a forecast CAGR of 5.8%. Stout has a relatively small market size with a total value of EUR 0.8 million and is forecast to grow at a CAGR of 2.2% between 2021 and 2025. Non-alcoholic beer has yet to take off to a considerable scale in Turkey.

Figure 5-36: The beer market in Turkey, 2015-2025; total retail value (EUR million)

Source: Euromonitor International: Alcoholic Drinks, 2021.

Consumer profile and purchase criteria

Consumers

The consumption of beer in Turkey at 10.9 litres per capita is quite low compared to EU levels, such as to neighbouring Bulgaria with a consumption rate of around 75 litres per capita or Greece with a consumption rate of around 35 litres per capita. The main reason explaining the low consumption rate in Turkey is adherence to Islam which advocates against alcohol consumption, which is respected by a large segment of the population. Those parts of the population that consume beer are likely to be living in urban areas in the country, such as Istanbul and Izmir, where the consumption of beer is viewed more as a social norm rather than in the interior of the country where consumption is less encouraged. Younger consumers have become increasingly open to consuming beer when compared to older consumers; this helps explain the expected rise in CAGR across all beer products between 2021 and 2025, which occurs after a period between 2015-2020 when lager and stout sales declined. The legal drinking age in Turkey is 18 and this is strictly enforced, which means this age group, in particular, stands out as one that can be marketed to obtain brand loyalty as they first begin to consume beer. Lager is by far the most popular beer in Turkey and to an extent, it is often associated as a *de-facto* beer choice by consumers, which explains why lager is the predominant type of beer with a market value of EUR 3.9 billion compared to the second-largest category of dark beer which in comparison has a market value of EUR 12.8 million. Domestic brands *Efes Pilsen* and *Turk Tuborg* are the most popular beers found in Turkey and both fall into the larger category; these two brands together account for roughly 62% of the market, with other popular beers also coming from these two companies.

Drivers and method of consumption

Drivers of beer consumption in Turkey follow many parallels found in other European countries such as the desire to consume beer as a social activity, to relax and to celebrate special occasions. Within Istanbul and along the western coast of Turkey it is relatively easy to come across several bars offering beer which encourages consumers to visit and the end of a busy day, especially in the summer months when the days are longer. Beer

consumption rises during major sporting events in the country with notable rises recorded when the national team is playing in football. Several Turkish football teams play at the European level which encourages fans from other European countries to visit Turkey, further driving beer consumption. Tourism is a key driver of beer consumption within Turkey as the country is a top destination for tourists arriving from the EU, which encourages the presence of Spanish, Irish and German-themed bars typically offering beers from these countries, as is notable in Istanbul and along the coast of the country. St Patrick's day is also acknowledged and celebrated in many bars across western Turkey which encourages consumption of stout in particular.⁸² Methods of consumption follow many of the same practices found in the EU with the inclusion of ice in beer being more common in the summertime.

Purchase criteria

Most consumers in Turkey will associate beer solely with the category of lager which is by far the most popular beer category in Turkey. This creates a difficult marketplace for other beers such as dark beer and stout to compete. Consumers will expect beer to be reasonably priced, with the *Efes* brand having such a large presence on the market in Turkey at a price well below that of imported beers. Imported beers, which are most commonly from the EU, will typically cost more in Turkey compared to domestic beers and this price difference brings with it a higher expectation from consumers in relation to quality and packaging. Beers in Turkey typically have an ABV of around 5-7% and most consumers seeking a beer to relax will expect the beer to fall within this ABV range, which acts in itself as a pricing criterion.

Beer on retailers' shelves in Turkey

Consumers in Turkey rarely make a distinction between domestic and imported beer cans with price playing a larger role as a purchasing criterion. As such, it is common for imported beers to be displayed alongside domestic beers with imported beers often being at eye level to encourage consumers to spend more on the product.

Most imported beers in the country are lagers as this is by far the most popular beer category in Turkey. Glass bottles of 330 ml are particularly popular, and sizes go up to 750 ml. Cans are usually present in a 550ml size and, although less popular in Turkey than bottles, their popularity is growing both for domestic and imported products.

⁸² 15 Surprising countries that celebrate St Patrick's day, Wetravel Academy. Available at:

<https://www.wetravel.com/academy/countries-you-didnt-know-celebrate-st-patricks-day/>

Recent market trends

The Turkish government has implemented several restrictions in recent years aimed at limiting the consumption of alcohol. These restrictions include a ban since 2013 on the promotional advertising of alcoholic beverages, a tax hike on alcoholic beverages in 2010 and finally a limit in trading hours of alcohol distribution which is now only permitted by licensed vendors between the hours of 06.00-22.00. This helps to explain why the lager market has contracted between 2015-2020. On the other hand, younger consumers are increasingly open to consuming beer and this is expected to help reverse the negative trend into a predicted positive growth rate between 2021 and 2025.

Although craft beer remains largely a niche area in Turkey, several craft beers have emerged in the market in recent years such as the Pablo brewery in Bodrum and the Park Gıda brewery in Terkirdag. The success of these craft beer producers in the market will likely act as an incentive for further craft beer producers to appear in the Turkish market in the coming years. Non-alcoholic beer has yet to penetrate the Turkish market to the level seen in other European countries, but there is growth potential. An indication is that the company *Efes* which holds over half of the Turkish market has recently released a 0.0% non-alcoholic lager in an attempt to tap into the growing awareness surrounding non-alcoholic beer in Turkey. Increasingly, imported beer brands provide special promotional glasses distributed to bars, pubs, special events like music festivals and nightclub events.

5.8.3 Offer

Domestic production

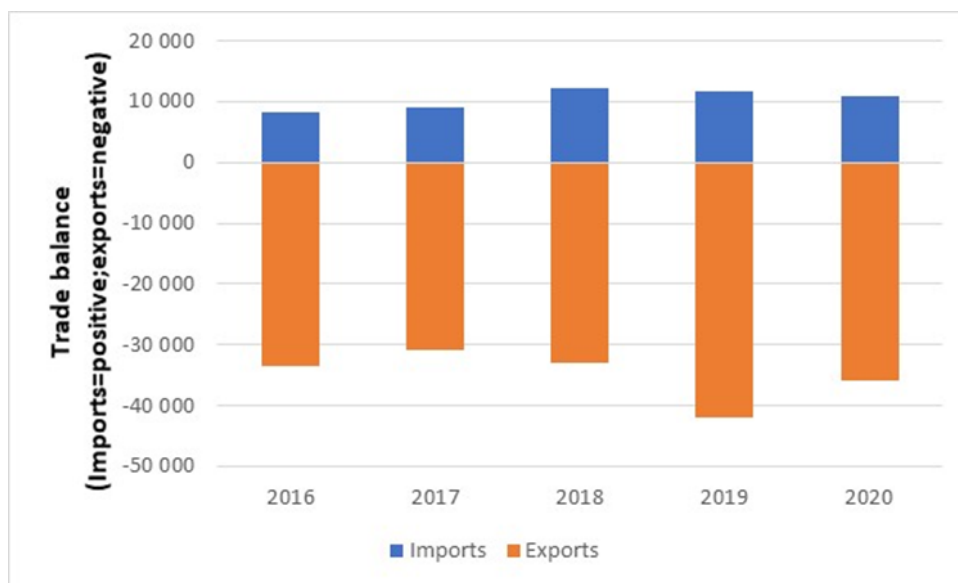
Efes Pilsen is the largest beer produced in Turkey, with the *Efes* beverage group enjoying a monopoly status in the country up until 2004. The introduction of *Turk Tuborg Bira ve Malt Sanyaii AS* (parent company is Carlsberg) has shaken the market in Turkey as the company has grown to have a market share of 47.6%, creating a duopoly situation in the Turkish beer market as *Efes* controls 51.7% of the market. The government has been making it more difficult to promote all alcoholic drinks including domestic and imported beer in Turkey, with a ban on advertising meaning that brewers are unable to display their logos even outside of their breweries. Despite this there have been some notable success stories within the craft sector, with the brewery *Gara Guzu* located in Mugla being one of the larger craft beer producers in the country; this company mainly focused on the production of blond ales and IPAs. *Graf Microbrewery* in Istanbul is another notable example of a growing microbrewery within Turkey. Brewpubs (bars/restaurants which brew beer on-site) remain largely niche in Turkey however the opening of one in Istanbul by the *Bosporus brewing* company has shown that this method of production and distribution is possible within Turkey.⁸³

Imports and exports

As shown below in Figure 5-37, Turkey is a net exporter of beer with the country's domestic flagship beer of *Efes* becoming increasingly popular throughout the middle east and Asia, the main destinations for Turkish beer exports which came to a value of EUR 35 million in 2020. Concerning imports, total imports came to a value of EUR 10 million in 2020 and have remained more or less around this figure since 2016.

⁸³ Beer n Biceps, Beer in Turkey: Everything you need to know. Available at: <https://beernbiceps.com/beer-in-turkey/>

Figure 5-37: Trade balance (imports and exports) of beer in Turkey, 2016-20 (EUR 000)

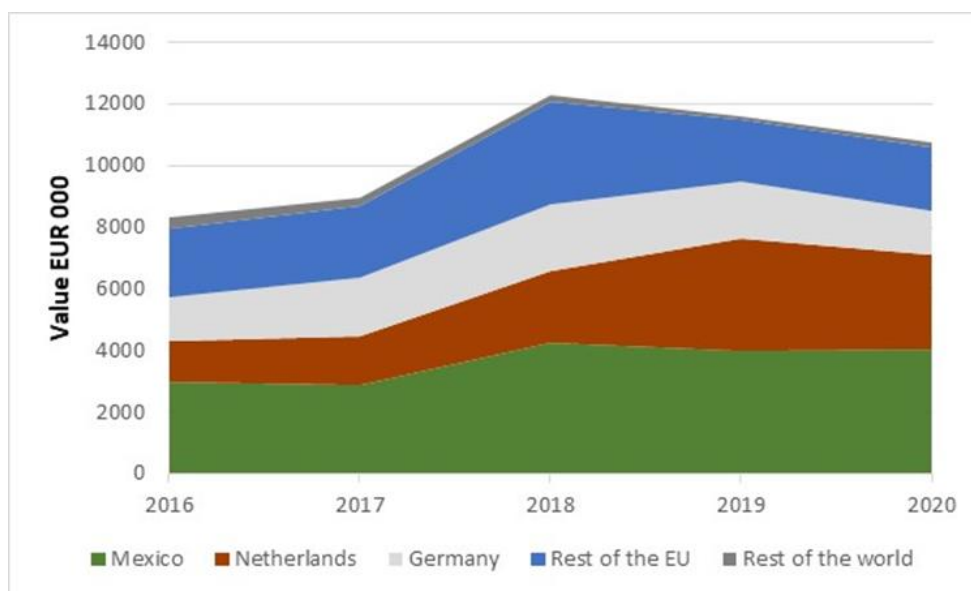


Data for CN code 2203.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-38 further shows that Mexico is the largest origin of beer imported to Turkey with the country exporting a total of EUR 4 million worth of beer to Turkey in 2020. This is followed by the Netherlands with a total value of EUR 3 million and Germany with a total value of EUR 1.4 million. Other EU Member States among the top ten largest exporters of beer to Turkey include Ireland, Belgium, Poland, the Czech Republic, France and Italy.

Figure 5-38: Turkish imports of beer by country, 2016-20 (EUR 000)

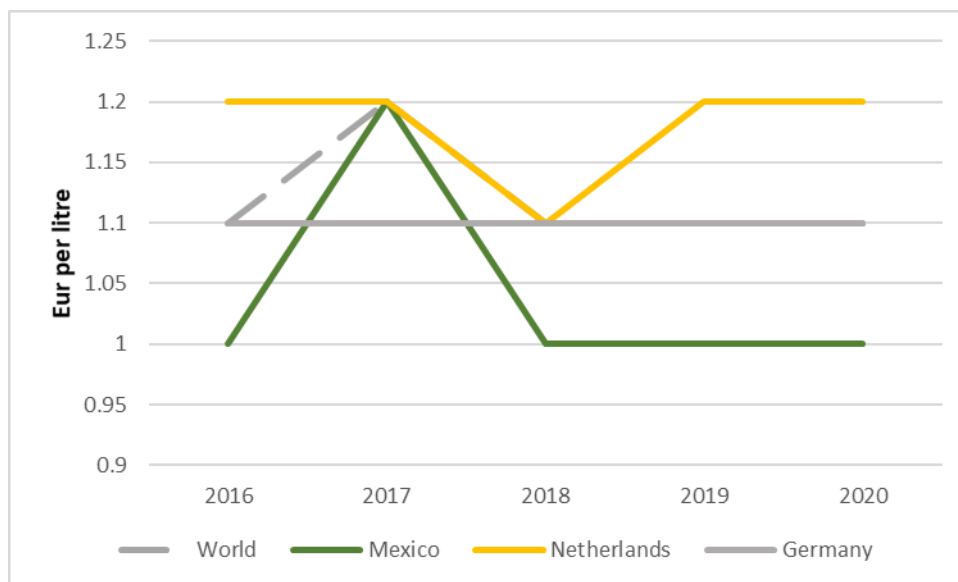


Data for CN code 2203.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-39 shows the unit value of Turkish imports of beer from 2016 to 2020, with Dutch beer having the highest overall per litre value at EUR 1.2 per litre. The world average was around EUR 1.1 per litre which is the same value as German beers. Mexican beers have declined in unit value in recent years, peaking at EUR 1.2 per litre in 2018 and declining to EUR 1 per litre in 2020.

Figure 5-39: Turkish imports of beer by country, 2016-20 (unit value, EUR per litre)



Data for CN code 2203.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for beer have been identified as having been registered.

Main competitors

The main competitors in this market come from domestic producers who can leverage their lower costs of production in comparison to imported beers in the market. *Efes* enjoys a comfortable majority of the market in Turkey and the only other major competitor is *Turk Tuborg* (which is owned by Carlsberg). *Efes* is likely to remain the most popular beer in Turkey due to its cheaper price, which is increasingly important in a market that has been impacted by rising taxes and a fall in the Lira currency value. Outside of Turkey, the biggest competitor is Mexico, the largest exporter of beer overall to Turkey, although it is important to note that this is largely through the trade of Mexico's flagship beer, corona, which is a competitor for EU lager products. No other country has a significant trade of beer to Turkey when compared to the EU Member States, with only Serbia (along with Mexico) being amongst the top ten biggest non-EU exporters of beer to Turkey.

5.8.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, a certificate of conformity and certificate of analysis is required for a beer imported into Turkey. All types of alcoholic beverages are furthermore to be notified to the Department of Tobacco and Alcohol of the Ministry of Agriculture and Forestry and can only be imported at designated ports of entry. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>

Turkey applies a zero tariff on imports of beer.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – beer (2203) from Germany to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=22030001&origin=DE&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for beer. The Turkish food codex for beer was published in July 2006 (Communiqué No. 2006/33). This specific legislation, which contains various definitions, product features, transport, storage and other provisions can be found here:

<https://www.resmigazete.gov.tr/eskiler/2006/07/20060707-13.htm>.

Labelling

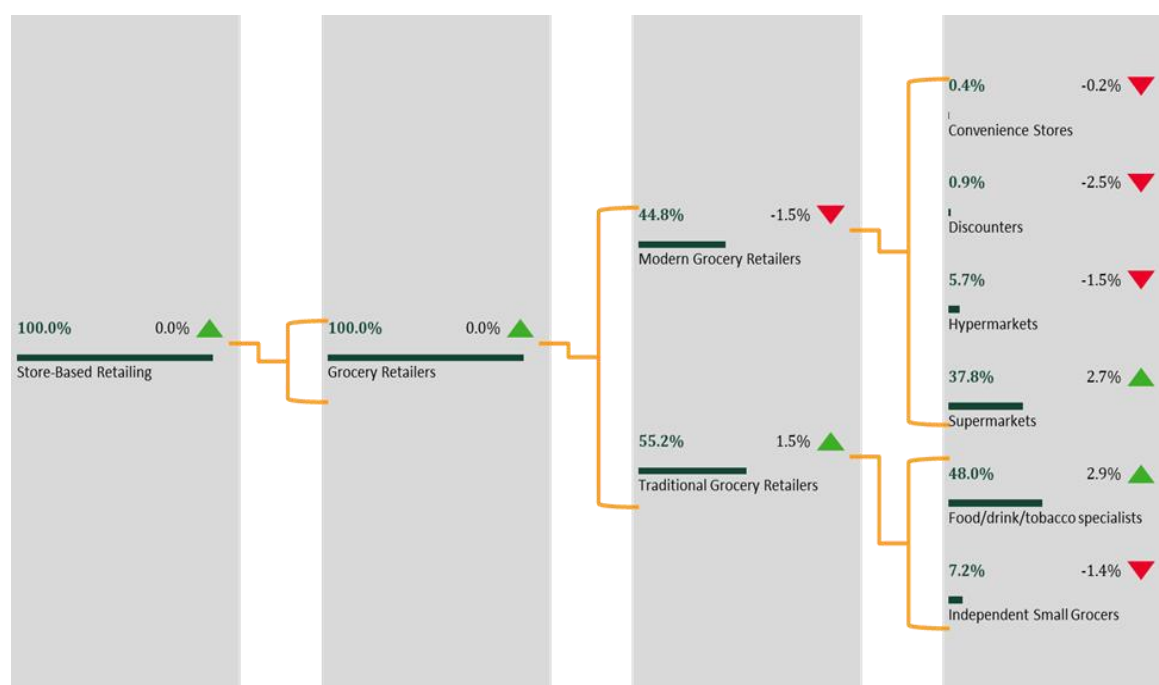
Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. According to this legislation, the statement “...contains alcohol” must be included on the label of alcoholic drinks and any other food if ethyl alcohol is used as an ingredient in its manufacture or preparation, notwithstanding the amount of the alcohol. It should be remembered that the above-mentioned Turkish food codex regulation on beer includes detailed rules on the packaging and labelling of beer.

There are also specific rules on declaring alcohol by volume on the label of alcoholic beverages – this covers all drinks containing more than 1.2% alcohol by volume (Communiqué No. 2003/06). This legislation has been prepared within the framework of harmonisation with EU legislation, and takes into account Commission Directive 87/250/EEC on “Determining the Amount of Alcohol by Volume in Labelling of Alcoholic Beverages Offered to the Consumer”. As already noted, alcohol advertising and promotion are completely banned in Turkey according to the applicable law, forbidding advertising on TV/radio and at the point of sales (see section 6.2).

5.8.5 Distribution

As shown in Figure 5-40, traditional grocery retailers account for the majority of sales of beer in Turkey within off-trade establishments. Food/drink and tobacco specialists are the largest sole distributor of beer in Turkey with a share of 48% of all sales. Supermarkets account for 37.8% of all beer sales in the country and make up the majority of sales conducted via modern grocery retailers. Hypermarkets account for 5.7% of sales, while independent small grocers account for 7.2% of sales. Before the outbreak of Covid-19 and subsequent restrictions on the opening of on-trade establishments in Turkey, on-trade establishments accounted for 23.2% of all beer sales in the country.

Figure 5-40: Distribution channel overview of beer in Turkey (2020); off-trade sales (% share)



Source: Euromonitor International: Alcoholic Drinks, 2021.

5.8.6 Challenges for EU products

Challenges for EU beer include competing with the domestic lager *Efes Pilsen* which is the most popular beer in the country and largely satisfies key criteria for consumers concerning price and taste. *Efes* retains a majority share of the market in Turkey and is in a position to influence the market on its own, which is evident in its recent launch of a non-alcoholic beer in a market that has yet to embrace this product to the levels seen in other European countries. Government restrictions act as another challenge for EU products as there is an ongoing ban on the promotional advertising of beer products in the country, coupled with a tax hike on alcoholic beverages in 2010 and the introduction of a limit in trading hours for off-trade distributors. Despite this, Turkey's younger population is a consumer segment that is identified as being increasingly open to beer consumption, and beer consumption as a whole is increasingly becoming normalised which is particularly apparent within larger urban centres of the country such as Istanbul and Izmir.

Market Takeaway: Beer

Consumption: Consumption of beer in Turkey is low compared to EU levels but is increasingly becoming normalised in the country, particularly within larger urban centres and tourist hotspots. Lager is the predominant beer consumed in Turkey with other beer categories consumed to a far smaller extent.

Competition: Domestic beer producer Efes enjoys a majority share of the Turkish beer market and stands as the biggest competitor for EU beers in the country, particularly for a lager. Competition outside of Turkey comes largely from Mexico (due to its flagship beer, corona) and to a lesser extent Serbia.

Distribution: Off-trade sales of beer largely through traditional grocery retailers with food/drink and tobacco specialists accounting for 48% of all off-trade sales. Supermarkets account for 37% and is the only other major distribution channel of note. On-trade sales before Covid-19 accounted for 23.2% of all beer sales within Turkey.

Challenges: The market position of Efes combined with the government's restrictions on alcohol consumption in Turkey stand as the biggest challenge for EU beer. Efes enjoys a market share of 51.7% and can influence the market by itself. The government implemented the ban on advertising alcoholic products in Turkey which limits the marketing and promotion ability of new imported EU beers within Turkey.

Opportunities: The expected rebound of tourism in Turkey post-Covid 19, combined with a growing youth population that increasingly views the consumption of beer as a social norm, stand as the bigger opportunities for imported beer in Turkey.

5.9 Pasta

5.9.1 SWOT analysis

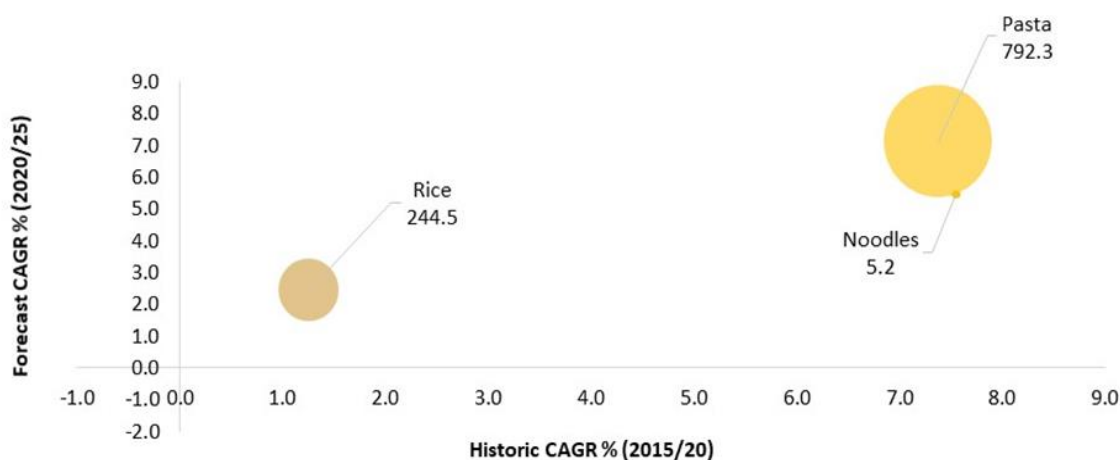
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Italy is the largest exporter of pasta to Turkey. ▪ Consumption of pasta in Turkey has been normalised and is commonly compared to other countries in the region. 	<ul style="list-style-type: none"> ▪ Turkey is amongst the top five largest producers of pasta in the world. ▪ Turkish pasta is widely available at relatively lower prices. ▪ Turkey is by far a net exporter of pasta.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ An urbanising population with an increasing demand for convenience foods. ▪ EU pasta appeals to middle- and higher-income earners seeking new and luxurious foods. 	<ul style="list-style-type: none"> ▪ Domestic production is forecast to continue growing as demand for Turkish pasta both within Turkey and the Middle East and African markets grow. ▪ Turkish pasta is generally viewed as being of a high quality, which places additional pressure on EU producers to compete. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.9.2 Consumption

Evolution of consumption

Figure 5-41 below shows that pasta is by far the largest category of the pasta, rice and noodle products sector in Turkey, with a total volume of around 792 000 tonnes. Pasta grew by a CAGR of 7.4% between 2015-2020 which is forecast to be sustained to a CAGR level of 7.1% between 2021 and 2025 so that pasta will remain the largest category by total volume. Rice is the second-largest category, although far behind pasta, with a total volume of 244 000 tonnes which will grow by a predicted CAGR of 2.4% between 2021 and 2025. Noodles is an extremely small category in the Turkish market with a total volume of 5 200 tonnes, which is nonetheless forecast to grow at a CAGR of 5.5% between 2021 and 2025.

