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# **Agriculture in Turkey**

## *Trade and Regional Diplomacy*

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# **Agriculture in Turkey**

## *Trade and Regional Diplomacy*

### **Introduction**

The Republic of Turkey, which used to be called the “Sick man of Europe” in the XIXth century has become an emerging economy and a regional power (Ünal, 2012). Thanks to a more assertive foreign policy, embodied in 2010 by the Foreign Affairs Minister Ahmet Davutoğlu, Turkey is gaining influence in its neighbouring region, be it in the Middle East, the Balkans or in Central Asia.

Located at the junction of three continents and at the crossroad of major pipelines, Ankara has led an ambitious diplomacy since the early 2000's. Close to regions freight with protracted conflicts and political disputes, such as the Syrian crisis started in 2011, Turkey has, by contrast, enjoyed political and economic stability since the establishment of Republic of Turkey in 1923 by Mustapha Kemal “Atatürk”. Therefore, as an official candidate to the EU membership since 1999, it has become fundamental to ensure stabilized relationships with immediate trade partners. On the other hand, such an active policy, particularly towards the Middle Eastern neighbours, has sparked controversies among Turkey's Western allies who fear that Turkey might shift towards alliances with non-democratic regimes and abandon the EU accession reforms.

Observing the structure of the Turkish economy, one cannot miss the great importance of agriculture accounting for 8% of the GNP. Agriculture can be analysed as a geopolitical tool as it implies fundamental socio-economic stakes. As an example, many observers agree to argue that food shortages resulting from a decrease in state subsidies have contributed to the population uprisings in 2011 in the Arab countries (Abis, 2012; Muasher, 2013). Having these considerations in mind, the purpose of this study is to draw attention on agriculture and agricultural trade as geopolitical stakes for Turkey in its regional diplomacy.

This paper will address the recent developments in Turkey's foreign policy theory. It will be shown how Ankara has progressively adopted a power projection diplomacy backed by a strategic geographic position and a dynamic economy. Then a presentation on the structure of the Turkish agriculture (II) and on economic development policies (III) will be made. Agro-food trade and regional interdependence will form a fourth and fifth part, further explaining why the Turkish agriculture can be considered as a major geopolitical instrument.

# I. The Zero problem policy: encouraging fruitful relations with the neighbours

## Turkish foreign policy since the early 2000's

An extensive literature has described the new Turkish foreign policy as starting in 2010. Actually, as early as 1995, Turkey was being described as an “emerging regional role” by Dr. George E. Gruen, professor of Turkish Affairs at Columbia University. Indeed, the end of the Cold war gave Turkey new opportunities.

The reorientation of Turkish foreign policy towards the Middle East really started with the election of the Justice and Development Party's (AKP - *Adalet ve Kalkınma Partisi*) second legislature from 2007 to 2011 and the arrival of Ahmet Davutoğlu as Foreign Affairs Minister in May 2009 (Marcou<sup>1</sup>, in D. Schmidt, 2012). This policy reorientation can be traced back to the late 1990's under the Coalition government and the Presidency of Turgut Özal (1989-1993) and Ismael Cem's policy, Foreign Affairs Minister from 1997 to 2002. The election of Recep Tayyip Erdoğan as Prime Minister in 2003 gave a further impetus to the Turkish diplomacy towards reinforcing good relations with three regions: Eurasia, the Balkans and the Middle East (Tica-Diaconu, 2011; Somun, 2011).

Since 2009, Ahmet Davutoğlu, Professor of International relations at the Beykent University in Istanbul, has developed his own international relations theory. It is based on the idea of Turkey as “a central country” that should lead a “zero problem” policy with its neighbours. In an article published in Foreign Policy magazine in May 2010, he stated that: « Turkey is playing an increasingly central role in promoting international security and prosperity. ». In this purpose, foreign relations must be pursued with a « visionary approach » rather than a crisis-oriented attitude, characteristic of the Cold war era<sup>2</sup>. Ahmet Sösen (2010), a Turkish political science specialist, explains that five principles shape the new Turkish foreign policy: a « balance between security and freedom; zero problems with neighbours; multidimensional and multi-track policies; a new diplomatic discourse based on firm flexibility; and rhythmic diplomacy » (Sösen, 2010: 1).

Overall, better relations can be observed between Turkey and its neighbours, be it in the Middle East, even with Israel since March 2013<sup>3</sup>, in South Eastern Europe or in Central Asia. Turkey's cultural influence in Middle Eastern societies lies in Turkey's original model of a Muslim society with a democratic state. Many observers have described it as a political model of democracy in the region, in spite of the numerous remaining structural reforms required by the accession process (Tica-Diaconu, 2011).

In particular, the Turco-Syrian relations have improved since the second half of the 2000's, despite conflicts about the Kurdish issue and the control of the regional rivers' flow. In 2007, the Turkish Army was allowed to intervene in the north of its neighbours against the PKK (Workers Party - *Partiya Karkerên Kurdistan*) and, from 2009, a strategic partnership was

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<sup>1</sup> Professor at Sciences Po Grenoble and member of the Observatoire de la vie politique turque (OVIPOT)

<sup>2</sup> [http://www.foreignpolicy.com/articles/2010/05/20/turkeys\\_zero\\_problems\\_foreign\\_policy](http://www.foreignpolicy.com/articles/2010/05/20/turkeys_zero_problems_foreign_policy)

<sup>3</sup> Turkey-Israel relations have been difficult since the outburst of the 2009 Gaza war, vigorously denounced by Erdoğan, and worsened since March 2011. Since March 2013, both countries seem to have reconciled thanks to the US mediation.

established, including economic, cultural to military cooperation, while trade increased dramatically during the period 2009-2010. On the other hand, following a strong opposition to the US intervention, Ankara has been involved in the reconstruction of Iraq, pushing for territorial unity against the federalisation trend. Perceived as a threat, it would encourage the pro-independence Kurdish movement in the region. Symbolically, in 2008, Erdoğan was the first Turkish Prime minister to visit Iraq after twenty years (Marcou, in Schmidt, 2012: 52-53).

Meanwhile, Ankara gained its reputation of a rather independent power from the West, and especially towards the NATO alliance and the EU (Groc, 2011: 2). However, it has to face many criticisms, from accusations of neo-Ottomanism, particularly developed in the Western Balkans, or neo-Panturkism regarding its relations with the Community of Independent States (CIS), to mistrust among the Western partners. A former European diplomat explains that this policy is actually isolating Turkey<sup>4</sup>. Others, such as Didier Billion (IRIS co-director), explain that a close EU-Turkey relation is not undermined by a diversification of Turkey's partnerships. Similarly, the economist Kermal Derviş argues in favour of a strategic cooperation between Turkey and European Mediterranean countries like France regarding trade in the Mediterranean and support provided to North African states<sup>5</sup>.

## **A regional economic power**

Today, as one of the fastest-pace developing country, the Turkish economy was ranked 15th world largest GDP-PPP economy in 2011 (Gross Domestic Product – Purchasing Power Parity) (WorldBank, 2012). As one of the 20 largest economies, Turkey's economic growth achieved 9% in 2010-2011 according to the OECD (2012), with an important job creation.

Moreover, the size of its population is impressive with about 73.6 million people, an increase of 165% in the last three decades, whom are also potential consumers (Kirişçi et Kaptanoğlu, 2011, 2; DG trade, 2009). Turkey has become a "middle-income country". Internal consumption has been increasing, also in terms food and beverages, thanks to the increase of purchasing power, as today's per capita income is five times the level of the 1980's (Ali Koç, 2012: 284).

This rapid economic development was first allowed by a major change of economic policy from the 1980's under the Presidency of Turgut Özal, who abandoned the Import Substitution Industrialisation model (ISI) restraining foreign trade and encouraging state-run companies. Instead, an export-oriented model backed by economic liberalisation reforms was promoted. The second element is the entering into force of the Custom Union Agreement with the EEC (European Economic Community), now the EU, on 1 January 1996 which developed trade relationships between the two neighbours. Two decades of macro-economic instability (high inflation, increasing budget deficits and debt levels, unstable and increasing exchange rates) plagued the first period of economic reforms until the economic crisis in 2001. Then, structural reforms including judicial reforms and a dramatic decrease in state spending allowed the Turkish economy to recover and cope rapidly with the 2008 world economic crisis. During this second phase, Turkey's annual economic growth rate has been around 7% between 2002 and 2007 and the public debt fell from 90 GDP to 39% GDP in 2007 (OECD, 2011: 16).

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<sup>4</sup> Jean-François Drevet, former DG Relex diplomat

<sup>5</sup> IRIS Conference « La Turquie et l'Europe », Paris, Maison de l'Europe, 21/02/2013

The EU is still Turkey's most important trade partner with 38.1% in 2011 of its overall imports and 46.2% of its exports, though the EU's shares are in a declining trend with respectively 40.8% and 56.8% in 2007. Overall, the EU-27 represented 41.1% in 2011 of Turkey's overall trade, against 56% in 1999. Germany has been replaced by Russia as Turkey's second most important trade state partner with 8% of its overall trade, followed by China (6.5%), the USA (5.5%) and Iran (4.3%) (DG Trade, 2012). In fact, Turkey's trade with its immediate neighbours have surged to increase from USD 3.9 billion in 1991 to USD 88.3 billion in 2008, accounting for 11 to 26% of its overall trade. A symbol of this economic expansion is the numerous openings of stores for the supermarket chain Ramstore which inaugurated the 22nd of them in Russia in 2011. These developments led some analysts to describe Turkey as a "trading state" (Kirişci et Kaptanoğlu, 2011).

These new relationships have sparked the economic development of the Southern regions of Turkey, such as the city of Gaziantep where Syrians used to travel frequently to buy food products until today's crisis. Besides, as a result of Turkey's economic growth and political democratisation, Turkey has become an attractive country for migrants and cheap workers from the Middle East region. The visa liberalization measures implemented since 2009-2010 encouraged this phenomenon. In December 2010, a Schengen zone was promoted by the Prime Minister, though with small chances to be implemented in the near future.

#### Gas and Oil routes (existing and projected) across Turkey



Source: <http://www.presseurop.eu/en/content/article/106641-all-pipelines-lead-ankara>

Besides trade, the Turkish industries invest a lot in the surrounding regions, especially in low added value industries. For instance in Egypt, investments have been directed towards textile, automobile and the construction industries to reach USD 1.5 billion in 2009 and a total trade value of USD 3.5 billion (Bourgeot, in Schmidt, 2012: 102). In the CIS, Turkish Foreign Direct Investments (FDI) especially target Turkmenistan<sup>6</sup>, Kazakhstan<sup>7</sup>, and Azerbaijan<sup>8</sup>.

