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## **Turkey**

### **Exporter Guide**

#### **2016 Exporter Guide to Turkey**

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**Report Highlights:**

This Exporter Guide to Turkey will provide an overview of the market situation and how to access the agriculture and food export opportunities in Turkey as well as provide resources and contacts for further detail and information. The Turkish market is large and very dynamic, with interest in new food products, yet also very competitive. Despite Turkey's growing market, ongoing political and economic instability have slowed growth for 2016 and are forecast to impact 2017 as well.

# Exporter Guide to Turkey

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## **SECTION I. MARKET OVERVIEW**

With a population of 78.7 million and a median age of about 30 with a high consumption potential, Turkey is a prominent emerging market for U.S. agricultural products. With a Gross Domestic Product (GDP) of \$720 billion in 2015, Turkey is the 18th largest economy in the world. A young population, rising middle-class incomes, a culture of spending (not saving), and rising female labor force participation are driving Turkish consumerism.

Though Turkey experienced rapid growth in recent years, the Turkish economy is expected to slow down in 2016, with estimates of 3.3 growth percent in 2016 and 3.0 percent in 2017, according to International Monetary Fund projections. Although GDP per capita has grown from US \$4,500 in 2003 to US \$10,700 in 2013, GDP per capita was just \$9,200 in 2015 due to domestic currency depreciation.

The Turkish Lira (TL) has declined considerably against the U.S. dollar in recent years, thereby increasing the costs of imported goods. One U.S. dollar bought 2.34 TL on January 1, 2015, 2.92 TL on January 1, 2016, and is now over 3.50 TL in early December 2016. November 2016 was particularly volatile, starting at a rate of 3.11 TL on November 1 and reaching 3.44 TL by the end of the month.

The proportion of household expenditures spent on food was 20.2 percent in 2015. While in general the proportion of expenditures on food and beverages has declined in the last decade, the proportion of expenditures on restaurant and hotels has grown 50 percent over the same period. The proportion of household expenditures spent on restaurant and hotels was 6.4 percent in 2015, according to Turkstat. While the share of food expenditures of households whose main source of income is salary and wages was 18.5 percent in total expenditures, the same ratio was 24.5 percent for the households whose main source of income is pensions. Also purchasing power parity of Turkey was 1.27 in 2015, and was 1.16 in 2014, according to OECD data.

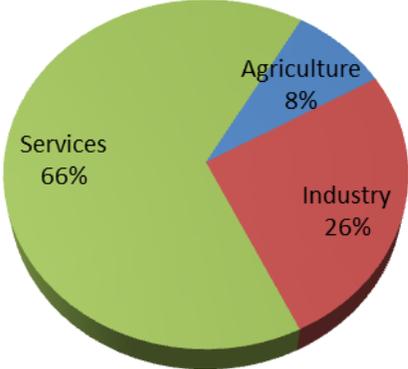
Following the coup attempt on July 15, 2016, the Turkish government declared a State of Emergency, removed thousands of civil servants from their government positions, and seized businesses which had a suspected connection with the organization the Turkish government believes to be behind the coup attempt. The State of Emergency and subsequent dismissals have interrupted some government

operations and processes. However, the State of Emergency has had a relatively small overall impact on the agriculture and food retail sector.

Turkey is undergoing rapid urbanization, and the rate of urbanization has reached 92.1 percent, up from 77.3 percent in 2012 and 64.9 percent in 2000. The main reason of the recent jump in these figures is related to the definition of "province and district centers" and "towns and villages" which changed in the law in 2013. The population in large cities such as Istanbul, Ankara, Izmir and Bursa has increased 10 percent over the last ten years. Consequently, one-third of the total retail sector is located in these cities. Although annual growth rate of the population is 1.3 percent, the annual growth rate of the urban population is 1.7 percent.

The agriculture sector represents the eight percent of total GDP, which equals about \$5.7 billion. The chart below shows the distribution of these categories.

**Figure 1: GDP – Composition, by Sector of Origin 2015**



Source: The Word Fact Book

Although Turkey is surrounded by politically and economically unstable countries, stubborn economic growth and rising incomes have sparked an expansion in consumer products in recent years, including higher quality and new flavors in the food and beverage sector. Household income is expected to appear to decrease due to the devaluation of the local currency, the Turkish Lira, in 2015, as income in lira has not adjusted to the new dollar standards.

The retail sector is projected to grow more than the country’s general economic performance in the upcoming five years, and food retail is expected to register an average of eight percent annual growth in the same period - see the [2016 FAS Retail Foods Report](#). The average growth rate of the restaurant and tourism sector is expected to slow - see the FAS 2016 Food Sector - Hotel Restaurant Institutional Report.

The percentage of women in the labor force continues to increase, which leads to increased demand for consumer-ready food products. Additionally, urban women in particular are shifting to healthier lifestyles for themselves and their children and are thus shifting their food consumption patterns to a

more health-conscious style. These trends are also impacting food distribution and food consumption in restaurants and hotels. This drives sales of imported and usually higher value products.

**Table 1: Country Parameters for Turkey**

Parameter	Value
Population	78.7 million (2015)
Labor Force (Population)	29.7 million (2015)
Median Age	31 (2015)
GDP	USD 720 billion (2015)
GDP Per Capita	USD 9,257 (2015)
Exports Value	USD 151.9 billion (2015)
Imports Value	USD 200.1 billion (2015)
Tourism Revenue	USD 31.4 billion (2015)
Tourist Number	35.6 million people (2015)
Foreign Direct Investment	USD 11.9 billion (2015)
Number of Companies with Foreign Capital	46,800 (2015)
Inflation Rate	8.8% (CPI – 2015)

Source: TurkSTAT, 2016

**Table 2: Advantages and Challenges of Entering the Turkish Market**

Advantages	Challenges
The movement of people from rural to urban areas continues at a rapid pace.	With a growing population of more than three million refugees, the decrease of tourism, unrest in some parts of Turkey and regional hazards, safety concerns are increasing and reducing demand from the tourism sector.
Rising household incomes are creating new marketing opportunities, though rapid growth of the past is tapering.	Significantly higher shipping costs and transportation time from the United States than Black Sea countries, Europe, Asia, and Oceania.
High export potential due to geographic proximity to EU, Russian, and Middle Eastern markets.	EU exporters enjoy lower transportation costs, and faster market access to Turkey due to geographical proximity.
The growing food processing industry is looking for new, high quality, imported food ingredients.	Phytosanitary and technical barriers and labeling requirements can cause border crossing problems and delays as Turkish import regulations can change rapidly and without notice.
Recognition of high quality product and growth of high end retail to support new product marketing.	The U.S. dollar appreciated 20 percent against the Turkish lira this year, making American goods comparatively more expensive than in previous years.
A young and urban population creates demand for and welcomes new products as they are open to try novel tastes.	Many Turkish consumers are price sensitive; imported products in general are higher in price.

