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GAIN Report

Global Agricultural Information Network

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Turkish Organic Market Overview

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Report Highlights:

The market for organic goods in Turkey is small but growing. Most of the organic production in Turkey is intended for export, with the European Union as the largest export market. Despite support and efforts to promote organic production, domestic consumption and awareness of organic products remains relatively limited.

Organic Agriculture in Turkey

Market Overview

The market for organic goods in Turkey, although small, is growing and has great potential. Organic production in Turkey started in the 1980s in the Aegean region due to a demand for organic goods in Europe. Since then, organic production and consumption in Turkey have increased each year. The first organic products produced in Turkey were Sultana grapes. Today there are more than 200 kinds of agricultural products produced organically in Turkey. Dried fruits, edible nuts, spices and herbs, fresh/processed fruits and vegetables, pulses, cereals, industrial crops, oil seeds, and other raw/processed products make up most of the organic production in Turkey.

Table 1 - Organic Production in Turkey

Year	Number of Products	Number of Producers	Area (Hectares)	Production (Tons)
2005	205	14,401	203,811	421,934
2006	203	14,256	192,789	458,095
2007	201	16,276	174,283	568,128
2008	247	14,926	166,883	530,224
2009	212	35,565	501,641	983,715
2010	216	42,097	510,033	1,343,737
2011	225	42,460	614,618	1,659,543
2012	204	54,635	702,909	1,750,127
2013	213	60,797	769,014	1,620,466
2014	208	71,472	842,216	1,642,235

Source: Ministry of Food, Agriculture and Livestock

Most of the organic production in Turkey is intended for export. The European Union is the largest export market for Turkish organic goods, but the United States, Canada, Australia, Iraq, Switzerland and Japan also import organic products from Turkey. In 2014, Turkey exported around \$19 million of organic products to the United States, primarily organic soybeans (HS 1201900010) and organic corn (HS 1005902015). Turkish organic exports to the United States from Jan – Nov 2015 were up 113 percent to \$40 million on the same period in 2014, mostly due to growth in organic corn, which is up 375 percent on Jan – Nov 2014 data.

Organic farming is regulated by the Department of Good Agricultural Practices and Organic Farming within the General Directorate Plant Production in the Turkish Ministry of Food, Agriculture and Livestock (MinFAL). The first domestic regulation on organic farming in Turkey was put into place in 1994. In 2004, the new Organic Agriculture Law was put into force as a part of EU harmonization, and has been amended several times since then to reflect new EU regulations, most recently in 2012. In addition to comprehensive regulations on the production, sale, transport and trade of organic products, the 2004 law also established the Organic Farming Committee, a government regulatory committee, and the National Directing Committee of Organic Farming, an advisory committee to MinFAL. Made up of

officials from several different government ministries, universities, the private sector, professional organizations, and NGOs, the National Directing Committee meets at least twice a year to implement organic agricultural projects, raise awareness among consumers, identify problems in the certification process, and develop priorities for projects and research. The Organic Farming Committee regulates and monitors organic production, authorizes agencies to conduct organic certifying inspections, and receives the recommendations from the National Directing Committee.

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 labeling rules, including organic labeling.

See below for copies of the laws and amendments, as well as a flowchart of the Turkish organic farming system:

- [Law 5262: 2004 Organic Farming Law](#) (in English)
- [2010 Amendments](#) (in Turkish)
- [2012 Amendments](#) (in Turkish)
- [Flowchart of the Turkish Organic Farming System](#) (in English)

MinFAL defines organic production as: “a controlled and certified way of agricultural production, which does not harm human health and environment and which does not include the use of chemicals. Organic farming aims to protect the life-sustaining resources and natural life by maintaining the natural balance. In organic farming, chemical and pesticides are not used in any stages including cultivation, harvesting, classification, packing, labelling, storing and transporting. Thus, the health of farmers and their families and eventually the society is protected and improved. As the use of organic farming methods [expands], the possibility of catching a disease which requires an expensive treatment is reduced, positively affecting the economy.”

