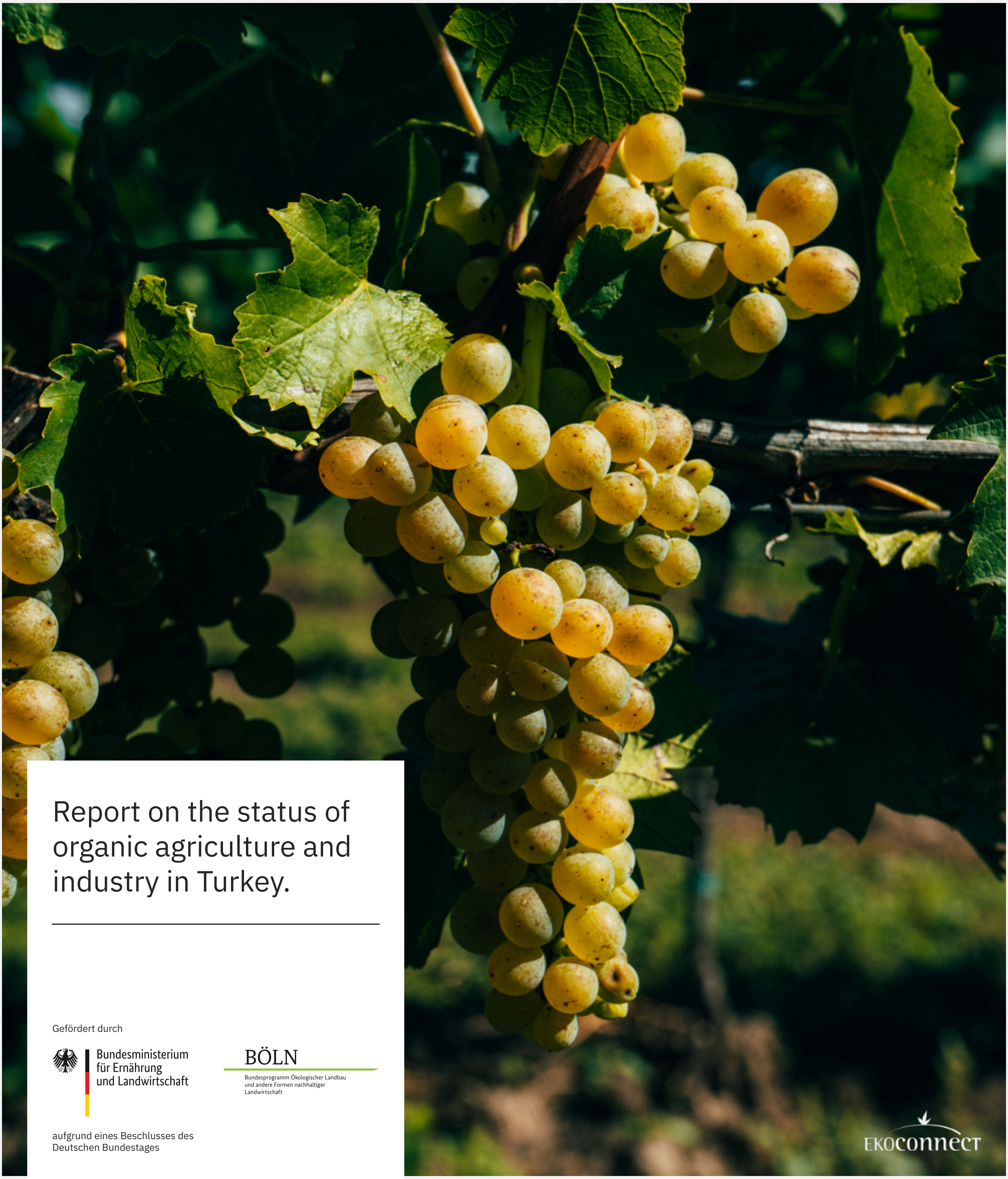
Country Report Organic 2021

TURKEY



Report on the status of organic agriculture and industry in Turkey.

Gefördert durch

Bundesministerium für Ernährung und Landwirtschaft

BÖLN
Bundesprogramm Ökologischer Landbau und andere Formen nachhaltiger Landwirtschaft

aufgrund eines Beschlusses des Deutschen Bundestages

EKOCONNECT

Imprint

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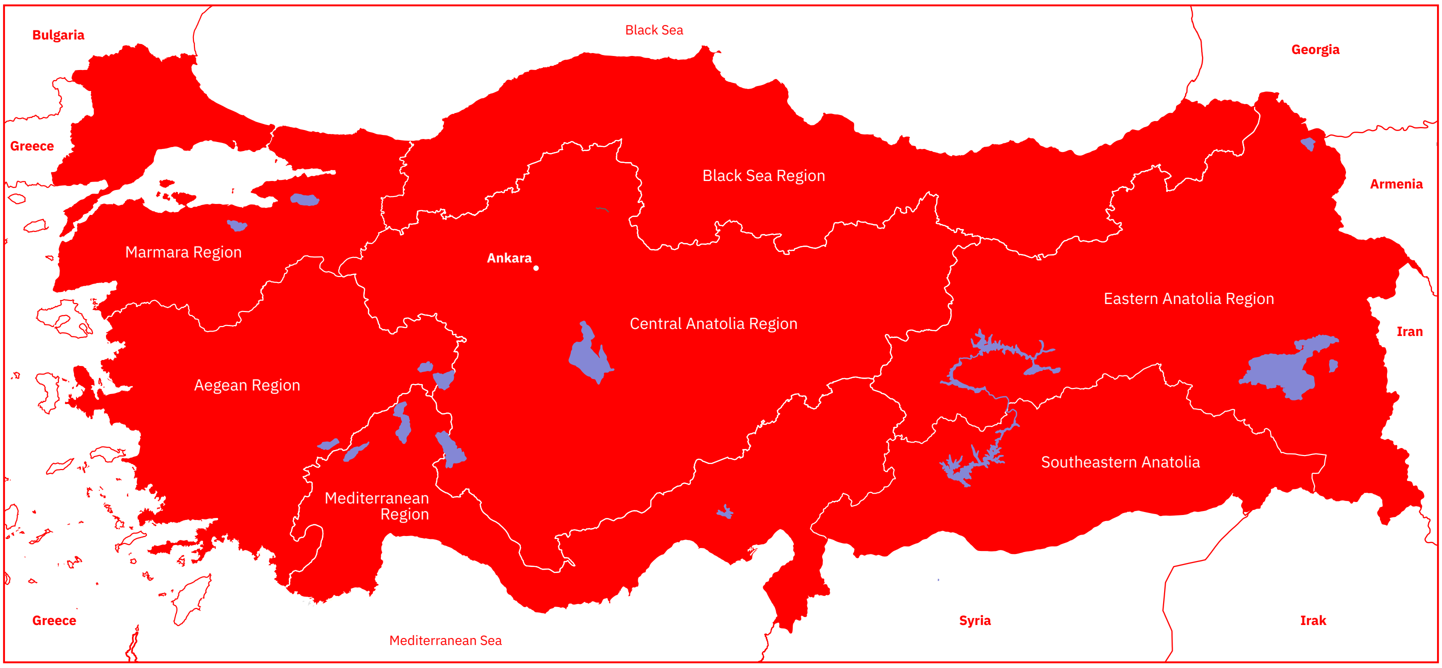

