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Report Highlights:

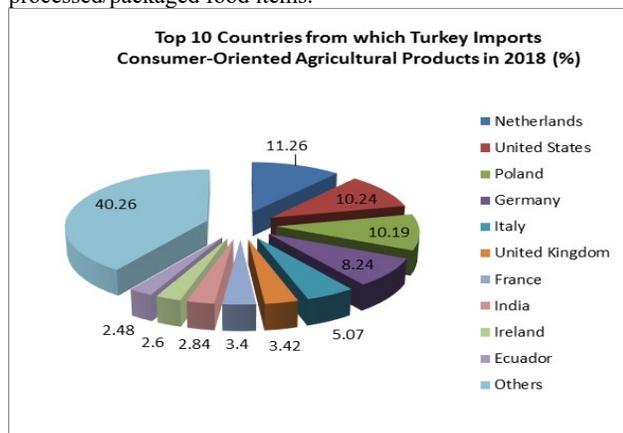
The Republic of Turkey has a young population of 82 million people fueling consumption. The country is in a Customs Union with the EU and is the 18th largest economy in the world. An annual average of three percent GDP growth is forecasted by Economist Intelligence Unit (EIU) between 2019 and 2023. Despite the current economic slowdown and geopolitical difficulties, there is still a gap in the market to fill. The food retail sales index is in a generally upward trend in real terms over the last five years.

Executive Summary

The Republic of Turkey has a young population of 82 million people fueling consumption. The country is in a Customs Union with the EU and is the 18th largest economy in the world. An annual average of 3 percent GDP growth is forecasted by Economist Intelligence Unit (EIU) between 2019 and 2023. In 2018 there was a 0.4 percent increase in total imports of consumer-oriented agricultural products compared to the previous year. Total imports of consumer-oriented agricultural goods have shrunk 19 percent in the first nine months of 2019 compared to same period in 2018. U.S. food exporters should utilize importers in Turkey to reach the market in most cases. The economy has slowed after summer 2018 elections and geopolitical challenges continue in the region.

Imports of Consumer-Oriented Agricultural Products

EU countries are the major suppliers to Turkey in terms of Consumer-Oriented Agricultural Products. They have the advantage of proximity and the Customs Union. Formerly supplying most agricultural commodities for consumer use from the internal market, Turkey's agriculture and food sector has in recent years become more specialized and export oriented and now also imports some consumer-oriented agricultural commodities such as rice, dried beans, walnuts, almonds, bananas, coffee, cocoa, meat, fish and different kinds of processed/packaged food items.



Food Processing Industry

There are 47,617 food processing and 595 beverage producing enterprises in Turkey as of 2017, according to the latest statistics published by TurkStat. Turkey has a modern and developed food processing industry supplying the domestic population and exporting to other markets. The food processing industry constitutes about 15 percent of all manufacturing industries in Turkey. As of the end of 2018, there were 611 foreign direct investments in food and beverage production of which 101 were German, 44 Dutch, 33 French, 31 American, 30 Italian, 26 Russian, 26 Iranian, and 25 Swiss.

Food Retail Industry

Grocery sales were US\$ 84 billion as of the end of 2018. The inflation/seasonally adjusted Real Retail Sales Index had been increasing between 2013 and 2016 but started to decline slightly in 2017 and 2018. Despite political and economic challenges that Turkey has faced in recent years, the food retail industry has been growing due to a young, dynamic population with a 75 percent urbanization rate and a growing middle class. Organized/modern retailers continue to grow as traditional/unorganized retailers slowly leave the stage.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2018 US\$2.6 billion

List of Top 10 Growth Products in Turkey (Imported Consumer Oriented Agricultural Products) 2016-2018

- | | |
|-------------------------------|--|
| 1. Nonalc. Beverages, nesoi | 6. Buttermilk/Kephir/Curdled FermAcidfd Milk & Cream |
| 2. Mandarins (tang.&satsumas) | 7. Chestnut Inshell, fresh/dried |
| 3. Roasted Chicory | 8. Green tea, not fermented |
| 4. Meat, Bovine Cuts, bone in | 9. Tomatoes Whl/Pcs Prep/Pres |
| 5. Chicken Cuts/Whl., frozen | 10. Mix of Nuts & Dried Fruits |