Figure 5-41: Evolution and forecast for pasta compared to rice and noodles in Turkey, 2015-2025; (000 tonnes)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Consumption of pasta in Turkey has been growing in recent years aided by the fact that the country is a large producer of pasta products and is not as reliant on imported pasta. Pasta is readily available across most retailers and is inexpensive for the majority of consumers. Consumers living in urban centres such as students and workers stand out as primary consumers of pasta in Turkey due to this segment of the population, in particular, being more likely to seek out foods that can be cooked quickly, cheaply and provide adequate filling. Dried pasta is more popular in Turkey due to its long shelf life, combined with its adaptability across several popular dishes in Turkey.

Drivers and method of consumption

A key driver of pasta consumption in Turkey has been its durability which is appreciated by Turkish consumers. The consumption of pasta in Turkey grew in 2020 following the outbreak of Covid-19, which resulted in a large growth in demand for products that can be stored for a prolonged period, such as pasta, as well as an increase in cooking at home. Several traditional pasta dishes are popular in Turkey such as *mantı* and *firin makarna*. Pasta is largely consumed with a mix of other ingredients including meat (except for pork), and vegetables. Urbanisation acts as another driver of pasta consumption as demand for foods that can be stored and prepared quickly tends to be higher in urban areas.

Purchase criteria

Consumers in Turkey have ready access to a wide range of domestic pasta products which results in pasta being generally cheap in the country compared to other countries in the region that are more reliant on imports. Turkish pasta is also generally regarded as being of a high quality, which brings with it an increase in demand for quality pasta products more generally. Lower-income consumers will be more likely to purchase Turkish pasta over imported variants due to the lower cost of domestic products.

Recent market trends

Most on-trade distributors of pasta were forced to close during the Covid-19 pandemic, which particularly affected distributors of imported EU pasta such as Italian restaurants. Despite this, overall imports of pasta from Italy grew, as consumers rushed to stockpile products during the pandemic. Italian pasta appeals largely to middle- and higher-income earners as a luxury product that can be stored for a prolonged period. Consumers in Turkey will continue to prefer pasta over rice and noodles, as observed in the product's large total volume of 792 000 tonnes which is forecast to grow at a CAGR of 7.1% between 2021 and 2025. Urbanisation in Turkey is likely to continue, and this further aids the consumption of pasta which appeals more to urban consumers seeking a quick meal.

5.9.3 Offer

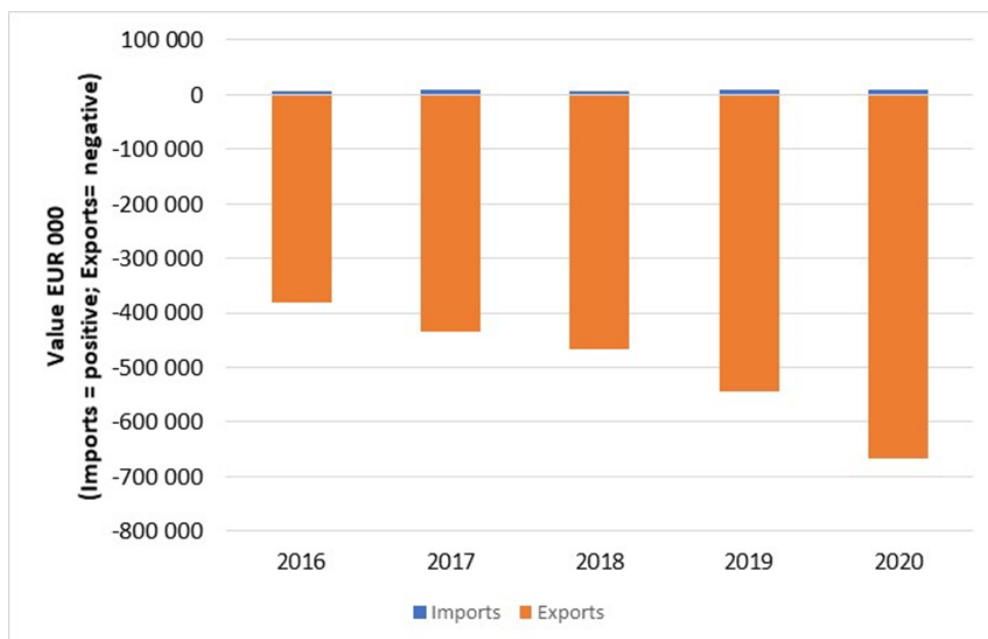
Domestic production

Domestic production of pasta in Turkey is high, and Turkish pasta has grown in exports in recent years, aided further by an increase in consumption. There are an estimated 24 producers of pasta within Turkey with the company of *BİM Birlesik Magazacilik* being the largest producer with a market share of 16.3%. The rest of the market is made up of smaller producers resulting in a fragmented marketplace. Turkey is ranked amongst the top 5 largest pasta producers in the world, which will likely continue to be the case as demand for Turkish pasta continues to grow in the Middle East and Africa.

Imports and exports

Figure 5-42 shows that Turkey is a net exporter of pasta, exporting a total of EUR 666 million worth of pasta in 2020. This compares to a total import value of EUR 7.5 million. Turkish pasta has emerged as a popular product within the Middle East and African markets which explains the high volume of exports from the country.

Figure 5-42: Trade balance (imports and exports) of pasta in Turkey, 2016-20 (EUR 000)

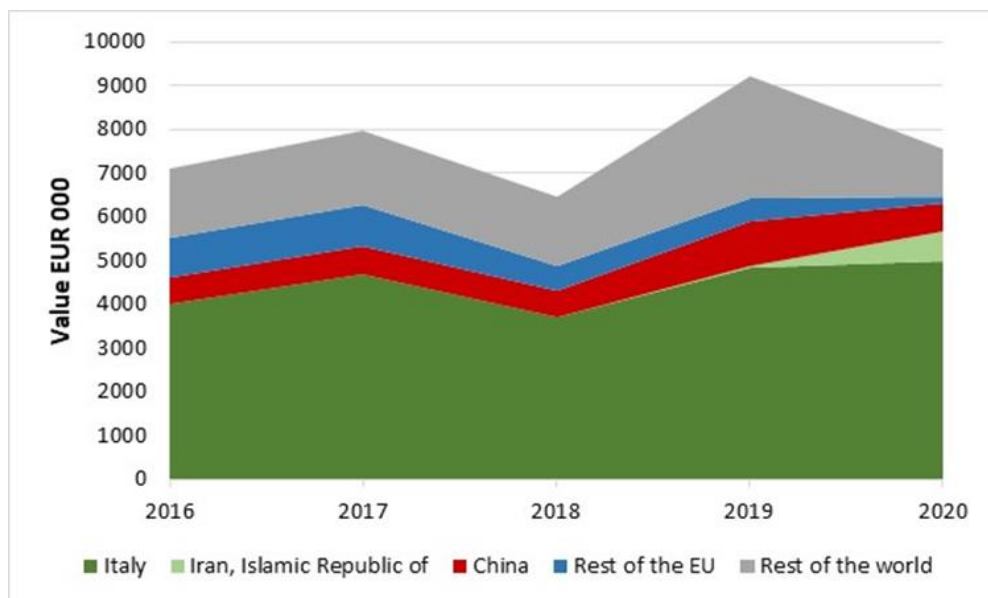


Data for CN code 1902.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-43 demonstrates that Italy is by far the largest EU exporter of pasta to Turkey, exporting over EUR 4.5 million worth of pasta to Turkey in 2020. This is followed by Iran and China with a total export value of over EUR 600 000 each. Romania is the second-largest exporter of pasta from the EU with a total export value of EUR 96 000.

Figure 5-43: Turkish imports of pasta by origin country, 2016-20 (EUR 000)



Data for CN code 1902.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. Prosciutto Di Parma has been registered under this system.

Main competitors

Main competitors in this market come from large-scale domestic producers operating in Turkey. Turkey ranks amongst the top ten largest producers of pasta in the world and production is set to continue to expand as the country continues to target external markets within the Middle East and Africa. Iran and China are the biggest competitors from outside of the EU, although exports from these countries are low compared to Italy.

5.9.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for pasta products imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products. Depending on the product's ingredients, a pre-notification form for ingredients of animal origin for inspection purposes, and a veterinary certificate may also be required. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, EU pasta products generally face an ad valorem tariff on imports into Turkey.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general pasta and noodles category (1902) from Italy to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1902&origin=IT&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for pasta products. The Turkish food codex regulation for pasta products dates from 2002 (Communiqué No. 2002/20), as amended in 2005. This specific legislation contains various definitions, product features, transport, storage and other provisions: <https://www.resmigazete.gov.tr/eskiler/2005/06/20050629-16.htm>.

Labelling

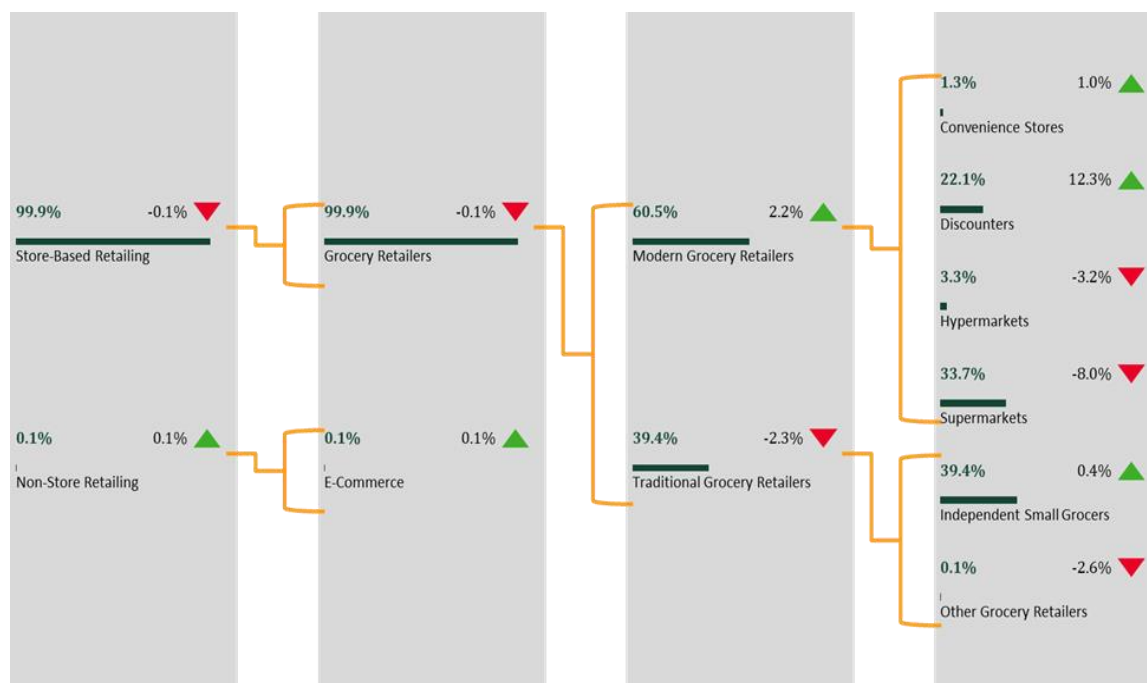
Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling.

The above-mentioned Turkish food codex regulation for pasta products contains specific requirements for the labelling of certain types of products (e.g. pasta enriched with vitamins and minerals, flavoured pasta). For example, in flavoured pasta, the seasoning substance should be placed next to the product name. This legislation should be consulted for details on labelling

5.9.5 Distribution

Figure 5-44 shows that modern grocery retailers are the biggest distributors of pasta in Turkey with these outlets accounting for 60.5% of total sales in the country. Supermarkets accounted for 33.7% of sales while discounters accounted for 22.1% of sales. Traditional grocery retailers accounted for 39.4% of all sales with independent small grocers accounting for this, which makes independent small grocers the biggest pasta distribution channel within Turkey presently.

Figure 5-44: Distribution channel overview of pasta in Turkey (2020); % share



Source: Euromonitor International: Packaged food, 2021.

5.9.6 Challenges for EU products

Notable challenges for EU pasta in Turkey include competing with domestic producers, which account for the majority of sales in the country and largely cater to most domestic demand from lower-income consumers. Targeting middle- and higher-income earners will be key if EU pasta is to be successful in Turkey as this consumer segment will be more

likely to purchase higher-priced products from the EU if similar products are also mass-produced in Turkey. Going forward, pasta popularity in Turkey is forecast to continue growing between 2021 and 2025, which will aid consumption of EU products to an extent, although domestic production is also forecast to continue growing within the same period.

Market Takeaway: Pasta

Consumption: Consumption of pasta in Turkey is high and is forecast to grow by a CAGR of 7.1% between 2021 and 2025. Consumers within urban areas are increasingly drawn to the consumption of pasta as it fits the desire for quick foods which can be stored for a prolonged period and prepared quickly.

Competition: The largest competitor comes from the domestic producers of pasta, which can largely cater to the demand for the product from within the Turkish market at relatively lower prices and high quality.

Distribution: Modern grocery retailers are the main channel of distribution for pasta with 60.5% of sales coming from this channel; small independent grocers the largest overall channel with a share of 39.4% of sales.

Challenges: Turkish pasta is of high quality and generally affordable for the majority of consumers in the country. EU pasta will have to demonstrate its higher quality within a marketing campaign aimed at middle- and high-income earners who will be the more likely to purchase EU pasta.

Opportunities: Consumption is forecast to keep rising resulting in more demand for pasta, which could result in uptake by consumers seeking new products including foreign variations of the product.

5.10 Processed cereals

5.10.1 SWOT analysis

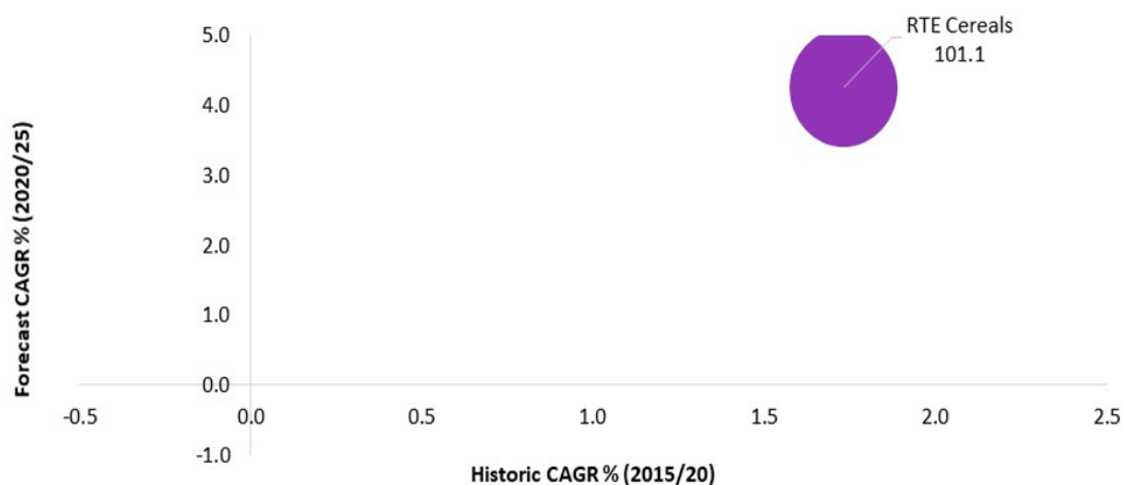
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ The EU accounted for 70% of all Turkish processed cereal imports in 2020. ▪ Turkish consumption of processed cereals is forecast to continue growing from 2021 to 2025, aided by an urbanising population and the impact of Covid-19 which encouraged home eating. 	<ul style="list-style-type: none"> ▪ The hot cereal category has yet to gain a significant presence in Turkey. ▪ Imported processed cereals compete with domestic alternatives, especially amongst lower-income consumers.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Demand for healthier variants of processed cereals is a key opportunity area, with muesli and granola cereals in particular benefiting from this trend. ▪ Consumers increasingly perceive breakfast cereal as a quick snack that can be consumed throughout the day which is likely to have a positive impact on the Turkish processed cereal market. 	<ul style="list-style-type: none"> ▪ Demand for high sugar, fat and maize cereals is forecast to decline. ▪ Turkish production of processed cereals has increased in recent years as large processed cereal producers Kellogg's and Nestle have opened production centres in the country. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.10.2 Consumption

Evolution of consumption

As shown below in Figure 5-45, RTE cereals (*ready to eat cereals*) currently are the dominant type of processed cereal products in Turkey with a retail value of EUR 101 million. RTE cereals grew by a CAGR of 1.7% between 2015 and 2020 and are further forecast to grow by a CAGR of 4.3% between 2021 and 2025. The hot cereals category has yet to gain a significant presence in Turkey.

Figure 5-45: Evolution and forecast of processed cereals market in Turkey, total value 2015-2025 (EUR million)



Source: Euromonitor International: Packaged Food, 2021

Consumer profile and purchase criteria

Consumers

Consumption of RTE breakfast cereals has been growing in Turkey as a result of parents increasingly associating this food as both healthy and filling for their children. Further increases are also explained by the impact of Covid-19 in Turkey which resulted in more consumers spending time in the home and consequently preparing foods at home too. Consumers seeking healthier breakfast meals have been drawn to muesli and granola cereals which have increased in total consumption in Turkey in recent years. Consumers of standard RTE cereals can come from any income background as these products are not overly expensive in Turkey and provide a quick and filling meal for both children and adults. Consumers of more expensive breakfast cereals from foreign brands or of a high nutritional variety will likely have more expendable income or live in larger urban centres with increased access to these products.

Drivers and method of consumption

Due to the Covid-19 pandemic, there has been a notable rise in breakfast cereal consumption in 2020 as consumers were forced to remain at home and sought out quick and filling foods. Breakfast cereals are commonly consumed in the morning however the consumption of cereal as a quick snack is also common in Turkey. Health food demand has impacted the breakfast cereal market which has resulted in producers in Turkey shifting focus towards the production of new healthier variants of their products, such as the incorporation of honey into their cereals and the replacement of maize which is increasingly viewed as an unhealthy product in Turkey. The addition of low fat and high fibre flakes is also increasing as well as the incorporation of rice in breakfast cereals.

Purchase criteria

Price is a key purchasing criterion in Turkey and producers have adapted to this by offering a discount on larger packs. High inflation following the depreciation of the Lira has impacted the ability of consumers to purchase imported brands that require foreign producers to offer their products in bulk or offer a loyalty programme for prolonged discounts. Motivated by health considerations, Turkish consumers increasingly are moving away from cereals with high sugar or fat content which has resulted in the presence of low-fat fibre cereals emerging in the Turkish market, with the cereal *special K* engaging in recent years in a marketing campaign to highlight the benefit of cereal consumption during weight management diets.

Recent market trends

Urbanisation has been a key market trend in the Turkish breakfast cereal market in recent years. Consumers increasingly have busier lives and less time to consume breakfast meals which have traditionally lasted for over an hour in Turkey. Breakfast cereals have benefited from urbanisation as the product is well-positioned to appeal to many criteria of the typical urban consumers namely the demand for quick, nutritional and filling food. The perception of breakfast cereal as both a snack meal and a healthy meal is growing in Turkey and has resulted in several shifts in the breakfast cereal market concerning production and promotion. Going forward it is likely that Muesli and granola products will see the most growth, as active marketing campaigns from producers of these cereals in Turkey has helped to increase the perception amongst Turkish consumers that these cereals are healthy and can be consumed as part of a balanced diet. The focus on healthy ingredients other than maize has come to influence the Turkish breakfast cereal market in recent years and this trend is expected to remain going forward.

5.10.3 Offer

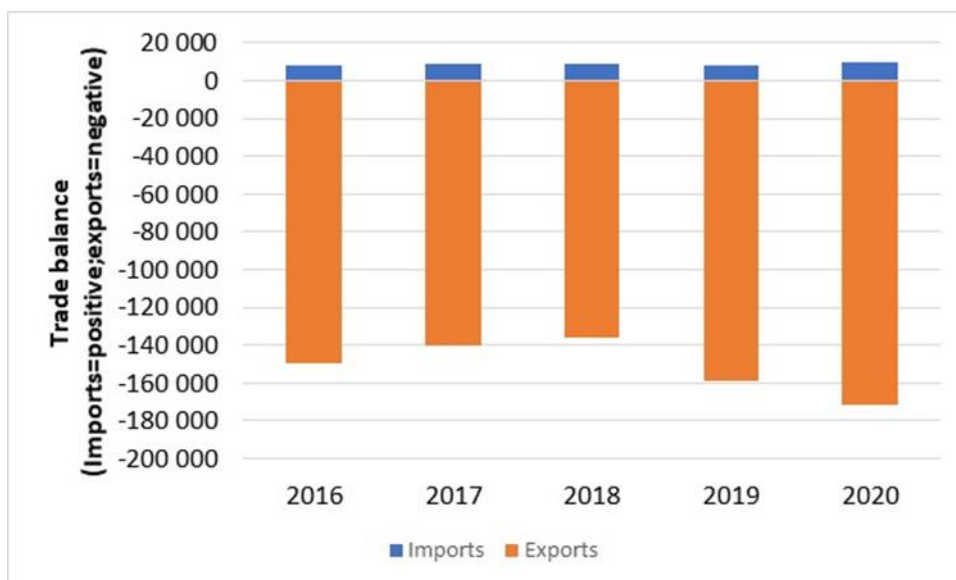
Domestic production

Large foreign breakfast cereal producers have entered the Turkish market in recent years such as Kellogg's and Nestle and have opened several production centres in the country. Nestle opened in 2012 a factory in the western Turkish city of Karacabey which caters both to the Turkish market and the wider middle eastern market. Kellogg's and Nestle through their Turkish subsidiaries' account for the largest share of the Turkish breakfast cereal market with Nestle having a share of 45.3% and Kellogg's having a share of 19.5%. *Eti Gıda* a Turkish company is the only other large player in the market with a share of 14% followed by a large number of smaller producers

Imports and exports

As shown below in Figure 5-46, Turkey is a net exporter of processed cereals with the country exporting a total of EUR 171 million worth of processed cereals in 2020, which represents an increase from EUR 149 million in 2016. Total imports reached a value of EUR 10 million in 2020, which also represents an increase from EUR 8.2 million in 2016.

Figure 5-46: Trade balance (imports and exports) of processed cereals in Turkey, 2016-20 (EUR 000)

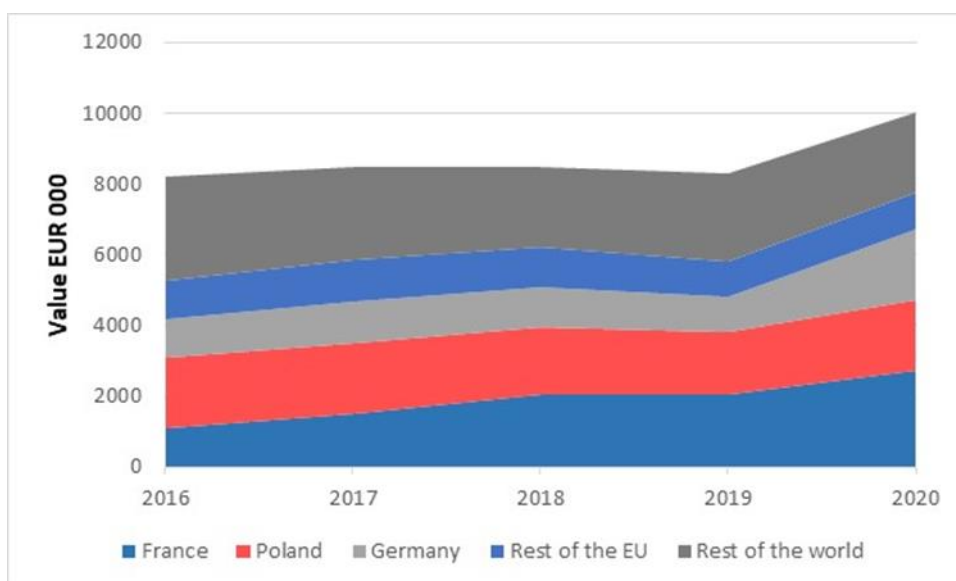


Data for CN code 1904

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

The largest exporter of processed cereals to Turkey is France, followed by Poland and Turkey (Figure 5-47). These three countries consistently account for around 60% of imports. In total, the EU accounted for close to 70% of total processed cereal exports to Turkey in 2020.