<sup>6</sup> "Turkish FDI stock in Kazakhstan reached 1,75 billion \$" in 2011.

<http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=KZ&region=2>

<sup>7</sup> In industrial plans especially, Turkish FDI stocks reached 1,75 billion \$ in 2011.

<http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=KZ&region=2>

Furthermore, Turkey lacking energy resources, its economy is highly dependent on oil and gas imports. Hence the willingness of the authorities to preserve good relations with the exporting states, as the country is located at the crossroads of energy routes.

The development of trade and economic relations between Turkey and its Middle Eastern partners results from political and private firms' initiatives (state leaders' visits especially), willing to diversify their economic relationships in a context of economic stagnation in the European market (Bourgeot, in Schmidt, 2012: 93-112). Therefore, it can be argued that the so-called "zero problem policy" is consistent with economic objectives as insuring greater stability and security in Turkey's immediate neighbourhood and eventually serves its business interests. However, the great political instability since 2011 in the Arab countries has made Turkey's special relationship with the EU even more valued by Ankara (Alessandri et Benli Altunışik, 2013). In fact, the Arab Spring has caused losses in Turkish exports and ambiguities on its own role in the region (Tica-Diaconu, 2011).

## **II. Agriculture in the Turkish economy**

### **The agriculture sector in the Turkish economy**

Agriculture represents a great part of Turkey's economy, about 8% of the GNP/economic activity in 2011 (OECD, 2011), although this share is in a declining trend: 35 % in 1970, 22 % in 1980, 16.4 % in 1995, 9.1 % in 2010, 9.8% in 2009 and 10.1% in 2010 (constant prices). In 2010, agricultural GDP was USD 51 billion (WorldBank, 2010; TurkStat; in OECD, 2011: 16) and in 2011, the total value of Turkey's agricultural production was worth USD 62 billion. In terms of exports, agricultural products represent 11.1% of Turkey's total merchandise exports and 7.3% of the total merchandise imports in 2011 (DG Trade, 2009; OECD, 2011: 17)

Estimated as the 7th world agricultural producer, Turkey's economy is highly dependent on its agricultural sector as about 25% of the workforce is employed in agriculture, or 6.5 million people (MINEFI – DGTPE, 2007). Moreover, about 30% of the population lives in rural areas (Ali Koç, 2012: 284). In terms of agricultural growth, Turkey takes the lead in Europe and ranks seventh in the world, as explained by Mehmet Şimşek, the current Turkish Finance minister<sup>9</sup>.

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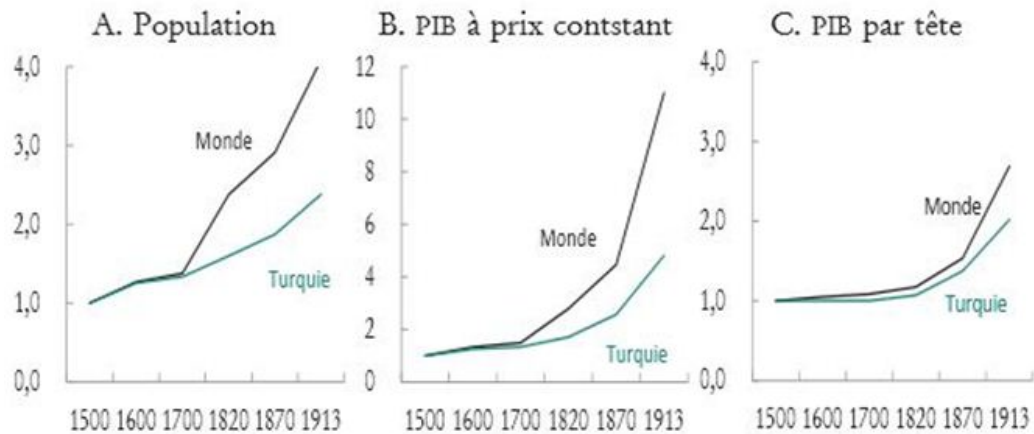
<sup>8</sup> Both state invest in each other: by the end of 2011, "the volume of Turkish investments in Azerbaijan was approximately \$6,5 billion and Azerbaijan's investments in Turkey approximately amounted to \$3 billion".

<http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=AZ&region=2>

<sup>9</sup> Turkey ranked the first in Europe in agricultural growth, Balkans.com Business News Correspondent , 21/03/2013; URL: <http://www.balkans.com/open-news.php?uniquenumber=171448>



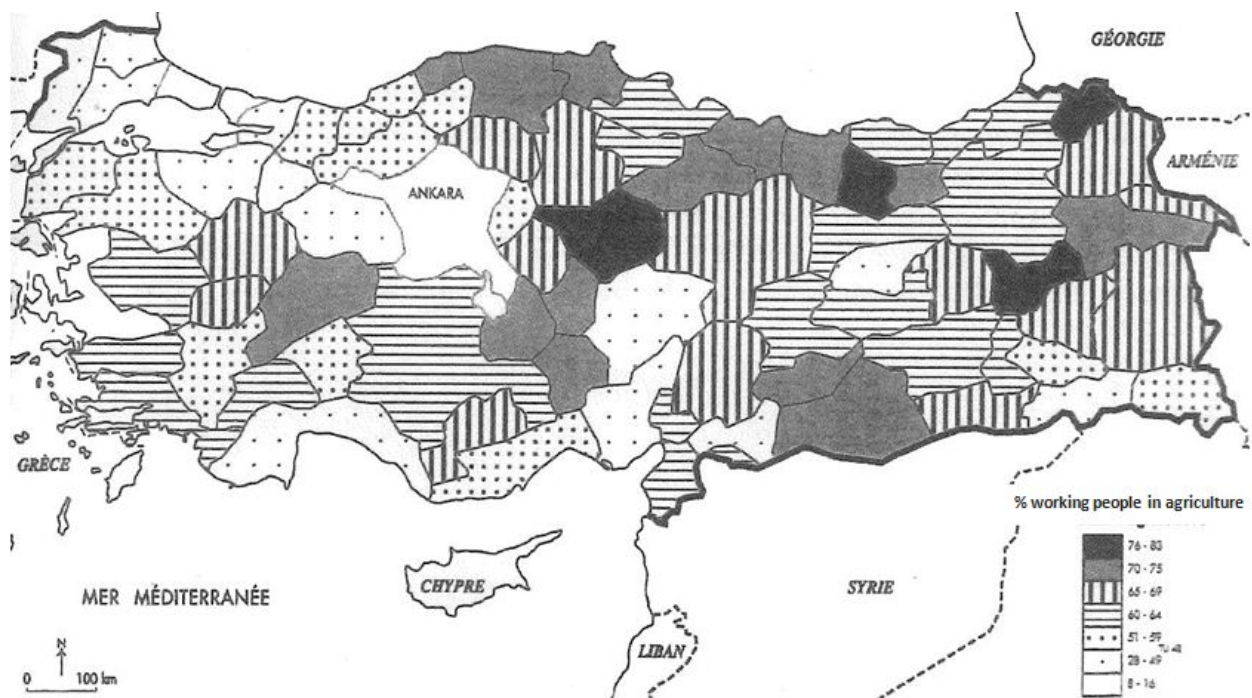
✚ Population growth, GDP growth and GDP/capita growth (1500-1913); 1500=1



Source : A. Maddison, Statistics on World Population, GDP and Per Capita GDP, 1-2008 AD University of Groningen.

Source: Ünal, CEPII, 2012: 3

✚ Share of the agricultural sector in the Turkish workforce in 2000



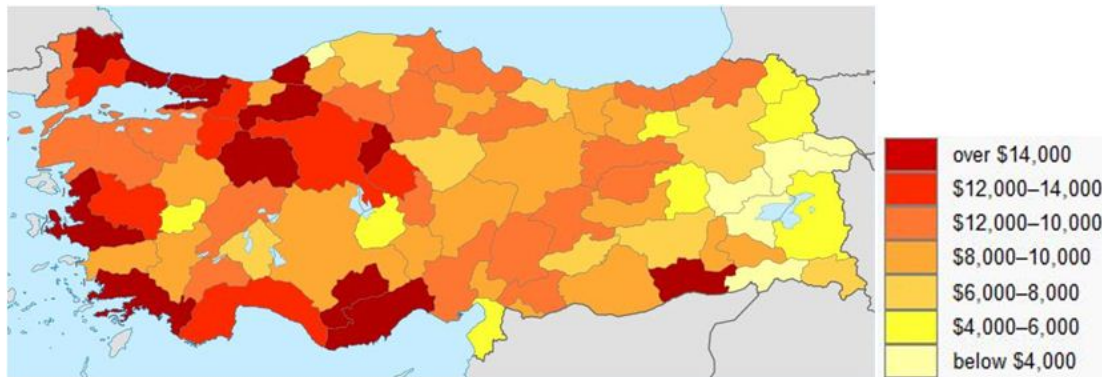
Source: Bazin et de Tapia, 2012: 107

Despite a decline in the economic importance of the agricultural compared with the industrial and the service sectors, agriculture remains a key factor in the Turkish society as it generates the greatest part of income in rural areas. Considering the whole agrifood chain, comprising the agrifood industry, makes agriculture an even more important economic sector for Turkey (OECD, 2011: 17).



However, great disparities in terms of economic wealth and population density exist between the east and the west of the territory and between the centre and costs. For example, the Marmara region represents 31% of the population and 45% of the total GDP and three times the revenue per capita than in the Southeast Anatolia region (Ünal, 2012: 4)<sup>10</sup>.

✚ GDP per capita in Turkey, 2000



Source: Wikipedia; URL: [http://en.wikipedia.org/wiki/Economy\\_of\\_Turkey](http://en.wikipedia.org/wiki/Economy_of_Turkey)

Turkey has a great comparative advantage vis-a-vis the MENA countries. Among the Southern and Eastern Mediterranean Countries (SEMCs), including Egypt, Morocco, Algeria, Syria, Israel, Jordan, Lebanon, Libya, Tunisia and Turkey, the share of the Turkish production amounts to 39%. Together with Egypt, Morocco, Algeria and Syria, the five countries represent 91% of the total agricultural production of the region (Belghazi, 2013 : 1). Thus, in the region, Turkey achieves food self-sufficiency as agricultural production usually trespasses the consumption needs in many areas. On the contrary, in other SEMCs such as Syria, Egypt, Algeria, and Morocco, dependence vis-à-vis cereals imports put a great burden on the public finances, despite recent enhancements conducted at the expense of sugar and vegetable oils production (Belghazi, 2013: 5).