MinFAL has made the expansion of organic production a focus in recent years. In the 2013 – 2017 Strategic Development Plan, MinFAL aimed “to spread the environment and human health friendly production systems in animal, plant and aquaculture production that require inspection and certification within the framework of certain rules on all stages from obtaining input to marketing.” In accordance with the Organic Law of 2004, the state television company (TRT) must broadcast an educational or promotional program on the organic sector for at least 30 minutes per month.

MinFAL publishes a list each year of supports (below) to the organic sector. Farmers and producers of organic products or inputs are also eligible for low interest loans through the state-owned bank, T.C. Ziraat Bankasi. In order to benefit from these loans, growers must use seeds/saplings that have an organic certificate. Organic farming subsidies are given to producers who are registered in “Organic Agriculture Information System” (OTBIS) and “Farmers Registration System” (CKS) for plant production. For organic livestock subsidies, the farmers should be registered in OTBIS and TURKVET database system for ruminants, KKSS (small ruminants registration system) for small ruminants and AKS (beekeepers registration system) for apiculture production.

Table 2- MinFAL Support to Organic Farming

Product Type	Support
Fruits and Vegetables	70 TL/decare
Field crops	10 TL/decare
Breeding Cattle/Buffalo	150 TL/head
Calf	50 TL/head
Breeding Sheep, Goats	10 TL/head
Bee hives with bees	5 TL/hive
Trout	0.35 TL/kg
Sea bream, sea bass	0.45 TL/kg

Source: Ministry of Food, Agriculture and Livestock, 2015

As organic production and consumption in Turkey grow, so too do the concerns about fraudulent organic products and lack of inspections. According to a EUROPOL report, some Turkish companies have been involved in relabeling or repackaging products as organic and bringing the counterfeit products into the European Union, even though the products do not meet the organic standards. Reports from the Research Institute of Organic Agriculture (FiBL) in 2013, Eurofins Scientific in 2012, the Cornucopia Institute in 2013 and the French Ministry of the Economy in 2015 uncovered fraud or unapproved production methods in organic products from Turkey. There have also been instances where a few Turkish companies were found to have been using fraudulent organic certificates. Turkish news articles report that consumers may be misled by conventional products that are marketed as organic, mostly in open air bazaars or independent stores where a vendor could more easily sell a fake organic product. Although inspections and transparency in the Turkish organic food sector are improving, the integrity of organic farming, production, shipping and marketing is not always guaranteed. Consumers are advised to look for organic labels and be cautious of unpackaged products marketed as organic.

Consumption

Despite the supports and efforts to promote organic production, domestic consumption and awareness of organic products remains relatively limited. Organic products are often viewed by consumers as a luxury item. Consumers of organic products in Turkey generally have higher income levels, are more educated, live in urban areas, and are more conscious of their health. Organic products are available in large urban supermarkets/hypermarkets, in organic bazaars, and, to a lesser extent, in specialty stores or on the internet. Most people in Turkey are not educated about the benefits of organic foods, and many consumers cannot distinguish organic products from conventional products. Consumers in Turkey often trust their local supermarkets' brands, and prefer to buy "what they know."

The market for organic packaged food in Turkey reached \$90 million in 2015 and is expected to reach \$170 million by 2020. Sales of organic packaged food increased 24 percent from 2013 to 2014, and are estimated to have increased more than 50 percent from 2014 to 2015. Most of this growth was due to rising urbanization, improving economic conditions, and increasing availability of organic products. Organic dairy, baby food, and snack items are the most consumed organic products in Turkey. Organic cheese and olive oils have significant growth potential, particularly due to their importance in Turkish cuisine and promotional efforts within Turkey.

