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Report Highlights:

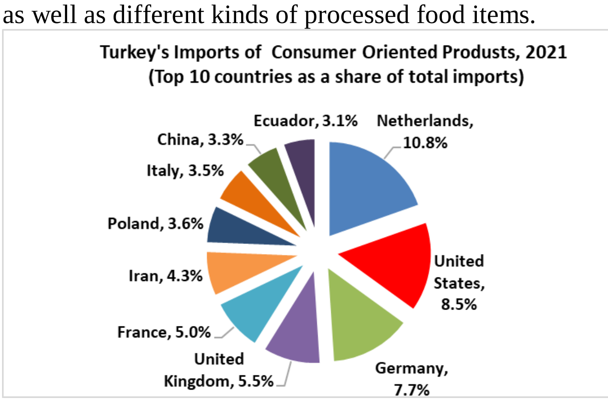
Turkiye is among the world's leading economies and home to a young, mostly urban population of 85 million people. This dynamic has fueled the country's rising demand for consumer-oriented agricultural products. In the last couple years, however, this demand has been tempered somewhat by geopolitical dynamics and persistent economic challenges, most notably record inflation and the steep depreciation of the Turkish Lira against the U.S. dollar. Notwithstanding these and other trade-related challenges, there are a wide range of export opportunities for U.S. agricultural products. This report provides a blueprint for identifying and capitalizing on these opportunities.

Executive Summary

Turkiye is the 23rd largest economy in the world, an urbanized upper-middle-income country with a relatively young population of 85 million people. The country's growing middle-class is fueling demand for consumer-oriented agricultural products. The country has a Customs Union with the EU and is the 23rd largest economy in the world. Though the Turkish economy stagnated recently, an annual average GDP growth rate of 3.9 percent is forecasted by the IMF between 2021 to 2025. In most cases, U.S. food exporters should utilize importers in Turkiye to penetrate the market.

Imports of Consumer-Oriented Agricultural Products

European Union (EU) countries are the major suppliers of consumer-oriented agricultural products to Turkiye, having the advantage of proximity and Customs Union duty rates. Turkiye imports a range of consumer-oriented products such as rice, pulses, fruit, tree nuts, coffee, fish, as well as different kinds of processed food items.



Food Processing Industry

Turkiye has a large and sophisticated food and beverage processing industry, made up of nearly 53,000 companies, which collectively account for 15 percent of the country's total manufacturing output. The food processing industry relies on domestic and imported ingredients to manufacture finished products for local and export market continues to grow in response to strong consumer demand for increased convenience, accounting for 15 percent of total manufacturing in Turkiye.

Food Retail Industry

Turkiye's food retail industry continues to grow, especially discount and online sales as consumers look to reduce costs while maximizing convenience. In 2021, retail food sales increased $1 billion year-over-year to $76 billion, due to steady demand and higher food prices. The sector is primarily made up of domestic modernized retailers, especially in larger cities. In the last decade, several foreign grocery chains have exited the market due to tough competition from domestic outlets.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2021

US $3.9 billion

List of Top 10 Growth Products in Turkey (Imported Consumer Oriented Agricultural Products) 2019-2021

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

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

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

*excl. sales tax

Top 10 Retailers (by Marketshare in 2021)

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

GDP/Population 2021

Population: 84.7 million (TurkStat, Year-end 2021)
GDP: USD 812 billion (2021)
GDP Per Capita: USD 9.581 (2021)

Strengths/Weaknesses/Opportunities/Challenges

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

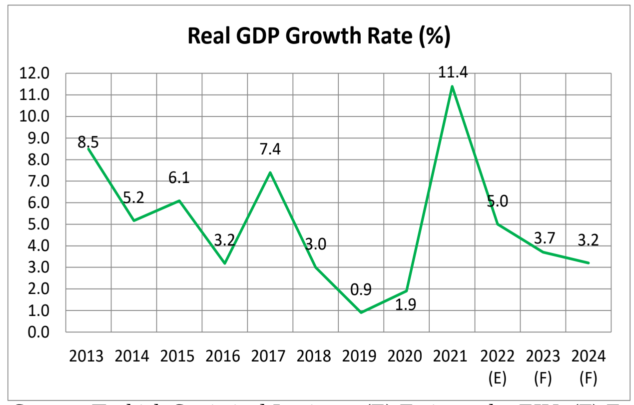
Sources: CIA World Fact Book; Euromonitor International; Turkish Statistical Institute, Economist Intelligence Unit

