

Food and Agriculture Exports from TR52 Region

-Executive Summary-

- 1. This report includes the basic findings of TR52 Region Food and Agriculture Sector Foreign Trade Analysis Project.** The project consists of two parts. First, current situation of TR52 region in mentioned sectors was examined. After this, targets were set to increase food and agriculture sector exports in the framework of agricultural products, foodstuff sectors related to these products and target markets.
- 2. TR52 Region has an important share in both agricultural and cultivated land.** TR52 Region has 22 million hectares of agricultural land which make up more than 9% of Turkish total agricultural area of 238 million hectares. The same ratio is valid for cultivated land as the region makes up 9% of total cultivated land of 154 million hectares.
- 3. Considering the amount of publicly trade produce in Konya Commodity Exchange, Konya's agricultural production, especially cereals, have a very important share in Turkish production.** According to 2012 data, Turkish cereal production is 33.4 million tonnes. In Konya Commodity Exchange 5 million tonnes of cereal was traded. In other words roughly 15% of Turkish cereal production is realised in Konya. Again 20% of Turkish cereal production (20 million tonnes) is realised in Konya.
- 4. Water scarcity is an issue mentioned in Konya. However with the Konya Plains Project and the construction of Blue Tunnel, irrigation opportunities will increase massively by 2023.** According to the Ministry of Development, agricultural areas covering some 729.000 ha for Konya and 119.000 ha for Karaman will be able to be irrigated.
- 5. Sectoral employment share is over the Turkish average. However average income level is relatively low.** Despite the irrigation issues, TR52 region has high productivity and sectoral concentration levels. However these value do not reflect upon the income level. This can be explained as not focusing on high value-added products.
- 6. There is a high level of agricultural production in the region, especially in cereals and a high level of mechanisation as well.** Also the productivity level is high and will increase of the development of irrigation opportunities. Bovine productivity in this region is relatively low and dairy products are not utilised properly.
- 7. In this study there is a three tier system in determining suitable agricultural products and target markets.** Through these analyses 45 products and 37 target markets were chosen as shown in the tables.
- 8. Determined produce-country pairs constitute 8.9% of world agricultural trade.** The size of 107 traditional markets where Turkey is one of the top five exporters is \$5 billion as of 2010 and 208 potential markets is \$26.3 billion.

Concentrated Products in Konya

Produce	Proximity
Lupine	%69.7
Fenugreek	%60.8
Cumin	%39.5
Sorghum	%39.5
Barley (Beer)	%36.7
Carrot	%31.7
Aspir	%31.6
Lentil (Green)	%29.5
Opium Poppy (Pod)	%28.6
Opium Poppy (Seed)	%28.6
Sugar beet	%27.5
Rye	%23.0
Eleagnus	%20.6
Wheat (Durum)	%20.6
Barley (other)	%19.9
Beans (Dry)	%19.5
Mushroom (Cultivated)	%18.3
Wheat (other)	%18.2
Sour Cherry	%17.9
Sunflower (Oil)	%16.2
Sweetpea	%8.1

Potential Products for Konya

Produce	Proximity
Trefoil (seed)	%57.9
Clover (Seed)	%45.8
Linen (Fiber)	%20.4
Pumpkin (Seed)	%23.7
Wild Apricot	%22.0
Turnip (Red)	%20.8
Onion	%20.1
Sunflower (Seed)	%19.8

Concentrated Products in Karaman

Produce	Proximity	Produce	Proximity
Pumpkin (Seed)	%48.8	Almond	%34.9
Wild Apricot	%46.5	Grapes	%34.2
Safflower	%44.6	Beans (Dry)	%33.8
Barley (Beer)	%44.5	Plum	%33.4
Sugar Beet	%42.1	Turnip	%33.1
Rye	%41.1	Bitter Wetch (Seed)	%33.1
Beans (Dry)	%40.9	Onion (Scallion)	%33.0
Apple (Golden)	%40.8	Spinach	%32.7
Pear	%39.8	Garlic	%32.4
Apple (Starking)	%39.6	Lettuce	%32.4
Oleaster	%39.2	Lettuce (White)	%32.3
Apple (Grannysmith)	%38.7	Watermelon	%31.9
Walnut	%38.5	Bitter Wetch	%31.7
Apple (Other)	%38.5	Headlettuce	%29.8
Oat (Seed)	%37.4	Leek	%29.7
Chickpea	%37.2	Marrow	%27
Wheat (Durum)	%37.0	Lettuce (iceberg)	%25.2
Pumpkin	%36.2	Parsley	%24,3
Cherry	%35.4		