Food Retailers by Channel (Sales in Million USD) 2018

| | |
|--------------------------------------|---------------|
| Modern Grocery Retailers | 34,920 |
| - Convenience Stores | 1,169 |
| - Discounters | 12,193 |
| - Gas station/ Forecourt retailers | 563 |
| - Hypermarkets | 1,044 |
| - Supermarkets | 19,950 |
| Traditional Grocery Retailers | 32,717 |
| Grocery Retailers Total | 67,637 |

Top 10 Retailers (by market share in 2018)

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

GDP/Population 2018

Population: 82 million
 GDP, PPP: US\$2,405 billion
 GDP Per Capita, PPP: US\$29,210 (2018)

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

Strengths/Weaknesses/Opportunities/Threats

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

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

Contact: [Office of Agricultural Affairs](#)
 U.S. Embassy Ankara

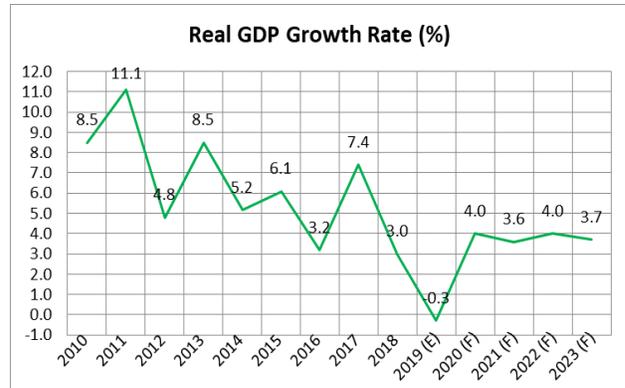
I. MARKET OVERVIEW

The Republic of Turkey, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea in the north and the Mediterranean Sea in the south, has a young population of 82 million¹ people fueling consumption. The median age is 31.4 and 59 percent of the population is between the ages 15 to 54. The urbanization rate has reached 75%, with rapid urbanization since 2000. Along with the young population, high urbanization rate, increasing middle-class household income, and broadening base of female participation in the labor force, the culture of spending drives consumption. The country is an Associate Member of the European Union (EU) and is in a Customs Union with the EU. In addition, [Turkey has Free Trade Agreements](#) with EFTA (European Free Trade Association Countries: Norway, Liechtenstein, Iceland, Switzerland) and [19 other countries](#). Turkey is the 18th largest economy in the world according to the International Monetary Fund (IMF) in 2018.

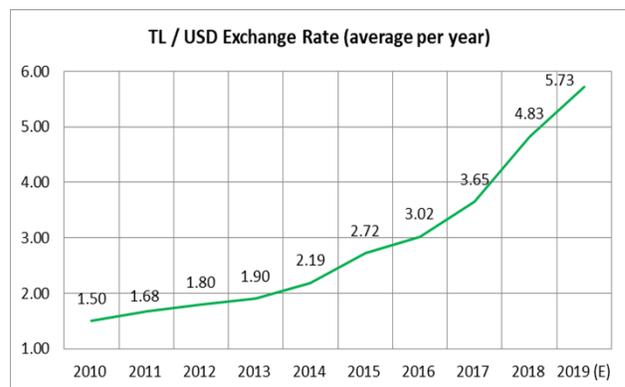
The average Gross Domestic Product (GDP) growth between 2014 and 2018 was 5.0 percent and annual average projected GDP growth is 3 percent according to Economist Intelligence Unit (EIU) between 2019 and 2023. Turkey has registered the highest GDP growth since 2013 with 7.4 percent annual real growth rate in 2017 after stagnation in 2016 caused by a series of terrorist attacks and an attempted coup against the Government of Turkey (GoT) in July 2016. The strong recovery in 2017 mostly depended on a short-term fiscal stimulus. Domestic and geopolitical challenges have since negatively impacted trade, tourism, investment, and growth.