Figure 1: Map Turkey

Country statistics[1]

785,350 km²
Land area

83.6 Mio.[2]
Population (2020*)

18 %
Share of employment in agriculture (2020)

31.5 yıl
median age of the population (2020*)

8,548 USD
GDP per capita (2020)

12.3 %
Inflation rate (2020)

Turkish Lira (TRY)
Currency

92.97 %[2]
of the Turkish population lives in cities (2019)

1 Germany Trade & Invest: Wirtschaftsdaten kompakt (May 2021); Statistica 2021
2 Source: TURKSTAT
* Estimate

Certified operators and area[3]

52,600
Sertifikalı üretici sayısı

382,665 ha
Total area under organic certification

114,845 ha
Agricultural area under conversion to organic

28,882 ha
Certified organic wild collection area

Cotton[4]

24,288 t
Organic cotton fibre (tonnes)

9.7 %
Share of global organic cotton

Animal husbandry[5]

1,091,423
Number of poultry

9,847
Number of ruminants (small and big)

182,991,927
Egg production (pieces)

21,800.61 ltr.
Milk production (litres)

49.78 t
Poultry meat production (tonnes)

706.20 t
Cattle meat production (tonnes)

70,385
Number of bee hives

1,028.39 t
Honey production (tonnes)

3 Organic data 2020, source: MoAF / TUIK
4 Organic data 2019, source: Textile Exchange
5 Organic data 2020, source: MoAF

The Organic Sector in Turkey

General info

Turkey has highly suitable production conditions for a wide range of organic crops:

- Excellent climatic conditions to produce a wide range of crops organically.
- Relatively low salary costs, especially in rural areas.
- Close proximity to the European market.
- Fairly good infrastructure: a nationwide welldeveloped road network and, with Izmir, Mersin and Trabzon, three large ports for the export of goods.
- A national organic legislation, which is largely harmonized with Council Regulation (EC) No 834/2007.
- A general positive attitude of the Government to wards organic agriculture, with a subsidy scheme for organic farming.

Hazelnuts, figs, apricots and raisins (sultanas) are the most important organic export crops grown in Turkey, being sold mainly as food ingredients in dried form. But fresh and frozen (IQF) fruits are also gaining increasingly in importance, such as strawberries, apples, cherries and pomegranate. In the non-food-sector, Turkey is well known for its strong textile industry and substantial organic cotton production.

The challenges relate primarily to the small-scale production patterns and the generally low level of education among farmers, toppled by very limited access to organic extension services. This leads to complex supply chains with many trading steps between field and shelf, which in turn negatively affects traceability. The involvement of many farmers within one business venture implies a rather high risk in regard to non-compliance of organic practices and potential contamination of produce at the level of production.

Organic sector development

The initial driver for organic sector development in Turkey relates to the export business. In the 1980s, first foreign companies initiated organic farming ventures to produce for the Western European market and soon after international certification bodies became active in Turkey. With increasing importance of organic production, the Turkish National Organic Regulation was issued in 1994 and in 2004 Turkey's first Law on Organic Farming came into force.

In parallel, key sector organizations such as the **Association of Organic Agriculture Organization (ETO)**, **Bugday** and **ORGÜDER** were founded, which actively promoted organic agriculture among civil societies. Greater engagement for organic issues was provided by the **EGE University, Faculty of Agriculture in Izmir and the Aegean Exporters' Associations (EIB)** was appointed in charge for all organic exports from Turkey.

Right from the beginning, Izmir, Turkey's third biggest city, became the main hub for the organic sector in Turkey. Since Izmir is the main export port, export companies were traditionally based there, and consequently, many organic control bodies (CB) also settled in Izmir. The idea of the formation of an efficient environment for the organic industry was picked up in 2005 by **EIB** and **ETO** with first clustering activities within an EU funded project. Following this initial stage, the 'İzmir Organic Cluster' was formed under the lead of EIB with the aim to enhance the competitiveness of export companies and thus achieving a sustainable increase of organic export volumes. Nowadays the İzmir Organic Cluster activities are coordinated by ETO.

Milestones of Organic Sector Development in Turkey

- 2015 Last revision of the Organic Law and Regulation
- 2011 Foundation of Department of Good Agricultural Practices and Organi Farming within the Ministry of Agriculture
- 2004 Law on Organic Farming set in place
- 2002 Foundation of Bugday Association
- 1994 Turkish National Organic Regulation issued
- 1992 Foundation of organic stakeholder association ETO
- 1987 International certification bodies start become active in Turkey: BCS, IMO, Ecocert, SKAL
- 1985 First requests from Europe for organic products from Turkey: dried fruits and nuts

Figure 2: Development of the organic sector in Turkey (1985 to 2015)

National legislation

In Turkey, organic agriculture is defined by two rules: The Organic Agriculture Law No. 5262 and the Turkish Organic Regulation No. 27676:

— **Organic Farming Law No. 5262 of 03/12/2004** (↳)
The Organic Farming Law defines authorities, duties and responsibilities in relation to inspection and certification services in the field of organic farming activities as well as to the procedures and principles of Ministry inspection. An English version is accessible under the link above.

— **Turkish Organic Regulation no. 27676 of 18/08/2010** (↳)
The Turkish Organic Regulation, which is largely harmonized with EU Regulation 834/2007, defines implementation rules for organic production, processing, packaging, labelling, storage, transportation marketing, control and certification. A consolidated version (in Turkish language) with all changes since its first publication in 2010 is accessible under the link above.

The competent authority responsible for the implementation of the national organic legislation is the Department of Good Agricultural Practices and Organic Agriculture, a subunit of the Plant Production General Directorate (BÜGEM) within the Republic of Turkey Ministry of Agriculture and Forestry (MoAF; former Ministry of Food, Agriculture and Livestock).

