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Report Highlights:

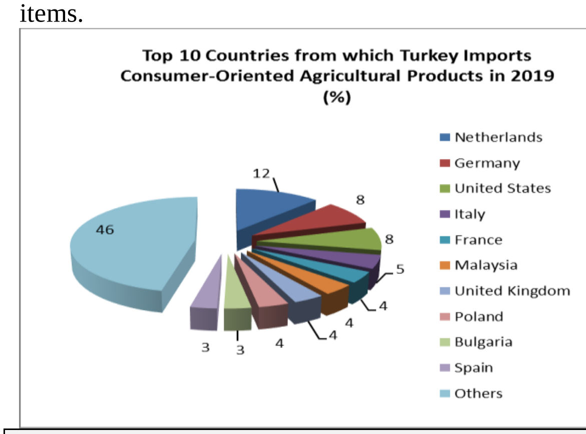
Turkey has a young population of 83 million people that is fueling the consumption of consumer-oriented agricultural products. The country is in a Customs Union with the EU and is the 19th largest economy in the world. Despite the current economic slowdown and geopolitical difficulties, there is still a gap in the market to fill and we expect increased demand in the long-term for many different types of agricultural products. There was a major boost to e-commerce in 2020 due to COVID19. Initial reports indicate that supermarket chains saw record sales before the COVID19 lock-down and throughout the pandemic period. Even with some food inflation, there has been no reported scarcity of food or beverages.

Executive Summary

The Republic of Turkey has a young population of 83 million people fueling consumption of consumer-oriented agricultural products. The country is in a Customs Union with the EU and is the 19th largest economy in the world. The Economist Intelligence Unit (EIU) forecasts an average annual two percent GDP growth rate between 2020 and 2023. Total imports of consumer-oriented agricultural goods have grown 0.15 percent in the first ten months of 2020 compared to same period in 2019. In most cases, U.S. food exporters should utilize importers in Turkey to reach the market.

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 EU Customs Union. Until recently, Turkey was not a major importer of agricultural products., supplying internally most products. However, Turkey's agriculture and food sector has in recent years become more specialized and export oriented and now imports some agricultural products 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 48,949 food processing and 627 beverage producing enterprises in Turkey, according to the latest statistics published by TurkStat. Turkey has a modern and developed food processing industry supplying the domestic population and exporting, which represents about 14 percent of all manufacturing activities.

Food Retail Industry

Grocery sales were USD $69 billion as of the end of 2019. The inflation/seasonally adjusted Real Retail Sales Index started to decline slightly in 2019. Despite the recent political and economic challenges, the food retail industry had been growing, particularly in the hard discount segment. Organized/modern retailers make up the majority of the grocery market share as traditional retailers slowly exit the market.

Quick Facts

Imports of Consumer-Oriented Ag. Products 2019

US$2.3 billion

List of Top 10 Growth Products in Turkey (Imported Consumer-oriented Agricultural Products) 2017-2019

1. Onions & shallots	**6.** Coffee, extracts.
2. Potatoes, fresh/chilled	**7.** Avocados, fresh/dried
3. Tomatoes, fresh/puree/paste	**8.** Cashew nuts, shelled
4. Animal Meat, boneless	**9.** Citrus, Prepared/preserved
5. Garlic, fresh/chilled	**10.** Chestnuts, inshell

Food Retailers by Channel (Sales in Mill. USD) 2019

Modern Grocery Retailers	**36,436**
- Convenience Stores	1,330
- Discounters	13,166
- Gas station/ Forecourt retailers	584
- Hypermarkets	941
- Supermarkets	20,415
Traditional Grocery Retailers	**32,523**
Grocery Retailers Total	**68,959**

Top 10 Retailers (by Marketshare in 2019)