Most importers can speak English	State of Emergency in place and rumors that EU-Turkey Accession Negotiations may be suspended, both of which cause uncertainty.
International retailers that market a wide range of imported products in the sector have great influence on purchasing patterns.	The Biosafety Law prevents all GE (genetically engineered) products for food purposes from entering Turkey. This affects many products with ingredients that have a possibility of being genetically engineered.
Some U.S. products (mainly bulk and intermediate commodities) are better priced than local products, though this is dependent upon currency fluctuations.	Laws governing the food sector are mostly focused on protecting local production rather than promoting trade, which can be overwhelming for both the importer and the exporter. In addition, regulations can be unclear, complex, and they may not be implemented uniformly.
As the processed food market continues to grow, so does the demand for food ingredients and they are mostly imported.	In the retail stores, competition for shelf space has led to higher costs for introducing new products.
Franchising has been introduced and the retail food sector is transitioning to a more modern structure with a growing number of Western-style fast food restaurant chains, bakeries, and coffee shops.	High store rents charged by shopping malls lead to high costs for introducing new products.

The Republic of Turkey is a complex and challenging market requiring adaptability and persistence. Careful planning and patience are the keys to success in Turkey. U.S. exporters face many of the same challenges that exist in other semi-developed countries, such as contradictory policies, a lack of transparency in regulations and documentation requirements, and an unpredictable judiciary, legal, and regulatory framework.

The currency is the Turkish Lira (TL) which is above 3.02 TL/\$1 in September 2016 and reached 3.50 TL/\$1 in early December 2016. The TL has lost roughly a half of its value to the dollar since 2012. Currency fluctuations have caused serious financial problems, especially in the feed and related sectors where companies import raw materials for feed in U.S. dollars which they then sell to the sector in Turkish Lira in credit sales. As a result, many companies have lost money because of the fluctuation in exchange rates and the recent general downturn of the Lira against many other currencies.

### **Chart 1: USD – TL Exchange Rate**



Source: Central Bank of the Republic of Turkey

## SECTION II. EXPORTER BUSINESS TIPS

### Local Business Customs

Personal relationships are essential to Turkish business relationships. Turks attach great importance to courtesy in all business endeavors. A warm handshake combined with conversation about the person's well-being, family, or other similar topics prior to launching into any conversation related to business is considered a common courtesy.

Standard time in Turkey is three hours ahead of Greenwich Mean Time (GMT). In Fall 2016, Turkey canceled its observance of daylight savings time and remained permanently set to UTC+3. However, there has been public pressure to change clocks back, so it is possible that Turkey may change again in the future. The local work week runs from Monday through Friday.

Traffic congestion in Istanbul and Ankara is a fact of life. It is highly recommended that sufficient time be factored into schedules in order to arrive at meeting destinations on-time.

Although Turkish is the official language of government and commerce, many in the private sector have a fairly good working knowledge of English, as well as some in the public sector. Turkish businesspeople often gather after work over dinner or drinks not only for socialization but also for business. Turks value first impressions and it is recommended to dress well when meeting or visiting importers. Turks will expect men to wear a business suit and tie, and for women to be dressed smartly in a suit or dress.

Basic market research is necessary to form a picture of what kinds of new products and services may prove profitable. Finding the right local partner is essential for navigating local business customs, legislation, and regulations. Local partners and personal contacts are necessary to successfully introduce a product into the domestic market.

Turkish holidays must be taken into account when planning to do business in Turkey. Especially to note are Ramazan and Kurban Feast, which are religious/Islamic holidays during which most business firms are closed for vacation, which can sometimes be up to a week long.

### **Turkish Holidays in 2017**

<b>Date(s)</b>	<b>Day(s)</b>	<b>Holiday</b>
January 1	Sunday	New Year's day
April 23	Sunday	Milli Egemenlik ve Çocuk Bayramı (National Sovereignty and Children's Day)
May 1	Monday	Emek ve Dayanışma Günü (Labor and Solidarity Day)
May 19	Friday	Atatürk'ü Anma, Gençlik ve Spor Bayramı (Ataturk Memorial, Youth and Sports Day)
June 24-27	Saturday- Tuesday	Ramazan Bayramı (Ramadan Holiday)
July 15	Saturday	Democracy and National Solidarity Day
August 30	Wednesday	Zafer Bayramı (Victory Day)
Aug 31-Sep 4	Thursday-Monday	Kurban Bayramı (Sacrifice Holiday)
October 28-29	Saturday-Sunday	Cumhuriyet Bayramı (Turkish Independence Day)

The security environment in Turkey has been fluctuating throughout 2016, and after the unsuccessful coup attempt, the Turkish government put a State of Emergency into effect. Check the [U.S. Department of State's travel warnings](#) before planning travel to Turkey for the latest updates.

### **Consumer Tastes and Preferences**

Younger and metropolitan Turkish consumers are seeking and experimenting with exotic tastes and imported foods. However, the majority of consumers are content with familiar staples of traditional Turkish cuisine.

Traditional Turkish cuisine carries traces of different cultures from the Mediterranean to Lebanese cuisine. For this reason, there is a strong demand for wide range of food ingredients. According to the seasonality and regional variations of what is available in local markets, Turkish diets depend on cereals, fish, or vegetables.

As the Western-style fast food restaurant sector is growing, some local businesses have adopted models to mimic the fast food sector. In recent years, there is growth in local chain restaurants that offer Turkish traditional foods like lahmacun which is like a pizza with meat, simit (a type of bagel), and çiğ köfte which is composed of bulgur and herbs.

The market for organic goods in Turkey, although small, is growing and has great potential with the help of increasing income and awareness. There is not much marketing done for organic foods and most people are not educated about the meaning of the label or the certification process. According Turkey's

organic regulations which were published in 2010, importers must apply to private organizations to verify their organic certificate. These private organizations can certify products as organic, but these organizations must be registered by Turkey's Ministry of Food, Agriculture, and Livestock and have received a permit from the government to conduct certifying activities in Turkey. For more information on Turkey's Organic Market, please see [Turkish Organic Market Overview Report](#).

Consumers in Turkey are becoming increasingly educated about and aware of quality, nutritional value, and packaging. They pay attention to expiration dates on products. At the same time, some consumers trust the supermarkets' own brand and prefer to buy what they know. Domestic supermarkets that offer a wide variety of food products are an important target for products entering this competitive market. Price and quality of products and proximity of retailer to consumers are other prominent factors affecting consumer decisions.