Table 3 – Domestic Sales of Organic Packaged Food 2009-2014

Sales (in millions of US Dollars)						
Product	2009	2010	2011	2012	2013	2014
Organic Baby Food	2.3	4.9	7.9	10.1	12.5	14.8
Organic Bakery Products	-	-	0.2	0.3	0.4	0.5
Organic Dairy	2.2	2.7	10.6	15.7	16.0	21.8
Organic Oils and Fats	1.9	2.3	2.9	3.6	4.7	5.9
Organic Rice	1.0	1.2	1.4	1.6	1.8	2.4
Organic Spreads	-	-	-	1.5	1.9	2.4
Organic Sweet and Savory Snacks	7.9	8.7	9.7	11.1	12.4	13.6
Total Organic Packaged Food	15.3	19.8	32.7	43.9	49.7	61.4

Source: Euromonitor

Note: Products with negligible sales are excluded. These products were organic canned/preserved food, chilled processed meats, confectionary, dessert mixes, frozen processed foods, ice cream, noodles, pasta, ready meals, sauces, snack bars, and soups.

Table 4 – Distribution of Organic Packaged Food 2009-2014 (Percentage)

Type of Retailer	2009	2010	2011	2012	2013	2014
Hypermarkets	40.0	38.2	35.4	32.5	32.8	33.0
Supermarkets	46.0	47.0	49.0	51.0	51.0	51.1
Independent Small Grocers	6.5	7.0	7.5	8.0	8.2	8.3
Other Grocery Retailers	7.0	7.2	7.4	7.7	7.2	6.8
Internet Retailing (Non-Store Retailing)	0.5	0.6	0.7	0.8	0.9	0.9

Source: Euromonitor

Table 5 – U.S. Exports of Organic Products to Turkey

Value (Thousands of US Dollars)						
Product	2012	2013	2014	Jan-Nov 2014	Jan-Nov 2015	Period Percentage Change
Total Organics	0	20	107	107	1,573	1,369
Organic Coffee Roast, Not Decaf	0	20	107	107	96	-11
Organic Peas	0	0	0	0	1,477	

Source: US Census Bureau

Note: U.S. import and export organic trade codes were established in 2011. Data for previous years is unavailable.

Table 6- Turkish Exports of Organic Products, 2014

Products	Quantity(MT)	Value (\$)	% KG	% \$
Figs and fig products	4,523	21,626,691	29.09	27.5

Hazelnuts	1,642	17,046,378	10.56	21.6
Dried grape	4,118	13,557,823	26.48	17.2
Apricots	1,975	11,102,466	12.70	14.1
Fruits and fruit product	1,292	8,595,480	8.31	10.9
Cotton and Textile	132	1,814,432	0.85	2.3
Pistachio	21	854,089	0.14	1.1
Lentils	365	709,020	2.35	0.9
Caper	76	604,698	0.49	0.8
Wheat and wheat products	845	364,871	5.44	0.5
Vegetable and Vegetable Products	56	347,835	0.36	0.4
Treenuts	22	343,069	0.14	0.4
TOTAL	15,071	76,966,852	96.9	97.7

Source: Ministry of Food, Agriculture and Livestock

Table 7- Countries Importing Organic Products from Turkey, 2014

Country	Quantity(MT)	Value (\$)	% Value
Germany	3,335	19,248,646	24.4
USA	3,782	19,053,760	24.2
France	1,488	8,507,402	10.8
Netherlands	1,254	7,075,308	9.0
Switzerland	1,190	6,217,360	7.9
UK	998	4,446,227	5.6
Sweden	808	4,360,203	5.5
Italy	389	2,775,607	3.5
Japan	296	1,910,147	2.4
Denmark	250	1,201,498	1.5
Australia	211	1,038,758	1.3
Belgium	136	471,784	0.6
TOTAL	14,143	76,306,700	96.9