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

GDP/Population 2019

Population: 83.4 million
GDP: US$ 760 billion
GDP Per Capita, PPP: US$ 9,106

Strengths/Weaknesses/Opportunities/Threats

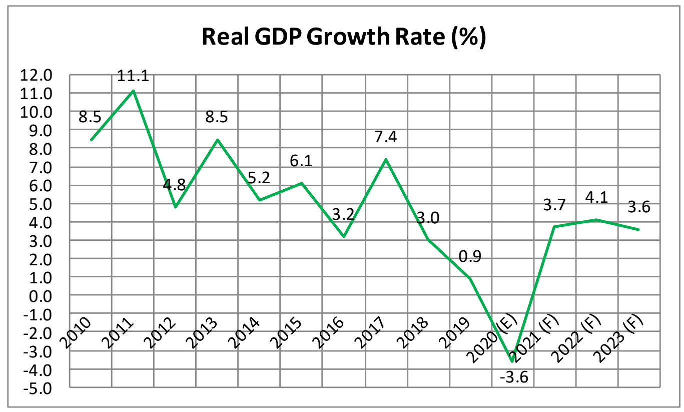
Strengths	Weaknesses
Long-term GDP and disposable income growth	Domestic and international political challenges
Large population base: young and growing	Current economic downturn and exchange rate fluctuations
Opportunities	**Threats**
Unsaturated market, open for new items	Complex and time-consuming 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

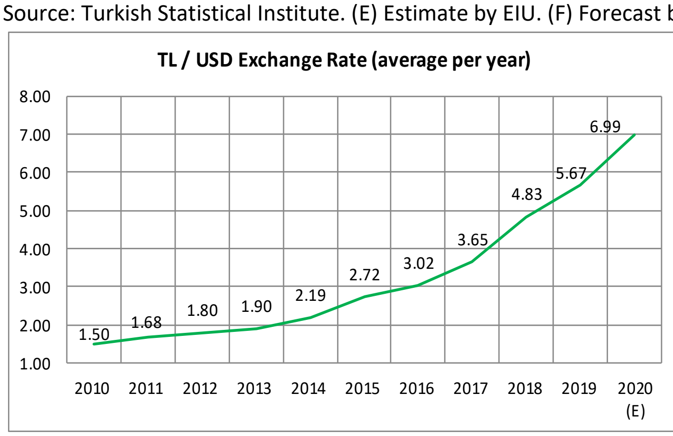
The Republic of Turkey, located in the southeast of Europe and the northwest of the Middle East, bordering the Black Sea in the north and the Mediterranean Sea in the south, has a young population of 83 million people[1] fueling consumption of consumer-oriented agricultural products. The median age is 32.2 and 59 percent of the population is between the ages 15 to 54. The urbanization rate has reached 76%, with rapid urbanization since 2000. Along with the young population, a high urbanization rate, increasing middle-class household income, a broadening base of female participation in the labor force, and a 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 was the 19th largest economy in the world in 2019 according to the World Bank.



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

According to Economist Intelligence Unit (EIU), the average Gross Domestic Product (GDP) growth rate between 2015 and 2019 was 4.1 percent and the annual average GDP growth rate is estimated to be around two percent between 2020 and 2023. Turkey's economy grew 7.4 percent in 2017 because of a short-term fiscal stimulus by the Turkish government. Since the fiscal stimulus was not sustainable, Turkey registered the lowest growth rate in 2019 in ten years, at only 0.9 percent.

Despite robust growth expectations in the long run, Turkey's macroeconomic outlook is facing challenges in the short run. Persistent political risk and geopolitical developments in the region, tensions in international relations, and investors' perceptions of risks make the Turkish economy fragile. These developments have negatively impacted trade, tourism, investment, and growth.