Turkish consumers also pay attention to the safety of their food. Along these lines though, there is misleading and incorrect information about food and health in the media, which can lead to confused and misinformed consumers and can affect consumer preferences. They are concerned with modern utilization of antibiotics, hormones, and especially agricultural biotechnology.

### **Food Standards and Regulations**

Exporters must be aware of regulatory and food standards in Turkey. It is highly recommended that U.S. exporters verify the full set of import requirements with their foreign customers, who are normally best equipped to research such matters with local authorities, before any goods are shipped.

For information on Turkey's food standards and import requirements, please refer to the Food and Agricultural Import Regulations and Standards ([FAIRS](#)) [Report for Turkey](#), including the report on [certificates](#). You can find the latest labeling requirements according to latest updates to these reports. No genetically engineered traits have been approved for food use in Turkey. As Turkey's regulation of biotech traits is broad and liability clauses within the Biosafety Law have some severe penalties, exporters should also review [the Agricultural Biotechnology Annual Report](#) and agricultural situation reports on biotechnology regulatory developments.

The legal infrastructure of agriculture is mainly based on regulations, communiqués, and/or circulars rather than on laws. The majority of the regulations on food and agricultural products are prepared and published by the Turkish Ministry of Food, Agriculture, and Livestock (MinFAL). However, there are also regulations published by other ministries, such as the Ministry of Finance and the Ministry of Health. More than one hundred implementing regulations of Law no. 5996 on veterinary services, plant health, food and feed has been published and enforced by MinFAL since 2011. The Turkish government does not always inform international bodies, such as the WTO, or trading partners about possible or actual regulation changes. Exporters should be aware that there may be some variation among Provinces in applying legislation. This may be due to the lack of guidelines for the enforcement of rules in some cases. Most Turkish food and agriculture-related laws, regulations, communiqués, directives, and circulars are available in Turkish [on MinFAL's website](#) in Turkish language.

Turkish Import Regime is prepared by taking into account the agreement establishing the World Trade Organization (WTO), the Customs Union Decision between Turkey and the European Union (EU), free

trade agreements (FTAs) that Turkey has signed with various third countries, the unilateral preferential treatments granted by Turkey to least developed countries and some developing countries within the framework of Generalized System of Preferences (GSP), as well as the specific needs and requirements of the agricultural and industrial sectors. The tariffs are published in the Turkish Official Gazette on the 31st of December and enters into force on the 1st of January of the subsequent year. For latest import regime see this [website](#).

## **Agriculture Sector**

The agricultural sector remains a very important sector of economic activity and employment for Turkey. The primary sector employs 21 percent of the total labor force in Turkey, amounting to approximately 5.7 million people. Agriculture contributed roughly 8 percent of GDP and accounted for 11 percent of exports (\$16.8 billion) in 2015. Turkey has 27 million hectares of agricultural land, excluding pastures and meadows. Around 40 percent of Turkey's land area is arable and offers a large range of products such as grains, pulses, oil seeds, fruits and vegetables, cut flowers, poultry, dairy products, seafood, honey, and tobacco.

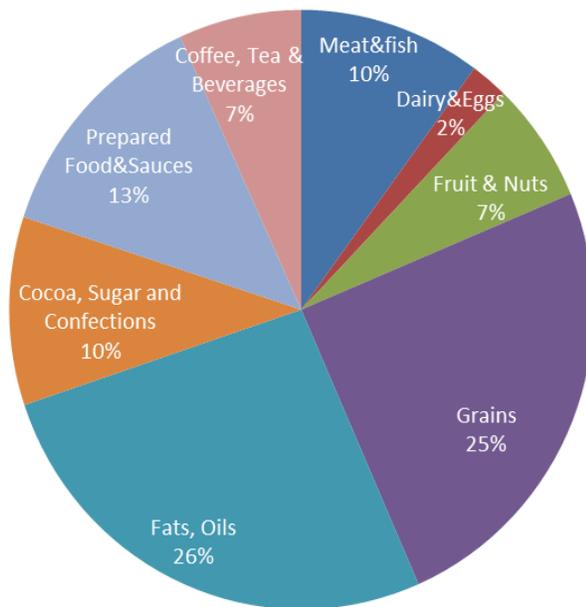
The top Turkish exports are hazelnuts and hazelnut products, dried figs, dried apricots, sultana raisins, wheat and wheat products, such as pasta and flour. Turkey's top imports from the United States are cotton, soybeans, tree nuts, feed ingredients and paddy rice. The vast majority of these products are used in value added production (either through meat, poultry, or prepared foods/snacks production) and are exported.

Turkey's largest agricultural import category is fats & oils, which is largely sunflower and palm oil (US\$ 1.5 billion) to supply domestic consumption and exports. Around \$840 million worth of sunflower oil and margarine was exported in 2015. Russia, Malaysia, and Ukraine are the main suppliers.

Turkey's second import category is grains, which is largely wheat (US\$ 1.7 billion) used as an input for wheat flour, pasta, and biscuit exports. This wheat comes in under Turkey's large inward processing regime, which allows tariff free imports for production of products which will be exported. The remainder is largely rice (US\$ 165 million) that competes with domestic rice production.

Turkey imported \$168 million worth of tree nuts in 2015, most of which were walnuts and almonds. The United States is the major supplier for tree nuts to Turkey. Note that Turkish imports are likely greatly underreported due to gray trade of tree nuts entering across Turkey's eastern borders. The chart below shows the distribution of Turkey's Food Imports categories.

### **Chart 2: Categories of Turkey's Food Imports**



Source: Global Trade Atlas

### Food Purchasing Behavior

Food and beverage expenditures rank second in terms of household spending, after housing and rent costs. According to the Turkish Statistical Institute, the proportion of Turkish household expenditure allocated to food and beverages, which was around 22 percent in 2004 and declined to about 20.2 percent in 2015, remains high compared with Western standards, which range between 15-20 percent. Alcoholic beverages and tobacco expenditures have averaged 4.2 percent over the last ten years. Total consumer spending on food, beverages, and tobacco was estimated at around US\$140 billion in 2015, which is similar to the previous year.

The major food consumption patterns have not changed as much in rural areas and are still based on wheat and grain products, fresh fruits and vegetables, as well as a variety of meat products. Consumers in Turkey's South East Region mainly prefer lamb, but more consumers in central Turkey as well as the western parts of Turkey, prefer beef and chicken.

Due to a shared history and religion, as well as common food cultures, Turkish agriculture and food exports to the Middle East have increased dramatically in the past decade. However, civil war in neighboring countries caused transportation problems throughout 2015 and disrupted Turkey's export markets. The Halal and organic food subsectors are areas which could be open to investments or partnerships in the region.