Contact: Office of Agricultural Affairs, U.S. Embassy Ankara

I. MARKET OVERVIEW

The Republic of Turkiye is located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea on the north and the Mediterranean Sea on the south. The country has a young population of 85 million, with a median age of about 32 years.[1] Turkiye has rapidly urbanized over the last two decades, with more than three-quarters of the population now living in urban areas. This mostly young, urban population, along with a growing middle class are among various factors contributing to increased consumption of consumer-oriented agricultural products. However, the country's challenging economic conditions during the last few years have tempered this upward trend in consumption.

Chart 1: Real GDP Growth Rate

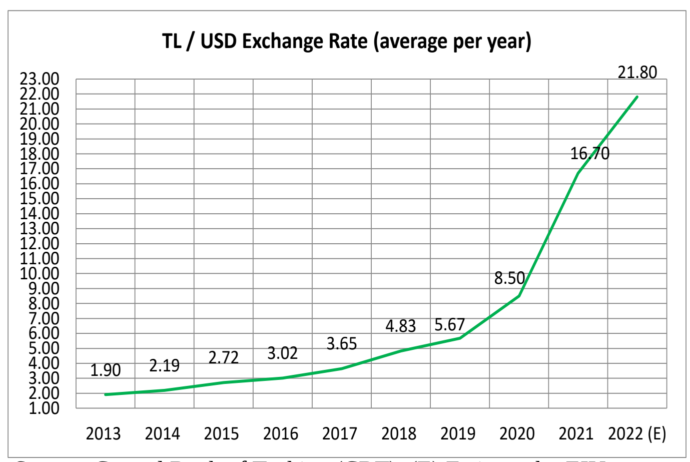


Source: Turkish Statistical Institute. (E) Estimate by EIU. (F) Forecast by EIU.

According to the International Monetary Fund (IMF), Turkiye was the 23rd largest economy in the world in 2021. The country's Gross Domestic Product (GDP) is forecast at 5 percent in 2022, down from the previous year's high of 11 percent as the economy returns to a more normal growth rate.

In the coming years, the pace of future economic growth is expected to slow in part due to the effects of the Government of Turkiye's (GoT) unorthodox market interventions, high inflation, and continued threats of a global economic slowdown. A few other factors that could influence the future macroeconomic outlook are the upcoming presidential election; geopolitical developments; and limits on certain domestic freedoms.

Chart 2: TL/USD Exchange Rate



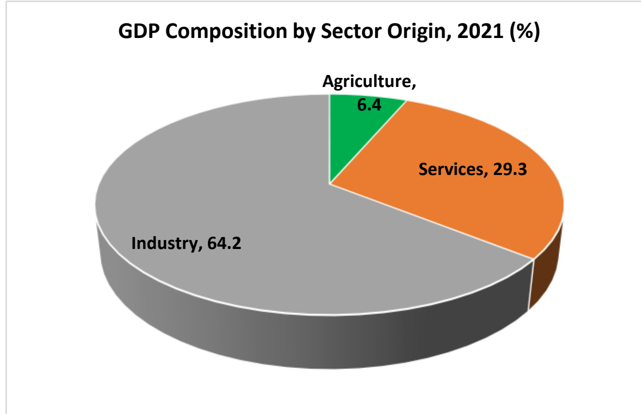
Source: Central Bank of Turkiye (CBT). (E) Estimate by EIU.

The GoT seeks to attract foreign direct investment (FDI) to spur economic growth in different sectors of the economy, including agro-processing. FDI levels have been historically low because of inconsistent economic policies and concerns about rule of law enforcement. In recent years, there has been an increase in investments from Gulf countries. See the State Department's [2022 Investment Climate Statement] for more information about the overall business climate in Turkiye.