The Economist Intelligence Unit (EIU) forecasts about -0.3 percent and 4 percent GDP growth for 2019 and 2020, respectively. IMF expects 0.2 percent real GDP growth for 2019 and 3 percent for 2020 for Turkey. The annual inflation rate was 25.24 percent in October 2018 causing a [stagflationary](#)² trend in the economy. Concurrently, the Turkish Lira (TL) has depreciated against major foreign currencies quickly. The average TL/USD exchange rate was 3.65 in 2017, the average TL/USD rate in 2018 was 4.83 and expected to be 5.73 in 2019. The official annual inflation rate declared by Turkish Statistical Institute has dropped to 10.56 percent as of November 2019.

Major foreign investment in Turkey has currently stalled. In February 2019, Honda Motor Co. declared that they will shut down their plant in Turkey in 2021³. Meanwhile, Volkswagen started preparations to open a car factory in Turkey, established a company in Manisa, but then later made an announcement in Fall 2019 that they will delay the decision for a while. Analysts believe that this due to geopolitical uncertainty affecting Turkey. The investment decision may be moved to another country⁴. UniCredit, one of the largest banks in Italy, is cutting its stake in Yapi Kredi Bank of Turkey, which is the third largest bank in the country. UniCredit



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



Source: Economist Intelligence Unit (EIU). (E) Estimate by EIU.

¹ Turkish Statistics Institute (TurkStat) 2018.

² Stagflation, or recession-inflation, is a situation in which the inflation rate is high, the economic growth rate slows, and unemployment remains steadily high. It presents a dilemma for economic policy, since actions intended to lower inflation may exacerbate unemployment, and vice versa.

³ April 8, 2019, Reuters: <https://www.reuters.com/article/us-turkey-honda/honda-will-stop-car-production-in-turkey-after-2021-statement-idUSKCN1RK0H6>

⁴ October 15, 2019, Reuters: <https://www.reuters.com/article/us-volkswagen-turkey/volkswagen-postpones-final-decision-on-turkey-plant-idUSKBN1WU0GW>

declared that they want to decrease their exposure to Turkey after 17 years of presence⁵ which analysts comment is also due to the geopolitical and economic difficulties Turkey is facing.

The 2018 “concordat” boom in Turkey among companies across sectors, including the food and agriculture industry, has slowed down in 2019 as many that needed the restructuring of debt already declared concordat. Concordat is perceived as the last step before bankruptcy in the Turkish business context. It indicates that the company has enough assets and business potential but due to the poor cash flow, debts are not being serviced properly. Debts of a company are restructured so they can make payments.

The agriculture sector represents 6.4 percent of total GDP which is \$49 billion as of 2018. The State Department provides [information about the investment climate in Turkey](#) which has a lot of business-related information which can be valuable for traders.

