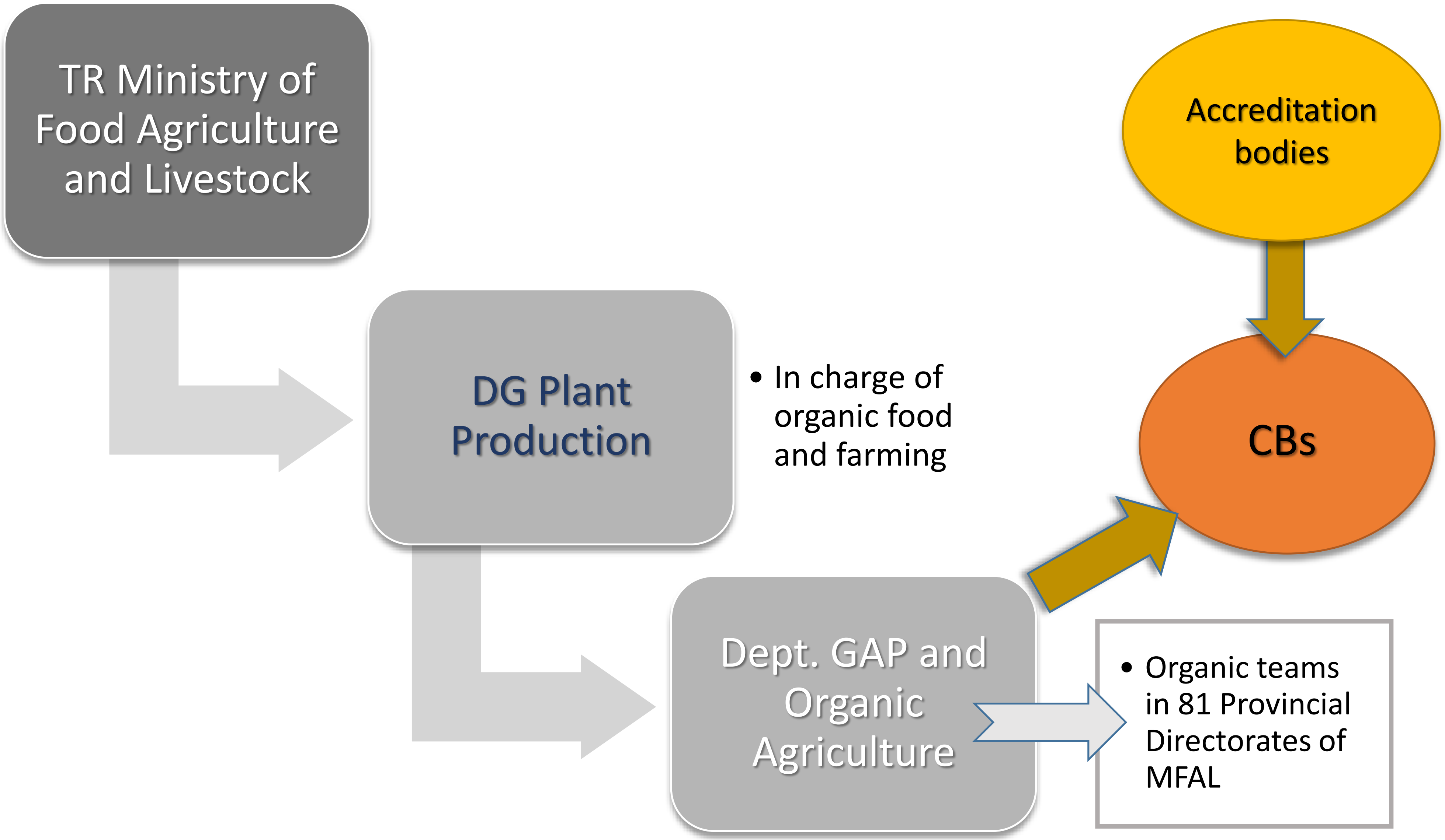
ORGANIC AGRICULTURE IN TURKEY

Prof. Dr. Ahmet Altindisli
Ege University Faculty of Agriculture
Department of Horticulture
Bornova-İzmir
altindisli@yahoo.com; ahmet.altindisli@ege.edu.tr
Phone/Fax: +90.232.3881865

Historical background

- Started in 1984-85 season with the demand coming from European companies due to enlarging European markets e.g. Germany,
- EU legislation EC 2092/91 triggered the first regulation on organic plant production issued in 1994,
- Legal framework is strengthened with the Law passed in 2004 and further amendments to the regulation,
- The current legislation is very similar to the EU,
- Turkey has applied in 2005 to be included in the third country list of the EU and the evaluation is nearly towards the end,