The Turkish diet contains a large share of baked goods and wheat products. Hence, the bakery subsector forms the majority (65 percent) of the total number of food and beverage companies in Turkey. Turkish consumers tend to buy bread from small bakeries when it is hot, and generally do not buy packaged

sliced bread. Another important bakery product is ‘simit’, which is a type of sesame coated Turkish bagel, as well as salty cookie or biscuit-like products. Modern bakery shops have begun to open and some bakery chains are expanding in an effort to reach international markets.

Turkey is now home to more than 3 million Syrian refugees since the civil war began in Syria. The refugee population currently comprises 4 percent of Turkey’s total population, which has impacted Turkey’s demographic structure and thus market preferences. As the Syrian population remains most consistent in Istanbul and the South East of Turkey, entrepreneurs have opened a number of Syrian style restaurants and bakery shops in these areas. The ease of these new developments suggests that the bakery sector in general offers a lot of opportunities for growth and development.

In 2015, although there was a sharp decrease in U.S. agricultural exports to Turkey, consumer-oriented agricultural product exports to Turkey remains almost similar level compared to last year. Some of the most significant exports as U.S. consumer oriented agricultural products to Turkey are tree nuts with \$300 million and prepared foods with \$50 million. Non-alcoholic beverages are also increased in export value in 2015.

**Finding Business Partners in Turkey**

There are 563 foreign companies actively operating in the Turkish food sector, according to the Turkish Ministry of Economy. One hundred of them are from Germany, 47 from Holland, 30 from France, and 29 from United States. Cargill, Bunge, Coca-Cola, and Pepsi-Co are some of the most prominent ones. Thirteen new international companies invested in Turkey in 2015. The Turkish food and beverage sector is a \$300 billion market with approximately 40,000 companies operating in this sector.

There are 150,000 restaurants and cafes in Turkey. There are 2,175 foreign companies actively operating in the hotel and restaurant sector. Restaurant franchises are one way of introducing new products. An increasing number of restaurant chains are opening in Turkey, especially in Istanbul. These include casual dining, fast food, and cafes. While most of these companies source food ingredients produced in Turkey, some require specialized ingredients or imports of certain items that are not readily available. Exporters should check with importers to see if they are approved suppliers for franchises.

Trader associations are also very important contacts for those seeking to enter the market. The Feed Millers Association, Turkish Food and Drink Industry Association Federation, and Poultry Meat Producers and Breeders Association are examples of important trader’s organizations. See Annex A for more details.

**Table 3: Turkey Agricultural Import Statistics from the United States**

	2010	2011	2012	2013	2014	2015	Period/Period % Change (Value)
Product	Value	Value	Value	Value	Value	Value	
<b>Bulk Agricultural Total</b>	1,418,523	1,625,921	1,175,943	1,191,524	1,367,404	796,375	-42
<b>Consumer Oriented Agricultural Total</b>	266,119	347,948	349,168	442,351	406,242	404,116	-1
Tree Nuts	184,664	223,336	227,885	278,222	261,052	288,729	11

Prepared Foods	16,023	25,064	25,600	35,621	33,248	32,685	-2
Poultry Meat & Prods. (ex. eggs)	32,248	39,260	65,861	65,600	53,544	26,076	-51
Processed Vegetables	12,498	40,403	9,464	18,087	13,614	21,468	58
Processed Fruit	5,082	6,147	5,713	5,666	11,684	18,378	57
Wine & Beer	265	459	4,182	730	2,303	2,720	18
Eggs & Products	188	0	771	1,241	2,138	2,069	-3
Dairy Products	8,555	5,090	2,225	29,098	18,854	1,837	-90
Fresh Vegetables	496	1,275	129	0	78	1,721	2,107
Non-Alcoholic Bev. (ex. Juice, coffee, tea)	243	585	839	621	737	1,234	68
Condiments & Sauces	726	826	1,417	1,401	1,248	1,149	-8
Chocolate & Cocoa Products	200	632	614	820	1,548	1,148	-26
Fresh Fruit	1,018	669	0	27	311	822	164
Spices	426	306	152	98	316	684	117
Tea	123	3	354	254	113	684	505
Coffee, Roasted and Extracts	145	225	641	402	1,398	651	-53
Nursery Products & Cut Flowers	404	350	512	171	355	534	50
Fruit & Vegetable Juices	267	1,127	234	687	756	481	-36
Dog & Cat Food	1,541	762	1,348	1,256	877	447	-49
Beef & Beef Products	853	1,091	953	1,590	1,090	324	-70
Snack Foods NESOI	105	180	253	495	764	268	-65
Meat Products NESOI	37	160	6	85	41	7	-83
Pork & Pork Products	12	0	14	179	173	0	--
<b>Intermediate Agricultural Total</b>	407,766	481,045	477,789	534,178	372,444	173,704	-53
<b>Agricultural Related Product Total</b>	71,349	103,723	134,789	108,601	139,024	163,442	18
<b>Grand Total</b>	2,163,758	2,558,637	2,137,689	2,276,654	2,285,114	1,537,637	-33

Notes: Data pulled on December 15, 2016, Covers January to December, Values in Thousands of Dollars, Source: USDA Foreign Agricultural Service: Global Agriculture Trade Statistics, which notes the following sources:

1. Data Source: United Nations Commodity Trade Statistics, United Nations Statistics Division
2. Product Group : BICO-HS6
3. See the U.N. Trade Data Disclaimer at [http://www.fas.usda.gov/gats/help.htm#UNTrade\\_Disclaimer](http://www.fas.usda.gov/gats/help.htm#UNTrade_Disclaimer)

Turkey has typically attracted 30 million tourists every year with more than 3,800 hotels. After instability and security issues in the region in 2015 and 2016, a general 30-percent decrease is expected in Turkey's tourism revenues by the end of 2016. Sector representatives are not hopeful about a full recovery in 2017 either. They believe that 2017 will be better than 2016, but will not be close to 2015 figures. Global hotel chains including the Marriott, Hilton, and Sheraton have a strong presence in

Turkey. Turkey has typically been a major tourism destination for German, Russian, British, and Scandinavian travelers. Turkey's hotel sector has traditionally represented an important niche market for certain high-value food products that cannot be readily found throughout Turkey. Fresh fruits and vegetables are readily available in Turkey but high quality meat (especially steak) and fishery products (especially shrimp and crab) can be extremely difficult to source.

While it is recommended to go through importers for high value items, support can also be sought from U.S. agricultural associations which have a presence in Turkey for commodities, such as USA Rice Federation, U.S. Dry Bean Council, U.S. Grain Council, etc.

A visit to Turkey to gain a first-hand information about the Turkish market, preferably coinciding with a major trade show such as FOODIST (see Annex C for more details), is a good way to meet prospective importers and get an introduction to the market before entering it. Similarly, international food shows such as ANUGA, SIAL and Gulfood are attracting more and more Turkish importers. These shows can also be a good way to meet prospective customers.