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

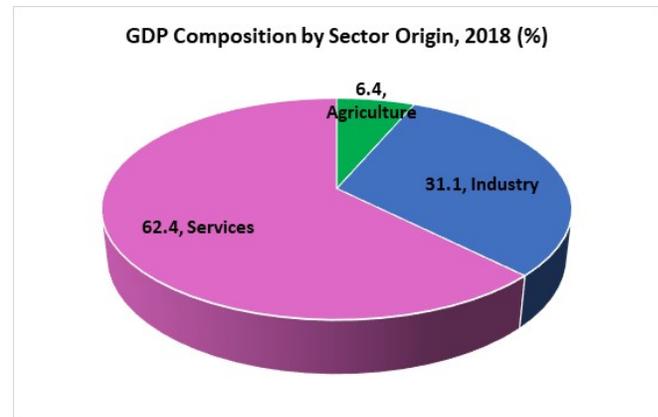


Table 1: Important socio-economic parameters for Turkey

| Parameter | Value |
|---|--|
| Population | 82.3 million (2018) |
| Median Age | 32 (2018) |
| Labor Force (ages 15-64) | 32.3 million (2018) |
| Unemployment Rate (ages 15-64) | 11.2 percent (2018) [14.3 percent, August 2019] |
| Unemployment Among Youth* (ages 15-24) | 20.1 percent (2018) [27.4 percent, August 2019] |
| GDP | USD 769 billion (2018) |
| GDP per Capita | USD 9,342 (2018) |
| Trade Balance | USD -42 billion (2018) |
| Tourists (# of foreign citizens entering) | 38.9 million (2018) |
| Inflation - CPI | 20.30 percent (2018) [10.56 percent, Nov. 2019] |
| Exchange Rate (end of period) | 5.28 TRL/USD (2018) [5.75 TRL/USD, Nov. 2019] |
| Foreign Direct Investment (FDI) | USD 13.2 billion (2018) |
| Number of Companies with Foreign Capital | 65,533 (2018) |
| Major Export Markets (all products) | Germany (9.6%), UK (6.6%), Italy (5.7%), Iraq (5.0%), USA (4.9%), Spain (4.6%), France (4.3%), Netherlands (2.8%), Belgium (2.4%), Israel (2.3%) (2018) |
| Major Import Sources (all products) | Russia (9.6%), China (6.6%), Germany (5.7%), USA (5.0%), Italy (4.9%), India (4.6%), UK (4.3%), France (2.8%), Iran (2.4%), South Korea (2.3%) (2018) |
| Major Cities | Istanbul (15.0 m), Ankara (5.5 m), Izmir (4.3 m), Bursa (3.0 m), Antalya (2.4 m), Adana (2.2 m), Konya (2.2 m), Sanliurfa (2.0 m), Gaziantep (2.0 m), 14 other cities over one million population (2018) |

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

The security situation in the country has improved in 2019, leading to an increase of tourist arrivals, which is one of the most important industries for Turkey. An operation in Northern Syria by Turkish armed forces called “Peace Spring” has

⁵ November 30, 2019, Reuters: <https://www.reuters.com/article/us-yapi-kredi-m-a-unicredit-koc/unicredit-agrees-to-cut-stake-in-turkeys-yapi-kredi-to-below-32-idUSKBN1Y407K>

been underway since autumn 2019, causing distress both in tourism and incoming foreign direct investments (FDI). Travelers are advised to [check the U.S. Department of State travel advisory](#) before planning to travel to Turkey.

| ADVANTAGES | CHALLENGES |
|--|---|
| GDP growth and disposable income growth despite recent slowdown | Domestic and international political challenges bring instability, which also affects the tourism industry. |
| Strong and steady retail market, as well as more dual income households, drives new demand for processed, frozen, prepared food and ingredients. | Artisan domestic products such as baked goods and cheese utilize domestic ingredients and have strong existing relationships with ingredient suppliers. |
| Large population base: young and growing, middle and upper middle class are growing. | Economic instabilities such as exchange rate fluctuations and increasing inflation. |
| High and increasing urbanization rate; increasing rates of female participation in work force. | Lack of transparency in rules and regulations. |
| Strong and steady retail market growth. | High import duties on processed/packaged food and agricultural products. |
| Unsaturated market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry is requiring a wide range of ingredients and is open to new ingredients, like additives and processing aids. | Importing can be complex: Time-consuming import procedures. |
| Internationally-savvy new generation open to more new tastes from abroad. | Strong traditional food and cuisine affecting consumption habits. |
| Growing demand for high value packaged food; ready to-eat/cook meals as the share of working women increases. | Risk of similar products being developed domestically, such as packaged confectionery products and ready-to-eat meals. |
| Fast-growing modern, organized grocery chains. | Unregistered economy can create unfair competition. |
| Positive perception for products from the USA. | No genetically engineered products or ingredients are approved for food use in Turkey. |
| Strong food culture and tradition of gathering for meals in large groups, so new products fitting into existing food culture and eating habits are easily adopted. | Marketing for some products can be difficult: Labeling laws limit health-related claims, and regulations limit alcohol advertising. |
| Many regulations are similar to those of the EU, so the expansion to Turkey can be easier for companies already exporting to Europe. | Competition from many products imported under FTAs or European countries with lower tariffs. Additional taxes were introduced for several U.S.-origin goods in 2018, which continues in 2019. |