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

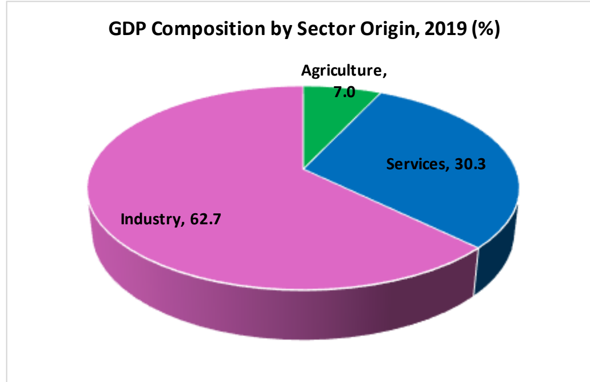
The inflation rate stubbornly stayed at double digit levels in 2019 (a consumer price index [CPI] of 11.84 percent by at the end of the year). However, this is a major decrease from the 20 percent plus inflation rate in 2018. The value of the Turkish lira (TL) has depreciated against major currencies like the U.S. dollar and the Euro in last few years. The ability of the Central Bank of Turkey to fight inflation and currency instability were undermined by political interventions with the management of the Central Bank. Moreover, since March 2020, Turkey has been struggling, like many other countries, with COVID-19 that is expected to adversely affect the economy and food price levels in 2020.

The Government of Turkey has been promising a new legal reform in the country since May 2020 to attract foreign direct investments (FDI). However, as of December 2020, the content of this reform is not yet known. Incoming foreign direct investments to Turkey dropped 54 percent between 2015 and 2019[2]. We also note that Western FDI was replaced by Gulf region investments.

[1] United Nations mid-year estimate for 2019.

[2] Central Bank of Republic of Turkey.

COVID-19 has been affecting Turkey since March 2020. Major industries and logistics kept working during the pandemic as well as the retail food industry and there has been no scarcity of food items across the country. Nevertheless, major lock downs of European countries have affected the Turkish economy as EU is the largest trading partner. The tourism industry was also negatively impacted in 2020 because of coronavirus.



In 2019 the agriculture sector represents seven percent, or $54 billion, of total GDP. The State Department provides information about the investment climate in Turkey which has a lot of business-related information that 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	83.4 million (2019)
Median Age	32.2 (2019)
Labor Force (ages 15-64)	56.9 million (2019)
Unemployment Rate (ages 15-64)	13.7 percent (2019)
Unemployment Among Youth* (ages 15-24)	25.4 percent (2019)
GDP	USD 760 billion (2019)
GDP per Capita	USD 9,106 (2019)
Trade Balance	USD -17 billion (2019)
Tourists (# of foreign citizens entering)	45 million (2019)
Inflation – CPI year-end	11.84 percent (2019) [14.03%, Nov. 2020]
Exchange Rate (end of period)	5.75 TRL/USD (2019) [7.95 TRL/USD, Dec. 2020]
Foreign Direct Investment (FDI)	USD 9 billion (2019)
Number of Companies with Foreign Capital	74,227 (2019)
Major Export Markets (all products)	Germany (9.2%), UK (6.2%), Iraq (5.7%), Italy (5.4%), USA (5.0%), Spain (4.5%), France (4.4%), Netherlands (3.2%), Israel (2.5%), Russia (2.3%) (2019)
Major Import Sources (all products)	Russia (10.9%), Germany (9.2%), China (9.1%), USA (5.6%), Italy (4.4%), France (3.2%), India (3.2%), UK (2.7%), South Korea (2.8%), Spain (2.1%) (2019)
Major Cities	Istanbul (15.5 m), Ankara (5.6 m), Izmir (4.3 m), Bursa (3.0 m), Antalya (2.5 m), Adana (2.2 m), Konya (2.2 m), Sanliurfa (2.1 m), Gaziantep (2.0 m), 15 other cities over one million population (2019)

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

The security situation in the country improved in 2019, leading to an increase of tourist arrivals, which is one of the most important industries for Turkey. 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 a 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.
A growth market, open for new items for consumer use. Furthermore, there is a large and developed food processing industry that requires a wide range of ingredients The industry is also open to new ingredients, like additives and processing aids.	Importing can be complex: Time-consuming import procedures.
An internationally savvy new generation of Turks are 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 2020.