### **SECTION III. MARKET SECTOR STRUCTURE AND TRENDS**

A young population, rising middle-class incomes, and increasing female labor force participation are driving an increase in eating outside the home. The proportion of household expenditures spent on restaurant and hotels was 6.4 percent in 2015, up from 6 percent in 2014, according to Turkstat.

Despite economic slowing, the fast food sector recorded 25 percent current value growth in 2014. The fast food sector is a \$2 billion sector in Turkey. One company alone accounted for 39 percent of overall fast food value sales with its numerous brands, including a burger fast food chain, a pizza chain, a chicken fast food chain, and a bakery products fast food chain.

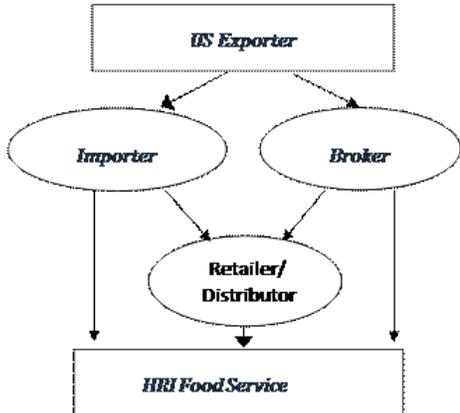
One of the driving forces of the fast food sector is the increasing spread of shopping malls in Turkey. The number of modern shopping malls in Turkey has increased six times in the last decade and reached 343 in 2015, 112 of which are located in Istanbul. Ten new shopping malls opened in 2016. Turkish consumers increasingly use shopping center food courts as an alternative to stand-alone locations. Rapid appreciation of U.S. dollar against the Turkish lira this year caused financial issues for retail and food renters who have rental contracts in U.S. dollars in shopping malls.

Despite the slowdown in the growth of the Turkish economy in general, the food retail sector is expected to continue to grow at higher rates than the general economy. The total retail sector in Turkey reached US\$214 billion in 2015 and is expected to reach US\$290 billion by 2018, fueled by increasing disposable income levels and strong consumer demand. The share of food in the total retail sector is roughly 62 percent, worth US\$137 billion.

The Turkish food industry is enjoying continuous growth trends due to the young population of the country, high urbanization rates, and rising income levels, despite the slowdown in growth of the past year. Total food retail sector had 30,000 sales points with 270,000 employees in 2015. For detailed and updated information on Turkey's retail sector, please see [FAS retail sector report](#).

Although black tea remains the prominent beverage of choice, Western-style coffee chains are growing in popularity, particularly among younger Turks. Socialization in coffee shops is becoming a staple of urban life in Turkey, but coffee consumption is still exponentially lower than in Western countries. Annual coffee consumption per capita in the European Union is 4.5 kg, while it is only 550 grams in Turkey. Besides international and domestic coffee chains, specialty and flavored coffee is spreading at a high pace and this trend is being promoted both by international coffee chains and their Turkish competitors. Coffee imports of Turkey reached \$146 million in 2015, which is 34 percent higher than 2014, according to Global Trade Atlas.

**Chart 3: Distribution network for HRI food service purchasers**



The supply chain for imported agricultural and food products in general involves multiple layers of importers and distributors. Major importers also act as distributors to their HRI clients with their own fleet, but also make use of cargo delivery companies to supply food products to large supermarkets.

Institutional food service is another success story in the HRI sector. It is now a \$7 billion market compared to \$2.25 billion in 2004, accounting for over 30 percent of the overall HRI sector. The size of the institutional food service market will continue to expand as public and private institutions outsource their catering services. The sector is striving to reach a market size of \$22

billion by the year 2023.

Turkey is the one of the most popular tourist destinations in the world, but numbers of tourists declined in 2016 and are not expected to be back to normal levels in 2017. Global hotel chains including the Marriott, Hilton, and Sheraton have a strong presence in Turkey. In 2015, 36 million tourists visited Turkey, and revenue from tourism remained at \$31 billion with a decrease 8.3 percent compared to the previous year. Unfortunately 2016 was a difficult year for Turkey’s tourism sector. For example, foreign visitors to Istanbul from January-October 2016 were numbered at just 8.5 million, compared to 11.5 million during the same time period in 2015. Security concerns are increasing due to turmoil in neighboring countries, unrest in some parts of Turkey, and the recent rise in terrorist attacks in Turkey, including some in Turkey’s urban centers. Russian tourism to Turkey was halted in 2016 in response to Turkey shooting down a Russian jet. Russian tourists are a driver of all-inclusive Mediterranean vacation packages in Turkey, though Russian tourism is expected to resume in 2017.

E-commerce is also emerging as an important sales channel in food retailing. Internet usage in Turkey is increasing at high rates beyond expectations. Overall internet penetration levels are around 61 percent, from just 52 percent two years before, according to [Turkstat](#) as of August 2016. In the first nine months of 2016, internet and phone shopping increased 23 percent, compared to the same period of 2015, where consumers spent US \$26.7 billion. The online food retail sector in Turkey is expected to reach US \$2.5 billion by 2018, which includes online restaurant take-out orders.

**SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS**

**Best Market Prospects**

Adopting products popular in the west is a large part of the modern Turkish life. Internationally known brand names are well placed for this. Exporters should be particularly sensitive to brand positioning and be ready to invest in the necessary research and marketing support to assist their local partners for a successful entry.

The best products for the imported food markets are internationally recognized branded food products. These types of products in general account for 30 percent of overall imported food items. These include cocoa and instant coffee, chocolate and confectionary goods, cookies and crackers, breakfast cereal, cheese, alcoholic beverages, sauces, seafood, and pet foods. The change in wine and beer import and distribution regulations now allow imported products to be sold in the retail market, which have created new opportunities for U.S. wine and beer to be sold in the Turkish market, although taxes still remain high. Functional food items such as food supplements and sports drinks are a relatively new sub-sector with rapid growth and represent a new opportunity for U.S. exports.

### **Product categories with market potential:**

#### Health and beauty promoting beverages

The health and beauty promoting beverages market is important for U.S. exporters, who profit by promoting their products as healthy and high-quality choices. Non-alcoholic beverages in Turkey are largely limited to fruit juices, sodas and mineral waters. There is a vast void in health promoting beverages such as digestive health, bone and joint health, brain and memory, cardiovascular health, etc. There are also few products in the market for 'beauty from within'. Consumers are looking for such products, which is a source of untapped demand. Companies should be aware of regulations limiting health claims on labels.