II. EXPORTERS BUSINESS TIPS

a. MARKET RESEARCH

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

b. LOCAL BUSINESS CUSTOMS & TRENDS

After conducting market research and determining that there is a potential market in Turkey for the food/agricultural item that you are dealing with, it is important to develop a good strategy for market entry considering the local business customs. The Turkish business community is very open to doing international business. Turkey straddles Southern European and Middle Eastern cultures, and relationships are very important for business. This makes already existing relations and connections in the country especially important. Personal relationships and connections are essential. Turkish businesspeople attach great importance to courtesy in business-related endeavors. Turkey is a country with a business culture and people that is somewhat like Southern/Western European countries/cultures; on the other hand, it has many qualities taken from Middle Eastern/Islamic cultures and Central Asian, Turkic cultures. Business life and habits are all affected from the mix, so it is important to understand your counterpart. In most cases, a local business partner is very useful to understand the context. Some points to consider are as follows:

- Dress well for business meetings, especially if it is the “getting to know each other” stage. Overdress if not sure what to wear. Dress conservatively if not sure. Shorts, sandals and sportswear are not taken well in business environments, especially for men, even in southern beach cities.
- Punctuality is taken seriously compared to Mediterranean and Middle Eastern cultures. Standard time is three hours ahead of Greenwich Mean Time (GMT). Turkey does not observe daylight savings time since 2016.
- Take Turkish and Islamic holidays in consideration. Although business is conducted at all times, it might be smart to consider the Islamic holy month of Ramadan. It is important to judge how much value your counterpart attaches to these days.
- Family is important in Turkey; the superiors in the company are often seen as father/mother figures that need to take care of the employees in many senses.
- Turkish people take pride in their rich history and cultural heritage. Try to learn something about Turkish history.
- Turkish people are also proud of their rich and varied cuisine. When you try Turkish food, compliments are appreciated.
- Turkish coffee and tea have a special role in Turkish culture and also in business meetings. They will be offered at the start of a meeting as a courtesy. It is polite to accept one of those when offered, or ask for a glass of water.
- Business lunch and dinners are rather important to build relations/connections; it is a good sign when invited. Try to accept when possible. These relations will affect the business done.
- Turkish businesspeople prefer to do business with people who they trust on a personal level; lunch and dinners might serve as very good platforms to build a personal connection and trust.
- Almost everything is taken personally. There is a very fine line between personal and business matters.
- In Turkish culture, it is important to take good care of business guests (as they do with personal guests), especially foreign ones. Reciprocity is expected and taken as a very good sign when done properly.

c. GENERAL CONSUMER TASTES & TRENDS

Although there is a strong Turkish culinary tradition and ample processed food production in the country, upper-middle and upper income level consumers, especially in large cities like Istanbul, Izmir, Ankara, Antalya, Bursa etc., tend to be

open to new, imported tastes. Young and single professionals in the metropolitan areas tend to have more interest in international travel compared to their parents. Thanks to this younger metropolitan population with increasing disposable income, there is an increased awareness of international tastes and influx of international cuisine to Turkey in the last two decades such as Italian restaurants, sushi places, Mexican restaurants, Indian restaurants, Thai kitchen, Chinese restaurants and takeaways, American-style diners, luxury burger houses, various fast food chains dominantly from the United States, and many fusion cuisines. In the last decade or so, Turkish supermarkets have been featuring more international ingredients and imported processed food compared to almost nothing a decade ago.

According to Post observations, thanks to the same demographic group, healthy, functional, and organic food sectors are growing as well. Consumers are becoming increasingly educated about and aware of the quality, nutritional value, and packaging of their food. They tend to be more aware of the food safety and expiration date of the foods they consume compared to a few decades ago.

Except for those at higher income levels, Turkish consumers are price sensitive in general; discount retailers and private label brands are on the rise.

III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

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

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

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

b. COUNTRY LANGUAGE LABELING REQUIREMENTS

On January 26, 2017, the Ministry of Food, Agriculture & Livestock (changed to the [Ministry of Agriculture and Forestry](#) as of Summer 2018) abolished the previous Turkish Food Codex Regulation on Labeling and published two separate regulations to replace it which include: The “Turkish Food Codex Regulation on Food Labeling and Provision of Information to Consumers” (available [here](#) in Turkish) and “The Turkish Food Codex Regulation on Nutrition and Health Claims” (available [here](#) in Turkish). As with the prior versions of the regulations, these were prepared in parallel to the relevant the EU Directives and Regulations within the framework of EU harmonization.