## Main characteristics of the Turkish agriculture

### Geography reveals great territorial diversity

Since the mid-XXth century, Turkish geographers have worked at defining regional specificities. Six to nine regions form the Turkish territory, characterised by different climate and thermic conditions: four maritime regions with a humid climate - the Marmara, the Aegean (*Ege*), the Mediterranean (*Akdeniz*) and the Black Sea region (*Karadeniz*), and three central regions - Central Anatolia (*Iç Anadolu*), Eastern Anatolia (*Dogu Anadolu*) and South East Anatolia (*Güney Dogu Anadolu*) with a dry climate and mountainous landscape in the East. Nowadays however, geographers distinguish between the north, south and east of

<sup>10</sup> It is worth mentioning that the Turkish economy still has numerous weaknesses: low saving level a structural competitiveness created a high current deficit at 11% GDP in 2011 while 40% of the workers are employed in the informal sector, including 15% in agriculture (Denis Ünal, 2012: 4).

Central Anatolia and between the north and the south of Eastern Anatolia (Bazin et Tapia, 2012: 72-77).

#### Regions in Turkey (FAO)



Source: FAO; URL : <http://www.fao.org/ag/AGP/AGPC/doc/Counprof/Turkey/Turkey.htm>

Because of radical climatic and soil quality differences, two kinds of agriculture are pursued in Turkey (Bazin et Tapia, 2012). The Aegean (west coast) and the Mediterranean coast (south-west) are the two regions where typical Mediterranean products are cultivated. These two regions plus Marmara (north-west) account for 90% of the fruits and vegetables production. Citrus (90%) and olives (80%) are produced mostly in the Mediterranean region while grapes cultivation is mainly located in the Aegean, with tobacco crops (51%) and south east Anatolia, along with cotton (45%). The south-west of Turkey produces more than half of the overall wheat production. The central and eastern parts of Turkey are more arid and mountainous, hence a production focused on livestock and animal products. Production on the Black sea coast focuses on hazelnuts and walnuts productions. 70% of sugar beet production takes place in mid-western Anatolia and the western part of the Black sea region (OECD, 2011: 29). Nevertheless, all the nine regions are more or less characterised by cereal crops and husbandry (Bazin et Tapia, 2012: 77). Out of the total amount of arable land (25 millions of hectares), irrigated lands represent 5.2 millions of hectares, most of which is used for field crops. Moreover, the potential for increased production is great as experts forecast that the surface of irrigated land could be doubled in the future (Ergun, Aydoğan et Osman, 2012).

### Turkey is a world leader in some production areas

Agricultural production includes large quantities of unprocessed crop commodities. Cereal production takes the lead with a production of wheat representing 63% of the total value of cereal production, before barley (18%) and maize (12%). Industrial crops follow with sugar beet (49%), cotton (35%) and tobacco (17%) (OECD, 2012: 25)<sup>11</sup>.

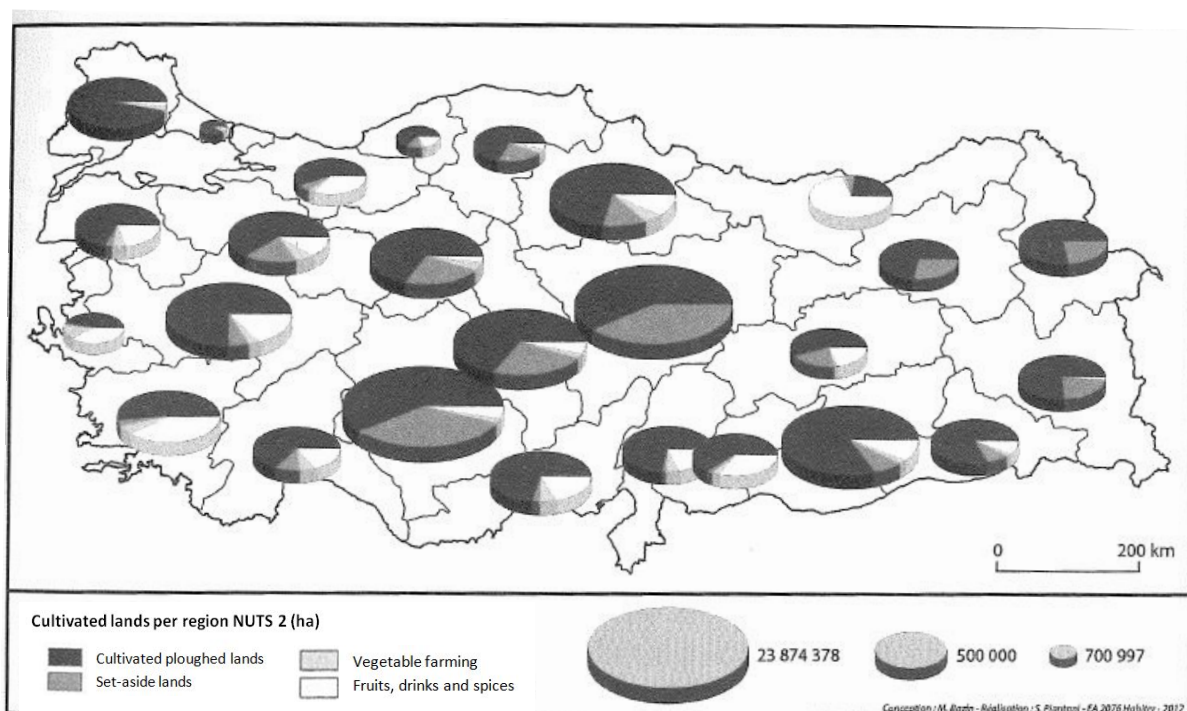
Turkey is a major world producer of vegetables and fruits. It accounts for 55% of the overall production value in 2009 (OECD, 2011: 25). The total fresh fruit and vegetable production

<sup>11</sup> According to the FAO, the production annual average between 1992 and 2010 amounted to 19 million tonnes of wheat, 16 million tonnes of sugar beets, 9 million tonnes of tomatoes, 8 million tonnes of barley and 4 million tonnes of potatoes (FAOSTAT).

has increased by 4.9% since 2010 to rise from 42,5 million tons to 44,7 million tons in 2011. This increase is to a large extent due to the rise of tomato production. Indeed, the enhancement of production techniques, such as greenhouses, has brought more efficiency despite seasonal changes for water-demanding products (tomatoes, cucumbers, melons, etc.) (TSI, 2012).

The tomato production represents 24.6% of the overall fresh fruits and vegetable production (TSI, 2012) with about 11 million tons in 2011, after an increase of 9.6% since 2010. Grappes (4,3 million tons, 9,6% of overall 2011 production), and watermelons are the second largest production sectors. Turkey is ranked first in the production of cherries, hazelnuts and apricots, and the second largest producer of watermelons and melons (5.5 million tons in 2011), cucumbers and gherkins (1.7 million tons in 2011), and figs, grown in the Bursa and Mut provinces (261 thousand tons), with respectively 12.3%, 3.9% and 0.6% of the overall fresh fruits and vegetable production (TSI, 2012). The Turkish agriculture is the second producer of pistachios and chestnuts, the third producer of chick peas, and olives (OECD, 2011; Ali Koç, 2012). Citrus fruits are the most important production group, of which Interdonato and Lamas are famous varieties. The production currently reaches about 3 million tons and a third is exported<sup>12</sup>. In 2011, citrus constituted 3.7 million tons or a share of 8.1% of the overall production, including oranges (1.7 million tons), tangerines, grapefruits and lemons, (2 million tons). In terms of cultivated fruits, pomefruits, especially apples, are the second important group while quinces are becoming attractive for foreign consumers. Stone fruits (apricots, peaches, plums, cherries, sour cherries) make up to 4.7% of the overall fruit and vegetable production (TSI, 2012).

#### ✚ Soil use and different types of agriculture



Source: Bazin et de Tapia, Figure 2.7, 2012: 77

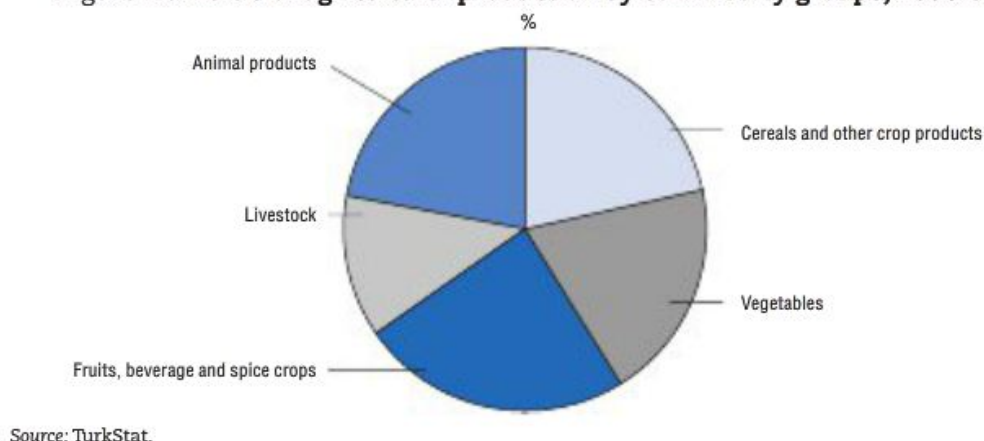
<sup>12</sup> Greenmed Journal, 14/01/2013, "Turkey invests on new citrus variety with half million euros", <http://www.greenmed.eu/news-1746.html>

Cereals crops represent about 50% of the cultivated land (MINEFI – DGTPE, 2007). The four prominent cereals produced are wheat, barley, maize, and rice and about 11 million of hectares are dedicated to the cultivation of wheat and barley, almost half of the arable lands. The production volumes of the four cereals increased during the period 2000-2010 despite a reduction of the cultivated areas in the case of wheat and barley (whereas they increased for maize and rice) which indicates a productivity rise (Ergun, Aydoğan et Osman 2012). Turkey is ranked 4<sup>th</sup> world producer of durum wheat and the 12<sup>th</sup> for wheat<sup>13</sup>. Despite favourable conditions, the 2012 wheat harvest should result in 20.1 million tonnes, a rather stable amount since the mid 2000's<sup>14</sup>. Barley harvest amount should be maintained at the 2011 level at 7 million tonnes, though the latter was already 7% below the last five years average. On the contrary, maize production should achieve a 10% increase compared with 2011 thanks to a higher productivity in South East Anatolia and Central Anatolia (FAO GIEWS Country brief, 2012).