#### Functional foods

Opportunities exist for functional food varieties which are still quite limited in Turkey. Socio-economic and demographic changes continued to alter food trends in Turkey. Turkish consumers desire innovative and more convenient foods offering quality image, better taste, and increased health benefits. Functional chocolate and sugar confectionary products, baby and toddler food, and biscuits offer a good market opportunity. Diabetic and gluten-free products also have good market potential.

#### Wine

Although highly taxed, wine has increased in popularity in recent years with total annual imports increasing five fold over the last decade. Turkish wine imports in 2014 were \$19.5 million, of which only \$318,460 were from the United States. The leading suppliers are France (52 percent), Italy (25 percent), and Chile (10 percent). Imports of Chilean wine have increased the most in the last decade, while the United States is the fifth largest supplier. Turkey has 191 licensed vineyards producing an estimated 75 million liters of wine worth \$300 million.

#### Whiskey

Blended scotch is the whiskey of choice. Two American whiskey brands in the market, Jack Daniels and Jim Beam, are targeting the younger generation through rock concerts and motor-rally sponsorships, as well as in- store displays in high end food retail outlets.

### Cocoa and chocolate:

Turkey is import-dependent in cocoa since there is no local production. The tariff rate for cocoa is 100 percent. Meanwhile, the Turkish chocolate sector has been growing approximately 11 percent annually for the past five years compared to the five percent growth in the global chocolate sector. Chocolate consumption is in direct proportion to income level, and 40 percent of total chocolate consumption is in the Marmara Region, which is the greater Istanbul region. The market is currently dominated by local production, but consumers are open to new tastes and brands. Turkish imports of cocoa and chocolate have been trending upward in recent years.

### Baked goods:

Imported crackers, cookies, diet breads, crisp breads, and special kinds of pasta are present in the Turkish market. These products tend to appeal to higher income consumers and are found at upper-middle income retail outlets (specialty shops, supermarkets, and hypermarkets). Products with an ‘edge’ that the local competition does not have such as being sugar free, gluten free, or other similar features would secure a better place on the shelves by offering consumers a reason to pay a relatively higher price for an added value. Tariff rate for baked goods are mostly 75 percent (except for some bread varieties which are 50 percent).

### Coffee:

Despite the dominance of Nestle and Jacobs brands in the instant and filter coffee markets (respectively), a niche market for flavored gourmet coffee in the upscale cafes and restaurants emerged after the arrival of Starbucks and Gloria Jean’s. The German coffee shop Tchibo also entered the Turkish market in December 2006 and has opened 52 stores in 11 cities. As third-wave coffee shops are increasing rapidly in number, specialty coffee is gaining more popularity in big cities. The tariff rate for roasted coffee beans is 100 percent and 75 percent for unroasted beans.

### Breakfast cereals

With the increasing number of women in labor force, Turks began to prefer quick solutions for breakfast instead of traditional dishes, so consumption of breakfast cereals is increasing. Chocolate cereals, corn flakes, and bran fiber flakes with raisins and mixed fruit are becoming popular among Turkish consumers. Note that no GE traits are approved for food use in Turkey.

### Sauces and Syrups

With the help of new foreign restaurants, Turkish individual consumers are becoming familiar with new tastes such as barbeque or salad sauces, which they are beginning to use these in their homes. Various brands of sauces for salads, meat, and international cuisines are popular in Turkey. The increasing popularity of Asian cuisine in particular is promoting the specialty herb, sauce, and syrup demand. Currently sauces are imported from Germany, the UK, France, Asian countries, and the United States.

**Table 4: Competitive Situation: Imports from all Countries**

<b>Product Category</b>	<b>2015 Import Market</b>	<b>2015 Imports (\$Mil)</b>	<b>5-Yr. Avg.</b>	<b>Import Tariff Rate</b>	<b>Key Constraints Over Market Development</b>	<b>Market Attractiveness for USA</b>
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	Size (Volume)		Import Growth			
Tree Nuts	52,000 MT	270	12%	43.2%	Depreciation of Turkish Lira against U.S. Dollar led to higher import costs. Political instability in Turkey's re-export markets.	Rising incomes translate into demand for new products; export demand requires mixing nuts not available in Turkey, ingredient of traditional pastries
Processed fruits	MT	171	23%	15.6-45%	European countries supply niche products whereas Far East and other countries supply tropical fruits	Turkey has a great amount of domestic production which creates a vast supply for processors and the imported varieties are mostly tropical fruits that are not grown domestically
Wine & Beer	9 million liters	22	26%	70% (additional taxes and fees apply)	Import tariffs, fees and sales tax raise the price of all spirits considerably. Strict advertising and marketing restrictions are implemented since early 2013.	Rising incomes have contributed to growing interest in spirits and cocktails. There are few varieties available domestically, and brand recognition are advantages for U.S. products.
Pet Food	75,000 MT	41	7.7%	7-8%	European products are less expensive and more familiar; Biosafety Law prohibits imports that test positive for biotech content	U.S. product variety and perceived quality
Snack Foods	20,000 MT	45	8.2%	75%	Domestic production is abundant and inexpensive; Price sensitivity; Biosafety Law prohibits imports that test positive for biotech content	U.S. varieties not available on the market; perceived high quality

Source: GTA

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Annexes to this report provide a full list of contacts which can be helpful in navigating the Turkish market. U.S. exporters are advised to contact the FAS offices in Ankara or Istanbul for additional information and lists of private sector firms which can provide assistance with customs clearance and import regulation issues. In most cases, the importing company or agent should be familiar with (and ultimately responsible for) existing regulations.

**United States Department of Agriculture Foreign Agricultural Service Offices in Turkey:**

American Embassy, Turkey  
110 Ataturk Blvd.  
Kavaklıdere, 06100 Ankara, Turkey  
Tel: +90-312-455-5555, Fax: +90-312-467-0056  
Email: [agankara@fas.usda.gov](mailto:agankara@fas.usda.gov)

American Consulate, Istanbul  
Kaplıcalar Mevki Sokak  
İstinye, 334460 Istanbul, Turkey  
Tel: +90-212-335-9000, Fax: +90-212-335-9077  
Email: [agistanbul@fas.usda.gov](mailto:agistanbul@fas.usda.gov)

Further reports and data on Turkey and other countries can be found on USDA Foreign Agricultural Service's website. The other FAS reports referenced in this Exporter Guide can be found from the FAS **Global Agricultural Information Network (GAIN)** Reports search engine which you can find here: <http://www.fas.usda.gov/data>

**Annex A- Traders Associations Contact List**

**Turkish Feed Manufacturers Association**

Address: Öveçler Mahallesi Çetin Emeç Bulvarı 2. Cadde No:38/7 Çankaya ANKARA  
Phone: +90 312 472 83 20 (pbx); Fax: +90 312 472 83 23  
E-Mail: [info@yem.org.tr](mailto:info@yem.org.tr)  
Web: <http://www.turkiyeyembir.org.tr/yembir/index.php>