Please have look at the Section V of our [Food and Agricultural Import Regulations and Standards Report](#) if you need details on labeling requirements. In general, most labeling requirements can be met with a sticker put on the packaging of imported processed food with the appropriate information on it in the Turkish language⁶.

c. TARIFFS and FOREIGN TRADE AGREEMENTS (FTAs)

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

Turkey is in a Customs Union with the EU. In addition, [Turkey has Free Trade Agreements](#) with EFTA (European Free Trade Association Countries: Norway, Liechtenstein, Iceland, Switzerland) and [19 other countries](#). Among these 19 countries, the FTA with Syria is on hold for a period of time. Furthermore, FTAs with Lebanon, Kosovo, Sudan, Qatar, and Venezuela have been signed but not ratified yet.

⁶ Having said this, each product should be examined and a decision of packaging and labeling should be given separately.

Due to the FTAs with EU and EFTA, European countries are competitors to 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 Trade Marks. You can take a look at the [Turkish industrial property law](#) which governs the patents and trademarks and [related regulations](#) (link in Turkish) about the applications of the law.

IV. MARKET SECTOR STRUCTURE and TRENDS

a. SUPPLY CHAIN & PRODUCT FLOW

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



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

b. RETAIL FOOD SECTOR

Despite the political and economic challenges that Turkey is facing in recent years, the food retail industry has been growing due to a young, dynamic population with 75 percent urbanization rates and a growing middle class. The grocery retail sector has been growing for the past five years. The real sales index has decreased slightly in 2017 due to economic slowdown but is expected to pick up in 2018. Grocery retail sales were \$67.6 billion, which constituted 55% of all retail sales through approximately 352,000 organized and unorganized grocery retailers in 2018. Discount and hard-discount chains have been growing for the last five years with their private label products. Several foreign market chains have left the market in the past decade, leaving the stage mostly for domestic chains. Although still limited in sales, there is an increasing demand for imported processed food. There is an increasing trend of online shopping for groceries in major cities, especially in Istanbul, as the number of companies that offer online ordering increase. Please read [our Retail Foods Report](#) for detailed analysis of the sector.

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

There has been an increase in incoming tourists in 2017 and 2018 compared to 2016, when there were several security problems. The number of tourists is expected to increase also in 2019, despite military operations in Northern Syria by Turkish Armed Forces. The security situation was stable in summer 2019 during the main tourist season for Turkey. Fast food restaurants have been performing better compared to full service and fine-dining outlets. There are over 140 thousand food service outlets in Turkey in all segments. The industry is very fragmented with mostly small stand-alone restaurants. Five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises. Please read [our Food Service: HRI Report](#) for detailed analysis of the sector.

d. FOOD PROCESSING SECTOR

There are 42,030 food processing and 499 beverage-producing enterprises in Turkey as of 2015, according to the latest statistics published by TurkStat. Turkey has a modern and developed food processing industry supplying the domestic

population and exporting to foreign markets. The food processing industry constitutes 12.53 percent and the beverage industry constitutes 0.15 percent of all manufacturing industries in Turkey. As of the end of 2016, there were 577 foreign direct investments in food and beverage production, of which 100 were German, 44 Dutch, 33 French, and 31 American. Of these 577, 12 were started in 2016. Please read [our Food Processing Ingredients](#) for detailed analysis of the sector.

V. **AGRICULTURAL and FOOD IMPORTS**

a. **AGRICULTURAL & FOOD IMPORT STATISTICS**

Table 1: Consumer Oriented Agricultural Products Imported from the United States to Turkey (2014 - 2019)**