In terms of husbandry and animal products, the Turkish market is protectionist as imports are restricted<sup>15</sup> to protect the internal market. Sheeps (30 million heads), goats (8 million heads), cattle (12 million heads) and buffaloes represent the most important herds in Turkey (FAOSTAT). According to the Turkish government, Turkey ranks 10<sup>th</sup> as producer of chicken meat and 11<sup>th</sup> in egg production<sup>16</sup>.

✚ Shares of agricultural production in terms of value by commodity groups

Figure 1.6. **Value of agricultural production by commodity groups, 2006-08**



Source: OECD, 2012: 25

<sup>13</sup> <http://www.tfyi.gov.tr/en/featured-product>

<sup>14</sup> <http://www.economy.gov.tr/upload/sectoralreports/Wheat%20Flour.pdf>

<sup>15</sup> DG Trade, 2009 : "Turkish meat consumption per head is about 1/5 of EU average, for sheep meat it is higher than in the EU. Consumption of cow milk and eggs are at half the EU level and ¾ of the EU level respectively."

<sup>16</sup> <http://www.byegm.gov.tr/docs/Turkiye2011/english/290-291.htm>



🇹🇷 Turkey's world ranking by selected crops in 2009

**Table 1.8. Turkey's ranking in world production top-10, by selected crop, 2009**

Field crops		Perennials		Livestock products	
Barley	8	Almonds	4	Chicken meat	8
Chick peas	3	Apples	3	Sheep meat	6
Cotton	7	Apricots	1	Sheep's milk	3
Cucumbers	2	Cherries	1		
Aubergines	4	Chestnuts	2		
Lentils	5	Figs	2		
Onions	3	Grapes	6		
Sugar beet	5	Grapefruit	5		
Tobacco	4	Hazelnuts	1		
Tomatoes	4	Lemons	4		
Watermelons	2	Olives	3		
		Pistachios	2		
		Tea	4		

Note: The figure for lentils refers to 2008. International prices are used to calculate the value of output quantities.

Source: FAOSTAT, September 2010.

Source: OECD, 2012: 26

## Agro-industry developments

The economic transition process led to a rapid development of productive techniques and the agro-industry since the mid- 1990's. The agriculture sector is subject to numerous investment projects looking for new techniques and products. Some target productivity such as the five-year plan launched by the Çukurova University in Adana and the Citrus Promotion Group aimed at developing new citrus varieties, seedless and bigger<sup>17</sup>. Other initiatives develop organic productions, encouraged by the influential environmentalist lobby (Akder, 2007; OECD, 2011).

Nowadays, the food processing sector accounts for 50% of the agro-food exports (2008), a significant increase compared with the 36% share in 1996. From 2008 to 2010, about 11.4% of the workers in the manufacturing sector were employed in the agro-industry. Furthermore, major restructuring measures have taken place since the early 2000's, from vertical integration, use of new marketing measures and quality increase. At the same time, FDI have surged and the number of foreign-owned enterprises has doubled to hit 467 in 2010, with a predominance of the multinational firm Unilever (Ali Koç, 2012: 285-286).

Thanks to great quantities of good quality wheat, Turkey produces large quantities of wheat flour which represents 30% of the value of the total agro-industrial output. While "bread and bakery products" manufacturers account for 61% of the total agro-food industries in 2008 (Ali Koç, 2012: 285), there are about 1200 wheat flour factories on the Turkish soil, with a total production capacity of about 30 million tons<sup>18</sup>. Other products derived from wheat are biscuits

<sup>17</sup> « Turkey invests on new citrus variety with half million euros», 14/01/2013, Greenmed journal, <http://www.greenmed.eu/news-1746.html>

<sup>18</sup> <http://www.tfyi.gov.tr/en/featured-product>

and pastas: cereals related products and biscuits, pastry and crackers account respectively for 12% and 10 % of the agro-food industries.

The latter also comprise manufactures producing processed fruits and vegetables (4%) and dairy products (3.7%). For instance, the Turkish firms ÇAYKUR produces tea, SÜTAŞ deals with dairy products, and Tat Konserve specialises in processed vegetables (Ali Koç, 2012: 285). According to FAOSTAT, in terms of processes crops, Turkey produces an average 2.2 million tonnes of sugar raw centrifugal, 1.3 million tonnes of cottonseed, 8.5 million tonnes of cotton lint, 8 million tonnes of beer of barley and 6.5 million tonnes molasses.

Grapes (ie, Sultana variety), allow for the production of wine which amounted to about 58 million litres in 2010, mostly spread among four large firms : Mey Kayra, Kavaklıdere, Doluca and Yazgan. Besides the internal market, the tourist sector accounts for 15% of the wine consumption (TAPDK, 2011, in Ali Koç, 2012: 288).

Another important processed food is olive oil whose production has increased dramatically since the 2000. About 68% of olives crops were used for the production of olive oil in 2008-2010 and the annual output reaches about 123 thousand tonnes (TurkStat, 2011d, in Ali Koç, 2012: 290).

## **Logistics: modernisation projects followed economic liberalisation**

Depending on the type of output (perishable or not) and companies (either Turkish or international) agro-food companies have either internalised or outsourced their logistics. For instance, while the poultry specialised firm Keskinoglu has internalised these services, Unilever and Nestle rely on Turkish logistic companies (Ersoy et Tozanli, 2012 : 8).

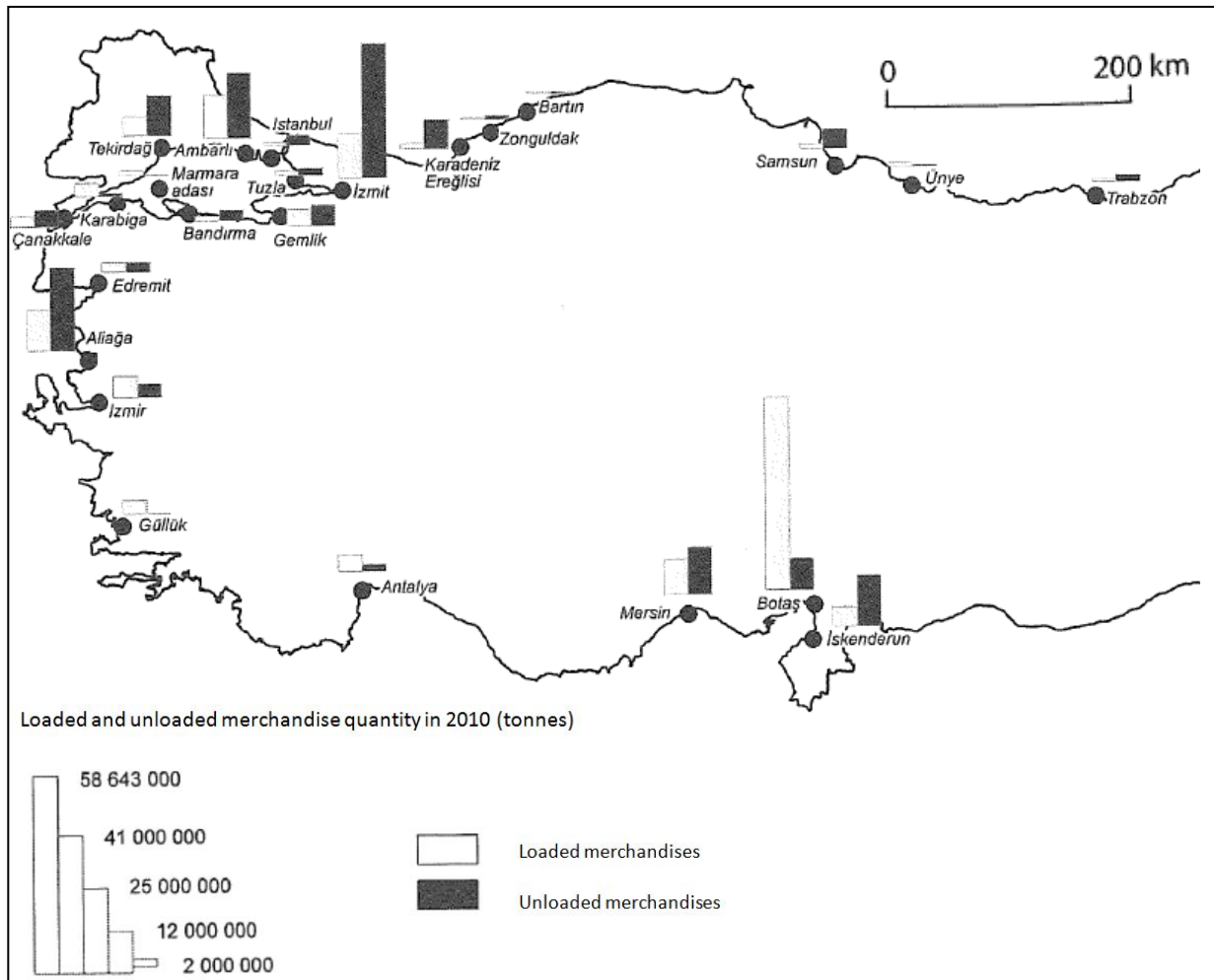
Agro-food transports are mostly shared between the road and sea: in 2009, for the Turkish imports, the road was used at 42% and the sea at 46%, the latter used at 59% for exports (Deloitte, 2010, in Ersoy et Tozanli, 2012: 6). The road has received most of the authorities' attention during the second half of the XXth century and is therefore the most relevant transportation mean for internal trade. In 2009 it accounted for 90% of transported goods (TUIK, 2010, in Ersoy et Tozanli, 2012: 6; Bazin et de Tapia, 2012: 168-172).

Many incentives led to the development of modern logistics in Turkey since the 1990's. First, the open up of the economy, political instability in the neighbourhood, state incentives and a saturated internal market urged companies to turn towards in international trade. These reasons, added to an increase in qualitative production in fresh fruits and vegetables, permitted the adoption of new ways to carry agro-food products, such as Ro-Ro methods and inter-modal transports. Then, expansion was encouraged by the investment of foreign capital which today accounts for 30% of the market (Karadoğan, 2011, in Ersoy et Tozanli, 2012 : 6).

Nowadays, the transports and logistics sector employs 1.1 million workers and accounted for 8 to 12% of the GDP. Since 2005, the logistics sector has then achieved a growth rate of about 20% per year, ranking Turkey at the third position among the SEMCs (TUIK, 2009 ; IGEME, 2009 in Ersoy et Tozanli, 2012 : 6).