MoAF is responsible to promote the sustainable use of agricultural and ecological resources in Turkey, including access to safe food and high-quality agricultural products for the domestic and international market. In regard to organic agriculture, it is MoAF’s responsibility to set in place a Competent Authority for implementing the Organic Regulation including surveillance of control bodies.

Packed organic products sold in Turkey have to be labelled with the national organic logo. The use of the logo is restricted to organic products inspected and certified by an approved Turkish control body (CB). On imported, final packed products the Turkish organic logo

Info

Key sector institutions in Turkey

— Aegean Exporters' Association (EIB)

https://www.eib.org.tr/en/

— Association of Organic Agriculture Organization (ETO)

www.eto.org.tr

— Bugday Association for Supporting Ecological Living

www.bugdayglobal.org

— EGE University, Faculty of Agriculture

http://agr.ege.edu.tr/

— ORGUDER (Organic Food Producers Association)

http://www.orguder.org.tr/

— TEMA Foundation

https://www.tema.org.tr/

cannot be used. However, if the imported product is a semi-processed product and is finally processed or packed in Turkey, the Turkish organic logo can be displayed. In any case, the product label must comply with the general labelling rules including organic labelling. Most of the final packed imported products are labelled over with a label in Turkish language with the information necessary according to Turkish legislation.

The national organic logo can be used on products that are organically certified and comply with the Turkish Organic Law No. 5262 issued 01.12.2004. Owner of the logo and the standard is MoAF, which is also in charge to take sanctions in case of misuse. The logo exists in three visual versions.

Figure 3: Organic logos of Turkey

State support

The Organic Agriculture National Action Plan 2013-2016 (Organik Tarim Ulusal Eylem Plani 2013-2016) was prepared in 2013 through a stakeholder consultation and addressed five main areas: developing and expanding organic farming, strengthening of services related to inspection and certification, improvement of data collection infrastructure and traceability, development of training and extension services, and the development of institutional capacities. Since then, organic agriculture is being supported within the framework of Organic Agricultural Law and incentives that are implemented by MoAF.

Organic farming subsidies are given to producers who are registered in the “Organic Agriculture Information System” (Organik Tarım Bilgi Sistemi, OTBIS) and “Farmers Registration System” (Ciftci Kayıt Sistemi, CKS) for plant production. For organic livestock subsidies, the farmers should be registered in the OTBIS and TURKVET database system for ruminants, KKSS (small ruminants registration system) for small ruminants and AKS (beekeepers registration system) for apiculture production.

In 2021, payments for organic agriculture amount to TRY* 1'000 per hectare for most fruits and vegetable crops, TRY 400 for industrial crops (i.e., cotton, sunflower, olives) and TRY 100 for extensive field crops (i.e., wheat); bee keeping is supported with TRY 10 per beehive. If farmers are organized in a group instead of being registered individually (see also chapter D: organic value chains), the payments per hectare are only half.

Additional state support for farmers is granted for the purchase of certified propagation material, biological controls and organic fertilisers, for soil analysis, diesel oil, for working in environmentally fragile areas, and for making use of agricultural consultants. Farmers and producers of organic products or inputs are also eligible for low interest loans through the state-owned bank, T.C. Ziraat Bankasi. For exporters, 50 % of the cost of analyses is subsidised, if no residues are found.

Despite this, organic stakeholders are of the opinion that the policy landscape in Turkey does not support organic farmers effectively. The subsidies and financial support provided by the government are not satisfactory and offer little incentive to compensate for the additional costs of transition and the steadily increasing costs of inspection and certification.

This may be one of the explanations for the fact that the number of organic farmers and the organically certified acreage fell drastically by almost 30% from 2019 to 2020. Experts believe this is largely due to lower government grants. Many producers in the eastern part of Turkey would have practiced organic farming only because of these payments, but not really marketed their products organically. With the reduction of state contributions, the system is no longer profitable.

* exchange rate: 1 TRY = 0,1 € (August 2021)

Control bodies

In Turkey, the organic control and certification process is performed by private control bodies (CBs) approved and supervised by the Department of Good Agricultural Practices and Organic Agriculture, a subunit of the Plant Production General Directorate within MoAF.

To be active in Turkey, CBs must be approved by MoAF and be accredited by TURKAK. At present, in 2021, 41 different organic control bodies are authorized in Turkey, from which several are also listed as EU equivalent control bodies according to Regulation (EC) No 1235/2008. The up-to-date directory of Turkish control bodies is published by the Ministry (↳).

Figure 4: Organic inspection in a fruit processing factory (source: E.Ruegg)

Research and training

Agricultural Research and Policy General Directorate (Tarımsal Araştırmalar ve Politikalar Genel Mudurluğu, **TAGEM**) at the Ministry of Agriculture and Forestry supports research into organic agriculture in its 47 national research institutes located all over the country. An organic research group meeting takes place annually, which is open to all stakeholders. In many of these institutes research is performed on a variety of organic crops and for biological control of specific pests and diseases. TAGEM and its affiliates are regularly participating in European research programs.

State advisory services are available in the so-called organic units in every provincial directorate. Private consultancy companies can be found all over the country. Some universities (Ege, Erzurum Ataturk, Ankar, Cukurova, 19 mayis, Uludağ) have included organic research in their research and training programmes.

Info

Ministry of Agriculture and Forestry

https://www.tarimorman.gov.tr/

Information about accreditation

https://www.turkak.org.tr/en/

TAGEM

www.tagem.gov.tr

Organic Crop and Livestock Production

Organic crop production

As a big country on the border to Europe, Turkey benefits from different climatic conditions and relatively low salary costs, thus being especially competitive for different labour-intensive organic crops such as dried apricots and figs, sultana raisins, and hazelnuts. The production of these crops is very much region-specific.

Production areas of main organic products (%)

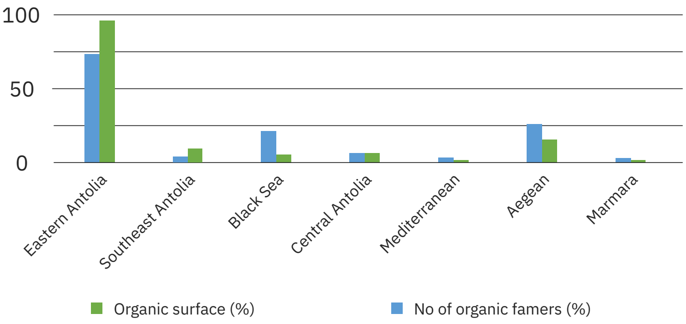

Figure 5: Production areas of main organic products (2016)

Apricots

Turkey is the largest producer and exporter in the world for sun dried apricots. According to the data of Aegean Exporters' Associations (EIB), Turkey exported 87,120 tons of dried apricots in the season 2020/2021. Organic apricot exports sum up to around 4,000 tons per year.