The Turkish economy continues to struggle with record inflation. Food prices have doubled over the last year. The cost of fuel, electricity, rent, and other living expenses have all likewise increased to record levels. At the same time, inflation and the country's unorthodox macroeconomic policies have eroded the value of the Turkish Lira (TL), which has lost more than 150 percent of its value against the U.S. dollar (USD) since the beginning of 2021. In the face of high prices, many consumers have scaled back on discretionary purchases and changed their eating patterns to get by.

[1] World Bank mid-year estimate for 2021.

Chart 3: Composition of GDP



In 2021, the agriculture sector represented about 6 percent, or $52 billion, of Turkiye's total GDP. This sector depends on domestic and imported agricultural products to fuel its food processing and manufacturing companies. Preferential trade arrangements allow certain imports to come in at lower duties, especially processed food products from Europe, which is Turkiye's largest trading partner.

As an Associate Member of the European Union (EU), Turkiye is aligning many of its regulations with the EU. Turkiye is also part of the Customs Union with the EU which allows preferential access for processed food imports, but not primary agricultural products. In addition, Turkiye has Free Trade Agreements with the European Free Trade Association countries as well as 21 other countries. These preferential trade arrangements along with Turkiye's retaliatory Section 232 duties on select U.S. agricultural products makes it difficult for certain items to compete in the market.

Table 1: Important Socio-economic Parameters for Turkiye	
Parameter	**Value**
Population	85.1 million (2021)
Median Age	33.1 (2021)
Labor Force (ages 15-64)	57.5 million (2021)
Unemployment Rate (ages 15-64)	12 percent (2021)
Unemployment Among Youth* (ages 15-24)	22.8 percent (2021)
GDP	USD 812 billion (2021)
GDP per Capita	USD 9,581 (2021)
Trade Balance	USD -29 billion (2021)
Tourists (# of foreign citizens entering)	25 million (2021)
Inflation – CPI year-end	36.08 percent (2021) [84.39%, Nov. 2021]
Exchange Rate (end of period)	12.96 TRL/USD (2021) [18.64 TRL/USD, Dec. 2022]
Number of Companies with Foreign Capital	78,257 (Total as end of 2021)
Major Export Markets (all products)	Germany (9.5%), UK (6.7%), USA (6.0%), Iraq (5.3%), Italy (4.7%), France (4.2%), Spain (4.0%), Netherlands (3.1%), Israel (2.8%), Russia (2.6%) (2020)
Major Import Sources (all products)	China (10.4%), Germany (9.7%), Russia (8.0%), USA (5.6%), Italy (4.1%), Iraq (3.9%), Switzerland (3.1%), France (3.1%), South Korea (3.7%), UAE (2.6%) (2020)
Major Cities	Istanbul (15.7 m), Ankara (5.7 m), Izmir (4.4 m), Bursa (3.1 m), Antalya (2.6 m), Adana (2.3 m), Konya (2.3 m), Sanliurfa (2.1 m), Gaziantep (2.1 m), 15 other cities over one million population (2021)