## Trade traffic in Turkish ports in 2010



Source: Bazin et de Tapia, 2012: 162

Modernisation projects, such as railway construction and electrification, are conducted with the help of European pre-accession funded programmes (European Transport Network programme, TRACECA programme...). For instance, the Marmaray project, which includes the building of a metro tunnel under the Marmara sea, was partially funded by the European Investment Bank (EIB). Since the early 2000's, modernisation and expansion projects are being carried out to remedy the delay accumulated by the railroad system, from Istanbul and Ankara towards the east and the coasts. These projects have recently accelerated thanks to new investments (Bazin et de Tapia, 2012: 155-157).

Besides, within the privatisation trend of the economy<sup>19</sup>, private companies have recently been entitled with the task to modernise ports (Bandirma, Samsun, Mersin) and create logistical hubs (Ankara, Samsun, Mersin, Kars, Iskenderun) under the supervision of the local authorities (Ersoy et Tozanli, 2012 : 8-9).

<sup>19</sup> « La Turquie privatisée à tout va », Econostrum, 19/02/2013, Clément Beuselinck-Doussin ; [http://www.econostrum.info/La-Turquie-privatisée-a-tout-va\\_a13705.html](http://www.econostrum.info/La-Turquie-privatisée-a-tout-va_a13705.html)

### **III. Agricultural policies and rural developments**

The Turkish agricultural policy has been continuously reformed, especially in the past thirty years, in order to meet with the World Trade Organisation (WTO) and EU standards. In other words, the Turkish authorities tried to implement a market-oriented agricultural policy and a comprehensive reform strategy, taking into account human resources and environmental aspects.

Meanwhile, agricultural and rural development plans have been implemented both at the national and regional levels. They mostly tackle rural poverty issues and infrastructure modernization projects. As the following section will demonstrate, agricultural and rural development plans consist in multiple frameworks, today supervised by the MARA and the General Directorate of Rural Affairs (KHGM – *Köy Hizmetleri Genel Müdürlüğü*) (Bazin et de Tapia, 2012: 247).

#### **Recent reforms aimed at applying international standards**

##### **Liberalisation and privatisation: WTO standards and macroeconomic stability**

In order to restore the macro-economic stability and reduce the fiscal deficit, Turkey started a stabilisation and restructuration programme from the mid-1990's which implied a drastic diminution of states expenses, including in the agriculture sector (OCDE, 2011: 14). Those reforms mostly intended to make the Turkish policy compatible with the WTO standards as Ankara joined the organisation on 26 March 1995.

From the 1930's to the 2000's, the Turkish policy was highly protectionist. Agricultural Sales Cooperative Unions (ASCUs) and State Economic Enterprises (SEEs) permitted to maintain a strong state control over the sector through subsidies (SEEs buying most of the production) and quotas. Manufacturing and commercial activities used to be carried out by SEEs on behalf of the state until the 1980's when they lost their monopoly over output prices. On the other hand, ASCUs allowed the state policy to be implemented on the ground by providing guidelines to the farmers (Anderson et Swinnen, 2008: 97).

The reforms, decided by the Council of Ministers, started as early as 1963 with the First Five-year plan (1963-1967) which carried out a rural development plan based on "model village" projects. The following plan (1968-1972) addressed mostly issues of urbanisation, industrialisation and modernisation in agriculture. The "Central Village" as well as the "Agricultural City" models were at the core of the Third plan (1973-1977), before that land reform was launched with the Fourth plan (1979-1983). The GAP (see below) and Leader Farmer projects were initiated under the Fifth plan (1985-1990) while the Custom Union with the EU was the main subject of the Sixth and the Seventh plans (late 1990's). The Eighth plan brought discussions on the "modern village" and the workforce in agriculture.

In parallel, rural development initiatives have been launched since the early 1970's. For instance, the Erzurum rural development project (1982-1989) intended to improve the

productive capacity and encourage the agroindustry<sup>20</sup> in the mountainous province. More recently, the Ordu-Giresun (1995-2003) and Erzincan-Sivas (2005-2012) projects aimed at enhancing the living conditions of poor families and at building up infrastructures in the rural areas (Bazin et de Tapia, 2012: 246). Nowadays, the goal of the Ninth Five-year plan (2007-2013) is to implement the National Rural Development Strategy (NRDS) and its Action Plan for Rural Development.

Over the past twenty years, the agriculture sector has been drastically reformed, especially under the Agricultural Reform Implementation Project (ARIP) in 2001 and, more recently, the Agricultural Law in 2006 which aimed at aligning the Turkish agriculture with the EU's practice (OECD, 2011).

The 2001 ARIP was decided in the aftermaths of the 1999-2001 macroeconomic crisis. Its three objectives were to (1) reduce the fiscal burden imposed by the agricultural policies, (2) enhance the sector's economic productivity and (3) implement a partial compensation system aimed at counterbalancing the farmers' income losses. The reform framework targeted four main areas:

“(i) elimination of price support and credit subsidies, and a replacement with a less production- and trade-distorting income support (DIS) scheme for farmers (USD 90 per ha), based on a uniform per-hectare payment; (ii) reduction of output intervention purchases financed from the budget ; (iii) withdrawal of the state from direct involvement in the production, processing and marketing crops; and (iv) provision of one-time transition payments to assist the switching-out of crops in excess supply (such as hazelnuts and tobacco) to alternative crops.” (OECD, 2011: 90).

Measures such as the phasing out of indirect support subsidies (input subsidies and price support) took place, as well as the restructuring of the ASCUs and the privatisation of the SEEs. The ARIP included the setting up of the National Farmers Registry System (NFRS) where farmers registered to obtain the DIS payment (OECD, 2011: 46). Reformed in 2005, the reform programme was ended in 2008.

From 2006 to 2010, the Agriculture Strategy Paper emphasised on competitiveness in agriculture and promoted principles such as better market-access, the development of agribusiness, local development initiatives and the setting up of associations and cooperatives. The objectives were to insure food security thanks to higher incomes and diversified sources of revenue<sup>21</sup>. At the same time, the 2006 Agriculture Law intended to reform the agriculture sector in accordance with the Common Agriculture Policy (CAP). Creating the necessary legal basis for some management systems, it however restored a commodity output-based policy without changing the import protection measures, thus contradicting the market-oriented ARIP reforms. Nowadays, market-price support granted to producers represents 88% of the total state support to farmers (OECD, 2011: 11).

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<sup>20</sup> [http://operations.ifad.org/web/ifad/operations/country/project/tags/turkey/96/project\\_overview](http://operations.ifad.org/web/ifad/operations/country/project/tags/turkey/96/project_overview)

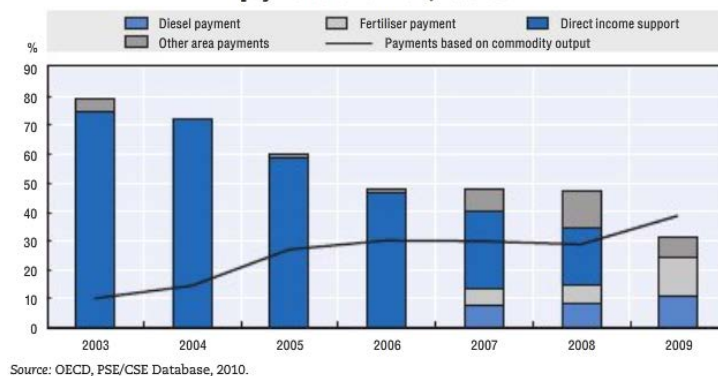
<sup>21</sup> <http://www.ruralpovertyportal.org/country/approaches/tags/turkey>

### Agricultural subsidies: DIS, diesel, fertilisers

Within the ARIP framework, subsidies to fertilisers and pesticides and subsidised credits were suppressed in 2001-2002, and replaced by a Direct Income payment (DIS), distributed to compensate the income loss of many farmers, mostly vegetables and fruits producers (Anderson et Swinnen, 2008: 105).

With the 2006 Agricultural Law and the Agricultural Strategy Paper, support became linked to the production type, with for instance an increase of subsidies to livestock producers. The DIS payment share of total budgetary support started to decrease from 2005 to account for only 3% of the PSE in 2008 (against 19% in 2002). Ended in 2009, it was progressively replaced by fertiliser and diesel subsidies, reappeared respectively in 2003 and 2005 and granted to DIS beneficiaries. Those two subsidies represented 87% of the total payments based on area to farmers in 2008 (OECD, 2011: 97)

Figure 6.2. Share of area-based and commodity output-based payments in total payments to farmers, 2003-09



Source: OECD, 2011: 97

### Implementing the EU acquis

The on-going Ninth Development Plan for the period 2007-2013 has several objectives, ranging from the enhancement of food security to the pursuit of the state's retreat in various agricultural activities (sugar, tobacco, tea) (OCDE, 2011). As explained before, its purpose is to implement the NRDS, elaborated in the context of the EU pre-accession process. The latter has four objectives: economic development and increased job opportunities, development of human resources, improvement of rural infrastructure services and quality of life, protection and improvement of the rural environment. By investing in environmental-friendly measures, local-capacity building and production efficiency of the food, agriculture and forestry sector, the Turkish strategy aligns with the EU priorities (OECD, 2011: 59-60).

The NRDS' action is supported by the EU-funded Instrument for Pre-Accession Assistance on Rural Development (IPARD) whose main goal is the "integration of environmental concerns and good practices in land management and rural development" (OECD, 2011: 11). IPARD is the fifth sub-component of the EU IPA programme, also comprising regional development (III) and human resource development (IV) components. IPARD targets some

sectors in priority: “dairy, meat, fruit and vegetables and fisheries”<sup>22</sup>. Implemented in two phases, 2007-2010 and 2010-2013, the IPARD has been allocated Euros 873 million by the EU for a seven year period (EC, MARA, 2007). It aims at supporting many projects, from rural policies to human resources, social policies, urbanisation, energy and environmental policies (Memişoğlu, Durgun et Yegül, 2012: 277-278).

However, the IPARD has had a limited impact due to slow implementation on the ground. Only 20 provinces out of 42 have received funding and only Euros 16 million had been allocated in 2011 (Şerefoğlu et Atsan, 2012). Administrative obstacles, in the selection process of the projects and provinces, were denounced as the main cause of this delay.