Figure 5-47: Turkish imports of processed cereals by country, 2016-20; EUR 000



Data for CN code 1904

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Main competitors

There is considerable domestic production from Turkish subsidiaries of the larger Kellogg's and Nestle companies which present the main competitors for EU processed cereals in Turkey. Outside of Turkey, The UK as the fourth largest exporter of processed cereal is the biggest competitor.

5.10.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for breakfast cereals imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products. Depending on the product's ingredients, a pre-notification form for ingredients of animal origin for inspection purposes, and a veterinary certificate may also be required. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, EU breakfast cereals generally face an ad valorem tariff on imports into Turkey. Some products can be imported at zero tariff, e.g. preparations of the Müsli type based on unroasted cereal flakes (1904 2010), but an additional duty is applied which is calculated on the basis of the product's agricultural components (e.g. milk content).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – breakfast cereals category (1904) from Germany to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1904&origin=DE&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based. This legislation covers aspects that are common to all agri-food products, including breakfast cereals, such as those relating to additives, contaminants, labelling, hygiene and official controls.

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country

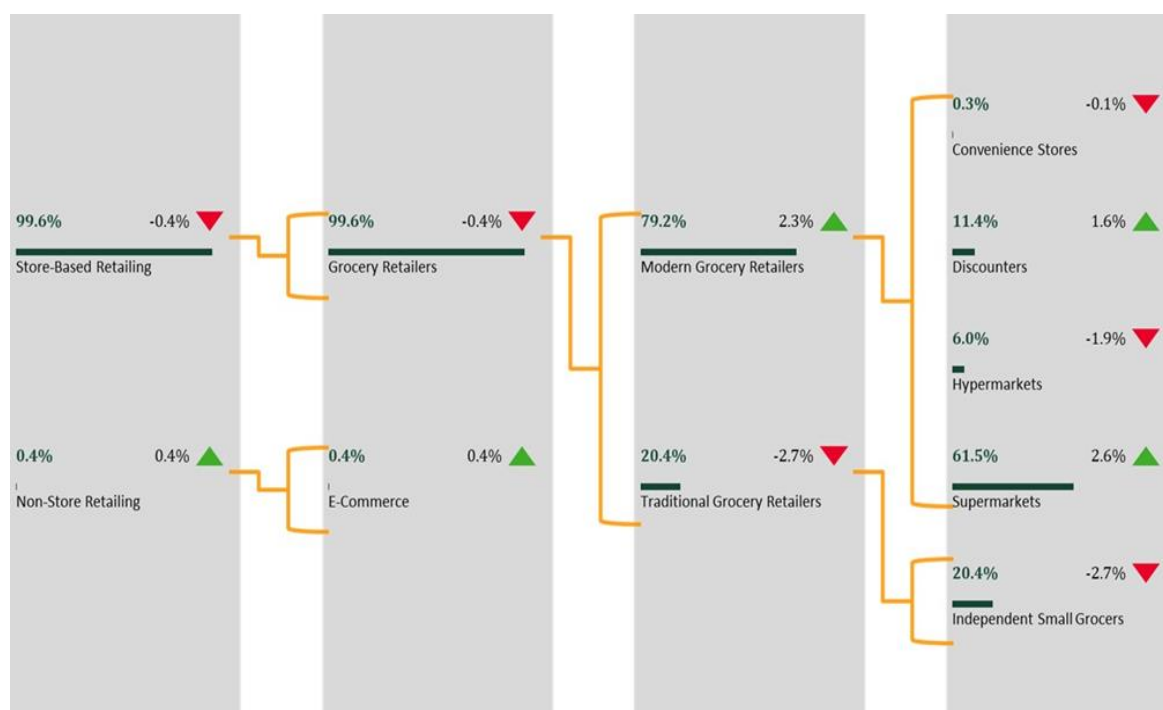
of origin labelling.

For products containing sweeteners, specific statements should be added on the label (“with sweetener(s)” or “contain sweetener(s)” or “contains sugar(s) and sweetener(s)).

5.10.5 Distribution

As shown in Figure 5-48, the majority of processed cereal sales in Turkey came from the modern grocery retail channel with a share of 79.2%. Supermarkets accounted for 61.5% of all sales followed by discounters with a share of 11.4%. Traditional grocery retailers accounted for 20.4% of sales with this all coming from independent small grocers. E-commerce remains a small channel of distribution with a total share of 0.4%.

Figure 5-48: Distribution channel overview of processed cereals in Turkey (2020); % share



Source: Euromonitor International: Packaged Food, 2021

5.10.6 Challenges for EU products

Competing with processed cereals producers in Turkey is the biggest challenge for EU breakfast cereals seeking to enter the Turkish market. Turkey has emerged as a key producer catering not only to the domestic market but also to the wider middle eastern region. Consumers in Turkey increasingly are seeking out breakfast cereals without the presence of maize, high-fat content and sugar which must be noted by EU exporters of breakfast cereals seeking to enter the Turkish market. It is also noted that high inflation in the country limits the ability of lower-income consumers to purchase imported processed cereals. Despite this, the EU accounts for roughly 70% of all imports of processed cereals into Turkey which came to a total value of EUR 10 million in 2020.

Market Takeaway: Processed cereals

Consumption: Consumption of processed cereals such as breakfast cereals has increased in recent years aided by the rise in urbanisation and the impact of Covid-19 which increased home eating consumption habits.

Competition: Considerable domestic production in Turkey is the biggest competitor for EU processed cereals. Outside of Turkey, the UK is the biggest competitor for EU processed cereals in the Turkish market.

Distribution: Mainly distributed through modern grocery retailers which account for 79.2% of all sales. Independent small grocers account for 20.4% of sales while the e-commerce channel remains small with a share of 0.4% of sales.

Challenges: High inflation in Turkey impacts the ability of lower-income consumers to purchase imported processed cereals compared to cheaper domestic alternatives.

Opportunities: Demand for healthier processed cereals with a high fibre content such as muesli is forecast to be a key opportunity area in this market.

5.11 Processed fruit and vegetables

5.11.1 SWOT analysis

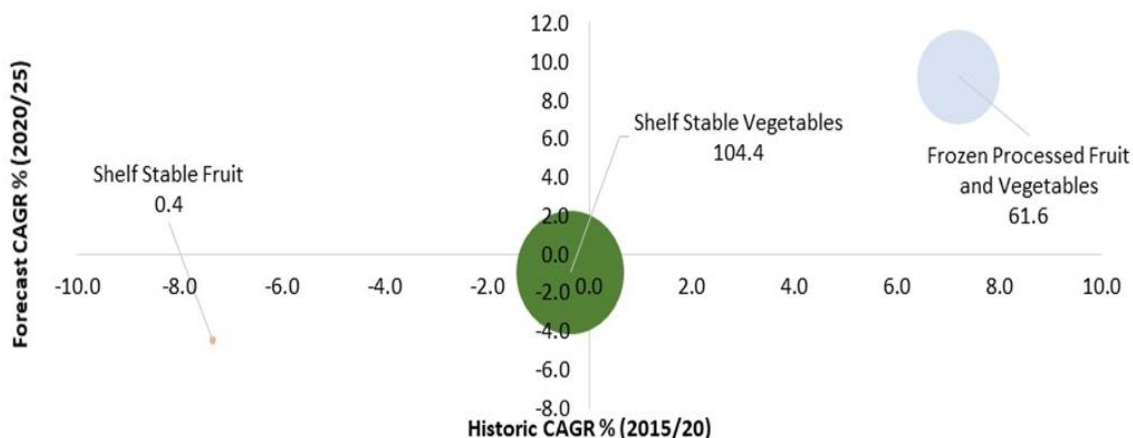
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Frozen fruit and vegetable consumption is growing. ▪ Consumers are increasingly appreciating the longer storage and convenience of processed fruit and vegetables. 	<ul style="list-style-type: none"> ▪ There is competition from the wide presence of cheaper and fresher alternatives in the market. ▪ The total consumption of shelf-stable fruits in Turkey is minimal.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ An urbanising population is continuously seeking convenience foods. ▪ The return of on-trade channels is likely to boost the segment. 	<ul style="list-style-type: none"> ▪ Turkish processed fruit and vegetable production is growing and increasingly catering to the domestic market. ▪ Production of new processed fruit and vegetable products in Turkey such as French fries is rising, limiting demand for these products from abroad. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.11.2 Consumption

Evolution of consumption

Shelf-stable vegetables have the highest retail value at EUR 104 million, although expected to decline at a CAGR of -1% between 2021 and 2025 (Figure 5-49). This is followed by frozen processed fruit and vegetables which has a smaller retail value of EUR 61.6 million and is expected to grow by a CAGR of 9.2% between 2021 and 2025. Shelf-stable fruit is the smallest overall category with a retail value of EUR 400 000, although also forecasted to decline at a CAGR of -4.5% between 2021 and 2025.

Figure 5-49: Evolution and forecast of the processed fruit and vegetable market in Turkey, 2015-2025 (retail value, EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Consumers increasingly sought out processed fruit and vegetables during 2020, as stay at home orders coupled with the closures of bazaars and other street distributors of fruit and vegetables resulted in a fall in demand for fresh fruits and vegetables. Consumers of processed fruit and vegetables are likely to fall into the category of middle to higher income, as processed fruits and vegetables generally cost more in Turkey which is a large fresh fruit and vegetable producer. Turkish consumers of frozen fruit and vegetables are more likely to live in urban centres with better access to appliances that complement these products such as freezers and refrigerators. Consumption of shelf-stable vegetables is much higher in Turkey than in shelf-stable fruits, as this product is more likely to be stored for prolonged use within dishes compared to fruit which is generally consumed quickly.

Drivers and method of consumption

Key drivers of processed fruit and vegetables include the outbreak of Covid-19 in Turkey, the increasing desire for foods that can be stored for a prolonged period of time and the increasing presence of food service outlets. The outbreak of Covid-19 impacted many aspects of fresh fruit and vegetable production concerning distribution which was limited as bazaars and other distributors were forced to close, coupled with issues surrounding supplies of fresh fruit and vegetables in some areas of the country. This resulted in many consumers instead switching to processed fruit and vegetable products. Turkish consumers are increasingly normalising the use of frozen fruit and vegetables which is aided by an increase in access to freezer appliances coupled with an increasing desire for products that can be stored for a prolonged period of time. The food service sector has been a key driver in the consumption of certain processed fruit and vegetables. However, as the sector has been heavily impacted by the outbreak of Covid-19 this channel for processed fruit and vegetable products has shut. Nonetheless, it is expected that this channel will emerge as a key driver for processed fruit and vegetable consumption once the sector reopens and tourism resumes to Turkey. Urban centres in Turkey commonly

feature an ever-expanding food service sector.

Purchase criteria

Demand for foods that can be stored for a prolonged period of time emerged as a key pricing criterion across several agri-food products in Turkey in 2020 due to the impact of Covid-19, including demand for processed fruit and vegetables. Shelf-stable fruit has yet to emerge as a popular food in Turkey as access to fresh fruits is common despite recent restrictions; therefore, shelf-stable fruit producers will have to enact additional marketing information campaigns concerning nutritional information and the benefits of consuming processed fruit products.

Recent market trends

Shelf-stable fruit has declined in consumption in recent years with a CAGR of -7.4% occurring between 2015-2021 and is further expected to decline by a forecast CAGR of -4.5% between 2021 and 2025. Turkish fresh fruit and vegetable production has grown in recent years which has caused in some instances oversupply in the market leading to a fall in prices of fresh fruit and vegetables, and this has impacted overall demand for processed fruit and vegetables which are generally more expensive. Covid-19 resulted in a large rise in demand for processed fruit and vegetables, however as consumption habits return to normal as the economy reopens it can be expected that consumer preferences will return to fresh fruit and vegetable products which have traditionally been far more popular in Turkey.

5.11.3 Offer

Domestic production

Fruit and vegetables represent the largest food processing sector in Turkey with a share of 17.9%.⁸⁴ The largest processed fruit and vegetable producer within Turkey is the company Kerevitas AS which has a market share of 15.6%, followed by Tamek Gıda ve Konsantre with a share of 13% and BIM Birlesik Magazacilik with a share of 11.3%. Notable fruits commonly sent for processing in Turkey include apples, oranges and pomegranate which are mainly processed into juices or incorporated within dessert dishes. Processed vegetables commonly produced in Turkey include potatoes and beans.

Imports and exports

Identifying data on trade in processed fruit and vegetable products is extremely complicated due to the number of different lines and customs codes under which such products can be imported. Data on trade in processed fruit and vegetables is ultimately captured under the trade data for fruit and vegetables in section 5.2.3.

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for processed fruit or vegetable products have been identified as having been registered.

⁸⁴ Food processing ingredients in Turkey, USDA Gains report, available at:

https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Food%20Processing%20Ingredients_Ankara_Turkey_3-29-2019.pdf

Main competitors

The processed fruit and vegetable market in Turkey is fragmented as it is made up of several smaller companies resulting in a competitive market. Turkey itself is a large producer of juices and processed fruit and vegetables making it even more difficult for outside players to establish themselves in the market.

5.11.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for processed fruit and vegetables imported into Turkey: a control certificate for agricultural products and a certificate of conformity for agricultural products. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements:

- General import requirements (all foods):
<https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>
- Specific import requirements for food products of vegetable origin:
<https://www.tarimorman.gov.tr/Konular/Gida-Ve-Yem-Hizmetleri/Ithalat-Ihracat/Bitkisel-Kokenli-Gida-Ve-Yemlerin-Ithalati>

In terms of tariffs, EU processed fruit and vegetables generally face an ad valorem tariff on imports into Turkey.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – Frozen vegetable category (0710) from Belgium to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=0710&origin=BE&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based. This legislation covers aspects that are common to all agri-food products, including processed fruit and vegetables, such as those relating to additives, contaminants, labelling, hygiene and official controls. There are also specific provisions for the storage, preservation and transportation of all categories of quick-frozen food (Communiqué No. 2014/48):

<https://www.resmigazete.gov.tr/eskiler/2014/10/20141018-6.htm> .

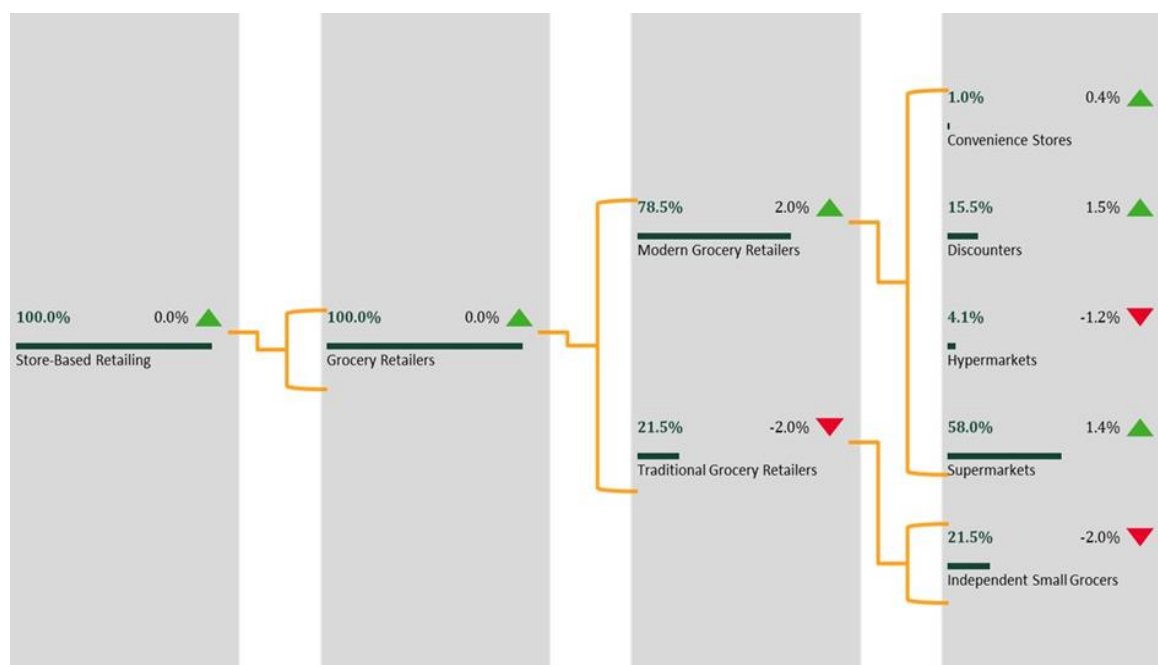
Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling.

5.11.5 Distribution

As can be seen in Figure 5-50, store-based retailing remains largely the only channel to purchase processed fruit and vegetables in Turkey. Modern grocery retailers account for 78.5% of all processed fruit and vegetable sales in Turkey, with supermarkets accounting for 58% of total sales. Traditional grocery retailers accounted for 21.5% of all sales with this share coming exclusively from small independent grocers.

Figure 5-50: Distribution channel overview of processed fruit and vegetables in Turkey (2020); % share



Source: Euromonitor International: Packaged Food, 2021.

5.11.6 Challenges for EU products

The main challenge for EU products in Turkey comes from competing with domestically processed fruit and vegetables. Turkey itself is a large producer of a wide variety of processed fruit and vegetable products which limits demand for foreign variants. The total demand for processed fruit and vegetables grew in 2020 due to the impacts of the Covid-19 pandemic. As the economy reopens and consumers return to their normal consumption habits, it can be expected that most consumers will shift to the more traditionally preferred fresh fruit and vegetable products.

Market Takeaway: Processed fruit and vegetables

Consumption: Consumption grew in 2020 due to the outbreak of Covid-19, however in normal circumstances Turkish consumers prefer fresh fruit and vegetable products over processed fruit and vegetables.

Competition: Largely competition comes from the domestic market with several small producers making up most of the market share.

Distribution: Largely sold through modern retail channels which account for 78.5% of sales. Supermarkets accounted for 58% of total sales. Independent small grocers accounted for 21.5% of sales and are largely the only distributor of processed fruit and vegetable from traditional retail outlets.

Challenges: Competing with Turkish processed fruit and vegetables, combined with marketing to a consumer base that generally prefers fresh fruit and vegetable products that are available throughout the country at a low cost.

Opportunities: Demand for on-trade processed fruit and vegetables is likely to return to normal once these establishments reopen. This segment of the consumer base is likely to retain purchasing habits for processed fruit and vegetable as the economy reopens.

5.12 Pet food

5.12.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Turkey is a net importer of pet food. ▪ Focussed market with main segments being cat and dog food. ▪ EU Member States account for roughly 80% of total pet food imports into Turkey. 	<ul style="list-style-type: none"> ▪ The pet food market for birds, fish and small mammals/reptiles is extremely small considering the size of the country. ▪ Domestic production is increasingly shifting to the production of luxury grade pet foods such as grain-free variants, which was largely an EU only product in the country until a few years ago.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The Covid-19 pandemic increased the interest in pets (mainly cats and dogs) as companions. ▪ Sales via e-commerce are increasing at a high rate. 	<ul style="list-style-type: none"> ▪ Domestic production is growing, although not catering to the wider domestic demand for pet food in the country. ▪ Serbian pet food is the biggest threat from outside of Turkey, even if overall it accounts for a small percentage of total imports into Turkey. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.12.2 Consumption

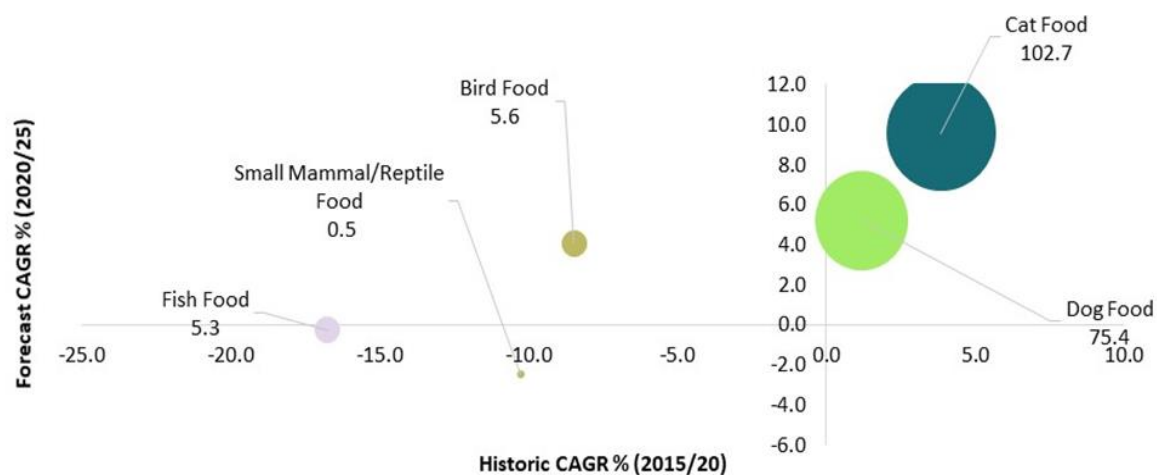
Evolution of consumption

The total size of the pet food market in Turkey was about EUR 187 million in 2020. Dog and cat food alone accounted for close to 90% of the total market size.

Figure 5-51 below illustrates that:

- **Cat food** is the most popular pet food item purchased in Turkey with a value close to EUR 103 million. The sale of cat food has grown at a high rate between 2015 and 2020 with a CAGR of 3.8%, with this percentage expected to grow rapidly to a CAGR of 9.6% for the foreseeable years up until 2025.
- **Dog food** has also grown in Turkey between 2015 and 2020 with a CAGR of 1.2% which is expected to even increase to a CAGR of close to 5.2% up until 2025. The present value of dog food in Turkey is roughly EUR 75 million.
- **Bird food** had a value of EUR 5.6 million in 2020 and has declined between 2015-2020 with a CAGR of -8.5%. Between 2020 and 2025 bird food is forecast to grow at a CAGR of 4.1% per year.
- **Fish food** declined at an even higher level of about -16.8% between 2015 and 2020 and today the value of the fish food market is estimated to be around EUR 5.3 million.

Figure 5-51: Evolution and forecast of the market for pet food in Turkey, 2015-2025 (EUR million)



Note: figures for 2021 to 2025 based on forecasts

Source: Euromonitor International: Pet Care, 2021

Consumer profile and purchase criteria

Consumers

Roughly 10% of Turkish households have at least one pet which most commonly is either a dog or a cat. Humanisation is an emerging trend that is resulting in an increased demand for pet foods and cosmetic items within the country.

Turkey is a country of cat lovers, with cats being viewed as popular pets in the country for centuries. Turks appreciate that cats helped to keep emerging cities clean from pests which further aided their popularity in the country. Cats are found throughout larger cities in the country however not all of them will have an owner. Consumers with a higher income will be more likely to have a dog in Turkey as this animal requires more space and the unit price of dog food in Turkey is higher than cat food. Cats appeal to middle- and lower-income earners more likely to be living within smaller spaces which helps cat ownership; cat ownership within larger population centres such as Istanbul and Ankara are therefore quite normal.⁸⁵

Drivers and method of consumption

As the Turkish population continues to grow and urbanise it has been forecast that pet ownership will in turn also grow in the country, with cats and dogs accounting for most of this new pet ownership statistic. Consumers increasingly spent more time at home between 2020 and 2021 due to the impact of Covid-19, which results in many consumers becoming more attentive about their pets' behaviours and food demands. The killing of stray cats in Turkey is forbidden and municipalities are required to rehabilitate them, which aids the consumption of economy brand cat foods. Municipality spending on both cat and dog foods act as a key driver of sales within Turkey.

Purchase criteria

The economic situation in Turkey continues to impact the ability of consumers to purchase high-

⁸⁵ Euromonitor International: Pet Care, 2021

value pet foods in Turkey. Economy brand labels remain the most popular in the market, although the growth of niche pet foods such as nutritional rich variants of economy brand pet foods has occurred in recent years. Turkish consumers are increasingly impacted by a wider humanisation trend in Turkey which pushes consumers to spend even more on the maintenance of their pets. Consumers are increasingly curious about the nutritional information surrounding the pet foods they purchase which has led to an increase of information available online combined with educational campaigns from pet food producers in Turkey.