ADVANTAGES	CHALLENGES
Long-term growth in GDP and disposable income.	Unorthodox economic policies as well as domestic and international political challenges undermine economic stability. Exchange rate fluctuations and increasing inflation.
Strong and steady retail market, as well as more dual income households, drives new demand for processed, frozen, prepared food and ingredients.	Artisan domestic products such as baked goods and cheese utilize domestic ingredients and have strong existing relationships with ingredient suppliers.
Large population base: young and growing, middle and upper middle class are growing.	Lack of transparency in rules and regulations.
High and increasing urbanization rate; increasing rates of female participation in work force.	High import duties on processed/packaged food and agricultural products.
A growing market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry that requires a wide range of ingredients inputs. The industry is also open to new ingredients, like additives and processing aids.	Importing can be complex: Time-consuming and non-transparent import procedures.
An internationally savvy new generation of Turks are more open to new tastes from abroad.	Strong traditional food and cuisine affecting consumption habits.
Growing demand for high value packaged food; ready to-eat/cook meals as the share of working women increases.	The Turkish industry has developed many western-origin products domestically, such as packaged confectionery products and ready-to-eat meals.
Fast-growing modern, organized grocery chains.	Unregistered economy can create unfair competition.
Positive perception for products from the United States.	No genetically engineered products or ingredients are approved for food use in Turkiye.
Strong food culture and a tradition of gathering for meals in large groups, so new products fitting into the existing food culture and eating habits are easily adopted.	Marketing for some products can be difficult: Labeling laws limit health-related claims, and regulations limit alcohol advertising.
Many regulations are similar to those of the EU, so expansion to Turkiye can be easier for companies already exporting to Europe.	Competition from many products imported under FTAs or European countries with lower tariffs. Retaliatory Section 232 taxes on select U.S.- origin agricultural products remain in effect.

II. EXPORTER BUSINESS TIPS

a. MARKET RESEARCH

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

b. LOCAL BUSINESS CUSTOMS & TRENDS

After conducting market research and determining that there is a potential market in Turkiye for the food/agricultural item that you are exporting, it is important to develop a good strategy for market entry while considering the local business customs. As part of that strategy, it's critical to invest in developing business relationships. Relationships are very important for transacting business and getting things done. Turkiye is a country with a business culture and people that is somewhat like Southern/Western European countries/cultures; on the other hand, it has many qualities taken from Middle Eastern/Islamic cultures and Central Asian, Turkic cultures. Business life and habits are all affected from the mix of cultures and traditions, so it is important to understand your counterparts.

In most cases, a local business partner is very useful to understand the culture context. Some points to consider are as follows:

- Dress well for business meetings, especially if it is the "getting to know each other" stage. Overdress if not sure what to wear. Dress conservatively if not sure. Shorts, sandals and sportswear are not taken well in business environments, especially for men, even in southern beach cities.
- Punctuality is taken more seriously compared to Mediterranean and Middle Eastern cultures. Standard time is three hours ahead of Greenwich Mean Time (GMT). Turkiye has not observed daylight savings time since 2016.
- Take Turkish and Islamic holidays into consideration. Although business is conducted at all times, it is smart to consider the Islamic holy month of Ramadan and avoid events during the two major Bayram religious holidays and Turkish Republic Day. It is important to judge how much value your counterpart attaches to these days. If unknown, err on the side of caution to avoid serious offense.
- Family is important in Turkiye; the superiors in the company are often seen as father/mother figures that need to take care of the employees in many senses.
- Turkish people take pride in their rich history and cultural heritage. Try to learn something about Turkish/Ottoman history.
- Turkish people are also proud of their rich and varied cuisine. When you try Turkish food, compliments are appreciated.

- Turkish coffee and tea have a special role in Turkish culture and also in business meetings. They will be offered at the start of a meeting as a courtesy. It is polite to accept one of those beverages when offered or ask for a glass of water.
- Turkish businesspeople prefer to work with people they know and trust on a personal level. In-person meetings and business lunches and dinners are important to build personal and business relationships; it is a good sign when invited. Try to accept when possible. These relations will affect business opportunities.
- Almost everything is taken personally. There is a very fine line between personal and business matters.
- In Turkish culture, it is important to take good care of business guests (as they do with personal guests), especially foreign ones. Reciprocity is expected and taken as a positive indicator when done properly.

c. GENERAL CONSUMER TASTES & TRENDS

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

According to Post's observations, thanks to the same demographic group, healthy, functional, and organic food sectors are growing as well. Consumers are becoming increasingly educated about and aware of the quality, nutritional value, and packaging of their food. They tend be more aware of the food safety and expiration date of the foods they consume compared to a few decades ago. Except for those at higher income levels, Turkish consumers are generally price sensitive, which has contributed to the rise of discount retailers and private label brands.