### **Summary of the main reform programmes**

(2001-2010) Agricultural Reform Implementation Project (ARIP)

(2006-2010) Agriculture Strategy Paper / (2006) Agriculture Law

(2007-2013) Ninth Development Plan / National Rural Development Strategy / IPARD

Overall, despite the ambitious objectives of the successive reform programmes, the outcomes have proved limited. As observed, the Turkish authorities have realised that a drastic reduction of subsidies to farmers was almost impossible, for economic and political reasons. Indeed, the “farmer vote” has induced the governments to act consequently. Some analyses have shown that subsidies tend to be increased slightly before the election campaigns, insuring politicians a good reputation (Akder, 2007). Then, administrative deficiencies and economic disparities have prevented a successful implementation of the reforms.

## **Today’s characteristics of the Turkish agriculture**

Successive reforms led to progress in environmental considerations, the reinforcement of the judicial setup, institutional reform and the enhancement of rural policies. However, according to the 2011 OECD report, the agricultural policy remains too protectionist, due to high subsidies to farmers and trade barriers to food production. Indeed, many agriculture producers rely on state subsidies which accounted for 34% of the overall agricultural revenue of 2007-2009, above the OECD average of 22% (OECD, 2011). Besides, a high segmentation of the arable lands hampers the farms’ productivity. This is partly due to the DIS system of subsidies to owners of small production areas (Akder, 2007) as farmers tended to divide their land into parcels split up and shared between family members. Thus, nowadays, about two thirds of the exploitations measure less than 5 ha. Finally, great disparities persist in terms of rural development and farmers’ revenues: the eastern regions are much less developed and rich than the western and northern parts of the territory (OECD, 2009, in Anderson et Swinnen, 2008).

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<sup>22</sup> For instance, actions pursued thanks to the IPARD are: “Investments in agricultural holdings to upgrade them to the Community standards (sectors supported: Meat, Milk); Investments in Processing and marketing (sectors: Meat, Milk, Fruit and Vegetables, Fisheries); Support for setting up of producer groups; Support for preparation of local rural development strategies; Support for measures related to the environment and the countryside; Diversification of economic activities (actions such as: development of local products, rural tourism, etc.)”. [http://ec.europa.eu/enlargement/instruments/funding-by-country/turkey/index\\_en.htm](http://ec.europa.eu/enlargement/instruments/funding-by-country/turkey/index_en.htm)

Additionally, the Turkish agriculture will have to meet with several challenges. First, there is a need for a production increase to meet the needs of the growing Turkish population. In this purpose, modern techniques, equipments and infrastructures are required to enhance the sector's productivity. But the process entails a diminution of the workforce need. The sector should consequently release numerous unqualified workers on the job market, hence a growing pressure for growth on the other sectors of the economy (industry, services) (Bazin et de Tapia, 2012: 97).

### **The GAP, an example of development project**

Giving the water scarcity in the region, securing its access has been a primary objective for all countries in the region. Controlling the water flows allows the states to provide drinking water to their population, to preserve and extend land irrigation for agriculture and to organise hydroelectricity production.

Thus, the Euphrates and Tigris flows which irrigate the region have aroused great interest, in the Ottoman Empire, Iraq and then Syria from the 1960's. The first important construction projects to control the water flows were conducted by a British planning bureau for the Ottoman Empire and then Iraq in the early XXth century. Derivation dams were built on the Euphrates (Hindiya dam, 1913) and the Tigris (Kut dam, 1927). Then Syria built the Tabqa dam on the upstream of the Euphrates (1968-1976).

The Republic of Turkey started to be interested in this resource from the 1970's. The Keban dam was the first to be built in 1974. It aimed at producing electricity (1,2 TWh), keeping 30 billion m<sup>2</sup> of water (Mutin, 2003). Ankara then launched the Great Anatolian Project or GAP (*Güneydogu Anadolu Projesi*) in 1977, arguing for a "geographical legitimacy" on the water resources belonging to the Turkish territory, at the expenses of its neighbours' needs (Turkish President Suleyman Demirel speaking in 1993, in Blanc, 2012: 307).

The GAP is a huge construction plan of 13 projects focused on the rivers' downstream. It involves the building of 22 dams, including 7 on the Euphrates (*Firat*) and 6 on the Tigris (*Dicle*) and their tributaries and of 19 hydroelectric plants producing 26 TWh, mostly in the south-east of the country. The project should provide irrigation to about 1.7 million ha or 35% of the total irrigated land area. Cotton and cereal crops are expected to increase dramatically, providing Turkey with an even greater advantage in the MENA region (Blanc, 2012: 309). The Atatürk dam, opened in 1992, was erected as a symbol of the Turkish strength. It keeps 48 billion m<sup>2</sup> of water, twice and a half times the Euphrates' flow and produces 8,1 TWh.

As explained by Bazin and de Tapia (2012), besides electricity production and irrigation, other consequences are to be considered. First, it implies major infrastructure building plans (roads, railroads, airports, etc). It also constitutes a way to integrate the central regions mainly populated by Kurdish populations with the rest of the territory.

However, entirely funded by the Turkish state (the total cost should reach USD 32 million), the GAP suffers from delays both in the electricity plants (only 7 are finished) and especially



in the irrigation programme, as in 2008, only 17% of the total was achieved (Bazin et de Tapia, 2012 : 240-241).

✚ Map of the region



Delays partly result from the absence of the expected international funding by Ankara as fund providers such as the World Bank oppose any contentious project in the region (Blanc, 2012: 310). In fact, the project has political consequences. In particular, it has raised concerns in Syria and Iraq whose lands are irrigated by the two rivers. By 2010, the GAP is expected to reduce by 37% the flow of the Euphrates entering Syria and by 24% the Tigris flow entering Iraq's lands. Therefore, tensions between Turkey and its neighbours have lasted and reached a peak in the 1990's when the rivers' flow towards Syria were closed during one month, as explained by Barah Mikail, an IRIS researcher (in Billion, 2009: 22-23). However, and despite sanitary concerns caused by stagnating waters, the GAP is expected to be pursued as no tripartite solution has been found, which seems even less likely to happen with the ongoing Syrian crisis. Additionally, another project in preparation, the DAP (*Dogu Anadolu Projesi* –Central Anatolia Project) in the Erzurum region, should raise the total number of dams to 150 and further aggravate the problem (Blanc, 2012: 310).

### III. Turkey's agricultural trade

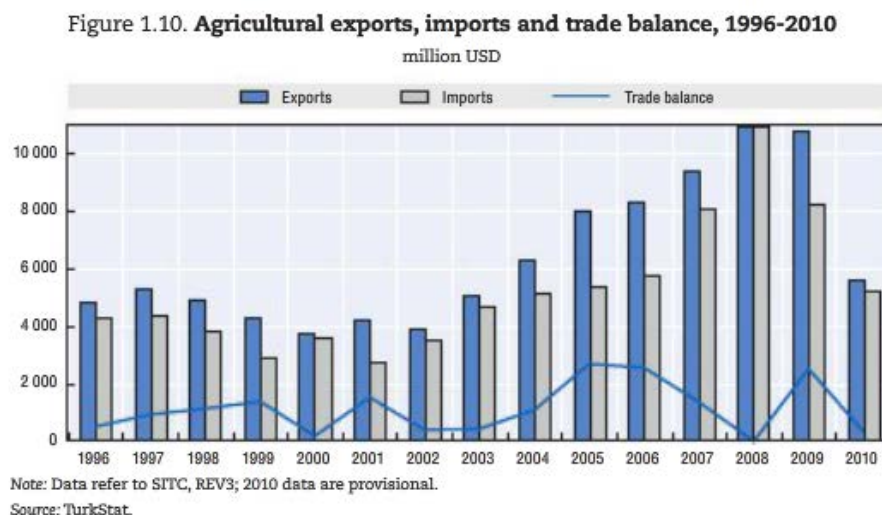
#### A dynamic trade sector

Agriculture, though not part of the objectives of the liberalisation policy launched in the 1980's, has become a major element of Turkey's trade. Thus, Ankara's economic relations have been determined not only by oil and gas trade but also by agricultural markets. It has become a major component of its relations with the EU but also increasingly with its neighbours.

Throughout history, the agriculture sector has continuously shown a trade surplus. The export-oriented economic policy led to great performances in the manufacture sector and

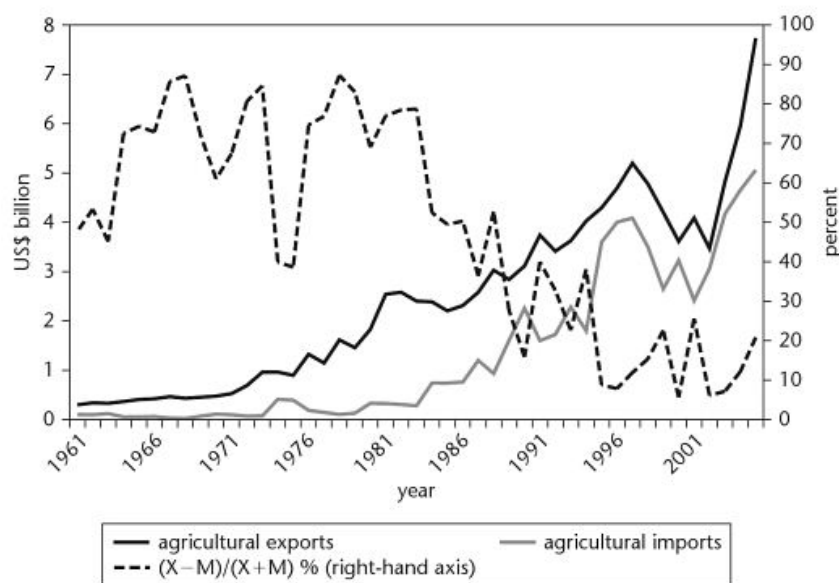
fostered economic development that increased the internal demand. Both phenomenon led to a decrease of the agriculture share in the overall imports which fell from 18% in 1996 to 8% in 2000 and stays now around 10%. Its share in the total exports declined from 10% to 5% (Burrell, 2005 in OECD, 2011: 32).

#### ✚ Agricultural trade balance in Turkey 1996-2010



Source: OECD, 2011: 32

#### ✚ Agricultural trade in Turkey 1961-2005



Sources: FAOSTAT Database 2007; Turkey, Ministry of Industry and Trade.

Note: The right-hand axis refers to net exports  $(X - M)$  as a percentage of exports plus imports of farm products  $(X + M)$ .