Turkish dried apricots are of a special quality which is unique in its taste and shape and makes them a desired produce on the world markets. Apricots are grown in the East of Turkey, on the high plateau of Malatya. This area has a continental climate with cold winters, wet springs and hot dry summers that make irrigation a major factor for achieving satisfactory yields. The production of apricots demands substantial labor input. Fruits are harvested in July without mechanical support; open air drying is done by the farmers and each single kernel is removed by hand (whole pitted). Final processing and packing is done in specialized factories.
During the drying process of organic apricots, it is prohibited to use sulphur dioxide (SO2), which is a standard method for conventional apricots giving them a shiny orange appearance. Consequently, organic apricots are of a much darker color, however also sweeter than the sulphured type. As fumigation is also not permitted for organic crops, which is a standard process in conventional apricots, organic apricots need to be shockfreezed in order to avoid any contaminations with insects

Figs

Turkish dried figs are of the Sari Lop variety, a sweet tasting fig that is suitable for sun drying. Turkey's share of worldwide dried fig production is around 60% and the annual production volume is 70,000 tons, around 10% of this being certified organic.

Fig production has a very long tradition in Turkey. Figs were already used as part of the diet in this region since 3000 BC. Today, most dried figs for export are produced on the Aegean coast in the region of İzmir and Aydın, where mild winters (figs can survive light frosts) and hot, dry summers prevail. High temperatures in summer favor fruit ripening and sun drying in August and September.

Hazelnuts

The hazelnut is native to the Black Sea coast with its special climate characterized by sufficient rain throughout the year. Turkey is by far the biggest producer and exporter of hazelnuts worldwide. Approximately 430,000 hectares are cultivated with hazelnuts in the Black Sea region. About half a million growers are involved and a lot of seasonal work force during harvest. All in all, about 4 million people in Turkey earn their income from hazelnut production, marketing and processing.

According to expert estimation, organic hazelnut production relates still to a relatively small share, less than 10% of total production, but generating an interesting turnover of 75-85 million $ per year with exports.

Sultanas

With approx. 300,000 tons of annual harvest, Turkey is the world biggest producer of sultana raisins. Organic sultana exports make up around 10,000 t per year.
Turkish sultanas are made from dried seedless grapes of Vitis Vinifera L. variety. The large, yellow-green grapes that are dried into these raisins are particularly flavorful and soft. The Aegean Region has the most suitable climate conditions for vine growing and traditional sun drying.

Şekil 6: Map of growing areas of sultanas

The drying process starts with dipping sultanas into a solution of water, potassium carbonate and olive oil. This operation fastens the drying process and transforms the grapes into a golden yellow color. After dipping, the sultanas are spread on concrete floors and nylon materials in open air with a drying period up to 10 days. Non-dipped sultanas need around 20 days of sun-drying, resulting in a darker color. The dried grapes are sifted for elimination of foreign substances and stalks of the grape bunches and then filled into plastic crates for transport to the processing facilities.

In specialized processing factories, the dried grapes are sized, de-stemmed, laser screened, washed in potable water, aspirated and oiled. After final grading the sultanas are stored in warehouses under controlled conditions and ready for export.

Cotton

Turkey is considerably important for the world textile and apparel industry with its cotton production capacity and its excellent textile and clothing manufacturing infrastructure.
Organic cotton production is growing in importance: Textile Exchange data shows that in 2019 Turkey ranks

Şekil 7: Typical sultana open air drying place (source: E.Rüegg)

fourth in organic cotton production in the world with a contribution of around 10% to the world production.[6]
Across Turkey, the Aegean Region and Southeast Anatolia Region are the main production areas.

The country is profiting from a steadily growing demand for organic cotton on the world market, resulting in a significant increase in organic cotton growth with a high number of new producers having started up organic cotton production in recent years. However, farmers do not have adequate technical or financial knowledge on organic cotton and are neither organized in a way that would allow them to improve their education.

Pest management, access to organic fertilizer inputs and adequate rotation are the main challenges for farmers. As organic cotton is collected by hand in Turkey, labor is crucial. COVID-19 affected the communities who have been making a living of this work.

In addition to that, even though Turkey is one of the biggest organic cotton producers, there are not any governmental or professional institutions gathering organic cotton sector community members like agronomists, farmers, suppliers, manufacturers, etc. and provide information on organic cotton adequately.

Animal husbandry

Turkey's well-adapted local animal rearing conditions, excessive meadows and pasture land and high forage crops production potential are a great opportunity for or-

6 Organic Cotton Market Report 2021, Textile Exchange June 2021

ganic animal production in Turkey. While organic plant production was initiated in the 1980s, studies on animal production started only after 2003, and in the same year the first serious private sector investment in organic animal production was made in the Kelkit district of Gümüşhane province.

Although there was a rapid increase until 2013, there was a very significant decrease in all animal species except bees in 2014 and thus also in meat and milk production. At the same time, organic egg production increased sharply, so that today eggs from organic production are offered in every supermarket, making eggs the most important organic product in the domestic market.

Social support projects

Rural areas in Turkey are facing several problems, poor education, lack of farmer organizations and combat against climate change being only some of many. Organic agriculture is not only a production method, but should also ensure benefits for farmers and improvements of living conditions in general. National and foreign trading companies are increasingly cautious of sustainable sourcing practices and support or initiate respective social initiatives with activities, such as the following:

- Provision of training to farmers for better growing and harvesting techniques.
- Continuous advisory support, i.e., for inputs for fertilization and pest and disease management.
- Performing necessary activities to improve the socio-economic structure of the villages, i.e., meeting the needs and requirements of the children at school, improvement in worker's buildings, providing water tanks during water crisis etc.
- Initiation of activities with environmental impact, such as planting of trees etc.
- Provision of inputs, technical equipment and other farming needs.

The German company Rapunzel started the first organic village project in Turkey with the original idea to convince neighboring farmers to convert to organic farming in order to avoid contamination risks. This initiative developed not only into a successful project with a focus on social improvements for the farming community. Today the majority of the sultana farmers in Tekelioğlu village is certified organic. Around 100 farmer families cultivate organic grapes for Rapunzel on an area of more than 500 ha, among other products (↳).

The Turkish company Isik Tarim is the initiator of the "Happy Village" projects, aiming to "heal and develop" the "bigger picture" or at least to assist for this purpose. Today, there are around 3,000 registered farmers, cultivating more than 11,000 hectares of land organically in more than 150 villages (↳).