III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

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

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

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

b. COUNTRY LANGUAGE LABELING REQUIREMENTS

On January 26, 2017, the Ministry of Agriculture and Forestry published two separate regulations: The "Turkish Food Codex Regulation on Food Labeling and Provision of Information to Consumers" (available here in Turkish) and "The Turkish Food Codex Regulation on Nutrition and Health Claims" (available here in

Turkish). As with the prior versions of the regulations, these were prepared in parallel to the relevant the EU Directives and Regulations within the framework of EU harmonization.

Please have a look at the Section II of our Food and Agricultural Import Regulations and Standards Report if you need details on labeling requirements. In general, most labeling requirements can be met with a sticker affixed to the outside packaging of imported processed food with the appropriate information available in Turkish.[2]

c. TARIFFS and FOREIGN TRADE AGREEMENTS (FTAs)

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

Turkiye is in a Customs Union with the EU. In addition, Turkiye has active Free Trade Agreements with European Free Trade Association (EFTA) Countries (Norway, Liechtenstein, Iceland, Switzerland) and 21 other countries. Furthermore, FTAs with Lebanon, Sudan and Qatar have been signed but not ratified yet.

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

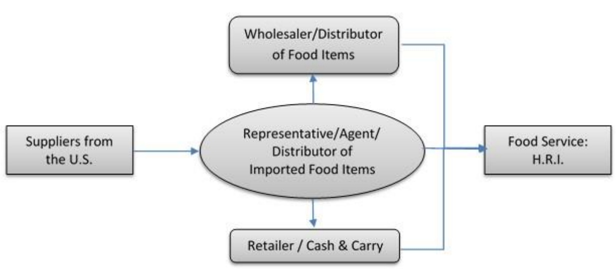
d. TRADEMARKS and PATENTS

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

IV. MARKET SECTOR STRUCTURE and TRENDS

e. SUPPLY CHAIN & PRODUCT FLOW

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



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

f. RETAIL FOOD SECTOR

Despite the political and economic challenges that Turkiye is facing in recent years, the food retail industry has been growing due to a young, dynamic population with a 77 percent urbanization rate and a growing middle class. The grocery retail sector had been growing for the last decade up until the recent economic slowdown that began in 2018. Grocery retail sales were $76 billion in 2021, which constituted 55 percent of all retail sales

[2] Nevertheless, each product should be examined, and a decision of packaging and labeling should be made separately.

through approximately 346,000 organized and unorganized grocery retailers. The number of discount chains have been growing for the last five years with their private label products. Several foreign market chains have left the market in the past decade, leaving the stage mostly for domestic chains. Although still limited in sales, there is an increasing demand for imported processed food. There is also an increasing trend of online shopping for groceries in major cities, especially in larger cities like Istanbul, Ankara, Izmir, and Bursa as the number of companies that offer online ordering and delivery increase. There was a major boost to grocery e-commerce in 2020 due to COVID-19 restrictions and the trend in online grocery sales continues. In the last couple years, record food inflation has impacted consumer buying behavior.[3] Please read our Retail Foods Report for detailed analysis of the sector.

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

Turkey's HRI sector continues to recover after being hit hard by the COVID-19 pandemic. Even by the end of 2021, as pandemic restrictions were starting to ease, HRI both sales in U.S. dollar terms and the number of food service outlets remained below pre-pandemic levels. The pandemic spurred increased demand for restaurant home delivery service. This trend is expected to continue as consumers increasingly desire greater convenience.

Rising inflation and a depreciating currency has increased operational costs (e.g., rent, electricity, labor) for food service companies in Turkiye, forcing them to raise their sales prices. At the same time, persistent inflation has eroded consumers' buying power, causing them to switch to cheaper dining-out options, such as fast food and street stalls. One reason fast-food companies weathered the pandemic better than family-style restaurants was because they could efficiently deliver food to customers' doorstep at a low cost.