Recent market trends

E-commerce is emerging as one of the biggest distribution channels for pet foods in Turkey as consumers appreciate the nutritional information available for pet foods purchased online. This channel now accounts for 34.6% of all sales which is an unusually large share of sales for the e-commerce channel in any product market in Turkey.

Small dogs have emerged as the more popular pet sought out by Turkey consumers as these dogs are better adapted to urban environments and take up less space compared to larger dog breeds. Younger consumers are increasingly seeking out pets, aided by the growth of social media usage in Turkey where it is becoming a common trend to post about a pet's activities and seek information regarding pet ownership maintenance. Going forward, both dog and cat foods are expected to register a positive CAGR while demand for fish and small mammal/reptile foods is likely to remain small in the country. Turkey has never had a large culture of small mammal/reptile pet ownership which explains why this category is extremely small in the country and unlikely to grow at any significant pace in upcoming years.

5.12.3 Offer

Domestic production

Nestle Purina Turkey has the largest share of both the dog and cat food markets with the company having a 23% of both the cat and dog market. Tropical pet is a large domestic producer with the company producing around 68 000 tonnes of pet food per year.⁸⁶ Production is forecast to continue to grow in Turkey with many domestic producers such as Hemos pivoting towards the production of grain-free pet foods. Most of Turkey's bigger pet food plants such as the Lider Pet Food factory are located along the western coast of the country.

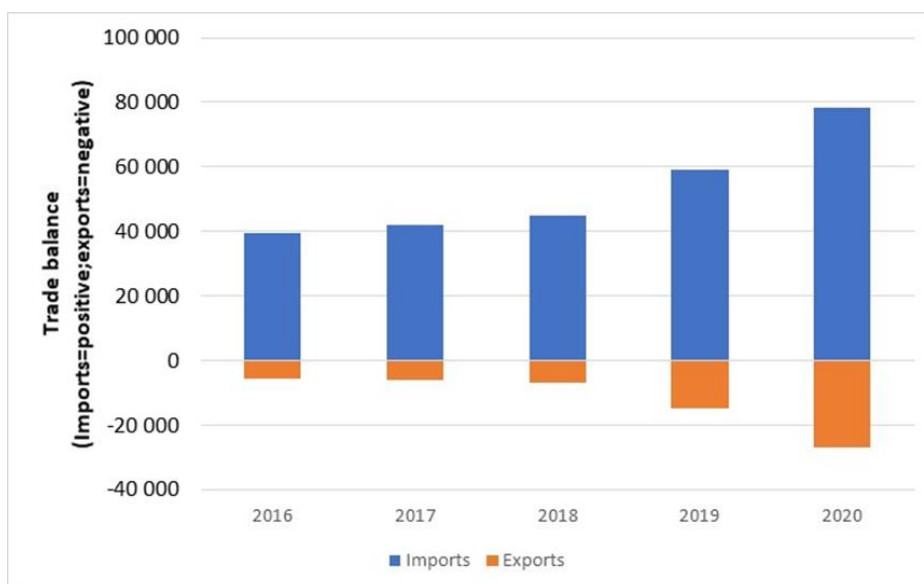
Imports and exports

Figure 5-52 below shows that Turkey is a net importer of pet food, with the country importing EUR 78 million worth of pet food in 2020 compared to exporting EUR 26 million in the same year. Total imports of pet food in 2020 have almost doubled in value from EUR 39 million in 2016.

⁸⁶ Turkey's pet food industry eyes higher sales, exports. Available at:

<https://www.petfoodindustry.com/articles/5309-turkeys-pet-food-industry-eyes-higher-sales-exports>

Figure 5-52: Trade balance (imports and exports) of pet food (cat and dog food) in Turkey, 2016-20 (EUR 000)

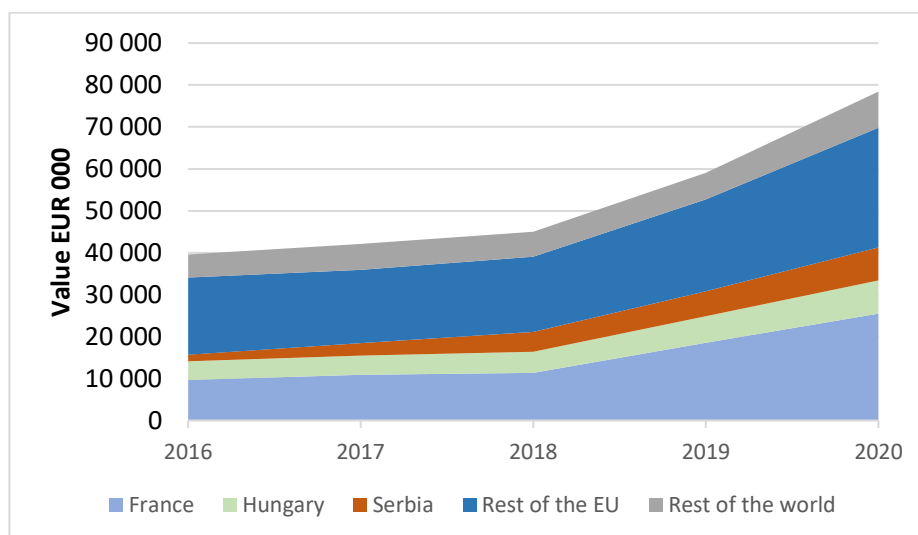


Data for CN code 230910 (cat and dog food)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-53 shows that France is the largest exporter of pet food to Turkey, exporting EUR 25 million worth of pet food in 2020, almost a third of total imports into Turkey. Hungary is the second-largest exporter of pet food to Turkey with a total value of EUR 7.9 million, followed by Serbia with a total value of EUR 7.8 million. Collectively, EU Member States account for over 80% of total pet food imports into Turkey with Italy, Poland, Germany, and the Netherlands also listed amongst the main EU exporting countries.

Figure 5-53: Turkish imports of pet food (cat and dog food) by origin country, 2016-20; total value (EUR 000)



Data for CN code 230910 (cat and dog food)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Main competitors

Domestic production, although growing, has not yet been able to keep up with the increase in domestic demand. This explains the growth of imports in 2020, which particularly reflects the growth in pet food ownership following the outbreak of Covid-19. Outside of Turkey, Serbia is the biggest supplier of EU pet food products, although exports from Serbia in comparison to the EU as a bloc are minimal.

5.12.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for pet food imported into Turkey: a certificate of conformity for agricultural products and a certificate of analysis. Depending on the product's ingredients, a pre-notification form for ingredients of animal origin for inspection purposes, and a veterinary certificate may also be required; specific veterinary health certificates exist for exports of processed pet food, canned pet food and dog chews to Turkey, which require compliance in the manufacture of pet food products with Regulation (EC) No 1069/2009 and implementing Commission Regulation (EU) No 142/2011 on animal by-products not intended for human consumption. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, EU pet food products generally face an 8.5% tariff on imports into Turkey. Some dog or cat food products put up for retail sale (1904 2010) can be imported at zero tariff with certain quantitative limits (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – Dog or cat food, put up for retail sale (2309 10) from France to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/results?product=230910&origin=FR&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation that covers also the market of pet food, including feed safety requirements, traceability, labelling, and aspects of animal welfare and zootechnics. A specific Regulation on the placing on the market and use of feed including pet food, based on Law 5996 and EU rules (Regulation (EC) No.767/2009 of 13/7/2009), was adopted in 2011. These rules cover definitions, labelling and claims:

<https://www.resmigazete.gov.tr/eskiler/2011/12/20111227-12.htm>

There are also specific rules related to feed hygiene; feed additives; and, for undesirable substances in animal feed, including definitions and maximum allowed limits (Communiqué No. 2014/11):

<https://www.resmigazete.gov.tr/eskiler/2014/04/20140419-18.htm>

Labelling

Law No. 5996 lays down the principles of labelling which also cover pet food. The above-mentioned Turkish Regulation on feed contains specific requirements for the labelling of pet food. Mandatory labelling information should include:

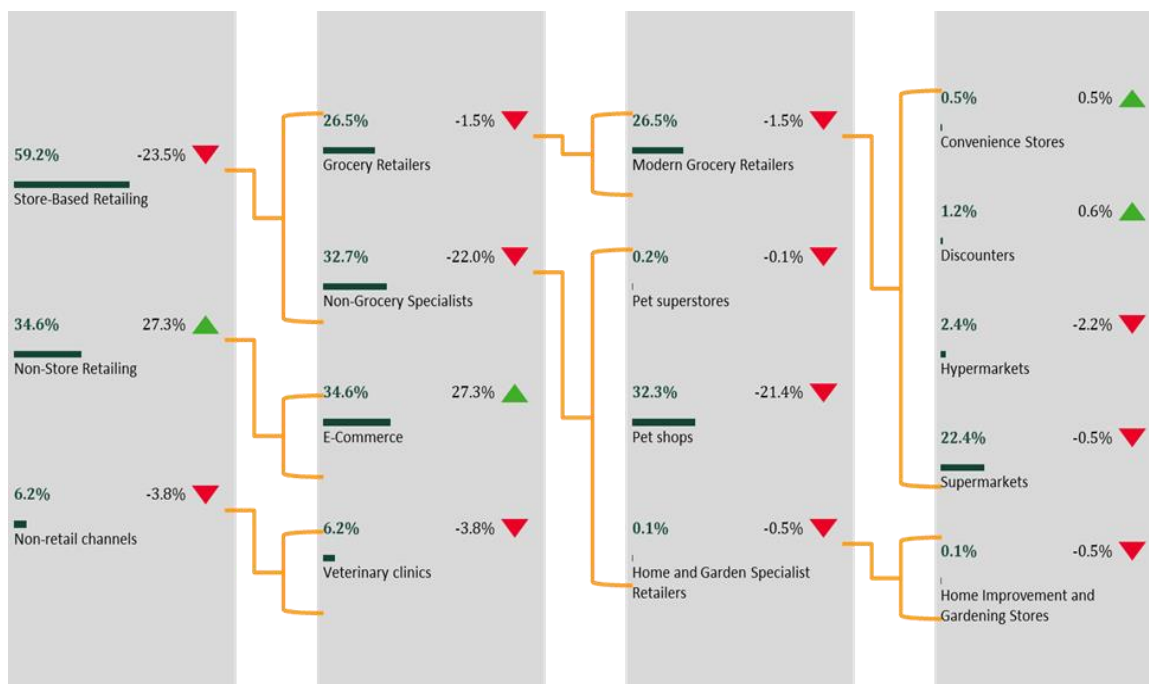
- a. Type of feed: such as feed material, whole feed or supplementary feed
- b. Name or company name and address of the feed operator
- c. Approval number of approved feed establishment
- d. Lot or serial number
- e. Unit mass amount for solid products, unit mass or volume amount for liquid products
- f. List of feed additives, if any (to be indicated according to Annex 6 or 7)
- g. Moisture content (as specified in Annex 1)

There are further detailed rules in Annex 3. This legislation should be consulted for details on labelling.

5.12.5 Distribution

Figure 5-54 below shows that store-based retailing is the largest distribution channel for pet food products with 59.2% of pet foods being distributed via this channel. Since 2016, e-commerce retailing has been gaining a lot of popularity and in 2020 accounted for 34.9% of total sales which represents virtually all non-store-based distribution of pet food in Turkey. Pet shops accounted for 32.3% of sales while veterinary clinics accounted for 6.2% of sales. There has been a notable shift away from store-based distribution towards e-commerce which will likely continue in Turkey as this method of distribution only grew in popularity in 2020 following the outbreak of Covid-19 in the country.

Figure 5-54: Distribution channels overview of pet food in Turkey (2020); % share



Source: Euromonitor International: Pet Care, 2021

5.12.6 Challenges for EU products

The biggest challenge for EU producers is competition from Turkey's emerging pet food production sector, which continues to expand into new areas including the segment of luxury pet food, thereby threatening the market position of EU pet foods. Despite this, pet food production in Turkey continues to lag behind total demand which is also increasing, with pet ownership (mainly cats and dogs) on the rise and further growing during the Covid-19 pandemic. As a result, the country continues to be a net importer of pet food products. Outside of the EU, there does not exist a significant competitor, with only Serbia standing out as a potential rival although exports from this country to Turkey are low compared to exports from the EU.

Market Takeaway: Pet food

Consumption: *The Turkish pet food market had a size of about EUR 187 million in 2020, with cat and dog foods the two most popular segments in Turkey, and expected to grow at high rates until 2025 reflecting growth in pet ownership.*

Competition: *Growing competition from domestic producers who have expanded production in recent years. Outside of Turkey, only Serbia stands out as a significant competitor.*

Distribution: *The main channels through which pet foods are sold are e-commerce and pet shops which account for just over half of sales. Modern grocery retailers accounted for 26.5% of all sales in 2020 with this largely coming from supermarkets.*

Challenges: *Competition from expanding domestic production is the key challenge for the bigger segments of cat food and dog food. The pet food market for birds, fish and small mammals/reptiles is extremely small in Turkey given the market size of the country.*

Opportunities: *E-commerce is growing rapidly, there is an increase in demand for high-quality premium products that are deemed to be healthy, and the market for both of the main pet food segments (dog and cat food) are forecast to continue growing.*

5.13 Fruit juice

5.13.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ EU Member States such as Germany, Cyprus and Spain are amongst the larger exporters of fruit juice to Turkey. ▪ Fruit juice consumption is forecast to continue growing in Turkey. 	<ul style="list-style-type: none"> ▪ Turkey is a net exporter of fruit juices and is a large producer globally. ▪ Turkish consumers consume around 8-9 litres of fruit juice per capita, which is lower than the regional average.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Re-opening of the economy and tourism will present new key growth areas in Turkey for fruit juice. ▪ Consumption of non-nectar fruit juice is predicted to grow to benefit EU apple and orange juice products. 	<ul style="list-style-type: none"> ▪ Domestic producers shifting focus towards producing a larger variety of fruit juice products. ▪ China, Iran and Brazil are the biggest competitors from outside of Turkey. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

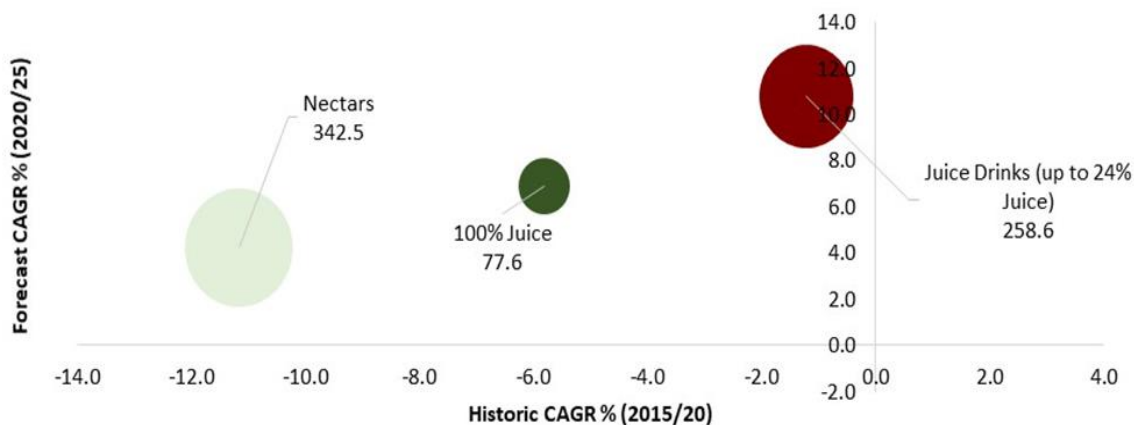
5.13.2 Consumption

Evolution of consumption

The fruit juice market in Turkey is split between nectars (i.e. juices made from cherries, apricots, peach and pomegranate) and juice drinks with up to 24% juice content. Nectars is a slightly larger segment in the Turkish market with a total value of EUR 342 million, while juice drinks have a total value of EUR 258 million, and 100% juice content juices have a total value of EUR 77.6 million (Figure 5-55).

Juice drinks with up to 24% juice content will be the fastest-growing fruit category between 2021 and 2025 with a forecast CAGR of 10.8%. Despite this, the juice drinks category will remain the second-largest in Turkey by 2025 as nectars are forecast to grow at a predicted CAGR of 4.2% in the same period. 100% juices are expected to grow by 6.9% between 2021 and 2025 but will remain the smallest of the aforementioned juice categories by total value. Coconut juices and other plant-based waters have yet to penetrate the Turkish market to any considerable extent.

Figure 5-55: Evolution and forecast of the fruit juice market in Turkey, 2015-2025 (EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Consumers of juices come from all age groups as well as from all groups of society. As Turkey is a large producer of fruit, there are several varied fruit juices available throughout the country including more unique fruit juices such as pomegranate juice. Fruit juice and nectar consumption is estimated to be around 8-9 litres per capita which is slightly lower than the regional average.⁸⁷ Consumers in Turkey prefer nectar juices over citrus juices, unlike global consumer preferences. Peach, cherry and apricot juices are the preferred nectar juices consumed in Turkey. Consumption is higher within urban areas, which are also more likely to have imported fruit juices visible within distribution centres.

Drivers and method of consumption

Key drivers of fruit juice consumption in Turkey include a desire for healthy products which can be consumed quickly, an urbanising population and finally tourism. The outbreak of Covid-19 in Turkey highlighted the importance of having a balanced diet and sales of fruit juice during 2020 increased in the country. The urbanising population of Turkey further plays a role in increasing fruit juice consumption as it is more likely to purchase the product combined with having access to appliances that complement fruit juice consumption such as refrigerators. Tourism is another key driver of fruit juice consumption, particularly tourists from the EU (where the consumption of fruit juice is higher) within tourist hotspots of Turkey such as Izmir and along the country's Mediterranean coast. The method of consumption follows many parallels found in the EU, namely the consumption of fruit juice in restaurants, at breakfast and lunches and finally as a refreshment product following a sporting activity.

⁸⁷ Fruit juice focus, Fruit juice tastes so good for Turkey, available at : <http://www.fruitjuicefocus.com/fruit-juice-tastes-so-good-for-turkey/>

Purchase criteria

One of the main purchase criteria is flavour. Turkish consumers slightly prefer nectar juices i.e. juices made from cherries, apricots, peaches and pomegranate. Turkish consumers further expect these products to be available at a reasonable cost, which means affordable to all consumer income classes. This is because Turkey is a large producer of fruit and juices and consumers will often associate any product made up of fruit to be of a low cost.

Recent market trends

The outbreak of Covid-19 in Turkey resulted in a rise in purchases of fruit juice in the country as the product was largely associated with a quick and nutritional beverage. E-commerce emerged as a new channel of distribution for fruit juices in 2020 and today has a distribution share of around 5.8%. Producers in Turkey have been increasingly focusing on the production of nectar juices as the popularity of these juices increased in the country. Apricot, cherry, peach and pomegranate have emerged as the more popular nectar juices in Turkey in recent years although citrus juice is popular across the country's Mediterranean coast, aided by tourism and a large segment of citrus production occurring in this region. As consumers return to on-trade establishments and the restrictions due to Covid-19 are lifted, it is forecast that juice consumption will continue to grow in the country.

5.13.3 Offer

Domestic production

Turkey's fruit juice production sector has grown exponentially in recent years with the country emerging as one of the larger producers of apple, orange, cherry and pomegranate juices in the world. Coca-Cola icecek AS is the largest company in operation in Turkey with a market share of 27.6%, followed by Erbak-Uludag Mesrubatlari AS which has a share of 11.6%. The rest of the market is fragmented, with several smaller producers present. Orange juice production was estimated to be at 9 500 tonnes in 2020⁸⁸.

Imports and exports

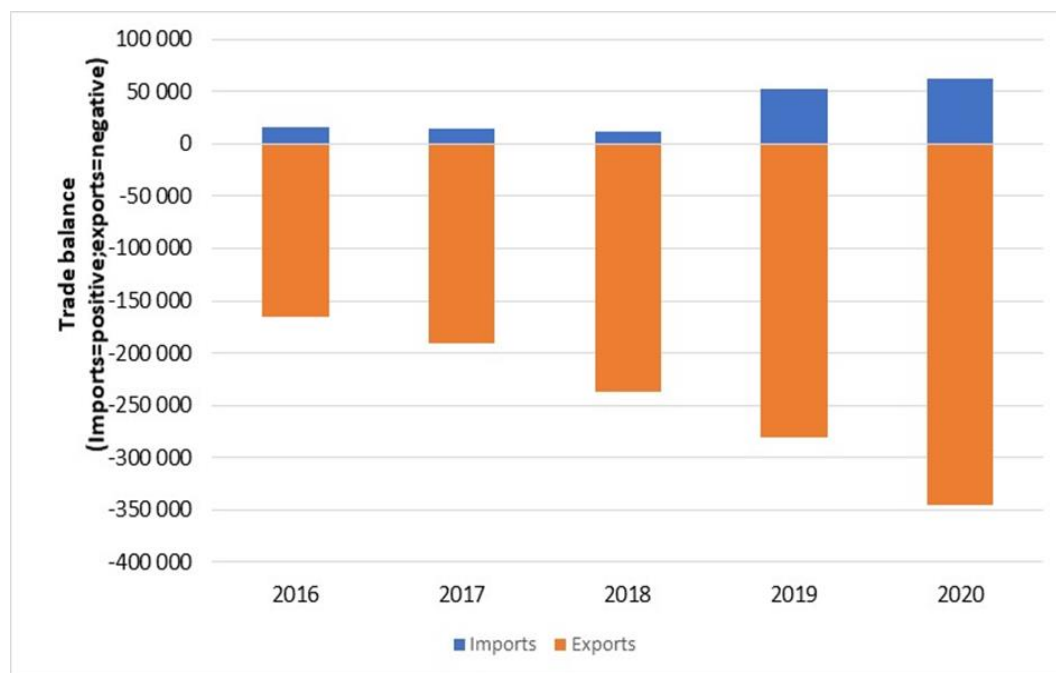
Figure 5-56 shows that Turkey is a net exporter of fruit juice, exporting EUR 344 million worth of fruit juice in 2020, almost double the exports recorded in 2016. Total imports in 2020 reached a value of EUR 62 million, which also represents a very large rise from the total import value of EUR 16 million in 2016.

Figure 5-57 shows that China is the largest exporter of fruit juice to Turkey with a total value of EUR 24 million, followed by Iran with EUR 10 million and finally Brazil with EUR 4.8 million. Total EU exports of fruit juice to Turkey came to a value of EUR 11 million with Germany, Spain and Cyprus being amongst the larger EU exporters.

⁸⁸ Citrus Semi-Annual: Turkey, USDA, available at:

[https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Citrus%20Semi-annual Ankara Turkey 06-15-2021.pdf](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Citrus%20Semi-annual%20Ankara%20Turkey%2006-15-2021.pdf)

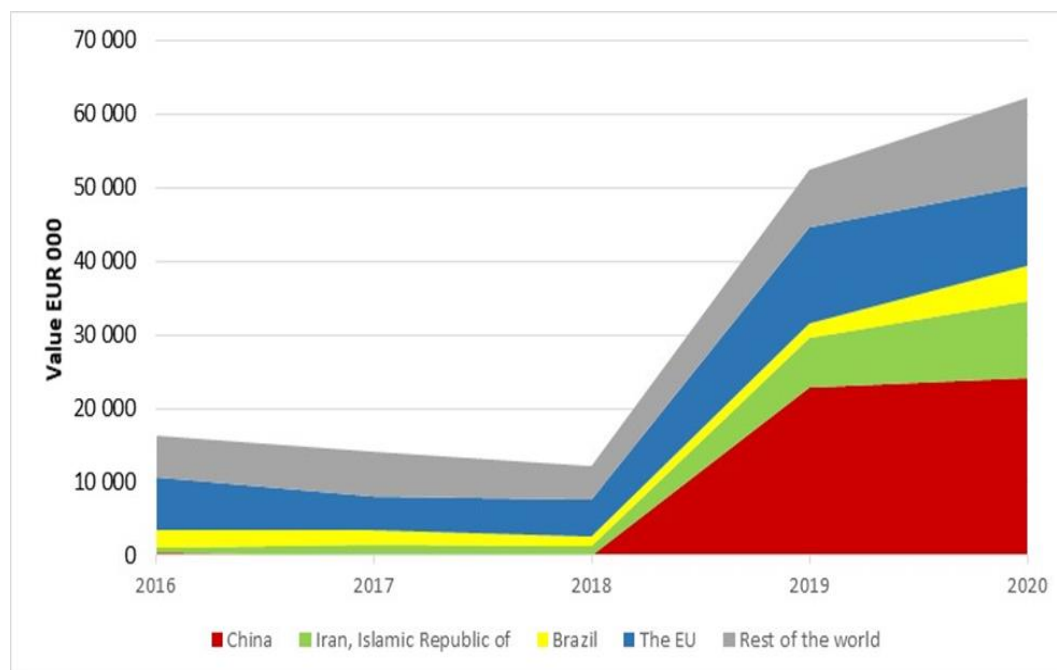
Figure 5-56: Trade balance (imports and exports) of fruit juices in Turkey, 2016-20 (EUR 000)



Data for CN code 2009

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Figure 5-57: Turkish imports of fruit juices by origin country, 2016-20 (EUR 000)



Data for CN code 2009

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Main competitors

Competition in the Turkey fruit juices market is strong. First of all, Turkey is a net exporter of fruit juices and thus is a big competitor itself. The country is a large producer both of fruit and of fruit juice domestically and this sector is continuing to grow. Secondly, the three biggest exporters of fruit juices to Turkey are China, Iran and Brazil.