Figure 8: Farmers of Tekelioğlu village planting sponsored trees around their fields (source: E. Ruegg)

Food Processing & Trade with Organic Products

Organic value chains

Success with organic business development for export relates in Turkey very much to the institutional setup of value chains. As land is fragmented, production for export relies on structures that aggregate production in order to reach exportable volumes. As illustrated in the figure below, mostly cooperatives or local traders, who act as middlemen, fulfill this role.

As farm holdings are small in Turkey, a commercial business tends to involve dozens of growers that are mostly organized in informal farmer-groups with leader farmers serving as contact person for buying companies. For an international trading company, it is essential to have a trustworthy local/national partner company managing agricultural production and required post-harvest activities. This company usually holds the organic certificates for both the primary production and the involved processing and trading infrastructure. In other words, besides having own storage and processing facilities, it actively coordinates and monitors primary production based on oral or written agreements with its associated growers (individual or farmer-groups). By doing so, it reassures buying companies that primary production is of good quality, while minimizing the risk that farmers might use non-allowed inputs such as synthetic pesticides or mineral fertilizers. In any case, the Turkish Organic Law requires that each farmer is at least controlled once a year by an accredited CB; group certification as allowed by the EU for several countries is not permitted in Turkey.

Model for a typical organic value chain in Turkey

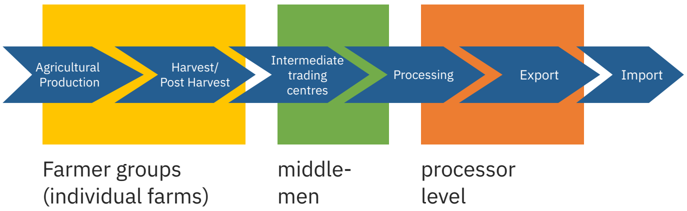

Figure 9: Generic model of organic value chains in Turkey

Food processing

Turkey has a modern and developed food processing industry with more than 40,000 food processing enterprises, supplying the domestic population and exporting to foreign markets. However, this sector is only marginally relevant for organic products. This is due to the still clearly export-oriented orientation of the organic farming sector. Thus, the majority of raw materials exported have only received primary processing (drying, freezing). At the same time, the Turkish food processing sector is also very one-sided. The graphic below illustrates the sub-sector splits.

Turkey's food processing industry

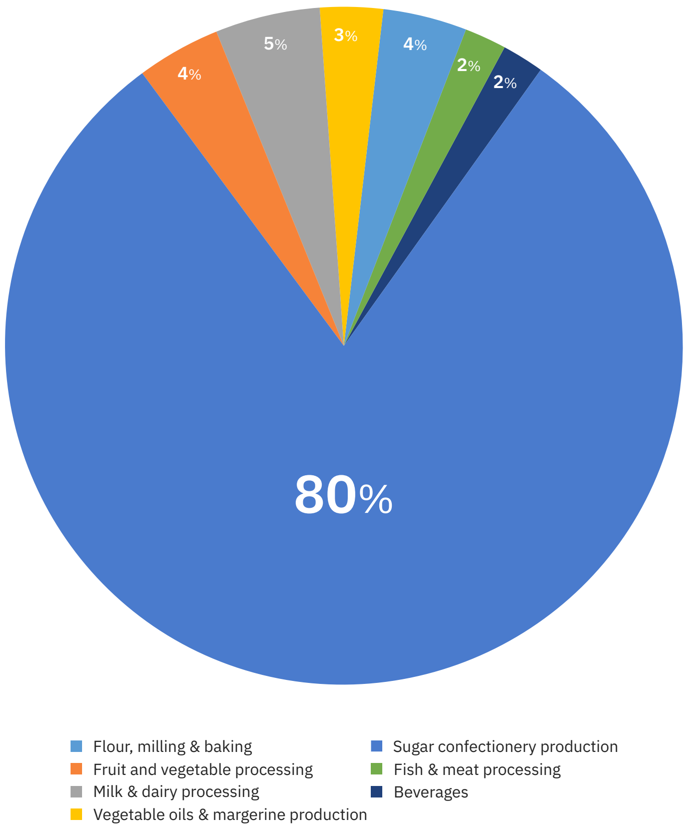

Figure 10: The Turkish food processing industry sub-sector composition (Source: ITE Food&Drink, http://www.foodexhibitions.com/Market-Insights/Turkey-and-Eurasia/Examining-the-Turkish-food-processing-industry, retrieved on 31.07.2021)

Despite enjoying a well-established food production sector, Turkey is reliant on imports of ingredients to fuel its manufacturing efforts. The constant fall of the Turkish Lira makes such imports more expensive than average, and the still relatively small market for organic products therefore provides little incentive for the manufacturing of processed products.

Another problem is the fact that the import of sugar is not allowed in order to strengthen the country's own production. Unfortunately, this regulation also applies to organic sugar, although there is no organic production in the country itself. This leads to the fact that classic confectionery products such as cookies or chocolate cannot be produced.

Domestically, Turkey's food industries are strong and do have also potential for organic products as shown by a wide organic assortment which can already be found in organic shops and retail markets all over the country. However, there remains a lot of room for international brands in Turkey to grab a market share and begin exporting organic processed goods.

Export of organic products

Organic production in Turkey has always been export oriented. Therefore, foreign demands shape the range of these products. While in the beginning of 1990s, Turkey's main agricultural export products (raisins, hazelnuts, apricots and figs) constituted a major part of the organic exports, the range of products has expanded since then. Nowadays, Turkey's organic exports include not only dried fruits, but also fresh and processed fruits and vegetables, spices, cereals, industrial crops, oilseeds and cotton. The United States are the leading importer of Turkish organic products in terms of value, with Germany, France, The Netherlands, Switzerland and other European countries taking up the remainder. In 2020, Turkey was the 6th largest export country to the EU with a share of 6% of total organic agri-food import volumes.[7]

The export of wheat and oilseeds, such as sunflower and soybeans, is a special case: these commodities are not grown organically in Turkey - there is only a small production which is not intended for export - but originate from Eastern European countries such as Romania, Kazakhstan, Ukraine and Russia. These goods are imported duty-free into Turkey (free-zone) by Turkish trading companies and then re-exported to the USA and EU countries.

In June 2018, the Cornucopia Institute released a comprehensive report chronicling how a small number of multibillion dollar agribusinesses came to dominate the U.S. organic grain industry following the systemic failures of the USDA's National Organic Program (USDANOP) to curb the infiltration of questionable organic grain imports. Cornucopia's report finds that the U.S. became a dumping ground for imports of fraudulent organic corn, soybeans, and other commodities supplied by Turkish companies[8].