Altogether, in 2021, there were about 123,000 commercial food service locations throughout the country, a 13 percent increase from 2020. Five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises. Please read our Food Service: HRI Report for detailed analysis of the sector.

h. FOOD PROCESSING SECTOR

Despite the geopolitical and economic difficulties, the food processing industry is still one of the largest industries in Turkiye. There are nearly 53,000 food processing and 657 beverage products enterprises in Turkiye as of 2020. The food processing industry constitutes approximately 15 percent of all production industries. Despite current economic headwinds, the processed food industry is expected to continue growing in the coming years. Much of this growth will be fueled by several demographic trends, including continued urbanization, a large young population, an increase in the number women in the workforce, a rising number of college students, and an increasing number of single-person households. Even though U.S. processed foods and food processing ingredients face strong competition from local suppliers and from European countries, there are still market opportunities for U.S producers. Please read our Food Processing Ingredients Report for more details.

[3] As declared by Turkish Statistics Institute, annual CPI inflation is 84.39 percent and CPI food & non-alcoholic beverages annual inflations is 102.55 percent.

V. AGRICULTURAL and FOOD IMPORTS

a. AGRICULTURAL & FOOD IMPORT STATISTICS

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

	Thousands of USD	2017	2018	2019	2020	2021	2022*
	Total	403,783	424,879	391,297	359,873	332,543	448,680
1	Almonds, Fresh Or Dried, Shelled	67,853	82,596	76,895	95,555	86,764	103,795
2	Walnuts, Fresh Or Dried, In Shell	107,114	109,880	86,718	82,069	74,849	72,637
3	Food Preparations Nesoi	32,744	38,567	24,773	41,856	46,455	38,079
4	Almonds, Fresh Or Dried, In Shell	66,769	33,515	42,218	38,861	26,934	27,478
5	Pistachios, Shelled, Fresh Or Dried	11,566	56,081	67,956	9,879	22,847	93,838
6	Pistachios, In Shell, Fresh Or Dried	18,357	15,908	15,233	10,230	16,092	49,215
7	Whiskies	20,660	22,362	14,458	15,096	11,934	12,480
8	Chicken Cuts & Edible Offal, Frozen	31,604	26,030	22,261	17,767	9,221	16,690
9	Eggs Of Chickens, Fertilized For Incubation	3,425	3,176	2,558	1,243	3,575	2,531
10	Tea Or Mate Extracts/Essences/Concentrates & Preps	3,346	3,434	1,932	2,899	3,543	1,713
11	Walnuts, Fresh or Dried, Shelled	3,381	793	550	1,624	3,303	4,520
12	Other Non-alch. Beverages (except water & non-alch. beer)	689	1,241	1,982	1,926	2,840	1,994
13	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	982	894	677	827	1,944	2,912
14	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	949	1,338	2,051	2,050	1,635	1,355
15	Sauces Etc. Mixed Condiments And Seasonings Nesoi	1,280	1,319	1,427	920	1,617	1,768
	Others Consumer Oriented Agricultural Products	33,065	27,745	29,607	37,073	18,989	17,675

Source: Trade Data Monitor, LLC.
* 2022 data is for the first ten months only (Jan. – Oct.)