5.13.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for fruit juices imported into Turkey: a control certificate for agricultural products, and a certificate of conformity for agricultural products. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements:

- General import requirements (all foods):
<https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>
- Specific import requirements for food products of vegetable origin:
<https://www.tarimorman.gov.tr/Konular/Gida-Ve-Yem-Hizmetleri/lthalat-lhracat/Bitkisel-Kokenli-Gida-Ve-Yemlerin-lthalati>

In terms of tariffs, EU fruit juices generally face an ad valorem tariff of 58.5% on import into Turkey, but preferential tariffs are in place for certain juices (orange juice, apple juice, mixtures of apple and pear juice) within certain quantitative limits (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – fruit juices category (2009) from Poland to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2009&origin=PL&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based, including specific standards for fruit juices. The Turkish food codex regulation for fruit juices and similar products dates from 2006 and was updated in 2014 (Communiqué No. 2014/34). This specific legislation contains various definitions, product features, transport, storage and other provisions:
<https://www.resmigazete.gov.tr/eskiler/2014/08/20140806-17.htm>

There are also specific provisions for the storage, preservation and transportation of all categories of quick-frozen food (Communiqué No. 2014/48):

<https://www.resmigazete.gov.tr/eskiler/2014/10/20141018-6.htm>.

Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling.

The above-mentioned Turkish food codex regulation for fruit juices contains specific requirements for the labelling of certain types of products (e.g. made from concentrate juice). This legislation should be consulted for details on labelling.

5.13.5 Distribution

Fruit juices are sold on-trade as well as off-trade. Figure 5-58 below shows that off-trade fruit juice is nearly exclusively sold through store-based retailing (94.2%). Modern grocery retailers accounted for 69.5% of all fruit juice sales, with supermarkets accounting for 36.8% of this share followed by discounters which accounted for 27.8% of sales. Traditional grocery retailers accounted for 24.7% of all sales with independent small groceries accounting for all of this share. E-commerce continues to grow in popularity in Turkey and now accounts for 5.8% of all fruit juice sales in Turkey.

Figure 5-58: Distribution channel overview of fruit juices in Turkey (2020); off-trade, % share



Source: Euromonitor International: Packaged Food, 2021.

5.13.6 Challenges for EU products

The market is strongly dominated by domestic producers which are more in tune with domestic preferences and consumption habits such as the demand for nectar juices which surpasses that of citrus juices. Competing with high-quality and competitively priced Turkish fruit juices is a major challenge for EU producers. EU fruit juices will largely appeal to tourists and middle to higher-income consumers in Turkey who have the income capability to purchase imported fruit juice over cheaper domestic fruit juices.

Market Takeaway: Fruit juice

Consumption: *The consumption of fruit juice in Turkey is estimated to be around 8-9 litres per capita which is lower than the European average. Consumers in Turkey largely prefer nectar juices over citrus juices.*

Competition: *Turkey is a net exporter and thus its domestic production is competing with imports. The three biggest origins of fruit juice imports are China, Iran and Brazil.*

Distribution: *Modern grocery retailers accounted for 69.5% of all sales with supermarkets and discounters being the larger distributors of fruit juice. Small independent grocery stores accounted for 24.7% of sales while e-commerce has grown to account for 5.8% of sales.*

Challenges: *Competing with domestic producers which can offer a variety of nectar juices at a lower cost is a key challenge. EU fruit juices are more likely to appeal to middle to higher-income consumers and tourists in the country.*

Opportunities: *Fruit juice consumption in Turkey continues to grow, while nectar juices remain the most popular, and consumption of citrus juices is growing which is another key opportunity area. Return of tourism and reopening of on-trade establishments is expected to further act as key opportunity areas for fruit juices in the country.*

5.14 Baked goods

5.14.1 SWOT analysis

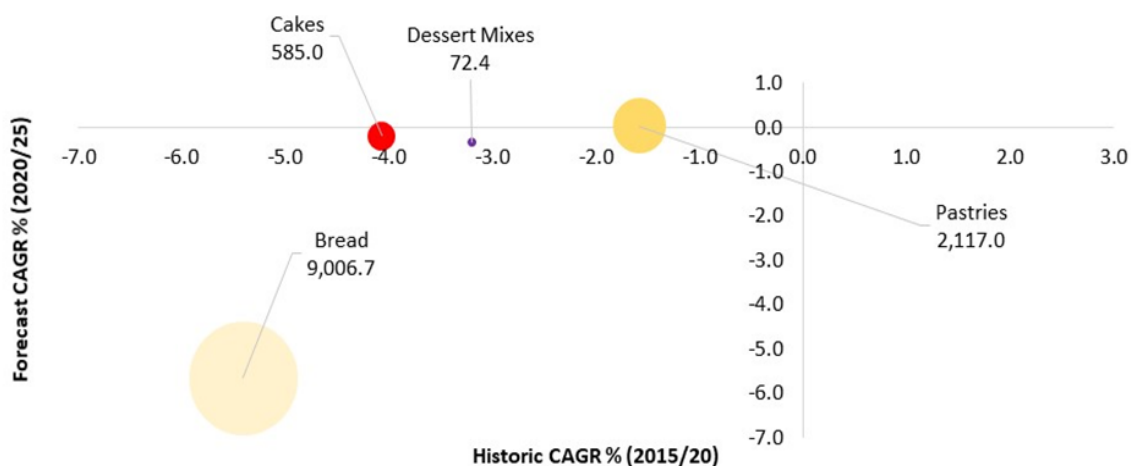
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Bread consumption in Turkey is amongst the highest per capita in the world. ▪ The EU accounts for the vast majority of baked goods imports into Turkey. 	<ul style="list-style-type: none"> ▪ Domestic production of baked goods in Turkey is high and largely caters to domestic demand. ▪ Turkey is a net exporter of baked goods products.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Higher-income groups, with more disposable income, seek new and varied baked goods products from abroad. ▪ Demand for gluten-free and other alternative baked goods products is growing. 	<ul style="list-style-type: none"> ▪ Artisanal bakeries remain the most popular distribution channel for baked goods in Turkey, accounting for 93.2% of the market. ▪ Domestic production of healthier alternative baked goods is growing, in line with the growing domestic demand for these products. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.14.2 Consumption

Evolution of consumption

Figure 5-59 shows that bread is the largest baked good product in Turkey by retail value with a total retail value of EUR 9 billion. Bread retail value has declined in recent years at a CAGR of -5.4% between 2015-2020 and is forecast to decline further at a CAGR of -5.7% between 2021 and 2025. Despite this decline, bread will remain the largest category of baked goods in Turkey by the year 2025. Pastries came to a value of EUR 2.1 billion in Turkey in 2020 and are forecast to remain around the same level by the year 2025. Cakes had a value of EUR 585 million, followed by dessert mixes which came to a value of EUR 72.4 million.

Figure 5-59: Evolution and forecast of the baked goods market in Turkey, 2015-2025 (retail value, EUR million)



Source: Euromonitor International: Packaged Food, 2021.

Consumer profile and purchase criteria

Consumers

Despite a fall in retail value in recent years, bread consumption in Turkey remains high making this one of the largest markets for bread in the world. Consumers in Turkey consume bread throughout the day, with breakfast meals such as *Yumurtali Ekmek*, the consumption of *Ramazan pidesi* bread at lunch and finally dinner dishes such as pita bread with fillings. Turkey has a wide range of domestic bread variants that are often produced within local artisanal bakeries and available fresh to consumers at a reasonable cost. The most often cited bread as being the most popular in Turkey is *somun Ekmek*. In recent years, consumers, particularly from the younger generation, have been slowly moving away from the consumption of traditional bread in Turkey towards alternative bread such as gluten-free variants. Pastry consumption is common although largely associated as a treat dish, with notable examples of Turkish pastries including *Kol boregi* and *katmer*. Cakes are also consumed as a treat dish and notable Turkish cakes include *revani*. Dessert mixes remains a small market in Turkey but benefited from the impact of Covid-19 as consumers cooked more at home as a result of lockdown measures.

Drivers and method of consumption

Bread has long been associated as a cheap and fresh source of nutrition in Turkey and this helps to explain why the Turkish market for bread is amongst the largest in the world. Turkish bread is known for its quality which resonates with consumers seeking fresh foods at a reasonable cost. Bread is consumed throughout the day and it is commonly consumed with fillings such as fresh meat or dairy products. Pastries are also popular in Turkey and are incorporated into many of the more popular dishes found in the country such as *Su Boregi* and *Acma*. Pastries appeal to consumers seeking indulgence products and also those seeking to bake at home. Cake consumption is common around celebratory events such as a birthday or wedding which mirrors that of western practices; these events generally incorporate between 1-3 cakes and are a key driver of cake sales in the country.

Purchase criteria

The price of baked goods is expected to be reasonable and affordable to lower-income consumers, particularly of bread and pastries which are readily prepared and available throughout the country. Some segments of consumers, e.g. the younger generation and urban consumers, are increasingly seeking out gluten-free and wholegrain variants of bread and pastry products, although this trend has yet to reach the same levels found within the EU. Unpackaged bread is a general cultural norm in Turkey, as consumers associate this generally with freshness. Dessert mixes tend often to be meticulously inspected concerning their ingredients, as this product is generally used for home baking which encourages consumer interest to have adequate nutritional information. Convenience is a key criterion with consumers appreciating suppliers that can offer a variety of freshly baked products quickly.

Recent market trends

The impact of Covid-19 lockdowns encouraged home baking, and this is putting pressure on the sales of pastries and cakes in Turkey as consumers are becoming more accustomed to baking at home. While artisanal bakeries will continue to appeal to consumers who do not have the time or inclination to bake their cakes and pastries, there will remain a sizeable portion of the consumer base which has grown to prefer cooking and baking at home. Bread total retail value has declined over in recent years and is forecast to continue declining between 2021 and 2025 at a CAGR of -5.7%, although bread will remain the most popular and largest baked product by total value in Turkey by 2025. E-commerce sales grew quickly in 2020 and the share of distribution as a whole grew to a total of 5.8% which also makes this one of the fastest-growing channels for the distribution of baked goods in Turkey. Despite a surge in demand for pastries and cakes during the Covid-19 lockdowns, as a result of food service closures, forecast growth is expected to be restricted by the return of competition from food service outlets as well as the growing trend for home baking.

5.14.3 Offer

Domestic production

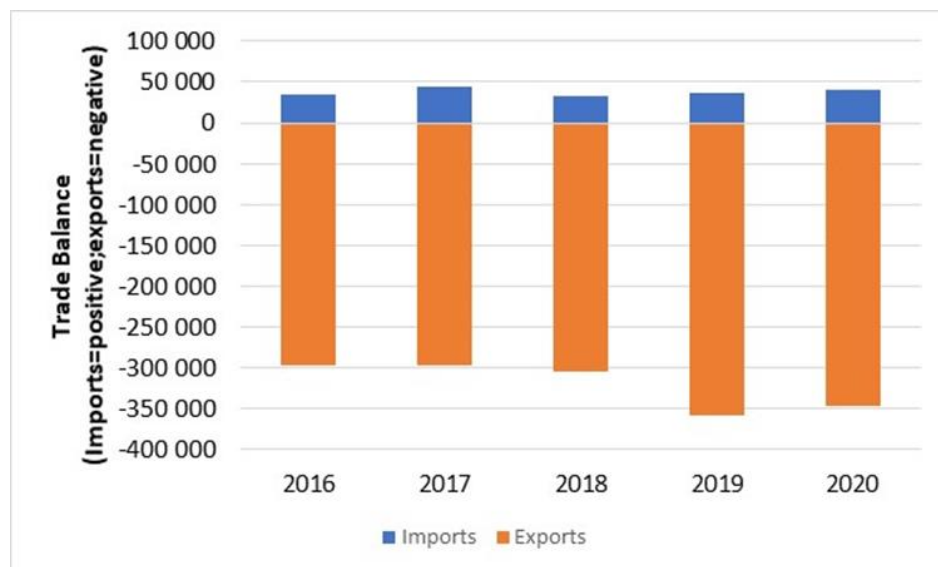
Turkey has a long history of bread and pastry production with notable Turkish bread products including *bazlama*, *gozleme* and *lavas*. Artisanal bakers predominantly account for most baked goods produced in Turkey with a market share of 93.2%. Turkish consumers appreciate baked goods prepared in a more traditional setting and this benefits artisanal bakeries in Turkey. The popularity of unpackaged leavened white bread further supports the large market share that artisanal bakeries have in Turkey. The production of pastries and cakes is also largely conducted within artisanal bakeries in Turkey. The extremely fragmented market in this sector is also reflected in the fact that Eti Gida San ve Tic AS, the largest producer outside of artisanal bakeries with a manufacturing plant in the town of Bozuyuk, only has a market share of 1.3%.

Imports and exports

As shown in Figure 5-60, Turkey is a net exporter of baked goods, exporting a total of EUR 345 million worth of baked goods in 2020. The majority of these exports are bread, pastries and cakes. Total imports came to a value of EUR 40 million in 2020, with bread, pastries and cakes also accounting for the majority of imports. Total imports in 2020 were the

highest within the previous five-year period.

Figure 5-60: Trade balance (imports and exports) of baked goods in Turkey, 2016-20 (EUR 000)

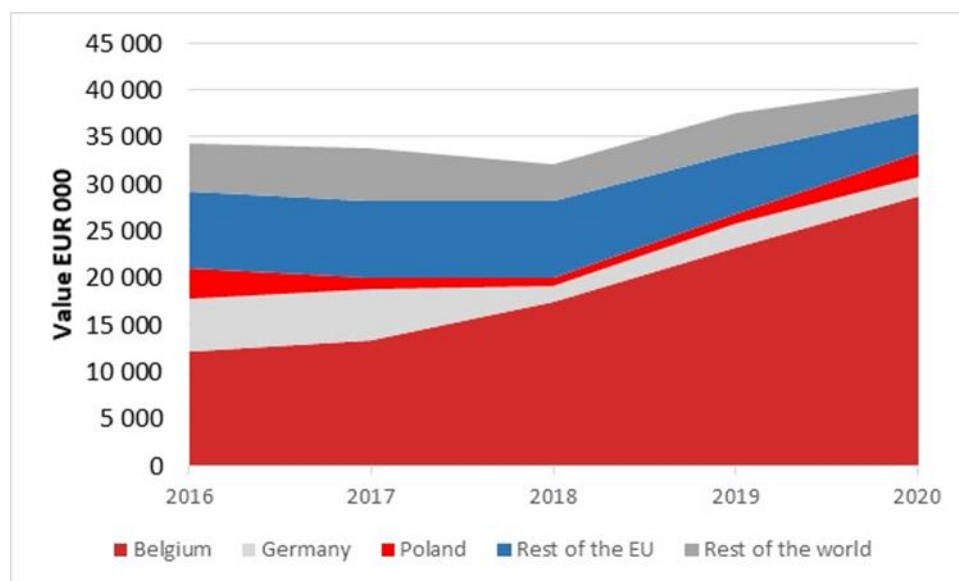


Data for CN code 190510, 190520, 190540, 190590

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

The larger exporters of baked goods to Turkey come from the EU, with Belgium accounting for roughly 70% of all baked goods arriving in Turkey, mostly bread, cakes and pastries (Figure 5-61). Total Belgian exports of baked goods to Turkey in 2020 came to a value of EUR 28 million in 2020. Germany and Poland are the next biggest exporters of baked goods to Turkey, although lagging far behind Belgium, with a total value of just over EUR 2 million each.

Figure 5-61: Turkish imports of baked goods by origin country, 2016-20 (EUR 000)



Data for CN code 190510, 190520, 190540, 190590

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Turkey. No GIs for baked goods have been identified as having been registered

Main competitors

The biggest competitors for EU baked goods in Turkey are domestic Turkish baked goods offering popular varieties of bread, pastries and other products. Beyond Turkish producers, there is no major competitor for EU baked goods which account for over 80% of all imports into Turkey.

5.14.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for baked goods imported into Turkey: a control certificate for agricultural products, a certificate of conformity for agricultural products. Depending on the product's ingredients, a pre-notification form for ingredients of animal origin for inspection purposes, and a veterinary certificate may also be required. Depending on the product, there are additional specific quality requirements (certificate of quality conformity). This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>.

In terms of tariffs, EU baked goods are generally imported into Turkey at zero tariffs, but an additional duty is applied which is calculated on the basis of the product's agricultural components (e.g. wheat content).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – sweet biscuits category (1905 31) from Italy to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1902&origin=IT&destination=TR>

Standards, SPS measures

Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standard is the legislation on which the Turkish food standards code is based. This legislation covers aspects that are common to all agri-food products, including baked goods, such as those relating to additives, contaminants, labelling, hygiene and official controls.

There are also specific rules on bread and wheat flour, which contain various definitions, product features, transport, storage and other provisions for these products:

- Bread and bread types (Communiqué No: 2012/2):
<https://www.resmigazete.gov.tr/eskiler/2012/01/20120104-6.htm>

- Wheat flour, which covers flour for bread, biscuits and dough making (Communiqué No. 2013/9):
<https://www.resmigazete.gov.tr/eskiler/2013/04/20130402-7.htm>.

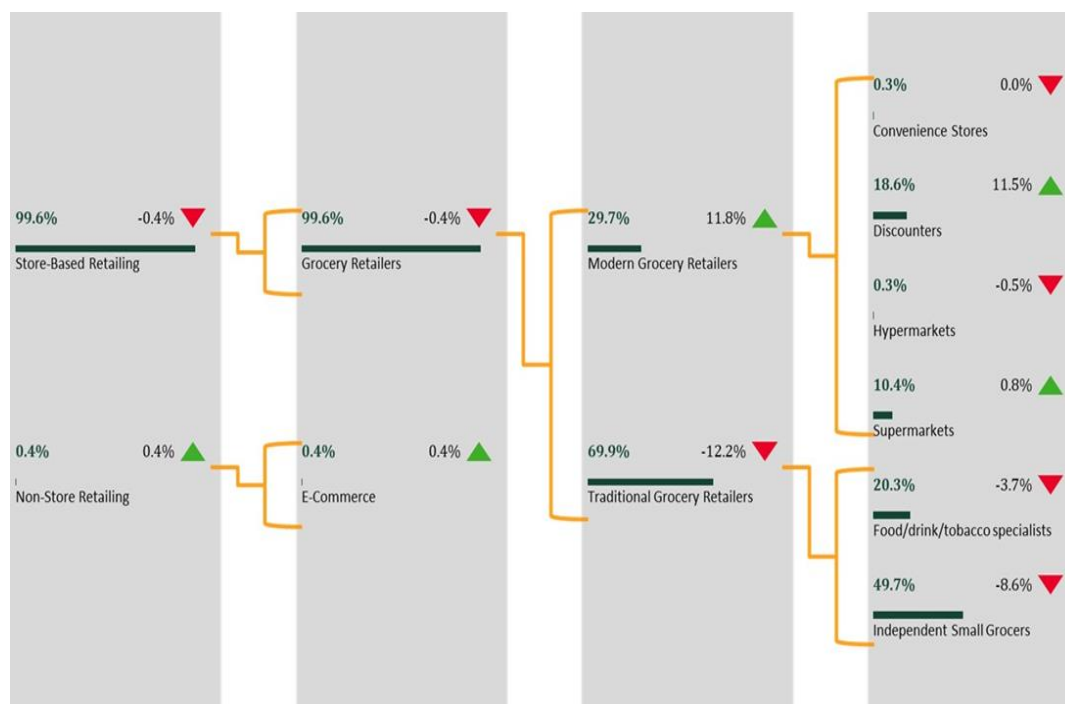
Labelling

Section 4.2.3 contains detailed information on the labelling requirements for packaged foods in general, under the Turkish Food Codex Regulation on Food Labelling and Consumer Information. It should be remembered that the rules include compulsory country of origin labelling. The above-mentioned Turkish food codex regulation for bread and wheat flour contains specific requirements for the labelling of these products.

5.14.5 Distribution

Traditional grocery retailers account for 69.9% of all baked good sales in Turkey in 2020, despite a decline of 12.2% in their share since 2016 (Figure 5-62), which seems to have been taken over by modern grocery retailers (see below). Independent small grocers accounted for just under half of all sales with a share of 49.7% of all sales. Food and drink specialists account for 20.3% of all sales. Modern grocery retailers accounted for 29.7% and grew by 11.8% since 2016 with discounters accounting for 18.6% of all sales. E-commerce remains a minor channel for the distribution of baked goods with a share of just 0.4%, although it is expected to grow as the wider adoption of e-commerce continues in Turkey.

Figure 5-62: Distribution channel overview of baked goods in Turkey in 2020; % share



Source: Euromonitor International: Packaged Food, 2021.

5.14.6 Challenges for EU products

Currently, the biggest challenge for EU products is competing with domestic variants of baked goods which are abundantly available at relatively competitive prices and are often produced to cater to the specialised taste of Turkish consumers; examples include the production of pide bread (*Ramazan Pidesi*) and *Gullac* (Turkish pastry dish). This limits demand domestically for imported baked products. Despite these challenges, the EU accounts for the vast majority of baked goods exports to Turkey with Belgium alone accounting for 70% of all imports into Turkey.

Market Takeaway: Baked goods

Consumption: Bread consumption is amongst the highest in the world, with bread being a common feature during Turkish meals throughout the day. Consumption of pastries and cakes is also high when compared to other European countries.

Competition: The main competition comes from domestic specialist Turkish products which cater to the vast majority of domestic demand for baked good products, with traditional artisanal bakeries having a market share of 93.2%.

Distribution: Mainly via traditional grocery retailers such as independent small grocers and bakeries. Modern grocery retailers continually grow their share of total sales with discounters now accounting for 18.6% of all sales. E-commerce remains a minor channel of distribution despite recent growth.

Challenges: Competing with domestic producers who are more in tune with the preferences of the local population with regards to specialist bread, cakes and pastries which are mainly found in Turkey or within the region (such as *Ramazan pidesi* and *Gullac*).

Opportunities: EU Member States account for the vast majority of total imports of baked goods into Turkey and imports are growing.