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 a 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 some other Mediterranean/Levant cultures, most of the market intelligence and business is conducted based on relationships. Please visit our country page for other FAS exporter assistance reports. Other reports can be purchased from various sources such as, but not limited to, Euromonitor or Neilsen. Getting a reliable local partner/agent is a good way of doing relationship-based market research.

b. LOCAL BUSINESS CUSTOMS & TRENDS

After conducting market research 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 has not observed daylight savings time since 2016.
- Take Turkish and Islamic holidays in consideration. Although business is conducted at all times, it might be smart to consider the Islamic holy month of Ramadan. It is important to judge how much value your counterpart attaches to these days.
- Family is important in Turkey; the superiors in the company are often seen as father/mother figures that need to take care of the employees in many senses.
- Turkish people take pride in their rich history and cultural heritage. Try to learn something about Turkish history.
- Turkish people are also are proud of their rich and varied cuisine. When you try Turkish food, compliments are appreciated.
- Turkish coffee and tea have a special role in Turkish culture and also in business meetings. They will be offered at the start of a meeting as a courtesy. It is polite to accept one of those when offered or ask for a glass of water.
- Business lunch and dinners are rather important to build relations/connections; it is a good sign when invited. Try to accept when possible. These relations will affect the business done.
- Turkish businesspeople prefer to do business with people 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 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 a 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 language[3].

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

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.

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.

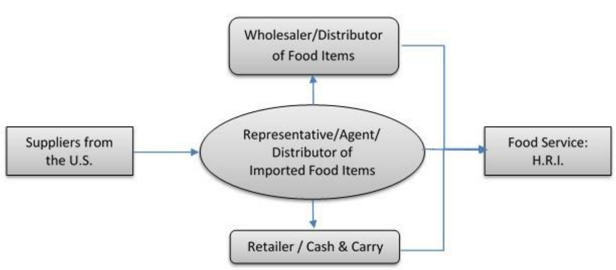
d. TRADEMARKS and PATENTS

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 last decade up until the recent economic stagnation that began in 2018. Grocery retail sales were $69 billion in 2019, which constituted 55% of all retail sales through approximately 348,000 organized and unorganized grocery retailers. 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 also an increasing trend of online shopping for groceries in major cities, especially in Istanbul, as the number of companies that offer online ordering increase. There was a major boost to grocery e-commerce in 2020 due to COVID19. Initial reports indicate that supermarket chains saw record sales before the COVID-19 lock-down and throughout the pandemic period so far. There was no reported scarcity of food or beverages, but some food inflation was observed. Please read our Retail Foods Report for detailed analysis of the sector.

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

There was an increase in incoming tourists in 2017 and 2018 compared to 2016, when there were several security problems. The number of tourists entering the country continued to increase, but the real value of tourist receipts decreased in 2019. Full-service and fine dining continues to have increased sales. Fast food outlets and home delivery from them have been performing well due to continuing concerns off macroeconomic challenges including inflation and depreciation of the Turkish lira. Cafes/Coffee shops are still trendy among a young urban population. Bars, especially on the Mediterranean coast, but also in Istanbul, have been suffering due to a lack of European tourists. There are approximately 145,000 food service outlets in all categories which most are independent establishments. 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 48,949 food processing and 627 beverage producing enterprises in Turkey as of 2018 according to latest data published. Turkey has a modern and developed food processing industry supplying the domestic population and exporting to foreign markets. The food processing and the beverage industry constitutes 14 percent of all manufacturing industries in Turkey. As of the end of 2018, there were 611 foreign direct investments in food and beverage production. The major investments came from Germany (101), the Netherlands (44), France (33), the United States (31), Italy (30), Russia (26), Iran (26) and Switzerland (25). Please read our Food Processing Ingredients for details.