Organic import volumes of the EU from Turkey, by product category (2019/2020/thousand t)

	2019 imports	2020 imports	Change (%)	2020 Share (%)
Vegetables	24.9	34.1	37.2	21.9
Fruit, excl. citrus & tropical fruit	29.0	32.7	12.9	21.0
Wheat	24.2	27.5	13.3	17.6
Fruit juices	21.4	18.9	-11.8	12.1
Oilseeds, other than soyabeans	37.8	15.9	-58.0	10.2
Tropical fruit, nuts & spices	11.4	13.1	14.3	8.4
Preparations of vegetables, fruit or nuts	4.9	6.3	28.3	4.1
Infant food and other preparations	3.0	4.3	43.0	2.7
Cereals, excl. wheat & rice	12.1	0.6	-94.9	0.4
Total	**173.0**	**155.7**	**-10.00**	**100.0**

Figure 11: Table Organic Import Volumes (source: Traces)

7 EU Agricultural Market Briefs No 18 | June 2021: EU imports of organic agri-food products. Key developments in 2020
8 https://www.cornucopia.org/2018/06/looking-at-fraud-industrywatchdog-releases-comprehensive-report-documenting-suspicious-organic-grain-imports/ (retrieved on 31.07.2021)

Organic import volumes of the EU of oilseeds, other than soybeans, by exporting country
(2019/2020 thousand t)

	2019 imports	2020 imports	Change (%)	2020 Share (%)
China	18.9	19.6	4.1	14.3
Ukraine	29.1	19.3	-33.7	14.1
Turkey	37.8	15.9	-58.0	11.6
Kazakhstan	12.5	15.1	21.6	11.0
India	13.1	14.1	7.8	10.3
Russian Federation	3.7	13.2	259.8	9.6
Egypt	4.6	9.3	99.8	6.8
Moldova	15.7	8.5	-45.7	6.2
Total	**156.3**	**137.1**	**-12.3**	**100.0**

Figure 12: Table Organic Import Volumes (source: Traces)

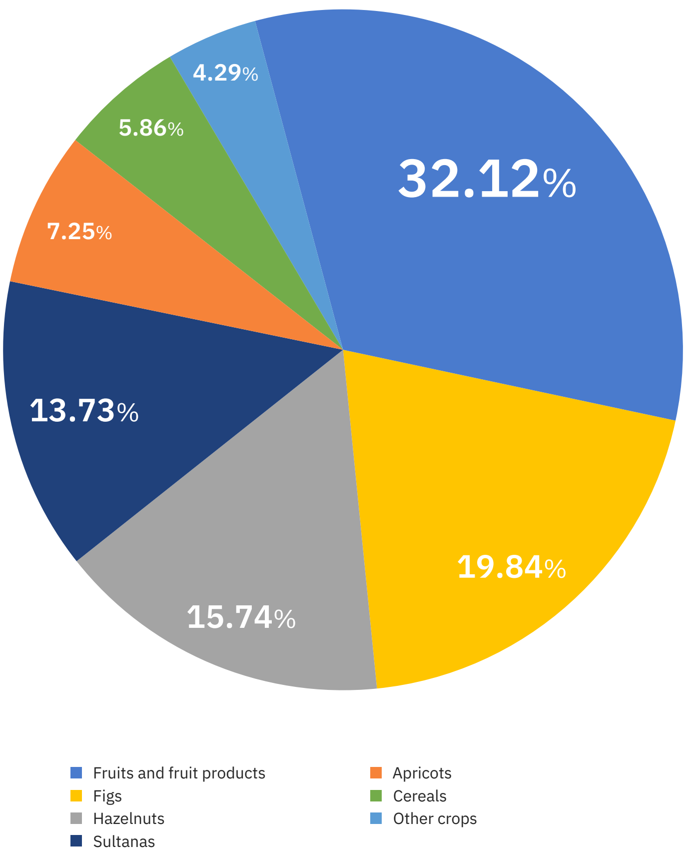

Figure 13: Main exported organic products from Turkey in 2019 (source: MoAF)

This has led to a lot of speculation in the past about the integrity of the organic inspection and certification system in Turkey, and this might be one of the reasons while such exports to the EU significantly decreased in 2020. The EU as well as the United States reacted with additional control measures that are being applied to date to the countries of concern[10]. Although this re-exporting procedure is legal, any importer should ensure that there is no doubt about the transparency of the supply chain and, in addition to the mandatory inspection certificates, request evidence of the origin of the products.

Unfortunately, Turkey has no solid system for data collection and official export statistics are in general below real values. The table below gives an indication about the main organic export crops. The classic export products - dried figs, hazelnuts, sultanas and dried apricots - account for more than 50% of the total export volume of organically produced foodstuff, while fruits and fruit products – IQF, fresh fruits, concentrates, juices and other dried fruits – make up the other 32%.

Import of organic products

Imported organic products to Turkey must be again inspected and certified by an authorized Turkish control body. For that, the importing company must be certified by an authorized CB and provide the required information and documents such as information on the amount, origin and type of the imported lot as well as the inspection report and other necessary certification documents (see Article 32 of the Turkish Organic Regulation). Based on these, the CB will conduct an inspection to determine, if the imported product meets all requirements to be certified as organic according to the Turkish Law. Once the certification is granted, the product can officially be imported and marketed as organic.

The laws also specify the labelling requirements for organic products. If the product is produced in Turkey and marketed domestically, it should have the Turkish organic logo. Imported products, however, cannot use the Turkish organic logo, but they must have a label in Turkish which complies with the general labelling rules, including organic labelling.

9 https://ioas.org/latest-news/eu-release-new-guidelines-on additional-control-on-organic-products-re-ukraine-azakhstan moldova-turkey-russian-federation-and-china/ (retrieved on 31.07.2021)

Selection of Turkish companies exporting organic products[10]

Birlik

- Herbs and seeds

http://birlikas.com/birlik-home

Durak Fındık

- Hazelnuts

http://www.durakfindik.com.tr/en/index.html

Göknur

- Fruit and vegetable concentrates

https://www.goknur.com.tr/eng/kurumsal-1-about-us.html

Işık Tarım

- Dried fruits and nuts, frozen food (IQF)

http://www.isiktarim.com/

Morgenland / EgeSun

- Dried fruits and nuts

https://www.morgenland.bio/morgenland-unternehmen/?lang=en

Rapunzel Organik

- Dried fruits and nuts

https://www.rapunzel.com.tr/

Orvital

- Frozen chicken meat, eggs

https://www.orvital.com.tr/en

Sentas

- Dried figs and apricots

https://www.sentas.com.tr/en

Tiryaki

- Oilseeds
- Pulses
- Dried nuts

http://www.tiryaki.com.tr/our-business/organic-farming/

Nimeks Organik

- Dried fruits and nuts
- Frozen food (IQF)
- Purees and concentrates

http://nimeks.com/

10 For more export companies see: https://www.europages.co.uk/companies/Turkey/organic%20food.html

The Organic Market in Turkey

Domestic market size and trend

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. Discount chains have popped up for the last five years with their private label products. There was a major boost to grocery e-commerce in 2020 due to COVID-19, however there are no figures available of the actual size of the domestic organic market. Top-selling organic product in Turkey is eggs.