5.15 Live plants

5.15.1 SWOT analysis

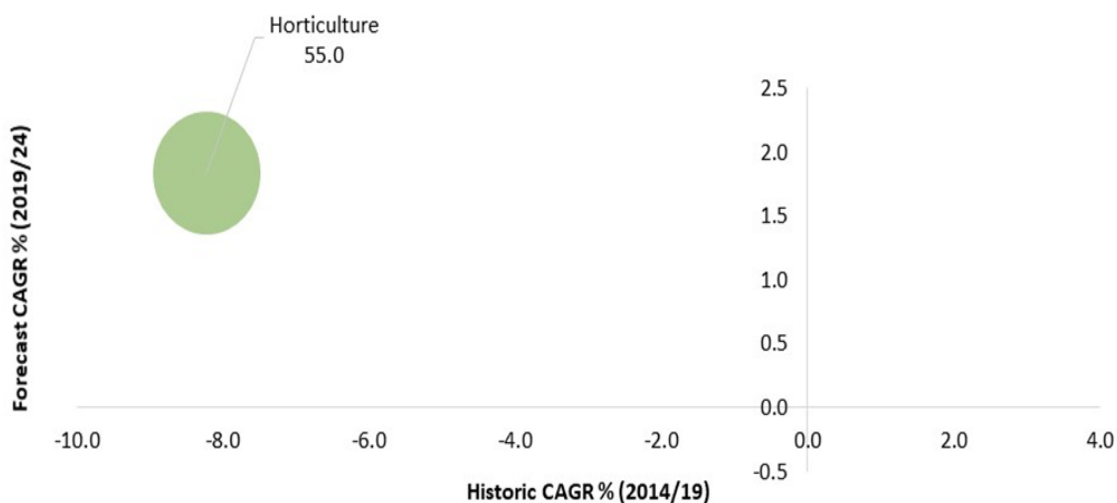
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ The EU accounts for roughly 80% of total live plant imports into Turkey. ▪ Dutch live plants are by far the most imported live plant, accounting for almost half of live plant imports into Turkey. 	<ul style="list-style-type: none"> ▪ Middle- and lower-income consumers are less likely to purchase EU live plants compared to domestic alternatives. ▪ The total market for live plants declined by a CAGR of -8.2% between 2014-2019.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Higher-income groups are more likely to spend on EU live plants during popular events throughout the year. ▪ Live plant collectors are present within Turkey. 	<ul style="list-style-type: none"> ▪ Domestic production of popular EU live plants such as tulips is growing in Turkey. ▪ China is the biggest competitor from outside of Turkey. ▪ Depreciation of the Lira against the Euro makes imported products from the EU less affordable.

5.15.2 Consumption

Evolution of consumption

The market for horticultural plants is valued at EUR 55 million in Turkey (Figure 5-63). This sector has declined by a CAGR of -8.2% between 2015 and 2020 but is expected to recover and grow by a CAGR of 1.8% between 2021 and 2025.

Figure 5-63: Evolution and forecast of the horticulture market in Turkey, 2015-2025 (EUR million)



Source: Euromonitor International: Home and Garden, 2021

Consumer profile and purchase criteria

Consumers

Consumers in Turkey are accustomed to having plants within their homes, especially within larger urban centres such as Istanbul where green space is limited. Consumers typically have plants such as showy oleanders and magnolias. Staying at home during Covid-19 led to a small rise in demand for live plants, which initially reversed the negative decline in sales witnessed in previous years, as consumers sought to redecorate their homes during the lockdown. Consumers more likely to purchase imported live plants tend to typically have a higher income or come from a segment of the consumer base which is enthusiastic about live plant collecting.

Drivers and method of consumption

Demand to redecorate the home ahead of lockdown coupled with a small percentage of live plant enthusiasts accounts for the biggest drivers of live plant sales in Turkey. Consumers appreciate that live plants allow them to let some nature into their homes, particularly consumers living in larger urban areas. Collectors are further likely to spend more on live plants from abroad and their enthusiasm is a key driver of sales. While the market of edible live plants is not wide scale in Turkey, there are several domestic plants which are preferred such as *Çiriş* (leaves of a lily plant, cooked with eggs) or *Ebegümeci* (pink flower consumed with rice or salads).⁸⁹

Purchase criteria

Price is a notable consideration from Turkish consumers who are accustomed to cheaper prices across most products produced in Turkey which extends to live plants. Turkish consumers are likely to spend more to purchase non-native plants to Turkey either to satisfy a collection demand or to satisfy a demand for exotic products.

Recent market trends

The overall market for live plants in Turkey has declined in recent years with only a rise in demand occurring in 2020 due to staying at home during the Covid-19 lockdowns. It could be expected that many offices and on-site establishments may purchase live plants to a higher volume due to the reopening of the economy post-Covid 19, but this has yet to be fully recorded. Turkish purchases of live plants in recent years have been spurred primarily from consumers seeking to redecorate the home, collectors and a small percentage of the population that buys edible plants for use in food.

5.15.3 Offer

Domestic production

The production of live plants in Turkey is growing with many live plants such as tulips emerging as a popular export product. Turkish live plant production is varied with climate and geographics playing a large role in determining regional focus in the production of certain plants, such as tulips largely produced near the city of Antalya. Red roses and carnations are also commonly produced in Turkey, with most producers focusing on the export market due to a smaller domestic demand for this product. As is the case with tulips,

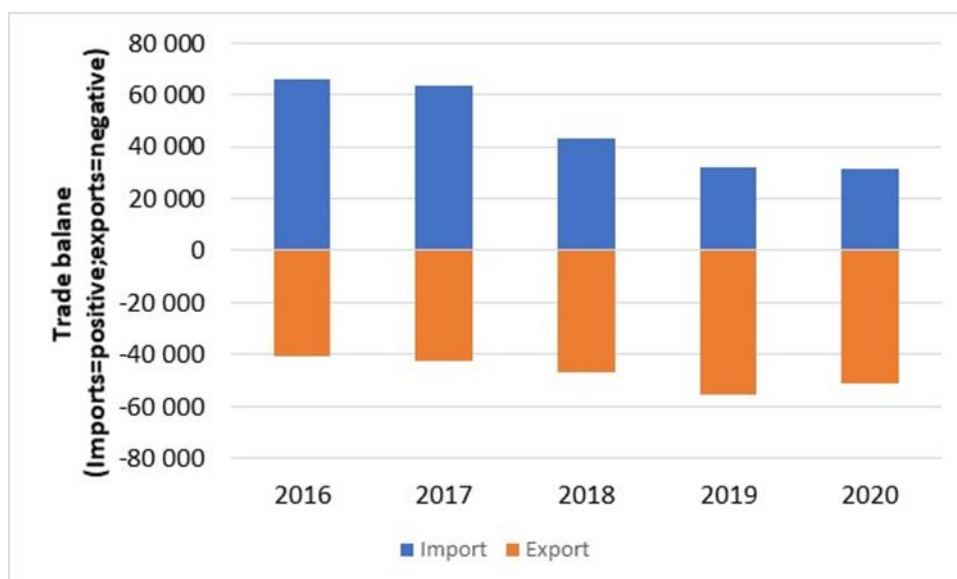
⁸⁹ Wild herbs of Turkey , Turkish cuisine , available at <http://www.turkish-cuisine.org/ingredients-7/ingredients-used-in-turkish-cuisine-66/wild-greens-and-herbs-188.html>

the majority of carnations produced in Turkey come from the region surrounding the city of Antalya.

Imports and exports

As shown below in Figure 5-64, Turkish imports of live plants have significantly declined in recent years, from EUR 63 million worth of imports in 2017 to EUR 31 million in 2020. At the same time, Turkey has emerged as a net-exporter of live plants in recent years, exporting EUR 51 million worth of live plants in 2020, up from EUR 40.7 million in 2016.

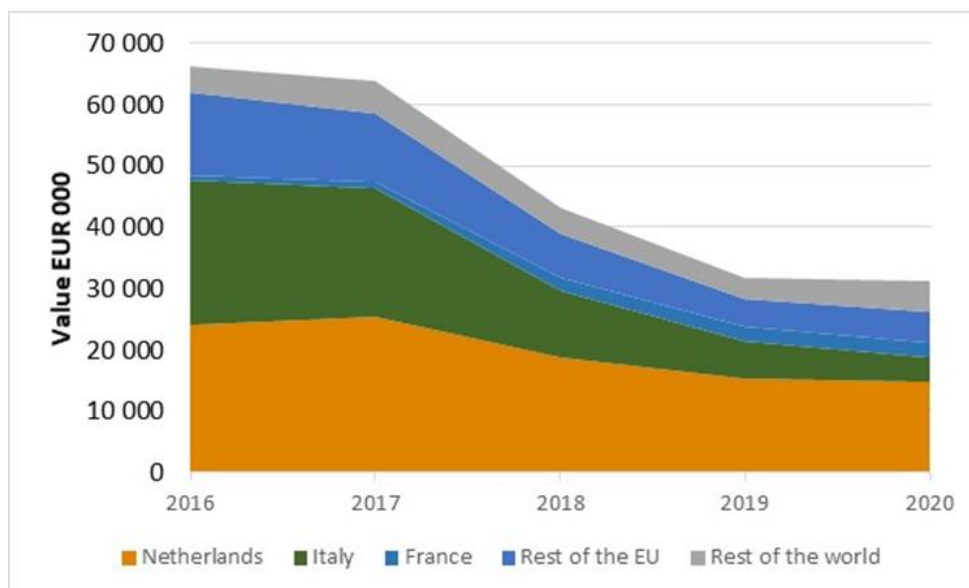
Figure 5-64: Trade balance (imports and exports) of live plants in Turkey, 2016-20 (EUR 000)



Data for CN code 0602

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

In terms of origin, as shown in Figure 5-65, the Netherlands stands as the largest exporter, exporting EUR 14.6 million worth of live plants to Turkey in 2020. Italy follows at a distance as the second-largest exporter with EUR 3.9 million worth of exports, followed by France with EUR 2.5 million. Overall, EU Member States accounted for over 80% of live plants imported into Turkey in 2020.

Figure 5-65: Turkish imports of live plants by origin country, 2016-20 (EUR 000)

Data for CN code 0602

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Main competitors

The main competition comes from domestic producers which are also large producers and exporters of popular EU live plants such as tulips, roses and carnations. Outside of Turkey, the largest competitor is China which is the fourth largest exporter of live plants to Turkey, although a small supplier when compared to the EU as a whole.

5.15.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, the following documents are required for live plants imported into Turkey: a control certificate (except for 0602.9010), a certificate of conformity, a pre-notification form for plant products for inspection purposes, a Phytosanitary certificate for designated plant products and a plant passport. New plant varieties need to be registered; and, an authorisation must be obtained to import endangered species if the product is subject to Cites. This is in addition to general import requirements.

It is strongly recommended that the latest Turkish legislation be consulted for the most recent import requirements: <https://www.trade.gov.tr/legislation/product-safety-and-technical-regulation/product-safety-and-quality-control-system-on-import-export-in-turkey>

In terms of tariffs, live plants are generally subject to a 2.4% tariff, but zero tariffs are in place for certain plants (e.g. vegetable and strawberry plants) within certain quantitative limits (see Table 4-1).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – live plants category (0602) from Spain to Turkey:

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0602&origin=ES&destination=TR>

Standards, SPS measures

The Turkish Plant Quarantine Regulation was adopted in 2011 and has been amended several times. It is based on the principles laid down in Law No. 5996 on Veterinary Services, Phytosanitary, Food, and Feed Standards. It covers aspects that are common to all plants and plant products (including wood packaging materials and unprocessed food products of plant origin), such as definitions (e.g. harmful organisms, disinfection, fumigation, phytosanitary certificate), import controls, official controls and other relevant provisions. A list of harmful organisms subject to quarantine is provided in Annexes 1 and 2 of the Plant Quarantine Regulation, special conditions for certain plants/plant products are detailed in Annex 4, while imports of certain plants listed in Annex 3 are prohibited:

<https://www.mevzuat.gov.tr/anayasa/MevzuatFihristDetayIframe?MevzuatTur=7&MevzuatNo=15548&MevzuatTertip=5>

Specific standards also apply in wholesale and retail trade of cut flowers and ornamental plants, which is under the control of the Ministry of Industry and Trade. The base legislation dates from 2010⁹⁰, with details for implementation laid down in subsequent specific legislation; the latest provisions, specifically for fruit and vegetables, were adopted in 2021 and cover packaging, transport and storage conditions: <https://www.resmigazete.gov.tr/eskiler/2021/06/20210629-13.htm>

Labelling

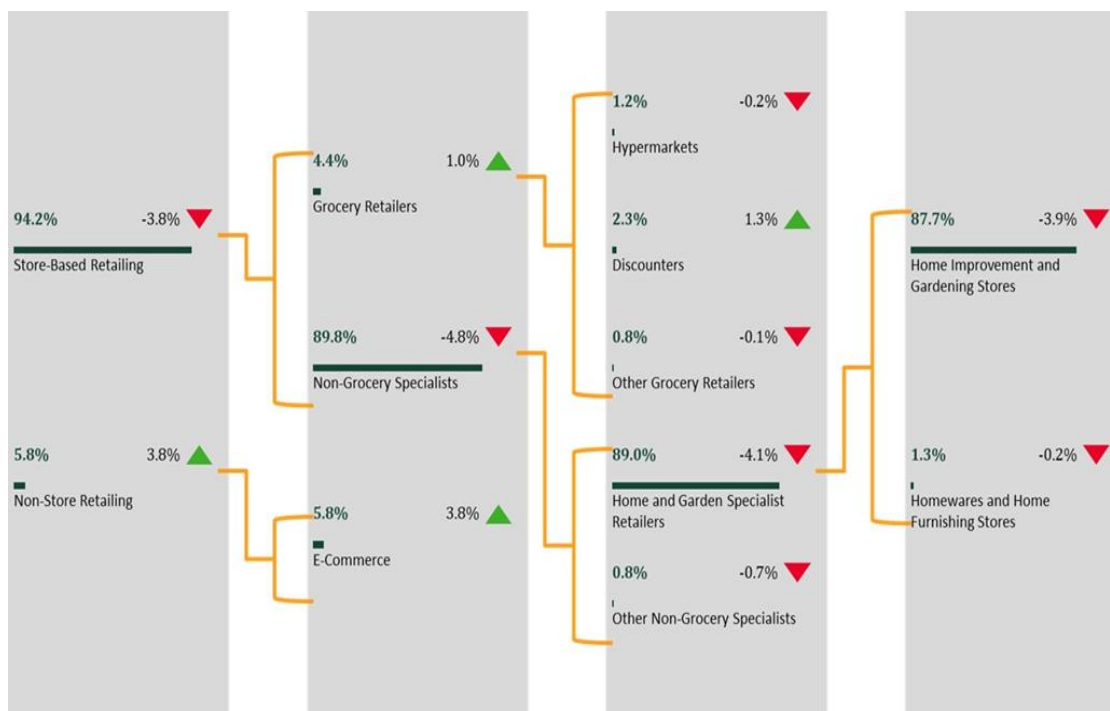
Law No. 5996 lays down the principles of labelling which also cover live plants. There are no specific rules beyond those imposed by the above-cited Turkish Plant Quarantine Regulation.

5.15.5 Distribution

Figure 5-66 shows that home improvement and gardening stores account for the vast majority of live plant sales in Turkey with a share of 87.7% of distribution in the country. E-commerce has emerged as the second-largest channel for live plant sales in Turkey with a share of 5.8%, followed by discounters with a share of 2.3%.

⁹⁰ Law No. 5957 on Trade in Vegetables and Fruits and Other Goods with Sufficient Depth of Supply and Demand (Official Gazette No. 27533 of 26-032010). <https://www.resmigazete.gov.tr/eskiler/2010/03/20100326-1.htm>

Figure 5-66: Distribution channel overview of garden items in Turkey (2020); % share



Source: Euromonitor International: Home and Garden, 2021

5.15.6 Challenges for EU products

Arguably the biggest challenge for EU products is competition from domestic Turkish live plant production, the country being a large producer and exporter of some of the more popular EU live plants such as tulips, roses and carnations. Turkish production of live plants has grown in recent years spurred by a growth in export demand for live plants from the country.

Market Takeaway: Live plants

Consumption: Turks are likely to have small plants at home, and the trend grew during the Covid-10 pandemic. The biggest market for imported live plants come from higher-income consumers and live plant enthusiasts. Some demand exists for edible plants used in food such as ciris and Ebegümeçi, but their popularity is not widespread.

Competition: Mainly from domestic producers who also produce and export popular EU live plants such as tulips, roses and carnations.

Distribution: Mainly sold in garden and home improvement retailers. E-commerce and discount retail outlets only have a minor share.

Challenges: Competing with Turkey's growing live plant production, which has been encouraged by export demand.

Opportunities: Celebration of events may spur higher-income consumers to spend more on imported EU live plant products.

6 Communication

6.1 Communication strategy

Companies wanting to market products and advertise in Turkey have different channels to consider. The aim of this section is to breakdown each section of the mass media landscape in Turkey and to introduce the main communication channels (new and traditional media, as well as fairs) available in the country, as well as provide a brief overview of key regulations for the advertising of food and beverages.

6.1.1 Online & Digital Media

The number of internet users in Turkey is increasing every year. Whereas in 2020 about 79% of people between the ages of 16 and 74 used the internet in Turkey, in 2021 the number increased by nearly 3% up to around 83%. The increased internet usage might be related to the Covid-19 pandemic that forced people to spend much more time at home. Thus, the daily internet traffic nearly doubled in Turkey because people had to work/study or attend school or socialise from home.⁹¹

The percentage of households with access to the internet in 2021 was even higher at approximately 92%. The biggest Turkish city Istanbul has the highest internet access rate all over Turkey; Ankara, the Turkish capital city, ranks second. Most households use mobile broadband rather than fixed broadband. Yet around 62% of households have a fixed broadband connection. Around four-fifths of internet users in Turkey are online nearly every day. Overall, it seems more men use the internet than women.⁹²

As a result of the high and ever-increasing use of the internet in Turkey, and following the Covid-19 lockdowns, online and digital marketing is becoming increasingly important. The audience which consumes online media does differ slightly from that consuming traditional media. As would be expected, internet usage is dependent on factors such as age and location within the country (urban/rural).

Digital advertising agencies may provide companies with support to develop a successful digital marketing strategy for Turkey. The box below includes some of the larger digital advertising companies though other agencies also exist.

Notable Turkish Digital Advertising Agencies¹

Kubix Digital - <https://kubix.digital/>

Jeel Media - <https://jeelmedia.com/>

ROIPUBLIC Digital Performance Marketing Agency - <https://www.roipublic.com/>

Sempeak - <https://www.sempeak.co.uk/>

Marketiff - <https://marketiff.com/en/home/>

Magna Digital Marketing Agency Webtures - <https://www.webtures.com/>

⁹¹ Internet usage in Turkey rises to 79 percent <https://www.hurriyetdailynews.com/internet-usage-in-turkey-rises-to-79-percent-157682>

⁹²Rate of internet users in Turkey rises to 82.6% <https://www.dailysabah.com/turkey/rate-of-internet-users-in-turkey-rises-to-826/news>

Social media platforms

Against the background set out above, the increasing importance of digital media in Turkey makes social media marketing unsurprisingly important too. As said, around 83% of people use the internet in Turkey and approximately 64% of people use social media, which is quite high. In total, this means 54 million people use social media in the country. Thus, consumers can be increasingly reached via social media platforms, which increases the importance of social media marketing in Turkey. Moreover, the average time spent on the internet by people aged between 16 and 64 in Turkey is around 7 and a half hours which ranks the country 15th in terms of daily internet and social media usage.⁹³ Turkey also ranks in the top ten countries regarding the use of Facebook, Instagram and Twitter.⁹⁴ More than 66% of urban Turks use social media channels as a news source besides also using it for fun and to stay connected with friends.⁹⁵

YouTube

YouTube is the most popular social media platform in Turkey, with at least nine out of ten internet users using YouTube. The US-based video-sharing platform was established in Turkey in 2012. Right after Youtube was launched it became the main platform for Turkish video content creators, who contribute significantly to the Turkish economy. The platform is a centre for creativity, learning, ideas and a source of information. Thus, it might be interesting to investigate the possibilities of YouTube advertising in Turkey to promote one's products. A list of notable food-orientated YouTube channels can be found below.⁹⁶

Notable food orientated YouTube channels in Turkey⁹⁷

Street Food Dream Food - <https://www.youtube.com/c/StreetFoodDreamFood>

Turkish Food Travel - <https://www.youtube.com/c/TurkishFoodTravel>

Recipes Chef Salim - <https://www.youtube.com/c/CookSalimRecipes>

Refika's Kitchen - <https://www.youtube.com/refikabirgul/featured>

Instagram

Instagram is the second most popular social media platform in Turkey, with the country ranking 6th in terms of the number of Instagram users compared to other countries.⁹⁸ The platform has a penetration rate of about 83%. While in 2018 around 37 million people used the platform, in 2021 the number increased to 49 million users. Thus, the platform gained 12 million extra users in only 3 years.⁹⁹ Close to 58% of the population in Turkey were active Instagram users in September 2021. The main user group is aged between 25 and

⁹³ There are 54 million social media users in Turkey <https://m.bianet.org/english/society/226764-there-are-54-million-social-media-users-in-turkey>

⁹⁴ Turkey among top 10 countries to use social media networks <https://www.duvarenglish.com/culture/2020/02/25/turkey-among-top-10-countries-to-use-social-media-networks>

⁹⁵ Online Media <https://turkey.mom-rsf.org/en/media/online/>

⁹⁶ Istanbulsh*: What Youtube Users in Turkey Need to Know <https://buyviewsreview.com/youtube-users-in-turkey/>

⁹⁷ 15 Turkish Food Youtube Channels https://blog.feedspot.com/turkish_food_youtube_channels/

⁹⁸ Turkey among top 10 countries to use social media networks <https://www.duvarenglish.com/culture/2020/02/25/turkey-among-top-10-countries-to-use-social-media-networks>

⁹⁹ Turkey ranks fifth with most active Instagram users <https://www.dailysabah.com/life/2018/12/07/turkey-ranks-fifth-with-most-active-instagram-users>

34; most users are men, accounting for about 58%.¹⁰⁰ The main reasons for the use of Instagram include but are not limited to interests in travel, music, food and drink.¹⁰¹

Notable Instagram food influencers in Turkey¹⁰²

Şükran Kaymak - @sukrankaymak
 Zeliha Küçükturan - @umutsepetim
 Zübeyde Mutfakta - @zubeydemutfakta
 Arda Turkmen - @ardaturkmen
 Yemek Askim - @yemekaskim
 Ghada El Tally - @ghadaeltally
 Yasemin Arslan - @nefis_mutfagim

WhatsApp

WhatsApp is the third most popular social media platform in Turkey. It was launched in 2009 and since then became known as a free messaging app that enables users to conduct video or voice calls, send messages or share their status just by being connected to the internet. The platform is the most popular and widely used messaging app in Turkey. However, since it introduced some new privacy rules in 2021 an increasing number of Turkish people switched over to other messaging apps such as BiP or Turkcell.¹⁰³

Facebook

Facebook is the fourth most popular social media platform used in Turkey. In Europe, Turkey is the country using Facebook the most and it ranks in the top 10 worldwide. In September 2021 Facebook recorded over 65 million registered users, which means close to four-fifths of the population is using the platform. The majority of users are aged between 25 and 34, with more men being signed up to the platform in this age group than women.¹⁰⁴

Other platforms

The above four platforms are the most popular in Turkey by some distance. However, Twitter also has a penetration rate of about 61%, followed by Pinterest with around 34%, LinkedIn with 32%, Snapchat with 29% and Tik Tok with around 27%. Thus, these platforms are used by many people in Turkey as well and could offer interesting marketing opportunities.

Food blogs

Another interesting option to promote EU food products in Turkey is to work closely together with food bloggers. There are possibilities to hire food bloggers and to ask them to promote certain products on their blog.

Well-known food bloggers are influencers as well and increasingly cross over between

¹⁰⁰ Instagram users in Turkey, September 2021 <https://napoleoncat.com/stats/instagram-users-in-turkey/2021/09/>

¹⁰¹ Instagram Demographics in 2021: Important User Stats for Marketers <https://blog.hootsuite.com/instagram-demographics/>

¹⁰² Top Food Instagram Influencers from Turkey <https://ninjaoutreach.com/food-influencers-tr>

¹⁰³ Turkey: Local messaging apps boom after WhatsApp update <https://www.aa.com.tr/en/turkey/turkey-local-messaging-apps-boom-after-whatsapp-update/2105123>

¹⁰⁴ Facebook users in Turkey, September 2021 <https://napoleoncat.com/stats/facebook-users-in-turkey/2021/09/>

written blogs and several social media accounts. This diversity of channels used also diversifies the exposure of a product on several platforms. Indeed, many of the top YouTube and Instagram pages for food in Turkey in the previous section also have blogs.

The box below contains a selection of notable food bloggers in Turkey, though this list is not extensive and certain blogs may be particularly relevant for certain food and beverage products. The sources in the footnotes may be referred to for more comprehensive lists of food bloggers.