Source: Ministry of Food, Agriculture and Livestock, 2015

Importing Organic Products into Turkey

The United States does not have an organic equivalency agreement with Turkey. Therefore, in accordance with Turkey's organic regulations, importers must apply to a certifying organization for an organic certificate. The certifying organizations are private companies, but must be registered by the Ministry of Food, Agriculture and Livestock. MinFAL approves these agencies to conduct organic inspections and issue certificates based on compliance with Turkish organic laws. See above (under "Market Overview") for links to the full set of organic regulations. After applying for a certificate, the companies will conduct an inspection to determine whether the product should be certified as organic. Once the certificate is granted, the product can officially be imported and marketed as organic. Organic products or inputs without the certificate cannot be imported as organic products. These products can be returned to the sender, or, as long as they comply with all other import requirements, can be sold or used

within the country as non-organic products or inputs.

Many of the certifying organizations have international offices and can conduct inspections in the United States. Please refer to the table below for more information on the certifying companies:

Company Name	Address	Email	Website
BCS ÖKO-GARANTIE	Kazım Dirik Mah. Gediz Cad. Kadri Dağüstü Apt. No:21 B Blok Daire:2 35040 Bornova /İZMİR	info@bcs-oeko.com.tr	http://www.bcs-oeko.com.tr
IMO Control	225.Sokak Dündar Apt. No:29 Kat:7 Daire:7 Bornova/ İZMİR	imotr@imo-control.org	http://www.imo-control.org/
ECOCERT	184. Sok. No: 60 Kat: 2 Daire: 3 Bornova/ İZMİR	office.turkey@ecocert.com	http://www.ecocert.com/
ETKO	160.Sokak No:13/7 35040 Bornova/İZMİR	info@etko.org	http://www.etko.org/
EKOTAR	Adnan Menderes Bulvarı Denis Apt. 36/1 33110 MERSİN	info@eko-tar.com	http://www.eko-tar.com/
ICEA	Mustafa Kemal Cad.Halil Bey Apt. B Blok No:166/2 Kat:7 Daire: 13 35040 Bayraklı/İZMİR	info@icea-tr.com	http://www.icea-tr.com/
CERES	Korutürk Mahallesi Ahlat Sok. No: 39 Balçova/İZMİR	ceres@ceres-cert.com.tr	http://www.ceres-cert.com.tr/
Control Union	Mansuroğlu mah. 286 sok. No:16/2 Bornova/ İZMİR	turkey@controlunion.com	http://www.controlunion.com/
ORSER	Paris Cad. No:6/15 06550 Çankaya/ANKAR A	info@orser.com.tr	http://www.orser.com.tr/

For more certifying agencies, please visit the Ministry of Food, Agriculture and Livestock's website: <http://www.tarim.gov.tr/Konular/Organic-Farming/Companies-Authorized-For-Organic-Farming-Certification>

Other than the process to obtain an organic certificate, the process to import organic goods is the same as for conventional commodities. It is highly recommended that U.S. exporters verify the full set of import requirements with their foreign customers, who are normally best equipped to research such matters with local authorities, before any goods are shipped. Please refer to [GAIN Report TR5069 “2015 Exporter Guide to Turkey”](#) and [TR5004 “Food and Agricultural Import Regulations and Standards – Narrative”](#) (click to download) for more information on accessing the Turkish market. In most cases, the importing company or agent should be familiar with (and ultimately responsible for) existing regulations.

Please refer to this link for general guidance on exporting organic products from the United States:
[Exporting Organic Products from the U.S.](#) (click to download)

Importing Organic Products into the United States

For general information on importing organic products to the United States, please refer to the following link:

[Importing Organic Products to the U.S.](#) (click to download)

Appendix I – Government Regulatory Agency Contacts

Vildan Karaarslan, Department Director
Department of Good Agricultural Practices and Organic Farming
General Directorate of Crop Production
Ministry of Food, Agriculture and Livestock (MinFAL)
Eskisehir Yolu 9. Km. Lodumlu, Ankara, Turkey
Phone: 0 312 258 83 14
Fax: 0 312 258 83 21

There are 16 Provincial Agricultural Directorate Authorities, which are intended to be the primary point of contact for importers to submit their import applications.