Source: Anderson et Swinnen, Figure 3.1, 2008: 95

The Turkish agricultural trade is made of diversified imports and rather basic exports. First, despite large quantities, exports are not highly diversified, and composed by 48% of unprocessed products. As fresh fruits, vegetables and cereals are the most important production sectors in Turkey, they are also the most exported commodities. Hence 60% of Turkey's agricultural exports in terms of volumes are comprised of fruits, nuts, vegetables

and connected processed products, and 20% derives from tobacco, cereals and sugar (OECD, 2011). Fresh fruits and vegetables exports represent 16% of the overall agricultural exports value, according to the Turkish government. It increased by 6.7% in 2010-2011 to reach USD 2.3 billion in 2011. Citrus group ranks first in terms of exportable fresh fruits (USD 1 billion in 2011) before tomatoes (USD 433 million) and grapes with USD 175 million. Citrus exports have been encouraged by a state firm, the Citrus Promotion Group of the Mediterranean Exporters Union, chaired by the industrialist Ali Kavak<sup>23</sup>, which has launched promotional campaigns in the neighbourhood, especially in the Russian Federation since 2010 and in the Middle East (Ali Koç, 2012:294). Turkish exports are currently diversifying towards exotic fruits (figs, quinces and pomegranates) for which there is an increasing demand.

#### Turkey's exports of fresh fruits and vegetables per year (2009-2011)

*Table 2. Exports of Fresh Fruits & Vegetables by Years  
(Quantity: Million Tons-Value: US \$ Million)*

Products	2009		2010		2011		Share 2011 (%)
	Quantity	Value	Quantity	Value	Quantity	Value	
TOMATOES	542,231	406,412	574,279	476,867	576,543	432,462	0,4
LEMONS	407,007	277,666	426,713	312,931	487,035	354,334	14,1
MANDARINS	364,228	253,369	429,401	290,722	470,882	337,995	9,7
ORANGES	236,596	146,995	212,832	143,474	360,912	258,654	69,6
GRAPES	188,486	155,623	237,86	203,925	239,577	175,325	0,7
CHERRIES	51,089	132,939	65,294	147,828	46,477	131,001	-28,8
GRAPEFRUITS	136,544	88,282	156,692	101,942	158,055	109,914	0,9
PEPPERS	64,767	61,01	61,247	69,366	68,569	77,544	12
POMEGRANATES	41,087	39,381	63,148	59,6	86,148	70,624	36,4
CUCUMBERS	95,17	66,482	105,06	75,463	80,991	59,176	-22,9
APPLES	59,945	22,862	80,698	32,865	87,238	36,591	8,1
FIGS	12,941	25,989	13,615	26,749	13,547	29,291	-0,5
APRICOTS	18,428	20,586	25,845	26,641	28,488	28,936	10,2
ONIONS	135,521	16,608	95,769	16,115	119,799	21,393	25,1
PEACHES	32,279	23,906	41,392	28,852	32,857	21,668	-20,6
STRAWBERRIES	23,2	25,26	25,867	28,101	21,103	20,441	-18,4
POTATOES	68,768	5,772	84,962	9,727	100,483	17,374	18,3
PEARS AND QUINCES	22,641	16,512	24,619	17,111	18,027	13,01	-26,8
CARROTS	56,256	9,954	56,374	10,284	64,711	11,938	14,8
<b>TOTAL</b>	<b>2 692,338</b>	<b>1,872,211</b>	<b>2,897,050</b>	<b>2,156,585</b>	<b>3,195,190</b>	<b>2,301,617</b>	<b>10,3</b>

Source: Turkish Statistical Institute

Source: TSI, 2012

URL: [http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh\\_fruit\\_2012.pdf](http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh_fruit_2012.pdf)

The cereal sector represented in 2009 a share of 28% of the overall agricultural products exports, reaching USD 3.6 billion. Turkey has a leading position in wheat flour exports, and ranked first from 2005 to 2007, second in 2008, after Kazakhstan. Both the export value and quantity of wheat flour increased over the years to reach USD 892 million and about 2 million tons in 2011 (49.6% increase compared with the previous year). The Turkish exports are significant considering that the world exports reach 9.7 million tons per year<sup>24</sup>. Top exports destinations are Iraq, Indonesia and the Philippines (followed by Sudan, Israel, Thailand, Angola, South Korea and United Arab Emirates<sup>25</sup>).

<sup>23</sup> <http://www.turkishcitrus.com/pages.asp?b=d&ID=2&AltID=3>

<sup>24</sup> <http://www.tfyi.gov.tr/en/featured-product>

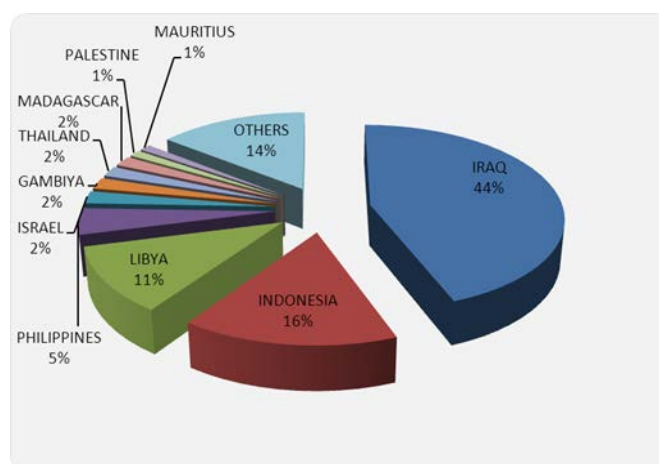
<sup>25</sup> <http://blog.tcp.gov.tr/index.php/2011/11/cereals-pulses-oil-seeds-and-products-industry/>

These amounts have increased over the years. In 2012, cereal exports (wheat flour and durum wheat) should attain 3.7 million tonnes, similar to 2011 and 31% above the five-year average (FAO GIEWS, 2012).

Imports are made of non-food agricultural commodities (leather, skins, textile, fibre scrap) at more than 50%, then of cereals and cereal related products, animal feed, animal and vegetable oils and fats (OECD, 2011). Imports of unprocessed agricultural materials allow agro-industries to re-export them as transformed goods (MINEFI – DGTPE, 2007). Indeed, cereals are also imported with about 4.5 million tonnes in 2011 and 3.8 million tonnes in 2012. Part of these imports will produce wheat flour, biscuits and pastas. But the sector productivity itself relies on the competitiveness of the Russian and Ukrainian imported grains (FAO GIEWS, 2012).

Finally, despite abundant natural resources (lands, water, sunshine), Turkish farmers still need fuel, fertilisers and machineries (Akder, 2007), hence imports turned towards these products.

#### Turkish wheat flour exports by major destinations



Source: <http://www.tfyi.gov.tr/en/featured-product>

## Turkey's main trade partners

Exports have surged over the past decades towards Turkey's neighbours<sup>26</sup>. Fresh fruits and vegetables are now exported to more than 50 countries, and increasingly towards the Community of Independent States members (CIS) (TSI, 2012). The EU still represents the main agricultural exports destination for Turkey with 45.1% of the overall exports, before Iraq (12.8%), the Russian Federation (7.6%), the USA (4.9%), and Saudi Arabia (3%) (OECD, Table 1.11, 2011: 35).

<sup>26</sup> Turkey currently shares 16 Free Trade Agreements (FTA): the European Free Trade Agreement (EFTA), Macedonia, Croatia, Bosnia-Herzegovina, Albania, Israel, Palestine, Morocco, Tunisia, Egypt, Syria, Georgia, Serbia, Montenegro, Chile and Jordan. Three more are still being ratified, one with Lebanon, Mauritius and the Republic of Korea. Many other are still under negotiations throughout the world.

## 🚩 Turkey's free trade agreements in the MENA region



Source: <http://www.economy.gov.tr/index.cfm?sayfa=tradeagreements&bolum=fta&region=0>

Turkey-EU relations are mostly driven by the accession process started in 2005. The European Union demands reforms in the agriculture and rural development sectors according to the Chapter 11 of the accession process. Still, both countries are major trade partners, especially since the signing of the Custom Union agreement in 1995. However, as far as agriculture is concerned, the liberalisation of bilateral trade is asymmetrical, as Turkey maintains a protectionist policy towards the EU. For instance, Turkey has been imposing an import ban on bovine products (live cattle especially). By contrast, about 70% of Turkey's agricultural exports enter the EU duty free. Overall, Turkey benefits from a great trade surplus towards the EU (Euros 1322 million in 2010), thanks to its exports of fruits, nuts, vegetables and their sub-products, tobacco and tobacco products (DG Trade, 2009). In particular, Turkey exports great quantities of fresh fruits and vegetables to the following EU member states: Germany, Bulgaria, Romania, the Netherlands, the United Kingdom and Poland.

As mentioned before, the last ten years have witnessed changes as the EU has lost ground in the Turkish overall exports, while Middle Eastern and North African countries have seen their share increasing by 27.8%<sup>27</sup>, as well as CIS members. Indeed, Turkish agro-food companies export a lot to Russia, Iraq, Ukraine and Saudi Arabia. 36% of the total Turkish exports to the Russian Federation were made of agricultural products in 2011<sup>28</sup>, and the vegetables and fruits share was worth USD 942 million. It receives 32% of the overall citrus exports, before Ukraine and Iraq (both receive a share of 14%), Saudi Arabia and Romania (both receive 7% of export share). On the other hand, Turkey mostly imports natural gas, crude oil, fuel products, and metals which results in a trade deficit<sup>29</sup> vis-a-vis these partners.

Trade between Turkey and the members of the CIS<sup>30</sup> has increased dramatically since the mid-1990's when economic and trade agreements were signed. Among the CIS, Ukraine is Turkey's second trade partner after the Russian Federation. Turkey's trade deficit towards

<sup>27</sup>[http://www.econostrum.info/Les-exportations-turques-en-hausse-de-223-en-10-ans\\_a13558.html](http://www.econostrum.info/Les-exportations-turques-en-hausse-de-223-en-10-ans_a13558.html) « Les exportations turques en hausse de 223% en 10 ans », Econostrum, Clément Beuselinck-Doussin, 11/02/2013

<sup>28</sup>[http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh\\_fruit\\_2012.pdf](http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh_fruit_2012.pdf)

<sup>29</sup><http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=RU&region=2>

<sup>30</sup> The Community of Independent States (CIS) includes Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Mongolia, the Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan.



this country is worth USD 3.08 billion in 2011. Fruits and vegetables are the most exported Turkish merchandises to Ukraine with a value of USD 251 million in 2011. On the other hand, Ankara mostly imports iron and steel from Ukraine (USD 1.85 billion), followed by vegetable oils (USD 463 million), fertilizers (USD 307 million) and finally seeds and fruits (USD 299 million)<sup>31</sup>. Kazakhstan receives textile inputs (70 million USD in 2011) and exports large quantities of agricultural products to Turkey (USD 110 million in 2011), especially wheat, after metals, petroleum and gas<sup>32</sup>. Azerbaijan mostly exchanges industrial and natural resource products.<sup>33</sup> Tajikistan receives a lot of textile fibres (USD 25 millions) besides coffee, tea and spices (USD 12 millions).<sup>34</sup> Finally, Turkey is Turkmenistan's second trade partner. Trade between both countries is dominated by petroleum products and metal exchanges and does not concern agriculture except for animal skins (USD 5 million)<sup>35</sup>.