Selected top Turkish Food Blogs¹⁰⁵
Almost Turkish Recipes - https://www.almostturkishrecipes.com/
Exploring the Turkish Kitchen - https://exploringtheturkishkitchen.com/
Vidar Bergum - https://vidarbergum.com/about/
Pantry Fun - https://pantryfun.com/
Ozlem's Turkish Table - https://ozlemsturkishtable.com/
Turkey's For Life Food & Drink - https://www.turkeysforlife.com/turkey/food-drink

6.1.2 Traditional Media

Despite the increasing popularity of digital and online media, traditional media still plays an important role in Turkey, in particular among certain demographic groups such as older people and citizens living in rural areas. Advertisements via television, radio or in newspapers can also be very useful. More information on different traditional media by type is set out below:

- **Television:** Television has long been and still is the number one medium for news and entertainment in Turkey, even though an increasing number of people tend to access it online. There are 196 television channels available in Turkey: 19 national ones, 12 regional ones and 165 local ones. State-owned Radio and Television Cooperation (TRT) is the Turkish state broadcaster that offers a total of 13 channels in different languages such as in Turkish minority languages including Kurmanji Kurdish and Arabic. TRT had a monopoly in broadcasting until Star 1, the first privately-owned TV station was founded in Turkey in 1990. On average each person in Turkey watches TV for around 3.5 hours per day. Some of the most popular private TV channels in Turkey today include Star TV, Show TV, Kanal D, ATV, Fox, NTV and CNN Turk.
- **Print media:** The popularity of print media is overall declining. In general, the number of readers of print media can be viewed as low when compared to the large population of Turkey. Istanbul and Ankara are known to be print media hubs until today. Since the start of the Covid-19 pandemic, more people than previously expected switched to digital publications as the delivery of printed newspapers was complicated by Covid-19 restrictions in the country. In 2020 the total number of magazines and newspapers printed in Turkey decreased by around 14%, while the circulation of magazines and newspapers decreased by nearly 21%. Yet, considering their circulation, the most widespread daily newspapers are Hürriyet,

¹⁰⁵ Top 20 Turkish Food Blogs and Websites https://blog.feedspot.com/turkish_food_blogs/

Sabah, Posta, Sözcü and Habertürk. These daily newspapers are printed every day of the year including Sundays and public holidays or religious feasts.¹⁰⁶

- **Radio:** Radio is a popular news and entertainment medium in Turkey.¹⁰⁷ More than 1 000 radio stations are available in Turkey and around 37 million people listen to the radio weekly, of whom more are men than women. This means around six out of ten Turkish people do listen to the radio. People who enjoy listening to the radio do so about three hours per day, many of them while they are driving. All age groups, as well as social groups, usually have access to the radio.¹⁰⁸ The Turkish Radio and Television state broadcaster (TRT) also operates several state-owned radio channels including TRT Radio 1, TRT Radio Haber, TRT World and TRT Radio Kurdi which is a channel using the Kurdish language. Some popular private channels include Show Radyo and NTV Radio.¹⁰⁹

6.1.3 Fairs and exhibitions

In addition to the digital approach or traditional media, companies may decide to promote their products at various trade fairs. Trade fairs are numerous, cover a broad range of product sectors and are generally considered a more attractive and sophisticated method for in-country product promotion and industry networking.

While the majority of trade fairs take place in urban centres such as in Istanbul, and Antalya, there are also some fairs in smaller cities/areas. Istanbul Expo Centre, Tuyap Exhibition and Convention Centre and CNR Expo are notable trade fair venues in Turkey's most populous city Istanbul; while Fuar Izmir, Antalya Expo Centre, Cultural and Convention Centre of METU, Altinpark Expo Centre and the Tuyap Adana International Exhibition and Convention Centre are notable venues outside the capital.¹¹⁰

A list of selected major upcoming food-related events and fairs can be found in section 8.4. Further, more comprehensive lists including more specialist fairs can also be found online at websites such as:

- <https://10times.com/turkey/food-beverage/tradeshows>
- <https://www.tradefairdates.com/Food-Fairs-Turkey-FSL216-L220-S1.html>

6.2 Advertising regulations

The Turkish Consumer Protection Law No. 6502, as well as the Regulation on Commercial Advertisements and Unfair Commercial Practices, and the CPL and Broadcasting Law No. 6112 constitute the main legislation dealing with advertising and broadcasting compliance in Turkey.

¹⁰⁶ Print media in Turkey suffers more decline amid pandemic <https://www.dailysabah.com/turkey/print-media-in-turkey-suffers-more-decline-amid-pandemic/news>

¹⁰⁷ Television <https://turkey.mom-rsf.org/en/media/tv/>

¹⁰⁸ 37 million Turks listen to radio per week <https://www.hurriyetdailynews.com/37-million-turks-listen-to-radio-per-week-141076>

¹⁰⁹ Turkey profile – Media <https://www.bbc.com/news/world-europe-17992011>

¹¹⁰ Exhibition & Convention Centres in Turkey <https://10times.com/venues/exhibition-convention-centres/turkey>

The Radio and Television Supreme Council (RTUK) supervises broadcast media advertising and is an impartial public legal entity working autonomously. The entity acts as a supervisor and regulator for television, radio and on-demand media services. The RTUK furthermore inspects advertisements to check if they are in line with the CPL and Broadcasting Law. The Advertising Self-Regulatory Board (ROK) is the main advertising self-regulatory entity in Turkey and thus it is its obligation to control advertisements for all media, including on TV, radio or broadcasts. Below are some of the main points that need to be kept in mind when aiming to advertise an agri-food product in Turkey.¹¹¹

- **Comparative advertising:** Comparative advertising is in general allowed in Turkey. In Turkish law, the following definition is given: “*advertisements used for the promotion of goods or services, in which elements concerning goods or services of a competitor are directly or indirectly used*”. It is important to know that comparative advertisements must not be misleading, must not enhance unfair competition and the compared goods must be of the same kind. Yet, very particular comparative advertising showing the name of the other company/product or its trademark or logo is forbidden. Comparative advertisement for food supplements is forbidden as well as comparing general health claims of products.
- **Testimonial advertisement and proof:** Advertisement needs to be honest and accurate. The accuracy of the claims made must be proven, in the best case with scientific data. The data used to prove a point may come from a company’s own research if it is in line with scientific guidelines.
- **Social media and influencer marketing:** Currently there are no specific laws in place that limit influencers from conducting social media marketing. However, general advertising rules apply to them too.
- **General and food-specific advertising to children:** Advertisements that target children are not allowed to contain information or images that might badly affect children’s mental, moral or psychological health and neither their social development. It furthermore is not allowed to use violent elements, images or statements that might decrease the children’s trust in their parents or other important people or those people’s authority. Food advertisements targeted at children have to follow specific stricter rules in Turkey. Since the establishment of the Nutrition Profile Guide by the Ministry of Health, food is put into three different categories following the traffic light concept. The red food category includes foods such as chocolate, candy and sugary drinks that are prohibited to be advertised during children’s programmes. The orange category includes foods such as breakfast cereal, full-fat dairy products, crackers and nuts that are allowed to be advertised during children’s programmes if certain criteria are fulfilled. The green category includes foods such as fresh fruit and vegetables, fish and eggs that are allowed to be advertised without any restrictions. Moreover, free items are not allowed for different food categories. As such, gifts that are targeted to appeal to children are not allowed to be given if the advertised foods are categorised to be bad for health if unreasonably consumed. This means that for example fast food children’s menus or confectionery or potato chips products are not allowed to come with toys, coupons or collectable items. This rule in particular threatens products

¹¹¹ Key Developments and Predictions for Media and Advertising Law in Turkey https://gun.av.tr/insights/articles/key-developments-and-predictions-for-media-and-advertising-law-in-turkey?utm_source=Mondaq&utm_medium=syndication&utm_campaign=LinkedIn-integration

that are a combination of food and toys such as chocolate eggs that contain a toy inside.¹¹²

- **Alcohol advertising:** Any kind of advertisement and showing-off of alcoholic beverages in any form of media including on TV and radio, product placement, printed media, advertising in the cinema, social media and any other digital platform is forbidden in Turkey according to Law no 4250. It is furthermore forbidden to use trademark logos or alcoholic brand signs in brick-and-mortar stores such as on sales units, coolers and refrigerators. If a company that sells alcoholic beverages sponsors certain activities or events it is only allowed to use the company's name but not the brand, sign or logo of any of its products. Exporters, producers and marketers are forbidden to give alcoholic beverages as gifts or promotions for free and any kind of tasting activities by consumers are forbidden too as it is only allowed for people or establishments with a license.¹¹³

¹¹² Key Developments and Predictions for Media and Advertising Law in Turkey https://gun.av.tr/insights/articles/key-developments-and-predictions-for-media-and-advertising-law-in-turkey?utm_source=Mondaq&utm_medium=syndication&utm_campaign=LinkedIn-integration

¹¹³ The Alcohol Advertising Law in Turkey <https://eucam.info/regulations-on-alcohol-marketing/turkey/>

7 Turkish Etiquette

7.1 Quick facts

It is important to remember that Turkey is a majority Muslim country, and a group-orientated culture. These two facts have considerable impacts on overall etiquette rules. It should be noted that, as a diverse country, differences between rural and urban areas, regions, socio-economic status and ethnicities exist. Some general etiquette considerations are set out below; some of these are explored in more detail in section 7.2 below:

- The Muslim religion impacts working days/times, major holidays and other aspects such as gift-giving practices.
- People from Turkey are known to be very friendly, polite and hospitable and have a strong national identity.
- The concept of honour is core in Turkish society and influences people's behaviour on a daily basis. If one person does something dishonourable, their whole family might be negatively affected.
- Community is highly important. Turkey has a collectivist culture and people generally have strong connections with their families, friends and often even with their neighbours and the whole community.
- Punctuality is not as important in Turkey as it is in many European countries. The daily activities are done at an easier pace and importance is placed in personal interactions. It is more common to take time to finish a conversation and be late for another meeting than to cut someone short. People rarely rush.
- The elderly are greatly respected in Turkey. If an elderly enters the room it is polite to stand up, and if no other seat is available offer the person one's seat.
- As part of being polite, it is common for Turks to refuse an offer several times before they accept it. The same might be expected from foreigners. This exchange is supposed to highlight the sincerity of the giving person and the humbleness of the receiver. Thus, it is important to offer something several times, as Turkish people are likely to refuse it the first time out of politeness.
- In some areas of Turkey, it is still seen as polite to escort a woman to a seat or the bathroom when having a meal together.
- It is seen as an insult when someone points their shoes directly at another person or when someone crosses their legs when facing someone else.
- Women should be asked permission before their photograph is taken.
- It is uncustomary to split bills in Turkey. Usually, the person that invited the other will pay. However, it is okay to offer the other person to pay the bill. If they insist to pay for it, they should be allowed to do so.¹¹⁴

¹¹⁴ Turkish Etiquette <https://culturalatlas.sbs.com.au/turkish-culture/turkish-culture-etiquette#turkish-culture-etiquette>

7.2 Key DOs and DON'Ts

Dos	Don'ts
<ul style="list-style-type: none"> • Give people as much time as is needed and take time to build proper relationships. Turks are very friendly and will make time for you. Do the same. • Respect the religious beliefs of people. Create an atmosphere where people can follow their beliefs such as observing religious rituals or prayers or fasting and other dietary choices. Yet not all Turks are Muslims. • Criticism or advice should always be given indirectly, via another person if possible, in particular when it comes to comments on another's personal traits or anything in relation to one's family or country. • Dress modestly. It is advised to cover legs, chest and shoulders to make a good impression and avoid unwanted attention. • Only haggle at bazaars and weekly markets, otherwise, it might be seen as rude. • Always greet the oldest person in the room first as Turks highly respect their elderly. • Keep eye contact while talking to someone as this shows your sincerity and helps to build a good relationship. In Turkey people often choose to do business with people they trust and like. • Try and converse with new business partners on a personal level, yet without being too personal. 	<ul style="list-style-type: none"> • Do not assume Turks can speak Arab or refer to them as Arabs. Turkish culture is very different from Arab culture and people might find it annoying or offensive to be compared to Arabs. • Do not underrate the nationalism in the country. Many people have a strong feeling of national pride and negative comments about their country and culture are viewed as bad insults. • In line with the previous, do not make any negative comments about Mustafa Kemal Atatürk, the founding father of the Republic of Turkey. He is highly respected by most Turks. • If you are not very well informed, do not share your opinion on Turkish politics or the president. • Do not assume that all Muslims are very conservative. In many parts of Turkey non-Islamic behaviours such as drinking alcohol is accepted. • Do not start a discussion on Turkey's relationship with Cyprus, Greece, or the Armenian and Kurdish minorities, as these are highly sensitive and emotional issues. • Do not put too much emphasis on danger or violence in Turkey. Even though political violence happened during the last years, this usually does not affect the general people's safety. Turks are sometimes unhappy with how negatively their country is portrayed by the media. • Do not drink alcohol in public, as it is a social taboo and even prohibited by law.

Source: Do's and don'ts <https://culturalatlas.sbs.com.au/turkish-culture/turkish-culture-do-s-and-don-ts#turkish-culture-do-s-and-don-ts>, Turkish Etiquette – Do's and Don'ts in Turkey <https://handsonturkish.com/turkish-etiquette-dos-and-donts-in-turkey/>, Business Etiquette in Turkey. Do's and don'ts <https://handsonturkish.com/business-etiquette-in-turkey-dos-and-donts/>

8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Turkey, for producers wishing to export to Turkey. These service providers include EU funded projects, services provided by the Member States and their embassies, other organisations and service providers, as well as buyers, importers, and distributors.

- Section 8.1 contains the project profiles for EU funded initiatives operating in Turkey.
- Section 8.2 contains the contact information for Member State embassies within Turkey
- Section 8.3 contains a listing of service providers including some information on the services available.
- Section 8.4 provides a calendar of exhibitions, trade shows, and other events to be held in Turkey in 2022.
- Section 8.5 contains a database of professionals' contacts (buyers, importers, and distributors).

8.1 European Union organisations

Certain EU funded, or co-funded, projects within the Turkish market offer a range of business-enabling services and information providing important insights into the Turkish market. Depending on your company profile these services can be free or fee-based; and are available for companies from any EU Member State.



Turkey-EU Business Dialogue

The Turkey-EU Business Dialogue organisation represents business chambers found in both the EU and Turkey and actively works to strengthen business relations between the two markets. TEBD is involved in organising webinars, conferences and high-level business dialogue between partners from both the EU and Turkey, and is a key player in business development for EU producers in Turkey.

Contacts

□ Avenue des Arts 19 A/D, Brussels, Belgium

☎ (+32) 2 282 08 79

✉ tebd@eurochambres.eu

🌐 <https://tebd.eu/>



Delegation of the European Union in Turkey

The European Union Delegation in Turkey represents the voice of the European Union in Turkey and actively encourages deeper cooperation in a number of areas including business. The delegation is available to advocate on European interests in the country. The delegation has been involved in the promotion of EU agri-food products in Turkey.

Contacts

□ Ugur Mumcu Cad. No:88 Floor 5 , Gaziosmanpasa ,06680 Ankara

☎ (+90) 312 459 87 00

✉ delegation-turkey@eeas.europa.eu

🌐 <https://www.avrupa.info.tr/>



EUROCHAMBRES

EUROCHAMBRES is one of the largest business representative organisations in Europe and incorporates chambers of commerce from both the EU and Turkey. As the union of chambers and commodity exchanges of Turkey (TOBB) is an affiliate member of EUROCHAMBRES the ability to facilitate internal business discussion and negotiation exists from members of this organisation seeking to enter the Turkish market.

Contacts

- Avenue Des Arts 19/A-D Brussels

































☎ (+32) 02 282 08 50

🌐 <https://www.eurochambres.eu/>

8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
Austria (Embassy)	Kavaklidere Mh, 06700, Ankara	☎ (+90) 312 405 51 90 ✉ Contact Through Website 🌐 https://www.bmeia.gv.at
Belgium (Embassy)	Eskisehir Yolu , 2176 floor 10-11 , Sogutozu , Ankara	☎ (+90) 312 544 30 58 ✉ ankara@diplobel.fed.be 🌐 https://turkey.diplomatie.belgium.be
Bulgaria (Embassy)	Remzi Oğuz Arık Mh., 06540 Ankara	☎ (+90) 312 427 51 42 ✉ Embassy.Ankara@mfa.bg 🌐 https://www.mfa.bg/
Croatia (Embassy)	Aziziye Mah. Kırkpınar Sokak 18/5 06690 Ankara	☎ (+90) 312 46 9460 ✉ ankara@mvep.hr 🌐 http://www.mvep.hr/
Czech Republic (Embassy)	Kaptanpasa Sokak No. 15, Gaziosmanpaşa, 06700 Ankara	☎ (+90) 312 405 61 39 ✉ ankara@embassy.mzv.cz 🌐 https://www.mzv.cz/ankara
Denmark (Embassy)	Yukari Dikmen Mahallesi , Turan Gunes Bulvari No 106 , Yildiz kule Office building , 22 nd floor , Ankara	☎ (+90) 312 408 33 00 ✉ ankamb@um.dk 🌐 https://tyrkiet.um.dk/
Estonia (Embassy)	Golgeli Sokak no 16, Gaziosmanpasa , Ankara.	☎ (+90) 312 40 56 970 ✉ embassy.ankara@mfa.ee 🌐 https://ankara.mfa.ee/
Finland (Embassy)	Beyaz Zambaklar Sokagi no 44 , Ankara.	☎ (+90) 312 457 4400 ✉ sanomat.ank@formin.fi 🌐 https://finlandabroad.fi/
France (Embassy)	Paris Caddesi no 70, Kavakildere , Ankara	☎ (+90) 312 455 45 45 ✉ Contact through website 🌐 https://tr.ambafrance.org/
Germany (Embassy)	Almanya Federal Cumhuriyeti Büyükelçiligi, PK 54, Çankaya, 06552 Ankara	☎ (+90) 312 455 51 00 ✉ Contract through website 🌐 http://www.ankara.diplo.de/
Greece (Embassy)	Zia Ur Rahman cad 9-11, Gaziosmanpasa 06700 Ankara	☎ (+90) 312 448 06 47 ✉ gremb.ank@mfa.gr 🌐 https://www.mfa.gr/ankara
Hungary (Embassy)	Polat OFIS B Blok , Imrahor CAD, Yanki Sokak no 27. Gursel Mah , Kagithane 33400 , Istanbul	☎ (+90) 212 314 21 40 ✉ consulate.ist@mfa.gov.hu 🌐 https://isztambul.mfa.gov.hu/
Ireland (Embassy)	Büyükesat, Uğur Mumcu Cd. No.88 D: No.88, 06700 Çankaya/Ankara	☎ (+90) 312 459 10 00 ✉ Contact through Website 🌐 https://www.dfa.ie/
Italy (Embassy)	Ataturk Bulvari, 118 Kavaklidere 06680 Cankaya Ankara	☎ (+90) 312 457 42 00 ✉ ambasciata.ankara@esteri.it

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EU MS	Address	Contact information
		 http://ambankara.esteri.it/ambasciata_ankara/it/
Latvia (Honorary Consulate)	Resit Galip Caddesi No.95 G.O.P. Cankaya Ankara	 (+90)312 405 61 36  embassy.turkey@mfa.gov.lv  http://www.mfa.gov.lv/turkey
Lithuania (Honorary Consulate)	Kazım Özalp, Mahallesi, Mahatma Gandhi Cd. No:38, 06700 Çankaya/Ankara	 (+90) 312 447 07 66  amb.tr@urm.lt  https://tr.mfa.lt/
Luxembourg (Embassy)	Resit Galip Caddesi 70/2 06700 Gaziomanpasa Ankara	 (+90) 312 45 91 400  ankara.amb@mae.etat.lu  http://ankara.mae.lu/
Malta (Embassy)	Resit Galip Caddesi No.70/1, Gaziosmanpasa 06700	 (+90) 312 417 80 51  maltaembassy.ankara@gov.mt  maltaembassy.ankara@gov.mt
The Netherlands (Embassy)	Mevlana Bulvarı Yıldırım Kule No.221 06520 Çankaya Ankara	 (+90) 312 409 18 00  ank@minbuza.nl  https://www.netherlandsworldwide.nl
Poland (Embassy)	Ataturk Bulvarı 241, 06650 Kavaklıdere, Ankara.	 (+90) 312 457 20 00  ankara.amb.sekretariat@msz.gov.pl  http://www.gov.pl/web/turcja
Portugal (Embassy)	Kırlangic sokak no 39, Gaziosmanpasa , Ankara	 (+90) 312 405 41 01 09  ankara@mne.pt  https://ancara.embaixadaportugal.mne.gov.pt/
Romania (Embassy)	Bukres Solak 4, 06680 , Ankara.	 (+90) 312 466 37 06  Ankara@mae.ro  https://ankara.mae.ro/
Slovakia (Embassy)	Atatürk Bulvarı 245 06692 Kavaklıdere Ankara	 (+90) 312 467 50 75  emb.ankara@mzv.sk  http://www.mzv.sk/web/ankara
Spain (Embassy)	Prof. Aziz Sançar 8 06680 Cankaya P.K. 48 Ankara	 (+90) 312 438 03 92  emb.ankara@maec.es  http://www.exteriores.gob.es/embajadas/ankara
Sweden (Embassy)	Katip Celebri Sokak 7 , B.P.3, 06692 Kavaklıdere , Ankara	 (+90) 312 455 41 00  ambassaden.ankara@gov.se  https://www.swedenabroad.se

8.3 Other organisations and service providers

8.3.1 Trade promotion organisations (TPOs) and agri-food promotion organisations (APOs)

EU MS	Address	Contact information
Austria Agrarmarkt Austria Marketing (APO)	Dresdner Straße 70, Vienna.	☎ +43 050 3151 0 ✉ office@ama.gv.at 🌐 https://www.ama.at/Home
Belgium (Flanders) FIT (TPO)	Siraselviler Caddesi 39, Istanbul	☎ +90 212 293 99 17 ✉ istanbul@fitagency.com 🌐 https://www.flandersinvestmentandtrade.com/
Belgium (Flanders) Flanders' Agricultural Marketing Board (APO)	Koning Albert II-laan 35 box 50 - 1030 Brussels	☎ +32 491861700 ✉ gert.vancausenbroeck@vlam.be ; export@vlam.be 🌐 https://www.vlaanderen.be/vlam/
Belgium (Wallonia) AWEX / Wallonia-Brussels, (TPO)	Place Saintctellet 2, Brussels	☎ +32 2 421 82 11 ✉ info@awex.be 🌐 https://www.awex-export.be/
Belgium (Brussels) (TPO)	110-112, Charleroise Steenweg , 1060 Brussels	☎ +32 02 422 00 20 🌐 https://www.awex-export.be/
Bulgaria Bulgarian Small and Medium Enterprises Promotion Agency (TPO)	2-4 Lege Street, Sofia	☎ +359 2 940 7940 ✉ office@sme.government.bg 🌐 https://www.sme.government.bg
Cyprus Trade Service of the Ministry of Energy, Commerce and Industry (TPO)	6 Andrea Araouzou Street, Nicosia	☎ +359 2 940 7940 ✉ office@sme.government.bg 🌐 https://www.sme.government.bg
France Business France in Turkey (TPO)	Asmali Mescit Mah Istikal Cal, Istanbul	☎ +90 0 212 982 02 82 🌐 https://businessfrance.fr
France SOPEXA (APO)	France	☎ (+33) 01 55 37 50 00 ✉ mybusiness@sopexa.com
Estonia Enterprise Estonia (TPO)	Lasnamae 2, Tallinn	☎ (+372) 6279 700 ✉ info@eas.ee 🌐 https://www.eas.ee .
Germany Federation of German Food and Drink (APO)	Claire Walfoff Straße 7, Berlin	☎ (+49) 30 200786-157 ✉ bve@bve-online.de 🌐 https://www.bve-online.de/english
Greece Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	109, Vasilissis Sophias Ave. 11521, Athens	☎ +30 210 33 55 77 9 ✉ a.gravanis@eg.gov.gr 🌐 https://www.enterprisegreece.gov.gr
Hungary Hungarian Export Promotion Agency (TPO)	Kasca Utca 15-23, Budapest	☎ +36 1 922 2600 ✉ info@hepa.hu 🌐 https://hepa.hu/en

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EU MS	Address	Contact information
Ireland Enterprise Ireland (TPO)	East point business park, Dublin	+353 1 727 2000 https://www.enterprise-ireland.com/
Ireland BoardBia (APO)	140 Pembroke Road, Dublin	+352 3 1 668 5155 info@bordbia.ie https://www.bordbia.ie/
Italy Italian Trade Agency (TPO)	Listz 21, Rome	+ 39 06 59921 agro.alimentari@ice.it https://www.ice.it/en/
Lithuania Enterprise Lithuania (TPO)	Juozo Balcikonio 3, Vilnius	+ 370 5 249 90 83 info@entrepriselithuania.com https://www.entrepriselithuania.com
Malta Trade Malta (TPO)	The clock tower level 1, Tigne Point, Sliema	+ 356 2247 24 00 info@trademalta.org https://trademalta.org
Netherlands Netherlands Enterprise Agency (TPO)	Mandemaat 3, Assen	+ 31 70 379 80 00 Contact through website Netherlands Enterprise Agency RVO.nl
Portugal Portuguese Trade & Investment Agency – AICEP (TPO)	Portugal	https://www.portugalglobal.pt/EN/Pages/Ind ex.aspx
Slovenia Spirit Slovenia (TPO)	Verovskova Ulica, Ljubljana	+386 01 5309 817 sonja.demsar@spiritslovenia.si https://www.sloveniabusiness.eu/about-spirit
Spain FIAB (APO)	Velázquez, 64 – 3ª Planta 28001 Madrid	+34 91 411 72 11 fiab@fiab.es https://fiab.es/
Spain ICEX / Economic and commercial office of Spain (TPO)	Calle Cumhuriyet Caddesi, N° 42 Kat: 4 - Dörtler Apt., Estambul 34367	+00 (90) (212) 2966161 estambul@comercio.mineco.es https://www.icex.es/icex/es/index.html
Spain Generalitat de Catalunya	Passieg de Garcia, Barcelona	+34 934 767 200 http://www.accio.gencat.cat/
Spain Basque Trade and Investment	Alameda Uruquilo 36, Bilbao	+34 94 403 71 60 info@basquetrade.eus https://basquetrade.spri.eus.