Turkey's retail sector (2019)

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

Figure 14: Food Retailers by Channel (2019/Sales in Mill. USD)
Source: USDA Foreign Agricultural Service, January 2021)

Top 10 Retailers by Marketshare (2019)

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

Figure 15: Food Retailers by Channel (2019/Sales in Mill. USD)
Source: USDA Foreign Agricultural Service, January 2021)

Sales points

Although export-oriented, the domestic market in Turkey for organic products is also steadily expanding and sales points can be found throughout the country.

Organic bazaars

Turkey is famed for the colorful fruit and vegetable markets that are traditionally held weekly in towns and villages throughout the country. Similar bazaars have been established exclusively for organic sellers by private sector organizations and municipalities in various cities. Established in 2006, Bugday's '100% Ekolojik Pazar'in Istanbul's Sisli area is the first, biggest and most prominent one. ETO operates weekly "Ekopazar" in two districts of Izmir. Organic farmer markets have strict rules and are controlled by organic CBs. They are the major sales point for fresh fruits and vegetables.

Figure 16: Organic farmers selling their produce on the Ekopazar in Izmir (Source: E. Ruegg)

Supermarket & discount chains

Organic products can be found in many retail chains all over Turkey. Besides organic eggs (numerous brands) and milk (Pinar sut, Tire sut), the assortment is often limited to dry products in a special shelf, while fresh fruits and vegetables are rarely offered. The number of products also depends on the location of the store: bigger cities have a wider assortment than shops in the country side.

Selection of retail chains in Turkey with organic products

Migros

Migros Turk, is the largest supermarket chain in Turkey. Originally a subsidiary of Migros Switzerland, Migros Turk has been independent since 1974. Together via Migros supermarkets, Macro Center Gourmet Stores, international Ramstore shopping centers, online and mobile shopping, wholesale stores, and mobile sales units, Migros Turk serves an estimated 160 million customers. As of July 2021, the company operates a total of 2.345 stores of different sizes all over Turkey. The organic assortment consists of more than 100 products, including fresh fruits & vegetables.

— Own organic brand: M Life

— Other organic brands: City Farm, Cantire, Elite Naturel, Sade Organik, Bemtat, Tat, Orgalife, Dogalsan, Koska, Lipton a.o..

https://www.migros.com.tr/ekolojik-biyolojik-urun-c-461

Carrefour

Carrefour is one of the largest market chains in the world. The owner of the Carrefour brand in Turkey is Sabanci, which is one of Turkey's largest compaines. Different product groups are on sale on differently cathegorized markets; namely 'Carrefour-Hiper','Carrefour-Super', 'Carrefour Gurme' and 'Carrefour-Mini'. Carrefour-Gurme offers products for high-end customers, including organic products.

— Own organic brand: Carrefour Bio

— Other organic brands: City Farm, Bemtat, Sade, Raya a.o.

https://www.carrefoursa.com/carrefour-bio/organik-urunler/b/1940

Rossmann

Entering Turkey in 2009, the brand has 112 stores and around 1000 employees in Turkey as of June 2018. Standing out with the concept of “Drogeriemarkt”, Rossmann sells a wide range of products at its stores, in categories such as skin and body care (including organic and vegan series), oral and dental health, hair care, baby care, imported and domestic perfumes, organic food, snack food, health and hygiene products, home cleaning, home living products, media, book-stationery, toys, decoration and souvenir. The organic assortment comprises around 20 products, all imported from Germany.

— Own organic brand: Enerbio: biscuits, cereals, chocolate, coffee

https://www.rossmann.com.tr/markalar/enerbio?cat=6

Macro Center

Macro Center is Turkey's upper segment retail chain, offering customers a gourmet portfolio with many imported products and a special store design. It operates 77 shops, mainly in big cities and tourist destinations. Macro Center is owned by Migros. With more than 200 products, Macro Center is the supermarket with the largest organic assortment.

— Organic brands: same as Migros

https://www.macrocenter.com.tr/arama?q=organik

A101

The Turkish retail giant A101 was established in 2008 and operates nearly 9.000 stores all over Turkey. With 99% household penetration, A101 issues 4 million receipts a day and more than 130 million a month. Its Instagram account has the most followers in the retail sector in the world (5.6 million)[11].

— A101 has a small assortment of organic products, including eggs, tea (Caykur) and milk (Pinar sut). It has not yet launched its own organic brand.

www.a101.com.tr

IKEA

IKEA Turkey presently sells 12 organic products in their “Swedish Food Market” stores, among others coffee, pasta and jams. Most products are imported from Europe.

https://www.ikea.com.tr/urun-katalogu/isvec-gida-marketi/organik-urunler.aspx

Tchibo

Tchibo is active in Turkey since 2005. Next to its organic textile assortment, Tchibo offer organic coffee for sales.

https://www.tchibo.com.tr

11 https://www.aydin.com/en/a-101/ (retrieved on 31.07.2021)

Specialized organic shops

Organic stores are mainly located in Istanbul, but can also be found in other big cities. In contrast to European countries, organic stores in Turkey have not been able to gain a large foothold and therefore only appeal to a specific clientele.

CityFarm is Turkey's first organic retail store chain. It was founded in 1999 by Karen Ardete and Murat Denizel,who opened their first store in Istanbul in 2000. Since then, the company has changed ownership several times (presently owned by Orya Organic Yaşam Gıda Tekstil Turizm San.ve Tic. Inc.) but is still in business with a large organic assortment. Today CityFarm is not only operating nine stores in Istanbul, Ankara and Izmir, but has its own online shop, processes organic products and distributes them to national and local markets.

In 2019, YOM, the first supermarket-like organic store, was opened in the hip area of Levent in Istanbul. The project emerged from a partnership between Gursel Tonbul, the founder of Kuşadası Değirmen Ciftlik and Yerlim brand, and Murat Denizel. YOM specializes in fresh fruits and vegetables and stocks 1.500 items, all of them in organic quality. YOM also provides online sales and delivery services.