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

	Thousands of USD	2017	2018	2019	2020	2021	2022**
	Total	1,980,918	1,824,034	1,338,942	1,342,102	1,508,088	2,002,952
1	Cotton, Not Carded or Combed	734,552	729,118	646,488	590,778	566,167	1,094,307
2	Brewing or Distilling Dregs And Waste, W/Nt Pellet	266,798	224,224	127,772	161,594	281,585	155,989
3	Soybeans, Other Than Seed	165,598	108,058	0	0	129,715	137,012
4	Soybean Oilcake and Other Solid Residues Resulting From the Extraction of Soy Bean Oil	32,365	14,918	0	1	17,625	52
5	Ethyl Alcohol, Undenatured, Strength by 80% vol. or Higher	0	1	2,077	8,048	12,476	5,422
6	Residues of Starch Manufacture and Similar Residues	39,406	19,160	22,146	5,583	11,275	0
7	Cattle, Live, Purebred Breeding	4,184	10,550	0	0	10,842	4,684
8	Wood In Chips or Particles, Coniferous	90,627	91,067	18,098	17,150	10,837	25,974
9	Corn (Maize) Oil and Its Fractions, Crude	15,202	14,340	8,725	14,165	9,464	0
10	Animal Feed Prep. Except Dog or Cat Food for Retail Sale	12,043	13,911	12,657	11,208	8,714	12,402
11	Tobacco, Partly or Wholly Stemmed/Stripped	51,273	56,117	16,227	18,909	7,775	5,822
12	Ethyl Alcohol & Other Spirits, denaturated, any strength	3,432	0	0	31,535	6,770	1,198
13	Vegetable Seeds for Sowing	7,051	6,095	5,537	8,383	6,698	5,954
14	Veneer Sheets And Sheets For Plywood, Etc., Not Over 6 mm Thick, Of Nonconiferous Wood, Nesoi	4,436	4,824	4,944	5,452	6,020	5,887
15	Wood in the rough, even peeled, or roughly squared, treated with paint, creosote or other preservatives, non-coniferous	1,417	2,227	1,616	3,443	5,439	7,235
	Other Agricultural & Related Products	552,536	529,426	472,654	465,854	416,685	541,013

Source: Trade Data Monitor, LLC.
* Data for *Consumer Oriented* Agricultural Products is not shown in this table since it has been listed in Table 1 above. However, the total in the table includes Consumer Oriented Agricultural Products.
** 2022 data is for the first nine months only (Jan. – Sept.)

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

Tree nuts, functional foods, sauces, gourmet/ethnic food ingredients, spices, certain dried fruits, and wine and non-alcoholic beverages are among the best high-value consumer-oriented food products with market potential. Please see our Retail Foods Report for more details.

VI. KEY CONTACTS and FURTHER INFORMATION

Turkish importers, agents, or distribution companies typically attend large trade shows such as Anuga in Germany, Sial in France, Gulfood in Dubai and Seafood Expo Global in Spain. Food trade shows in Turkiye can be helpful to visit before deciding to enter the market and promoting a product. Anfas Food Product, World Food Istanbul, CNR Food Istanbul, IbakTech, Sirha Istanbul, Ekoloji Izmir Exhibition, Gourmet Izmir OliveTech Exhibition, Future Fish EuroAsia and Food Ingredients Fi Istanbul are good shows to visit and excellent opportunities to meet importers.

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

Office of Agricultural Affairs United States Department of Agriculture U.S. Embassy Ankara 1480 Sokak No:1, 06530 Cukurambar, Ankara, Turkiye Telephone: +90 312 455 5555 E-mail: agankara@usda.gov	Office of Agricultural Affairs United States Department of Agriculture U.S. Consulate General Istanbul Ucsehitler Sokak No:2, Istinye, 34460 Istanbul, Turkiye Telephone: +90 212 335 9068 E-mail: agistanbul@usda.gov

Useful Links to Government & Industry Organizations

Republic of Turkiye, Ministry of Agriculture and Forestry (MinAF)

Union of Chambers and Commodity Exchanges of Turkiye (TOBB)

Foreign Economic Relations Board of Turkiye (DEIK)

Investment Support and Promotion Agency of Turkiye (ISPAT)

All Foods Foreign Trade Association (TUGIDER)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

Association of Food Additives and Ingredients Manufacturers (GIDABIL)

Federation of All Food and Drink Industry Associations of Turkiye (TGDF)

Federation of Food Industrialists Associations (YESIDEF)

All Foods Foreign Trade Association (TUGIDER)

Turkish Federation Retailers (TPF)

Food Retailers Association (GPD)

Istanbul Retailers Association

Turkish Restaurant and Entertainment Association (TURYID)

Istanbul Food Industrialists Association (IYSAD)

Out of House Consumption Association (ETUDER)

Turkish Tourism Investors Association (TTYD)

Hotel Association of Turkiye (TUROB)

Turkish Small Hotels Association

All Restaurants and Restaurant Suppliers Association (TURES)

Association of Turkish Travel Agencies (TURSAB)

Turkish Statistics Institute (TurkStat)

Attachments:

No Attachments