**Turkish Food and Drink Industry Association Federation**

Address: Altunizade Mah.Kısıklı Cad. Tekin Ak İş Merkezi No:3 Kat:2 Daire:7 34662 Bağlarbaşı-Üsküdar İSTANBUL  
Phone: +90 216 651 86 81; Fax: +90 216 651 86 83  
E-Mail: [tgdf@tgdf.org.tr](mailto:tgdf@tgdf.org.tr)  
Web: <http://www.tgdf.org.tr/>

**Poultry Meat Producers and Breeders Association**

Address: Çetin Emeç Bulvarı 8. Cad 86.Sokak 5/A Öveçler ANKARA  
Phone: +90 312 472 77 88  
Fax: +90 312 472 77 89  
E-Mail: [besd-bir@besd-bir.org](mailto:besd-bir@besd-bir.org)  
Web: <http://www.besd-bir.org/>

**Turkish Egg Producers Association**

Address: Çetin Emeç Bulvarı 1314. Cad. No: 4/6 Öveçler - ANKARA  
Phone: +90 0312 473 20 00 - 473 20 31  
Fax: +90 0312 473 20 61  
E-Mail: [bilgi@yum-bir.org](mailto:bilgi@yum-bir.org)  
Web: <http://www.yum-bir.org/>

**Union of Dairy, Beef, Food Industrialists and Producers Of Turkey**

Address: Şehit Ersan Caddesi Çoban Yıldızı Sokak 100. Yıl Apt. No: 1/14 06680 Çankaya - Ankara

Phone: +90 312 428 47 74-75

Fax: +90 312 428 47 46

E-Mail: [setbir@setbir.org.tr](mailto:setbir@setbir.org.tr)

Web: <http://www.setbir.org.tr/>

**Association of Packaged Dairy Industry of Turkey**

Address: Ceyhun Atıf Kansu Cad. 1386. Sok. No: 8/4 Balgat - ANKARA

Phone: +90 312 284 92 53 ; Fax: +90 312 284 92 58

E-Mail: [info@asuder.org.tr](mailto:info@asuder.org.tr)

Web: <http://www.asuder.org.tr/>

**All Food Importers Association**

Address: Büyükdere Cad.Somer Apt.No:64 Kat:5 D:13 Mecidiyeköy - İSTANBUL

Phone: +90 0212 347 72 22 Fax: +90 0212 347 25 70

E-Mail: [tugider@tugider.org.tr](mailto:tugider@tugider.org.tr)

Web: <http://www.tugider.org.tr/eng/index.htm>

**Turkish Wheat Millers Federation**

Address: Üniversiteler Mahallesi, 1598 Cadde, A3 Plaza, No: 33

Bilkent Plaza, Bilkent, 06800 / ANKARA

Phone: +90 0312 440 04 54 Fax: +90 0312 440 03 64

E-Mail: [bilgi@tusaf.org](mailto:bilgi@tusaf.org)

Web: [www.tusaf.org](http://www.tusaf.org)

**Dairy Breeders Association**

Address: Eskişehir Yolu üzeri, Mustafa Kemal Mh. 2120 Cadde, No: 5 Gözüm İş Merkezi Daire: 1-2  
06520 Çankaya - ANKARA

Phone: +90 0312 219 45 64; Fax: +90 0312 219 45 59

E-Mail: [dsymb@dsymb.org.tr](mailto:dsymb@dsymb.org.tr)

Web: <http://www.dsymb.org.tr/>

**Vegetable Oil and Fats Industrialist Association**

Address: Atatürk Bulvarı 231/15 06680 Kavaklıdere / ANKARA

Phone: +90 0312 426 16 82 Fax: +90 0312 426 16 95

E-Mail: [info@bysd.org.tr](mailto:info@bysd.org.tr) Web: [www.bysd.org.tr](http://www.bysd.org.tr)

**Annex B - Government Regulatory Agency**

The General Directorate of Food and Control at the Ministry of Food, Agriculture, and Livestock Central Office has the authority to control food and feed safety, is responsible for managing import and domestic controls, prepares regulations and laws, authorizes animal and animal product imports and plant and plant product imports, communicates directly with the public on food safety issues, and is responsible for overseeing animal health and quarantine.

**General Directorate of Food and Control**  
Ministry of Agriculture, Food and Livestock  
<http://www.gkgm.gov.tr/indeks.html>

Address: Eskişehir Yolu 9. Km. Lodumlu/ANKARA  
Telephone: 00 90 312 287 33 60  
Fax: +90 312 258 76 93

There are 20 Provincial Agricultural Directorate Authorities, each of which has the first-line regulatory authority to issue control certificates for specific products. They are intended to be the primary point of contact for importers to submit their import applications. The complete list can be found on the internet at: [http://www.gkgm.gov.tr/genel/bagli\\_kurum.html](http://www.gkgm.gov.tr/genel/bagli_kurum.html)

**The Main Provincial Directorate Authorities:**

Istanbul Provincial Directorate  
Istanbul Tarım İl Müdürlüğü Bagdat Cad. No.333, Kadıköy İstanbul, Turkey  
Phone: (90-216) 468 21 00  
Fax: (90-216) 369 81 51

Izmir Provincial Directorate  
Izmir Tarım İl Müdürlüğü Üniversite Cad. No: 47 Bornova, İzmir, Turkey  
Phone: (90-232) 435 10 02  
Fax: (90-232) 462 24 93

Mersin Provincial Directorate  
Mersin Tarım İl Müdürlüğü Gazi Mah. Mersin, Turkey  
Phone: (90-324) 326 40 06  
Fax: (90-324) 326 40 12

There are 41 provincial and one reference food control laboratories, the three largest being:

**Ankara Provincial Food Control Laboratory Directorate Ankara, Turkey**  
Phone: (90 312) 315-0089 or 315-8709  
Fax: (90 312) 315 7934 2)

**Istanbul Provincial Food Control Laboratory Directorate Istanbul, Turkey**  
Phone: (90 212) 663-3961 or 663-3959  
Fax: (90 212) 663-4296 3)

**Izmir Provincial Food Control Laboratory Directorate Izmir, Turkey**  
Phone: (90 232) 435-1481 or 435-6637  
Fax: (90 232)-462 4197

**National Food Reference Laboratory**

Fatih Sultan Mehmet Bulvarı (İstanbul Yolu) Yenimahalle Tarım Kampüsü No: 70 Yenimahalle /  
 ANKARA - TÜRKİYE  
 Phone : +90 (312) 327 37 03  
 Fax : +90 (312) 327 41 56  
 E-mail : ugr1@ugrl.gov.tr

### Other Import Specialist Contacts

U.S. exporters are advised to contact the FAS offices in Ankara or Istanbul for additional information and/or a list of private sector firms which can provide assistance with customs clearance and import regulation issues. In most cases, the importing company or agent should be familiar with (and ultimately responsible for) existing regulations. The USDA **Foreign Agricultural Service Offices in Turkey can be emailed at [agankara@fas.usda.gov](mailto:agankara@fas.usda.gov) and [agistanbul@fas.usda.gov](mailto:agistanbul@fas.usda.gov).** Phone Number: +90-312-457-7380.