The Main Provincial Agricultural Directorate Authorities are:

Istanbul Provincial Agricultural Directorate
Bağdat Cad. No.333, Kadıkoy
Istanbul, Turkey
Phone: 0 216 467 57 34
Fax: 0 216 369 81 51

Izmir Provincial Agricultural Directorate
Universite Cad. No: 47 Bornova, Izmir, Turkey
Phone: 0 232 462 60 33
Fax: 0 232 462 24 93

Mersin Provincial Agricultural Directorate
Gazi Mah. Mersin, Turkey

Phone: 0 324 326 40 13
Fax: 0 324 326 40 12

Main Food Traders Associations Contact List

Turkish Food and Drink Industry Association Federation

Chairman: Semsi Kopuz
General Secretary: Ersin Taranoglu
Address: Altunizade Mah.Kısıklı Cad. Tekin Ak İş Merkezi No:3 Kat:2 Daire:7 34662 Bağlarbaşı-Üsküdar İSTANBUL
Phone: 00 90 216 651 86 81
Fax: 00 90 216 651 86 83
E-Mail: tgdf@tgdf.org.tr
Web: <http://www.tgdf.org.tr/english/>

All Food Importers Association

Chairman: Mustafa Manav
General Secretary: Melehat Ozkan
Address: Büyükdere Cad.Somer Apt.No:64 Kat:5 D:13 Mecidiyeköy - İSTANBUL
Phone: 0 212 347 72 22
Fax: 0 212 347 25 70
E-Mail: tugider@tugider.org.tr
Web: <http://www.tugider.org.tr/>

Turkish Feed Manufacturers Association

Chairman: Murat Ulku Karakus
General Secretary: Nizamettin Senkoylu
Address: Oveçler Mah. Cetin Emec Bulvari 2. Cadde No:38/7 Çankaya- ANKARA
Phone: 0 312 472 83 20 (pbx)
Fax: 0 312 472 83 23
E-mail: info@yem.org.tr
Web: <http://www.yem.org.tr>

Organic Product Producers and Industrialists Association (ORGUDER)

Chairman: Ayhan SÜMERLİ
General Secretary: Melahat ÖZKAN
Address: Büyükdere Cad. Somer Apt. No: 64 Kat: 5 D: 13 Mecidiyeköy - İSTANBUL
Phone: 0 212 347 25 60
Fax: 0 212 347 25 70
Email: orguder@orguder.org.tr
Web: <http://www.orguder.org.tr/eng/index.php>

Buğday Association for Supporting Ecological Living

Osmanağa Mahallesi, Yoğurtçu Şükrü Sokak, A.H. Uzunal İş Merkezi, No: 48 Daire:6 Kadıköy-İstanbul

Phone: 0 216 349 99 33
Fax: 0 216 345 99 39
Email: portal@bugday.org
Web: <http://www.bugday.org/>

Appendix II - Other Import Specialist Contacts:

U.S. exporters are advised to contact the FAS offices in Ankara or Istanbul for additional information and/or a list of private sector firms which can provide assistance with customs clearance and import regulation issues. Please refer to GAIN Report TR 5004 “Food and Agricultural Import Regulations and Standards – Narrative”.

Foreign Agricultural Service Offices in Turkey:

American Embassy
110 Ataturk Blvd.
Kavaklidere, Ankara
Tel: +90-312-455 55 55
Fax: +90-312-467 00 56
Email: agankara@fas.usda.gov

American Consulate, Istanbul
Kaplicalar Mevki Sokak
Istinye, 334460 Istanbul
Tel: +90-212-335-9000
Fax: +90-212-335-9077
Email: agistanbul@fas.usda.gov