Potential Products for Karaman

Produce	Proximity	Produce	Proximity
Trefoil (seed)	%68.2	Wheat (other)	%36.7
Linen (Fiber)	%40.9	Sour Cherry	%36.2
Clover (Seed)	%38.1	Vetch	%35.6
Medlar	%33.3	Sunflower (Seed)	%35.2
Kidney Bean	%33.2	Potato (other)	%34.9
Cranberry	%32.1	Vetch (Seed)	%34.7
Opium Poppy (Pod)	%31.5	Grape (Table)	%34.5
Opium Poppy (Seed)	%31.5	Triticale (Seed)	%34.3
Cumin	%31.3	Quince	%33.2
Lupine	%30.8	Grape (Wine)	%32.5
Grasspea (Seed)	%30.4	Melon	%31.8
Black Cabbage	%28.3	Corn (Silage)	%31.3
Purslane	%27.6	Watercress	%30.7
Sweetpea	%27.1	Cucumber	%30.3
Fava Beans	%26.8	Fodder Beet	%30.1
Chestnut	%26.7	Apricot	%29.8
Hazelnut	%26.6	Corn	%29.4
Russian Turnip	%26.4	Corn (Seed)	%28.9
Chard	%26.4	Lentil (Red)	%27.9
Maize	%26.3	Pepper (Stuffing)	%27.3
Okra	%25.2	Turnip (Red)	%27.2
Rice	%25.1	Garlic (Dry)	%26.3
Barley (other)	%40.6	Roquette	%26.2
Lentil (Green)	%39.5	Onion	%26.1
Clover	%38.5	White Cucumber	%26.0
Apple	%38.0	Pistachio	%25.7
mulberry	%37.2	Gherkin	%25.7
Trefoil	%37.2	Aubergine	%25.1

9. **There are some differences regarding the determined produces between this study and basin support model.** This difference stems from the methodology and aim. This study aims to increase the agricultural exports of TR52 Region and using a deductive method.
10. **When deciding between the target markets, tariffs and barriers have to be considered and markets that Turkish farmers can be competitive should be determined.** In this study produce-market pairs are presented in the table below. It is expected from the exporters to calculate for the production cost and produce price in the target market.

Product-Potential Market Pairings

Produce	Potential Markets	Size of Potential Market	Turkey's Exports to Potential Market (m USD)	Turkey's share
Wheat and Mixture (other)	Bangladeş, India, England, Iran, Israel, Italy, Egypt, Nigeria, Pakistan, Yemen	6100.8	55.3	%0.9
Apple (fresh)	Germany, UAE, Belgium-Luxembourg, France, the Netherlands, England, Spain, Sweden, Russia	2493.6	0.0	%0.0
Wheat (durum)	Germany, Italy, Egypt, Pakistan, Tunisia, Yemen	2464.9	74.6	%3.0
Grapes (fresh)	Germany, Belgium-Luxembourg, the Netherlands, England, Russia	2281.9	183.1	%8.0
Corn (seed)	Austria, France, Iran, Macaristan, Malezya, Romania, Russia, Ukrayna	1592.2	5.1	%0.3
Barley	S. Arabia, Tunisia	1438.5	67.2	%4.7
Pear, Quince (fresh)	Germany, the Netherlands, Spain, Italy, Russia	868.9	3.9	%0.4
Soğanlar ve şalotlar (fresh cooled)	Germany, Belgium-Luxembourg, France, the Netherlands, England, Italy, Russia	841.8	7.2	%0.9
Sunflower seeds	Germany, France, England, Spain, Russia, Ukrayna	789.7	44.9	%5.7
Sesame (Seed)	Germany, China, Japan	720.4	6.3	%0.9
Vegetable seeds	Japan	689.1	2.8	%0.4
Other plants and plant parts (medicine, perfumery)	USA, Germany, France, England, Spain, Italy	684.0	17.3	%2.5
Tomatoes (fresh cooled)	Russia	656.4	289.8	%44.2