Overall, Turkey has a comparative advantage in the MENA region, mostly thanks to its control of the irrigation system. Compared with the other SEMCs, Turkey is the only country to export cereals while vegetables and fruits exports are quite common to these Mediterranean countries (Belghazi, 2013: 1). Products made out of cotton crops are among the most important Turkish exports towards the Middle East region (Lebanon) besides oil, metals and minerals. From Syria, Turkey imported, in 2011, fertilizers (USD 26 million) and exported textile fibres (USD 88 million). Iraq is the second agro-food exports destination, with an export value of USD 259 million in 2011<sup>36</sup>.

## IV. Agriculture and regional diplomacy

### Regional interdependence

As a fundamental part of its socio-economic life, agriculture has turned into a geopolitical stake for Turkey. Regional interdependency in terms of food and oil supply and access to water, as demonstrated by the GAP, can be otherwise exemplified by the Syrian crisis, started in 2011. Furthermore, Turkey's power projection has implied trade intensification and new investment plans in the region and even further, in Sub-Saharan Africa.

The Syrian crisis, started in 2011 when rebel groups contested the authority of the President Bashar Al-Assad, has shaken the economic stability of the whole region and raised the issue of food insecurity. Logistic obstacles plague all Syria's neighbours' trade: Jordan, Turkey, Lebanon, Iraq. Insecurity has pushed Beirut to develop new trade routes by the sea as 80% of the Lebanese agricultural trade used to cross the Syrian territory. Meanwhile, food prices surged in the region, as in Iraq where an annual 8% increase was recorded in septembre 2012 (Abis, 2013). Before the crisis burst, Syrian farmers used to produce mostly vegetables (2 million tons in 2010), fruits and meat (212,000 tons of animal products) and

<sup>31</sup> <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=ua&region=2>

<sup>32</sup> <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=KZ&region=2>

<sup>33</sup> <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=AZ&region=2>

<sup>34</sup> <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=TJ&region=2>

<sup>35</sup> <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=TM&region=2>

<sup>36</sup> [http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh\\_fruit\\_2012.pdf](http://www.tcp.gov.tr/english/sectors/sectoringpdf/agric/fresh_fruit_2012.pdf)



about one fifth used to be exported to Turkey and Iraq<sup>37</sup>. An FAO report notices that the volume of the 2012 wheat production in Syria suffered a 35% drop compared with the previous year (FAO, 2012, in Abis, 2013). Commodity border prices have been the most affected. They skyrocketed for several reasons: the production decline in Syria, the afflux of Syrian refugees, as in the south of Turkey, and the closing of the commercial traffic with the regime of Bachar Al-Assad, what Turkey did from July 2012. An IRIN news article reported that, for instance, the price of the kilogram of meat in Hatay (south of Turkey) rose from five (\$2.77) to 20 Turkish lira between 2010 and 2012. Likewise, oil shortages induced by the crisis worsen the situation for Turkish farmers.

## Competition or cooperation in the region?

The GAP example has clearly demonstrated the absence of regional cooperation on the issue of water access. On the other hand, economic cooperation and investment plans involving agriculture are taking place between Turkey and its neighbours.

On the northern shore of the Mediterranean sea, economic cooperation agreements have been concluded with some EU member states. Turkey exports olive oil to Italy which accounts for 18% of the overall exports in 2009, after the USA (26%) (Ali Koç, 2012:290). Recently, Turkey and Portugal signed an agreement to help both states' business interests in their respective sphere of influence<sup>38</sup>.

Cooperation is also taking place with Middle Eastern countries, such as Iran, despite trade sanctions imposed by the international community. Trade is mainly conducted through informal networks which also affect agriculture since the Iranian economy runs short of modern agriculture machineries<sup>39</sup>. In North Africa, Turkey has invested in strengthened cooperation plans with Tunisia and Egypt. In Tunisia, a "bilateral partnership" was recently announced and is expected to take place in many dimensions, including agriculture and agricultural technologies, along with "infrastructure development, tourism, energy, manufacturing and machine industries"<sup>40</sup>. In parallel, last November, the businessman Hassan Malek, Leader of the Egypt Muslim Brotherhood, has declared that about one billion of US dollars of Turkish investments were expected in 2013 in various sectors, including agriculture<sup>41</sup>. These agreements provide Turkey with the opportunity to tap into new markets in North Africa and southwards, while Tunisian and Egyptian leaders and members of the civil society praise the benefits of this cooperation which allow for a diversification of investors in their economy.

Investment plans have also been scheduled in South-East Europe, an area considered as a "sphere of influence" by the Turkish authorities. The transition state of the region after the breakdown of the Communist regimes and the Yugoslavia wars has offered many investment opportunities for foreign investments. For instance, Turkish businessmen recently invested in

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<sup>37</sup> "Syria and the regional chain - Raising food prices in Jordan, Iraq and Turkey", Global Arab Network, by Asmaa Malik, 24/10/2012; <http://www.irinnews.org/report/96583/Analysis-Syria-and-the-regional-food-chain>

<sup>38</sup> "Time for win-win in trade for Turkey, Portugal", Today's Zaman, 4 February 2013, by Ergin Hava, <http://www.todayszaman.com/news-306104-time-for-win-win-in-trade-for-turkey-portugal.html>

<sup>39</sup> "Trading with Iran, Today's Zaman, 27/01/2013, Gökhan Bacik, <http://www.todayszaman.com/columnist-305314-trading-with-iran.html>

<sup>40</sup> "Officials hopeful on rise of multidimensional Turkish, Tunisian economic cooperation", Today's Zaman, Güzde Nur Donat, 03/02/2013, <http://www.todayszaman.com/news-305919-officials-hopeful-on-rise-of-multidimensional-turkish-tunisian-economic-cooperation.html>

<sup>41</sup> "One billion USD Turkish Investment Expectation in Egypt", The Journal of Turkish weekly, 14/11/2012; <http://www.turkishweekly.net/news/144770/one-billion-usd-turkish-investment-expectation-in-egypt.html>

Serbia<sup>42</sup> and Macedonia<sup>43</sup>, in the pear production sectors. In this competition for new markets, Turkey is joined by Qatar who also invests in Southeast Europe (Bulgaria<sup>44</sup>) and North Africa (Tunisia<sup>45</sup>).

In Sub-Saharan Africa, Turkish investments have followed landmark diplomatic visits. For instance, the Turkish General Directorate of Agricultural Enterprises (TİGEM) recently invested in Sudan where it is competing with China, to grow cotton, nuts and fruits, thanks to a lower workforce price<sup>46</sup>. Providing the Turkish domestic market with cheaper products, these investments will also provide the Turkish investors with access to regional markets. Turkish agricultural exports have also expanded towards French-speaking African countries (Nigeria, Gabon, Senegal) where ministerial agreements have recently been concluded<sup>47</sup>.

## Conclusion

Since the mid-2000's, Ankara wishes to appear as a bridge between a number of regional areas, from Europe to the Middle East and the Asian continent. Shared historical, religious and cultural roots are often mentioned to strengthen the diplomatic links and encourage economic cooperation with the neighbours. In fact, the Turkish diplomacy takes advantage of its geostrategic position and of Turkey's own identity, a secular Republic with a Muslim society, to promote its influence in the region.

Agriculture in Turkey has remained a major economic asset and a fundamental political stake despite an accelerating economic development since the 1980's. As a major socio-economic component of the Turkish economy, it requires politicians to pay attention to a sector which employs one fourth of the population. Because, over the past thirty years, the Turkish foreign policy has focused on increasing its economic ties with the surrounding regions, agricultural trade, as part of these strategic economic relations, has become a geopolitical issue and contributes to the "zero problem strategy". Indeed, in a region where political instability and water scarcity are the rule, the necessity to preserve and encourage the development of agricultural trade partnerships is fundamental. As explained above, the Syrian crisis has revealed the great regional interdependency and the local propensity for food insecurity.

How will the Turkish authorities manage to face rising living standards, urbanisation, and the promotion of a competitive agriculture? So far, they have adopted a development policy based on limited agricultural trade liberalisation. Thus, the Turkish agriculture is being modernised, adopting new standards, methods and machineries. This process is made in parallel to protectionist policies, especially regarding meat, as trade barriers protect local producers from international competition. Besides, agriculture and agro-industries benefit from important investments, both within the country, in strategies aimed at increasing productivity, and abroad, where Turkish interests are expanding through economic cooperation agreements, especially towards the MENA region and Southeast Europe.

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<sup>42</sup> "Turkey and Serbia to cooperate in agriculture", Cumhuriyet, 15/14/2013, <http://en.cumhuriyet.com/?hn=281062>

<sup>43</sup> "Turkish investments grow in Macedonian agriculture sector", 20/12/2012, by Goran Trajkov, SETimes [http://setimes.com/cocoon/setimes/xhtml/en\\_GB/features/setimes/features/2012/12/20/feature-04](http://setimes.com/cocoon/setimes/xhtml/en_GB/features/setimes/features/2012/12/20/feature-04)

<sup>44</sup> "Qatari and Turkish joint investment heading for Bulgaria", 01/06/2012, by Menekse Tokyay, SETime [http://www.setimes.com/cocoon/setimes/xhtml/en\\_GB/features/setimes/features/2012/06/01/feature-03](http://www.setimes.com/cocoon/setimes/xhtml/en_GB/features/setimes/features/2012/06/01/feature-03)

<sup>45</sup> Tunisie : La coopération change de cap. De nouveaux projets avec Qataris, Koweïtiens et Turcs », 21/08/2012, AfricanManager ; <http://www.africanmanager.com/142679.html>

<sup>46</sup> "Government invests in Sudan farming plan", Today's Zaman, 7/02/2013, <http://www.todayszaman.com/news-306422-government-invests-in-sudan-farming-plan.html>

<sup>47</sup> Pierre Autissier, Agricultural Affairs Advisor, Regional economics department, French Embassy, Turkey

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