| Thousands of USD | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|--|---------|---------|---------|---------|---------|---------|
| Total | 238,990 | 198,541 | 226,093 | 219,909 | 262,594 | 119,225 |
| 1 Walnuts, Fresh Or Dried, In Shell | 70,951 | 62,431 | 64,642 | 51,588 | 98,644 | 21,049 |
| 2 Almonds, Fresh Or Dried, Shelled | 37,591 | 48,408 | 49,807 | 47,696 | 69,345 | 31,846 |
| 3 Food Preparations Nesoi | 42,029 | 38,891 | 37,957 | 32,569 | 33,745 | 21,166 |
| 4 Almonds, Fresh Or Dried, In Shell | 32,012 | 18,032 | 40,765 | 56,666 | 33,052 | 21,938 |
| 5 Tea Or Mate Extracts/Essences/Concentrates & Preps | 767 | 880 | 1,338 | 3,212 | 3,216 | 1,624 |
| 6 Bread, Pastry, Cakes, Etc Nesoi & Puddings | 1,446 | 921 | 1,022 | 2,054 | 1,657 | 100 |
| 7 Other non-alcoholic beverages (except water) | 0 | 0 | 0 | 350 | 1,336 | 1,587 |
| 8 Sauces Etc. Mixed Condiments And Seasonings Nesoi | 1,683 | 999 | 1,130 | 1,051 | 1,288 | 805 |
| 9 Coffee, Roasted, Not Decaffeinated | 906 | 1,225 | 1,423 | 1,602 | 1,199 | 371 |
| 10 Citrus Fruit (Including Mixtures), Prep Etc Nesoi | 14 | 0 | 28 | 847 | 1,159 | 1,409 |
| 11 Walnuts, Fresh Or Dried, Shelled | 7 | 349 | 4,445 | 609 | 1,055 | 0 |
| 12 Nuts/Other Seeds/Inc. Mix., Preps. Or Pres., Nesoi | 4,452 | 354 | 1,474 | 201 | 827 | 499 |
| 13 Vegetables, Nesoi, Dried And Vegetable Mixtures | 1,325 | 930 | 1,791 | 2,707 | 662 | 239 |
| 14 Fruit, Nesoi, And Nuts, Uncooked Or Cooked, Frozen | 9 | 0 | 199 | 211 | 564 | 4 |
| 15 Fruit & Other Parts Of Plants, Nesoi, Prep. Or Pre.ved | 445 | 645 | 757 | 926 | 510 | 112 |
| Others Consumer Oriented Agricultural Products | 45,352 | 24,476 | 19,316 | 17,621 | 14,335 | 16,476 |

Source: Trade Data Monitor.

** 2019 data is for the first nine months only (Jan. – Sept.)

Table 2: All Agricultural & Related Products* Imported from the United States to Turkey (2014 - 2019)**

| Thousands of USD | 2014 | 2015 | 2016 | 2017 | 2018 | 2019** |
|--|-----------|-----------|-----------|-----------|-----------|---------|
| Total | 2,122,338 | 1,578,816 | 1,482,709 | 1,803,310 | 1,625,390 | 956,363 |
| 1 Cotton, Not Carded Or Combed | 914,957 | 527,652 | 518,926 | 733,246 | 704,104 | 620,729 |
| 2 Brewing Or Distilling Dregs And Waste, W/Nt Pellet | 65,723 | 63,643 | 152,058 | 275,096 | 229,367 | 102,349 |
| 3 Soybeans, Other Than Seed | 272,425 | 338,851 | 173,840 | 174,765 | 97,795 | 1,495 |
| 4 Wood In Chips Or Particles, Coniferous | 82,126 | 134,856 | 110,688 | 90,627 | 93,694 | 10,480 |
| 5 Tobacco, Partly Or Wholly Stemmed/Stripped | 47,944 | 41,605 | 56,639 | 51,469 | 58,631 | 10,220 |
| 6 Residues Of Starch Mfr And Similar Residues | 29,804 | 5,854 | 45,931 | 42,441 | 19,430 | 16,787 |
| 7 Chickpeas (Garbanzos), Dried Shelled, Including Seed | 4,749 | 3,826 | 2,444 | 11,527 | 15,215 | 0 |
| 8 Animal Feed Prep Except Dog Or Cat Food, Retail Pk | 11,353 | 9,964 | 15,096 | 12,143 | 13,957 | 8,748 |
| 9 Whiskies | 20,461 | 22,002 | 15,222 | 20,146 | 12,738 | 3,272 |
| 10 Soybean Oilcake & Oth Solid Residue, Wh/Not Ground | 99,235 | 24,865 | 23,704 | 28,842 | 11,097 | 2 |
| 11 Cattle, Live, Purebred Breeding | 26,525 | 13,990 | 10,895 | 4,184 | 10,550 | 0 |
| 12 Tallow Of Bovine Animals, Sheep Or Goats | 18,052 | 17,573 | 13,082 | 10,178 | 8,756 | 6,318 |
| 13 Enzymes And Prepared Enzymes, Nesoi | 5,916 | 6,620 | 6,256 | 6,780 | 6,099 | 5,308 |
| 14 Vegetable Seeds For Sowing | 7,396 | 7,219 | 7,306 | 7,027 | 5,976 | 4,357 |
| 15 Tobacco, Not Stemmed/Stripped | 0 | 209 | 3,994 | 631 | 5,900 | 3 |
| Other Agricultural & Related Products | 515,671 | 360,089 | 326,629 | 334,207 | 332,082 | 166,296 |