8.3.2 Other service providers

Service provider	Address	Contact information
SERVICES FOR AUSTRIAN COMPANIES		
Advantage Austria Istanbul	Bukukdere Caddesi 100-102, Maya Akar Centre B Blok Floor 14, Office 51, Esentepe, Istanbul	☎ +90 212 211 14 76 ✉ Istanbul@advantageaustria.org 🌐 https://www.advantageaustria.org/
SERVICES FOR BELGIAN COMPANIES		
Belgium – Luxembourg chamber of commerce in Turkey	Siraselviler Caddesi No 39 , Beyogul- Istanbul	☎ + 90 212 293 74 46 ✉ info@belgianchambers.be 🌐 https://belgianchambers.be/
SERVICES FOR BULGARIAN COMPANIES		
Bulgarian Chamber of Commerce & Industry	17, Adriana Budevaska Str. Sofia 1463, Bulgaria	☎ (+359 2) 8117 400; 987 26 31 ✉ bcci@bcci.bg
SERVICES FOR CROATIAN COMPANIES		
Croatian Chamber of Economy	Rooseveltov trg 2, 10000 Zagreb, Croatia	✉ investicije@hgk.hr ; hgk@hgk.hr 🌐 www.investincroatia.hr
SERVICES FOR CZECH COMPANIES		
Czech Chamber of Commerce	Florentinum, Na Florenci 2116/15, 110 00 Praha 1	☎ +420 266 721 300 ✉ office@komora.cz 🌐 www.komora.cz
SERVICES FOR CYPRIOT COMPANIES		
Cyprus Chamber of Commerce and Industry	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	☎ +357 22889800 ✉ chamber@ccci.org.cy
SERVICES FOR DANISH COMPANIES		
The Danish trade council in Turkey	Yukari Dikem Mahallesi , Yildiz Kule office , Ankara	☎ +90 312 408 33 00 ✉ ankamb@um.dk 🌐 https://tyrkiet.um.dk/
SERVICES FOR DUTCH COMPANIES		
Chamber of commerce of the Netherlands in Turkey	Tomtom Mah . Istikal Cad No 189 Kat: 2 Istanbul	☎ +90 212 963 10 04 ✉ info@ccnt.nl 🌐 https://ccnt.nl/
SERVICES FOR ESTONIAN COMPANIES		
Estonian Chamber of Commerce & Industry	Toom-Kooli 17, 10130 Tallinn	☎ +372 604 0060 ✉ koda@koda.ee
SERVICES FOR FRENCH COMPANIES		
Turkish- French chamber of commerce and industry	Bareli Is Merkezi K2 , Gayrettepe- Besiktas , Istanbul	✉ contacts@ifcci.com 🌐 https://www.ccift.com/
SERVICES FOR GERMAN COMPANIES		
German – Turkish chamber of commerce	Dumlupinar Bulvarı No:252 (Eskişehir Yolu 9. Km.) 06530 /Ankara	☎ +90 312 218 22 00 ✉ Info@tobb.org.tr 🌐 https://www.tobb.org.tr/

Service provider	Address	Contact information
SERVICES FOR ITALIAN COMPANIES		
Italian – Turkish association	Piazza Costello 19, Milan, Italy	✉ info@italianturkish.org 🌐 http://www.italianturkish.org/
SERVICES FOR LATVIAN COMPANIES		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	☎ +371 67225592 ✉ info@chamber.lv
SERVICES FOR LITHUANIAN COMPANIES		
Lithuanian Chamber of commerce and industry	Vašingtono sq. 1-63a, LT-01108 Vilnius	☎ +370 2613 102 ✉ info@chambers.Lt 🌐 https://chambers.lt/en/
SERVICES FOR LUXEMBURG COMPANIES		
Belgium – Luxembourg chamber of commerce in Turkey	Siraselviler Caddesi No 39, Beyogul- Istanbul	☎ + 90 212 293 74 46 ✉ info@belgianchambers.be 🌐 https://belgianchambers.be/
SERVICES FOR MALTESE COMPANIES		
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	☎ + 356 2203 2000 🌐 https://www.maltachamber.org.mt/
SERVICES FOR POLISH COMPANIES		
Polish investment and trade agency	Krucza St 50, Warsaw	☎ + 48 22 334 99 99 ✉ paih24@paih.gov.pl 🌐 https://www.paih.gov.pl/
SERVICES FOR PORTUGUESE COMPANIES		
Camara de comercio (Portuguese Chamber of commerce)	Rua Das portas de Santo Antao,89	☎ + 351 213 224 050 ✉ geral@ccip.pt 🌐 https://www.ccip.pt/en/
SERVICES FOR ROMANIAN COMPANIES		
Chamber of Commerce and Industry of Romania	Address: 2, Octavian Goga Blvd, sector 3, 030982 Bucharest	☎ +40 21 3117534 ✉ narcis.pirnaeu@ccir.ro 🌐 www.ccir.ro
SERVICES FOR SLOVAK COMPANIES		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	☎ +421 2 54433272
SERVICES FOR SLOVENIAN COMPANIES		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	☎ +386 1 5898 000 ✉ info@gzs.si
SERVICES FOR SPANISH COMPANIES		
ASEMPEA	Velazquez 37 Madrid	☎ +34 91 420 24 27 ✉ info@asempea.com 🌐 https://www.asempea.com/
SERVICES FOR SWEDISH COMPANIES		
Sweden Chamber of Commerce	Brunnsgatan 2, 111 38 Stockholm, Sweden	☎ (+46) 8 555 100 00 🌐 https://www.chamber.se/

8.4 Calendar of trade events and exhibitions 2022

Note: the ongoing issues with Covid-19 at the time of writing both resulted in various cancellations/delays without fixed rescheduling dates and may result in further changes to the calendar outlined below. In view of this:

1. Scheduled fairs which did not take place have been included with their original date, as it is generally not clear when they will be rescheduled for, and most events are anyhow recurring. It is recommended that the links provided be monitored for news on when the event or the next edition is being scheduled for.
2. It is strongly recommended to monitor the links provided for any future events to check whether they are still going ahead, and if not whether a new date has been decided.

Event	Date	Recurrence	Venue	Organiser Details
January 2022				
Anfas Food product exhibition	18 th – 21 st	Annual	Antalya Expo centre, Antalya	☎ (+90) 242 462 2000 ✉ info@anfasfoodproduct.com 🌐 https://www.anfasfoodproduct.com/
February 2022				
International conference on pharma and food	7 th – 8 th	Annual	Antalya expo centre, Antalya	☎ (+91) 876 363 01 40 ✉ Contact through website 🌐 http://academicsera.com/
March 2022				
IDMA and Victam EMEA	10 TH – 12 TH	Annual	Istanbul Expo centre, Hall 5-6-7, Istanbul	☎ (+90) 212 275 42 06 ✉ info@idmavictam.com 🌐 https://idmavictam.com/www.idmavictam.com
IBAKTECH	10 th – 13 th	Annual	Istanbul Expo Centre, Istanbul	☎ (+90) 212 284 11 10 ✉ info@messe-stuttgart.com.tr 🌐 http://ibaktech.com/
Interfresh Eurasia	31 st – 2 nd	Annual	Antalya Expo centre	☎ (+90) 242 502 00 22 ✉ info@antexpo.tr 🌐 http://www.euroasiainterfresh.com/
May 2022				
Food and nutritional ingredients expo	25 th – 27 th	Annual	Istanbul Expo centre	☎ (+90) 212 324 00 00 ✉ sales@artkim.com.tr 🌐 http://www.artkim.com.tr/
Mersin Food Fair	25 th – 29 th	Annual	Yenisehir Fair Centre, Mersin	☎ (+90) 324 341 71 11 ✉ volkan.celik@cnr.net 🌐 https://cnrmersingidafuari.com/

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Event	Date	Recurrence	Venue	Organiser Details
Olive Tech	26 th – 29 th	Annual	Fuar Izmir conference centre, Izmir	☎ (+90) 232 497 10 00 ✉ irem.guler@izmirfair.com.tr 🌐 https://olivtech.izfas.com.tr/
June 2022				
International food safety conference	9 th – 10 th	Annual - bi location	Grand Cevahir Hotel Convention centre , Istanbul	✉ contact through website 🌐 https://www.iseki-food.net/
Foteg Istanbul	9 th – 11 th	Annual	Istanbul expo centre , Istanbul	☎ (+90) 212 216 40 10 ✉ info@hkf-fairs.com 🌐 http://www.hkftradefairs.com/
September 2022				
CNR Food Istanbul	1 st – 3 rd	Annual	Istanbul expo centre , Istanbul	☎ (+90) 212 465 74 74 ✉ batuhan.unen@cnr.net 🌐 https://cnrfoodistanbul.com
World Food Istanbul	1 st – 4 th	Annual	Tuyap Fair , Convention and congress centre, Istanbul	☎ (+90) 212 266 70 10 ✉ info.turkey@hyve.group 🌐 https://worldfood-istanbul.com/

8.5 Database of professionals' contacts

8.5.1 List of relevant buyers, importers, and distributors

Company name	Type	Area of interest	Contact information
A101	Import/ Distribution	F&B	☎ (+90) 0850 808 2 101 ✉ Contact through website 🌐 https://www.a101.com.tr/
1924 Istanbul	Import/Distribution	F&B	☎ +90 0 212 243 8 360 ✉ info@1924istanbul.com 🌐 http://www.1924istanbul.com/tr/
Ani Tarim	Import/Distribution	F&B	☎ (+90) 246 334 20 20 ✉ info@anitarim.com.tr 🌐 http://www.anitarim.com.tr/
Bachivan	Import/ Distribution	F&B	☎ (+90) 0 850 532 50 03 ✉ Contact through website 🌐 https://www.bahcivanpeynir.com/
Bastagida	Import/ Distribution	Fruit and Vegetables	☎ (+90) 216 574 13 62 ✉ info@bastagida.com.tr 🌐 https://bastasgida.com.tr/
Bayla Organik Health food store	Import/ Distribution	Organic F&B	☎ +90 0532 478 09 05 ✉ Contact through website 🌐 https://balyaorganikhealthfoodstore
Baylan	Import	F&B	☎ (+90) 0212 358 07 60 ✉ Contact through website 🌐 http://baylangida.com/
Beer_Bursa	Import/Distribution	Beer	☎ (+90) 0212 243 24 05 ✉ Contact through website 🌐 https://www.instagram.com/beer_borsa/
Best French Street Food Izmir	Import/Distribution	F&B	☎ (+90) 850 224 42 52 ✉ Contact through website
Bier Garden Beşiktaş	Import	Spirits, beer	☎ +90 552 611 19 03 ✉ barisdemirel@hotmail.com 🌐 https://www.facebook.com/biergartenbesiktas/
Bim	Import/ Distribution	F&B	☎ (+90) 0216 564 03 03 ✉ Contact through website 🌐 https://www.bim.com.tr/
Bira Housa	Import/Distribution	Beer	✉ Contact through website 🌐 https://www.bira.house/
Bistrot Francais	Import	French Food	☎ (+90) 0212 243 06 03 ✉ Contact through website 🌐 https://www.bistrot.com.tr/
Businessinfo	Import	F&B	☎ (+90) 544 2277 397 ✉ Info@buisness.info.tr 🌐 https://business.info.tr/
Carrefour SA	Import	F&B	☎ (+90) 444 10 00

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Company name	Type	Area of interest	Contact information
			✉ info@carrefourSA.com 🌐 https://www.carrefoursa.com/
Catagay	Import	Pet food	☎ +90 232 479 10 91 ✉ Export@catagay.com 🌐 https://www.cagatay.com/
Cecconis Istanbul	Import/ Distribution	Italian	☎ (+90) 212 377 7180 ✉ cecconis.istanbul@sohohouse.com 🌐 https://www.cecconisistanbul.com
Cengizfruits	Import/Distribution	Fruits	☎ (+90) 535 972 04 13 ✉ info@cengizfruits.com 🌐 http://www.cengizfruits.com/
Cigdem Pastries	Import	French pastries	☎ (+90) 212 526 88 59 ✉ info@cigdempastaneri.com 🌐 https://cigdempastanesi.com/
Cihan tarim	Import/Distribution	F&B	☎ (+90) 55 45 02 10 20 ✉ info@cihan-tarim.com 🌐 https://www.cihan-tarim.com/
City Farm	Import/ Distribution	F&B	☎ (+90) 212 332 00 10 ✉ contact@cityfarm.com.tr 🌐 https://www.cityfarm.com.tr/
Comedus	Import	Wine and cheese	☎ (+90) 0212 266 5118 ✉ Contact through website 🌐 https://www.instagram.com/comeduspera/?igshid=19jo2i9ldq2js
Cupit Foods	Import/ Distribution	F&B	☎ (+90) 850 303 39 30 ✉ info@cupitfoods.com 🌐 https://www.cupitfood.com/
Decathlon	Import/ Distribution	Sport nutritional bars	☎ +90 850 500 0000 ✉ Contact through website 🌐 https://www.decathlon.com.tr/
Divan	Import	Spirits, various F&B	☎ + 62 21 55915001 🌐 http://www.casfood.co.id/
Dorian Trade	Import, storage, distribution	F&B	☎ (+90) 232 290 82 40 ✉ info@doraintrade.com 🌐 https://doraintrade.com/
Dubh Linn	Import/ Distribution	Beer and Spirits	☎ +90 312 428 58 64 ✉ Contact through website 🌐 https://www.instagram.com/dubhlinntunali/
Eataly	Import/	Italian F&B	☎ (+90) 212 336 66 00 ✉ info@eataly.com.tr 🌐 http://www.eataly.com.tr/
Fischer Restaurant Istanbul	Import/Distribution	Spirits, beer	☎ +90 0212 240 88 88 ✉ Contact through website 🌐 https://www.1931fischerrestaurant.com/
FM Trade	Import/ Distribution	F&B	☎ (+90) 537 501 18 11 ✉ fmpremium.trade@outlook.com

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			https://fmpremiumtrade.wixsite.com/
French house coffee shop	Import	French F&B	+90 530 772 3737 Info.dogukanozdag@gmail.com https://french-house.eatbu.com/
French Pet Food Shop	Import/ Distribution	French Pet food	(+90) 0546 979 07 01 Contact through website https://french-petshop.business.site/
Frenchie Ice Cream	Import	Ice Cream	+90 021 6999 0287 Contact through website https://www.instagram.com/frenchieicecream/?hl=tr
Gittigidyor	E-commerce	F&B	Contact through website https://yardim.gittigidyor.net
Godiva Turkey	Import/ Distribution	Belgian Chocolate	+90 444 62 62 Contact through website https://www.mcdonalds.com.tr/
Gold Finger	Distribution	Wine	(+90) 850 532 09 40 info@gold-finger.com.tr https://gold-finger.com.tr/
Good Life Global	Import/ Distribution	F&B	(+90) 555 8781 902 info@goodlifeglobale.store https://www.goodlifeglobal.store/
Grup Gunsa	Import	Meats	(+90) 312 428 14 40 altan@grupgunsa.com.tr https://www.grupgunsa.com.tr
Gurmania	Importer	Breads	(+90) 0216 479 22 77 info@gurmania.com.tr https://www.gurmania.com.tr/
Hazzo Pullo	Import	Beer, various F&B inc olive oil	(+90) 0212 245 55 23 Contact through website https://www.hazzopulo.com.tr/
Hepsiburada	E-commerce	F&B	+ 90 0850 252 40 00 Contact through website https://www.hepsiburada.com/
Huramat	Import/Distribution	F&B	(+90) 31 22 57 46 00 info@huramat.com https://www.huramat.com/
IKEA	Import/ Distribution	F&B	(+90) 444 4 532 Contact through website www.ikea.com.Tr
Intrade	Import/ Distribution	F&B	(+90) 392 228 73 04 info@intradecompany.com http://www.intradecompany.com/
Isabey	Import/Distribution	F&B	(+90) 232 7824 959 isabey@sevilengroup.com http://www.isabey.com.tr/
Istanbul foods	Import/ Distribution	F&B	(+90) Contact through website

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Company name	Type	Area of interest	Contact information
			hypermart.co.id
Koska	Import/Distribution	F&B	(+90) 0850 242 35 35 koska.tr@koska.com https://www.koska.com/tr
La Cave	Import/Distribution	Wines	(+90) 0212 243 24 05 lacave@lacavesarap.com https://www.lacavesarap.com/
La Gioao	Import/ Distribution	F & B	(+90) 312 426 44 88 Contact through website http://www.LaGioaoAnkara.com/
La Patisserie Lune	Import/ Distribution	French Baked goods	(+90) 212 232 62 82 Contact through website https://www.instagram.com/lapatisserie/une/
La Salsiccia	Import	German Food	(+90) 0850 2208 171 aykut.ilci@hotmail.com https://lasalsiccia.eatbu.com/
Mado	Import/Distribution	F&B	contact through website http://mado.com.tr/
McDonalds Turkey	Import/ Distribution	Processed F&B	+90 0850 201 88 72 Contact through website https://www.godiva.com.tr/
Meshin International trading company	Import/ Distribution	F&B	(+90) 21 65 04 02 26
Metro Cash and Carry	Import/ Distribution	F&B	+90 444 50 40 Contact through website https://www.metro-tr.com/
Midaz	Import/ Distribution	F&B	(+90) 212 250 20 20 Info@midaztrade.com https://midaztrade.com/
Migros	Import/ Distribution	F&B	(+90) 216 579 30 00 iletisim@migros.tr https://www.migros.com.tr/
Milano Gourmet	Import	Italian F&B	(+90) 535 206 74 49 info@milanogourmet.com.tr https://www.milanogourmet.com.tr/
Mild Chocolate	Import/Distribution	Chocolate and confectionery	+ 90 232 465 27 18 yusef.nahmiyas@mildchocolate.com https://mildchocolate.com/
Moose Chocolatier	Import/Distribution	Chocolate and confectionery	+ 90 0850 346 66 73 info@moosechocolatier.com https://www.moosechocolatier.com/
Murat Wine House	Import	Wines	(+90) 0552 85 84 Contact through website https://by-murat-sarap-evi.business.site/
New Silk Road	Import/ Distribution	F&B	(+90) 236 433 19 19 Contact through website https://www.toprakzeytin.com.tr/

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Company name	Type	Area of interest	Contact information
Olea Pizzeria	Import/ Distribution	Italian	☎ (+90) 212 252 2754 ✉ info@oleapizzeria.com 🌐 http://www.oleapizzeria.com/
Petzshop	Import/ Distribution	Petfood	☎ (+90) 0850 242 35 35 ✉ m1@petzshop.com 🌐 https://www.petzshop.com/
Pio Gastro Bar	Import/Distribution	F&B	☎ (+90) 0242 247 6015 ✉ Contact through website 🌐 https://piogastrobistro.com/
Pizzeria Pera	Import/ Distribution	Italian	☎ (+90) 212 243 8643 ✉ Contact through website 🌐 https://www.pizzeriapera.com/
Que Tal Restaurant Istanbul	Import	Spanish beer and spirits	☎ +90 212 244 41 49 ✉ Contact through website 🌐 http://www.quetalbar.net/
Ritz Carlton Istanbul	Import	Luxury EU goods	☎ +90 2123344444 ✉ Contact through website 🌐 https://www.ritzcarlton.tr
Sensus Wines	Import	Wines	☎ (+90) 212 245 5657 ✉ Contact through website 🌐 https://sensuswine.com/
Sheffield Pub	Import/Distribution	F&B	☎ (+90) 242 244 04 00 ✉ Contact through website 🌐 https://www.facebook.com/sheffieldpub
Şok	Import/ Distribution	F&B	☎ (+90) 0850 808 00 00 ✉ Contact through website 🌐 https://kurumsal.sokmarket.com.tr/
Starbucks Turkey	Import/ Distribution	F&B	✉ infostarbucks-tr@alshaya.com 🌐 https://www.starbucks.com.tr/
Subway Turkey	Import/Distribution	F&B	✉ Contact through website 🌐 https://www.subway.com/en-tr
Terra Trade	Import/Distribution	F&B	☎ (+62) 21 5140 28281 ✉ customerservice@pacificplace.co.id 🌐 https://www.pacificplace.co.id/
The Harp Irish pub	Import/Distribution	Spirits, beer	☎ +90 0232 754 73 23 ✉ Contact through website 🌐 https://theharpirishpuburla.business.site/
The Irish Pub Izmir	Import/Distribution	Spirits, beer	☎ +90 0232 336 19 77 ✉ Contact through website 🌐 https://molly-rish-pub.business.site/
The Istanbul Butcher	Import/Distribution	F&B	☎ + 0216 302 34 34 ✉ Info@theistanbulbutcher.com 🌐 https://theistanbulbutcher.com/
Trendyol	Import/E-commerce	F&B	☎ (+90) 212 331 0 200 ✉ Pr@Tendyol.com 🌐 https://www.trendyol.com/

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Company name	Type	Area of interest	Contact information
Tugider	Import/ Distribution	F&B	☎ +90 0212 347 25 60 ✉ tugider@tugider.org.tr 🌐 http://www.tugider.org.tr/
Tumen Tarim	Import/ Distribution	F&B	☎ (+90) 454 00 88 ✉ kerem@tumen-tarim.com 🌐 http://tumentarim.com/
U2 Irish Istanbul pub	Import/ Distribution	Irish – European Alcoholic beverages	☎ +90 212 243 4045 ✉ u2istanbul@gmail.com 🌐 http://www.u2istanbulirishpub.com/
Vamos Istanbul Café	Import	F&B	☎ +90 0 544 721 92 92 ✉ Contact through website 🌐 https://www.vamosestambulrestaurant.com/
Win Agro Trade	Distribution	F&B	☎ (+90) 21 66 06 49 46 ✉ Contact through website 🌐 http://www.winagro.com.tr/
Wine up	Import/Distribution	F&B	☎ (+90) 0242 317 60 40 ✉ rezervasyon@wineupconcept.com 🌐 http://www.wineupconcept.com/
Yadiz holdings	Import/Distribution	Biscuits and cereal bars	☎ (+90) 0216 524 39 00 ✉ Contact through website 🌐 www.yildizholding.com.tr

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