Figure 17: Interior of YOM organic supermarket in Levent, Istanbul

Supply and distribution

Turkey is still far from having an efficient distribution system of organic products in the country. Although there are more and more companies with wholesale activities, the small quantities on the one hand, and the long distances on the other hand, make it difficult to build frequent and effective networks.

It is not surprising that the best supply of organic products is ensured in Istanbul. The highest demand for organic products is located here and the best prices can be obtained. The sales network is also denser than in any other city in Turkey, which in turn makes the supply of organic goods less attractive in other parts of the country. Unfortunately, the consumption of organic products has not yet been promoted by the state and there are no programs for out-of-home catering. Private companies and NGOs are financially hardly in a position to bring forward corresponding campaigns.

Info

Important organic trading companies in Turkey's domestic market

— CityFarm

https://www.cityfarm.com.tr

— Ekoorganik

https://www.ekoorganik.com/en/

— Orvital

https://www.orvital.com.tr/en

— OTS Organik

https://otsorganik.com/en/

— Raya

http://blog.rayaorganik.com/

— Sade

https://www.sadeorganik.com.tr/

— Taze Direkt

https://www.tazedirekt.com/arama?q=organik

— Yerlim

https://www.yerlim.com/

Challenges and Outlook

Turkey is already a well-established and important producer and exporter of organic products. To keep this position and to even scale up the existing potential of the domestic market, the country should focus on certain areas of improvement. We spoke with organic pioneer Atila Ertem about the challenges and further outlook of Turkey's organic sector.

Atila Ertem

Atila Ertem graduated from EGE University Faculty of Agriculture in 1979 and started his agricultural career in the Manisa Viticulture Research Directorate. In the 80s, his path crossed with Josef Wilhelm from the German company Rapunzel and from that moment on his life took an organic direction.

In 1998, Rapunzel established a company in Turkey and Atila became the general manager and shareholder of Rapunzel Organik and developed it to one of the leading exporters for organic products from Turkey. After a sudden decision to leave the partnership in 2009, he has been active as an organic ambassador all over Turkey, giving lectures and training, offering consulting services and serving as the Chairman of the Board of Directors of ETO. In 2013, he established OTS Organik, an important distributor of organic products to the domestic and international market.

Figure 18: Atila is a lover of organic food and lives on his own organic farm close to Izmir (source: E. Ruegg)

Better quality of organic products

“High quality processing infrastructure and transparent procedures in terms of product quality and traceability are demanded by foreign clients. With its complex supply chains, it is essential for exporters to implement a high-level quality assurance system, which is covering all trading steps from field to final export container. Capacity building interventions on all levels of the supply chain are key to better organic integrity.”

Expansion of the domestic market

“I see considerable potential in the domestic market for processed organic food but also for non-food products, such as organic textiles and cosmetics. We are confronted with a new group of consumers, who have a fully different lifestyle and taste. We can attract these consumer group to organic products, but we have to meet their needs and preferences: young people do not spend hours in the kitchen preparing traditional Turkish dishes. They come home from work and want a delicious meal ready-made. We have to develop new product lines – vegan, vegetarian, gluten-free, snacks etc. – with appealing packaging and good taste.

There are many reasons why this potential has not been sufficiently exploited to date. One of them is certainly the purchasing behavior of the large retail chains, whose buyers operate on the market solely according to price criteria. This puts enormous downward pressure on producer prices. The strategy of individual retailers, who set payment terms (unfairly) far behind (payment terms of 160 days are not uncommon), quickly drives wholesalers to ruin. A paradigm shift is needed here, because it is the retail chains that can do the most to promote organic agriculture with a serious "true-cost" policy.”

More effective control procedures

“In general, contamination risks relating to pesticide residues are a major issue for organic production in Turkey. As many conventionally grown crops are cultivated with heavy pesticide use, drift from adjacent fields is a real threat to organic producers. Another source of potential contamination is the use of spraying-, harvesting, and storage equipment that is also used in conventional production, which is a common practice among smallscale farmers.

Turkey has been repeatedly affected by fraud and residue problems in the past, which resulted in additional control measures imposed by the EU for Turkish organic products. Although residue contamination can have numerous causes - drift, comingling, cross-contamination or use of unauthorized pesticides - it is the CB's responsibility to get to the bottom of these incidents and react with appropriate measures. Qualification of staff is an important factor, but also the time available for inspection. Due to the situation with 40 competing private CBs, fees for inspection and certification services are under pressure and do often not allow to send an experienced inspector with enough time at hand. If not the government, the CBs should take the lead for improving their inspection performance and by this the organic integrity of the product they certify.”

Figures and References

Figures

Links to general information on organic farming in Turkey

Website of the Republic of Turkey Ministry of Agriculture and Forestry (MoAF) with information on organic farming in Turkey.
https://www.tarimorman.gov.tr/Konular/Organic-Farming/About-Organic-Farming?Ziyaretci=Ciftci (retrieved on 31.07.2021)

Summary report on organic farming in Turkey. The site is updated irregularly.
https://www.organic-europe.net/country-info/turkey/country-report.html (retrieved on 31.07.2021)

Website of the American Organic Trade Association (OTA) providing information on international organic trade designed for U.S. exporters. Most infomation is also relevant for exporters from other countries.
https://globalorganictrade.com/country/turkey (retrieved on 31.07.2021)

Website on relevant country information operated by FiBL
https://www.organicexport.info/turkey.html (retrieved on 31.07.2021)

FiBL and IFOAM Organics International: The World of organic agriculture. Statistics & emerging Trends 2021
https://www.fibl.org/fileadmin/documents/shop/1150-organic-world-2021.pdf (retrieved on 31.07.2021)

Abbreviations

Abbreviations

CB	Control Body
ÇKS	Farmers Registration System (Çiftçi Kayıt Sistemi)
EC	European Commission
EIB	Aegean Exporters' Associations (Ege İhracatçı Birlikleri)
ETO	Association of Organic Agriculture Organization (EKOLOJİK TARIM ORGANİZASYONU DERNEĞİ)
EU	European Union
GDP	Gross Domestic Product
IQF	Individual Quick Freezing

MoAF	Republic of Turkey Ministry of Agriculture and Forestry (T.C. TARIM VE ORMAN BAKANLIĞI)
ORGÜDER	Organic Food Producers Association (Organik Ürün Üreticileri ve Sanayicileri Derneği)
OTBIS	Organic Agriculture Information System (Organik Tarım Bilgi Sistemi)
TAGEM	Agricultural Research and Policy General Directorate (Tarımsal Araştırmalar ve Politikalar Genel Müdürlüğü)
TRY	Turkish Lira
USD	US Dollar