Source: Trade Data Monitor.

* Data for Consumer Oriented Agricultural Products is not shown in the table since it has been listed in Table 1 above. However, the total includes Consumer Oriented Agricultural Products too.

** 2019 data is for the first nine months only (Jan. – Sept.)

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

Tree nuts, sunflower seeds for confectionary, dates, functional foods, sauces, gourmet/ethnic food ingredients, spices, cranberries & dried fruits, wine and non-alcoholic beverages are some consumer oriented food products that have potential. Please see [our Retail Foods Report](#) for more details.

VI. KEY CONTACTS and FURTHER INFORMATION

Turkish importer/agent/distributor companies typically attend large trade shows such as [Anuga](#) in Germany, [Sial](#) in France, [Gulfood](#) in Dubai and [Seafood Expo Global](#) in Belgium. Food trade shows in Turkey can be helpful to visit before deciding to enter the market and promote a product. [Anfas Food Product](#), [World Food Istanbul](#), [CNR Food Istanbul](#), [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. The Turkish tourism industry is usually at [ITB Berlin Tourism Exhibition](#) to sell holiday packages; nevertheless there could be opportunities to talk to them as buyers too, although that is not their focus at the show. [Travel Turkey Izmir Expo](#) and [Eastern Mediterranean International Tourism & Travel Exhibition](#) are two local tourism-related exhibitions.

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

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| Office of Agricultural Affairs United States Department of Agriculture U.S. Embassy Ankara 110 Ataturk Bulvari, Kavaklidere, 06100 Ankara, Turkey Telephone: +90 312 457 7393 E-mail: agankara@usda.gov | Office of Agricultural Affairs United States Department of Agriculture U.S. Consulate General Istanbul Ucsehitler Sokak No:2, Istinye, 34460 Istanbul, Turkey Telephone: +90 212 335 9068 E-mail: agistanbul@usda.gov |
|--|--|

Republic of Turkey, [Ministry of Agriculture and Forestry](#) (MinAF)
[Union of Chambers and Commodity Exchanges of Turkey](#) (TOBB)
[Foreign Economic Relations Board of Turkey](#) (DEIK)
[Investment Support and Promotion Agency of Turkey](#) (ISPAT)
[All Foods Foreign Trade Association](#) (TUGIDER)
[Federation of All Food and Drink Industry Associations of Turkey](#) (TGDF)
[Association of Food Additives and Ingredients Manufacturers](#) (GIDABIL)
[Federation of All Food and Drink Industry Associations of Turkey](#) (TGDF)
[Federation of Food Industrialists Associations](#) (YESIDEF)
[All Foods Foreign Trade Association](#) (TUGIDER)
[Turkish Federation Retailers](#) (TPF)
[Food Retailers Association](#) (GPD)
[Istanbul Retailers Association](#)
[Turkish Restaurant and Entertainment Association](#) (TURYID)
[Istanbul Food Industrialists Association](#) (IYSAD)
[Out of House Consumption Association](#) (ETUDER)
[Turkish Tourism Investors Association](#) (TTYD)
[Hotel Association of Turkey](#) (TUROB)
[Turkish Small Hotels Association](#)
[All Restaurants and Restaurant Suppliers Association](#) (TURES)
[Association of Turkish Travel Agencies](#) (TURSAB)
[Turkish Statistics Institute](#) (TurkStat)

Attachments:

No Attachments