V. AGRICULTURAL and FOOD IMPORTS

a. AGRICULTURAL & FOOD IMPORT STATISTICS

Table 1: Consumer Oriented Agricultural Products Imported from the United States to Turkey (2015 - 2020)**

	Thousands of USD	2015	2016	2017	2018	2019	2020*
	Total	302,769	347,317	381,250	399,897	372,773	270,676
1	Walnuts, Fresh Or Dried, In Shell	74,634	92,780	107,114	109,880	86,718	68,297
2	Almonds, Fresh Or Dried, Shelled	86,627	79,512	67,853	82,596	76,895	76,410
3	Pistachios, In Shell, Fresh Or Dried	3,095	6,676	11,566	56,081	67,956	9,702
4	Almonds, Fresh Or Dried, In Shell	24,662	49,365	66,769	33,515	42,218	29,069
5	Food Preparations Nesoi	36,379	47,014	32,744	38,567	24,773	34,123
6	Pistachios, Shelled, Fresh Or Dried	3,671	1,259	18,357	15,908	15,233	8,049
7	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	0	29	949	1,338	2,051	2,025
8	Other Non-alch. Beverages (except water & non-alch. beer)	0	0	689	1,241	1,982	1,670
9	Tea Or Mate Extracts/Essences/Concentrates & Preps	852	1,515	3,346	3,434	1,932	2,330
10	Cheese, (Unripened Or Uncured) Fresh	0	0	0	0	1,920	100
11	Sauces Etc. Mixed Condiments And Seasonings Nesoi	1,508	927	1,280	1,319	1,427	780
12	Cheese, Nesoi inc. Cheddar And Colby	0	0	0	0	1,198	2,092
13	Food Preparations For Infant Use	0	0	0	1,237	1,111	0
14	Coffee, Roasted, Not Decaffeinated	729	1,720	1,551	973	709	101
15	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	645	764	982	894	677	677
	Others Consumer Oriented Agricultural Products	69,967	65,757	68,050	52,914	45,972	35,248

Source: Trade Data Monitor.

** 2020 data is for the first ten months only (Jan. – Oct.)

Table 2: All Agricultural & Related Products* Imported from the United States to Turkey (2015 - 2020)**

	Thousands of USD	2015	2016	2017	2018	2019	2020*
	Total	1,592,644	1,484,870	1,835,955	1,679,465	1,276,998	1,094,933
1	Cotton, Not Carded Or Combed	542,166	532,635	734,552	729,118	646,488	564,334
2	Brewing Or Distilling Dregs And Waste, W/Nt Pellet	63,775	154,902	266,798	224,224	127,772	133,763
3	Residues Of Starch Mfr And Similar Residues	5,500	45,912	39,406	19,160	22,146	3,438
4	Tobacco, Partly Or Wholly Stemmed/Stripped	67,312	66,984	51,273	56,117	16,227	17,399
5	Animal Feed Prep Except Dog Or Cat Food, Retail Pk	8,845	13,935	12,043	13,911	12,657	9,199
6	Kidney Beans, Including White Pea Beans, Dried Shelled	15,792	6,832	5,462	5,334	9,589	4,980
7	Tomatoes, Other Than Whole Or In Pieces (Inc. Paste and Puree), Prep. or Preser.	20,335	7,869	4,076	164	9,351	4,138
8	Tallow Of Bovine Animals, Sheep Or Goats, Nesoi	15,722	15,338	10,273	9,003	9,050	9,080
9	Corn (Maize) Oil And Its Fractions, Crude	30,505	16,783	15,202	14,340	8,725	14,165
10	Enzymes And Prepared Enzymes, Nesoi	6,705	6,155	6,974	6,199	5,929	2,869
11	Vegetable Seeds For Sowing	7,264	7,304	7,051	6,095	5,537	7,487
12	Mixtures Of Odoriferous Substances And Mixtures (Including Alcoholic Solutions)	4,511	5,197	6,014	5,539	5,298	3,602
13	Rice, Semi-Milled Or Wholly Milled	9,779	9,652	7,159	3,671	4,030	1,838
14	Sunflower Seeds, Whether Or Not Broken	9,024	6,268	5,626	3,120	2,902	2,315
15	Eggs Of Chickens (Fowls Of The Species Gallus Domesticus), Fertilized For Incubation	158	1,025	3,425	3,176	2,558	1,243
	Other Agricultural & Related Products	785,253	588,079	660,623	580,296	388,737	315,082

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.

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