Produce	Potential Markets	Size of Potential Market	Turkey's Exports to Potential Market (m USD)	Turkey's share
Melons (fresh)	Germany, the Netherlands, England, Spain, Italy, Russia	524.8	1.4	%0.3
Chickpeas, unshelled (dry)	UAE, Algeria, India, England, Spain, Italy, Egypt, Pakistan, S. Arabia, Ürdün	447.5	24.5	%5.5
Raspberries, malberries, blackcurrants, gooseberries (frozen)	Germany, Belgium-Luxembourg, France, the Netherlands, England, Italy	413.2	0.3	%0.1
Beans and kidneybeans (fresh cooled)	Germany, Belgium-Luxembourg, France, the Netherlands, England	382.0	0.4	%0.1
Walnuts (unshelled)	Germany, Austria, Belgium-Luxembourg, France, the Netherlands, England, Spain, Italy, Greece	356.7	2.3	%0.7
Plums and Bullaces (fresh)	Germany, Belgium-Luxembourg, France, the Netherlands, England, Italy, Russia	321.0	1.7	%0.5
Cherries and sourcherries (fresh)	France, the Netherlands, England, Russia	253.6	50.0	%19.7
Potatoes; others (fresh cooled)	Russia	246.1	1.4	%0.6
Pepper (capsicum and pimenta)(dried)	Germany, Belgium-Luxembourg, France, the Netherlands, England, Spain, Polonya	220.2	2.0	%0.9
Grafts	Germany, the Netherlands, Italy, Japan	201.5	1.3	%0.6

Produce	Potential Markets	Size of Potential Market	Turkey's Exports to Potential Market (m USD)	Turkey's share
Watermelons (fresh)	Austria, the Netherlands, England, Spain, Polonya, Russia, Slovaky	181.1	1.5	%0.8
Other edible seeds	Germany, France, the Netherlands, England, Italy	162.8	14.4	%8.8
Other seeds/spores suitable for cultivation	Germany, Danimarka, France, the Netherlands, Spain, Italy	110.8	3.4	%3.1
Carrots, Russian Turnips (fresh cooled)	Russia	97.8	0.3	%0.3
Sweet Pea (fresh cooled)	Germany, France, the Netherlands, England	90.0	0.0	%0.0
Çilek (frozen) (Yalnız çilek)	Austria, the Netherlands, Italy	84.8	2.8	%3.3
Apricots, Wild apricots (fresh)	England, Russia	84.6	8.9	%10.6
Apple (dried)	USA, Germany, France, the Netherlands, England	74.1	4.7	%6.4
Vegetable mixtures (frozen)	UAE, England	62.9	0.0	%0.0
Other beans; unshelled (dry)	Germany, UAE, Belgium-Luxembourg, France, the Netherlands, England, Spain, Pakistan	54.2	1.1	%2.0
Roses	the Netherlands, Italy, Russia	53.7	0.0	%0.0
Maize (Popcorn, Millet)	Germany, Belgium-Luxembourg, the Netherlands, England, Spain, İsviçre, Italy	37.5	0.0	%0.0

Produce	Potential Markets	Size of Potential Market	Turkey's Exports to Potential Market (m USD)	Turkey's share
Goatsbeard, Knob celery (fresh cooled)	Russia	33.2	0.0	%0.0
Arrowroot , Salep, Jerusalm artichoke, Sago	the Netherlands, England	31.0	0.0	%0.0
Cilantro seeds	Germany, France, India, England, Sri Lanka	29.5	0.1	%0.4
Trees and bushes with edible fruits/nuts	Romania, Russia, Ukrayna	26.5	0.0	%0.0
Potatoes (frozen)	Qatar, Malezya, Greece	25.8	0.0	%0.0
Ceral scapes (powdered/chopped)	UAE, Italy	12.2	0.0	%0.0
Sweetpeas (frozen)	Greece	6.1	0.0	%0.0
Cumin seeds	Russia	1.3	0.0	%0.0