FAS Global Agricultural Information Network (GAIN) Reports referenced in this guide and trade data can be found at the USDA Foreign Agricultural Service website. <http://www.fas.usda.gov/>

### Annex C - Important Conferences and Trade Shows

**Table 5: Major Conferences in 2017 in Turkey**

Date	Conferences	Location
March 30-April 2	Flour Millers Conference	Antalya
April 26-30	Poultry Meat Conference	Antalya
May 4-6	Food Ingredients Conference	Istanbul
December 1-3	Fats & Oils Istanbul / Feeds & Grains Istanbul	Istanbul

**Table 6: Major Trade Shows in 2017 in Turkey**

Date	2017 Major Food Trade Shows in Turkey	Location
February 15-18, 2017	Anfaş Food Product : International food and HRI equipment exhibition <a href="http://www.anfasfoodproduct.com">http://www.anfasfoodproduct.com</a>	Antalya
March 1-4	Konya Seed 2017, Seed and Seed Technology Fair	Konya
March 9-12	Ibatech 2017, 10 <sup>th</sup> International Trade Fair for Bakery, Patisserie Machinery, Ice Cream, Chocolate and Technologies”. <a href="http://www.ibatech.com.tr">www.ibatech.com.tr</a>	Ankara
March 23-26	Expomen Agro Livestock <b>Fair</b>	Izmir
May 4-7	“IDMA 2017 - 7th International Flour, Semolina, Rice, Corn, Bulghur, Feed Milling Machinery and Pulse, Pasta, Biscuit Technologies Exhibition”. <a href="http://www.idma.com.tr">www.idma.com.tr</a>	Istanbul
September 20-23	Food Istanbul 2017 International food & beverage, food ingredients and food processing exhibition.	Istanbul
October 11-15	BURSA International Agriculture and Livestock Fair	Bursa
October 25-	International Istanbul Food-Tech Eurasia 2017	Istanbul

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May 2-4 2018	Fi Istanbul: Food Ingredients (bi-annual) <a href="http://www.figlobal.com/istanbul/home">http://www.figlobal.com/istanbul/home</a>	Istanbul

## APPENDIX - STATISTICS

**TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION (2015)**

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%)	\$15,084 / 10.63%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%)	\$2,385 / 8.3%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%)	\$230 / 1.4%
Total Population (Millions) / Annual Growth Rate (%)*	78.7 / 1.3%
Urban Population (Millions) / Annual Growth Rate (%)*	72.5 / 1.7 %
Number of Major Metropolitan Areas (population in excess of 1 million)*	20
Size of the Middle Class (Millions) / Growth Rate (%) <sup>1/</sup>	41 / 13.9%
Per Capita Gross Domestic Product (U.S. Dollars)	\$9,257
Unemployment Rate (%)*	11.3%
Per Capita Food Expenditures (U.S. Dollars)*	\$2,048
Percent of Female Population Employed <sup>2/*</sup>	26.7%
Exchange Rate (US\$1 = X.X local currency) <sup>3/</sup>	3.50 TL

*Footnotes: 1/ Middle Class is defined using the international 10 USD/PPP 2005 line following the Lopez-Calva and Ortiz-Juarez, 2011 also used in Ferreira et al, 2013.*

*2/ Percent against total number of women (15 years old or above).*

*3/ The Turkish Lira has lost approximately 19% against US\$ since December 2015.*

*\*Turkish Statistical Institute: TurkSTAT 2016*

**TABLE B. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS**

Top 15 Suppliers of Consumer-Oriented Food Products

Turkey Import Statistics				
Commodity: Consumer-Oriented Food Products				
Calendar Year: 2013 - 2015				
Partner Country	United States Dollars			% Change
	2013	2014	2015	2015/2014

World	2,162,373,196	2,263,150,428	2,337,729,015	3.30
Germany	257,987,455	267,461,190	253,328,615	- 5.28
Netherlands	233,123,365	237,417,436	240,259,850	1.20
United States	240,029,383	248,550,302	208,225,066	- 16.22
Italy	139,446,002	141,322,480	137,012,765	- 3.05
Poland	95,576,645	82,505,460	119,334,367	44.64
France	82,686,615	102,169,992	97,660,373	- 4.41
Bosnia & Herzegovina	2,617,700	11,243,884	80,193,213	613.22
Ecuador	93,676,639	83,990,386	73,730,111	- 12.22
Switzerland	59,286,293	63,443,401	67,195,796	5.91
United Kingdom	61,686,680	77,448,940	64,340,567	- 16.93
India	46,319,099	52,988,750	63,844,591	20.49
Denmark	68,556,202	69,513,421	58,344,141	- 16.07
Spain	46,064,787	50,123,696	57,561,966	14.84
Belgium	55,735,981	53,545,772	56,118,439	4.80
Ireland	46,084,801	44,064,363	52,447,963	19.03

Source: Global Trade Atlas

### Top 15 Suppliers of Fish & Seafood Products

Turkey Import Statistics				
Commodity: Fish & Seafood Products, Group 9 (2012)				
Calendar Year: 2013 - 2015				
Partner Country	United States Dollars			% Change 2015/2014
	2013	2014	2015	
World	176,273,579	181,784,445	229,775,483	26.40
Norway	91,873,990	89,504,349	121,680,119	35.95
Iceland	11,187,726	12,481,302	20,365,919	63.17
China	6,960,803	12,359,738	11,619,936	- 5.99
Morocco	5,707,508	4,043,358	11,347,361	180.64
India	6,726,459	6,564,908	6,984,663	6.39
Spain	8,000,051	12,609,753	6,486,276	- 48.56
Vietnam	5,662,297	6,961,909	6,253,422	- 10.18
Seychelles	822,544	3,624,966	6,172,604	70.28
Curacao	1,444,304	0	4,807,258	0.00

United States	3,099,551	5,142,218	3,405,337	- 33.78
Cape Verde	0	1,083,857	3,050,179	181.42
Portugal	2,707,847	2,042,759	3,036,400	48.64
France	3,831,109	337,356	2,554,216	657.13
Indonesia	2,003,918	1,761,627	2,471,230	40.28
Chile	726,627	1,313,106	2,248,006	71.20

Source: Global Trade Atlas