Competent authority



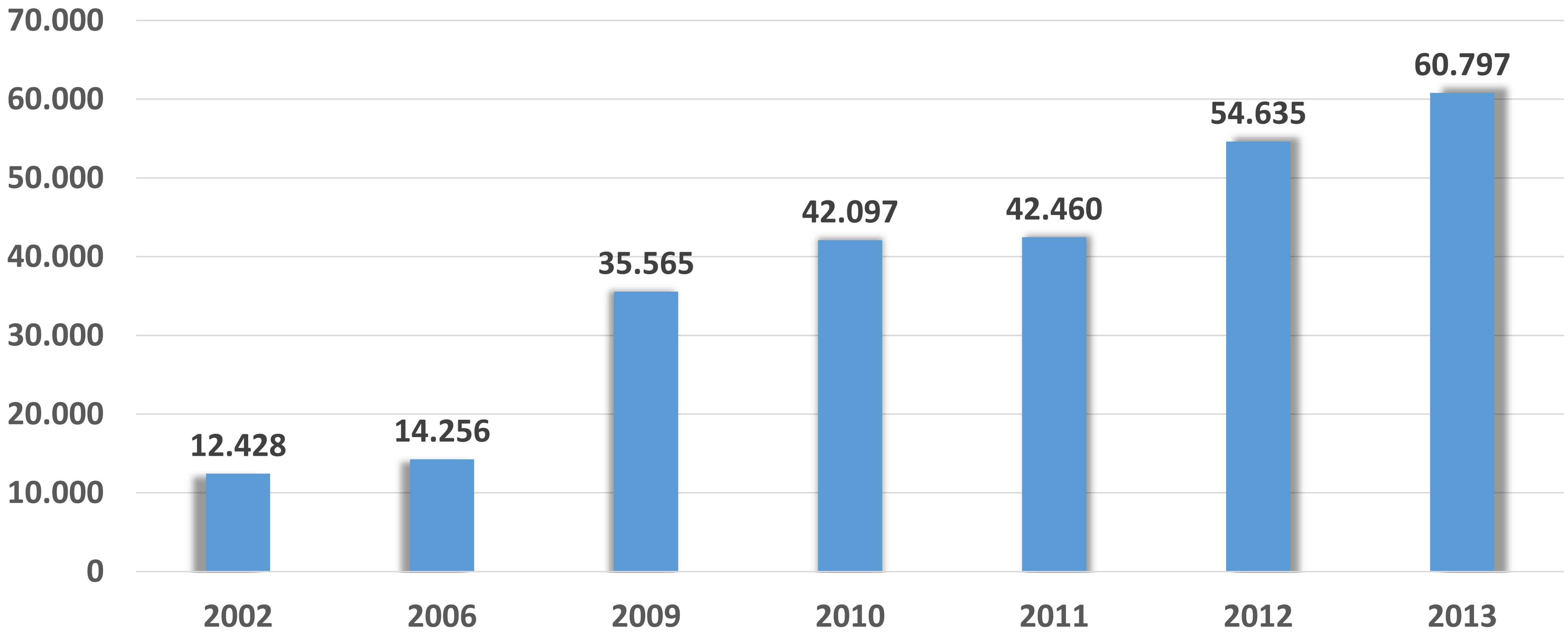
History

Period	Products	Market(s)
1985-1990	Dried fruit	Europe
1990-2000	Dry and dried fruit, pulses, …)	Europe, USA
2000-2005	Dry produce, processed	Europe, USA, other export markets, domestic market emerging
2005-2010	Diversification of products	Export market still the major, development of domestic market
> 2010	**Diversification of processing**	New export markets, enlarging domestic market

Authorized CBs

1	ETKO Ekolojik Tarım Kontrol Org. Ltd. Şti.	15	IMC Ltd. Şti.
2	ECOCERT Denetim ve Belgelendirme Ltd. Şti.	16	ANKA GLOBAL Kontrol ve Sertifikasyon A.Ş.
3	TURKGAP Tarım Uygulamaları Kontrol ve Sertifikasyon Hizmetleri Ticaret Ltd. Şti.	17	BİO İNSPECTA Kontrol Ve Sertifikasyon Limited Şirketi
4	NİSSERT Uluslararası Sertifikasyon ve Denetim Hizmetleri Ltd. Şti.	18	ECAS Belgelendirme Denetim Ltd. Şti.
5	EKOTAR Ekolojik Tarım Ürünleri Üretim, Kontrol, Sertifika, Sanayi ve Ticaret Ltd. Şti.	19	ORTAR Kontrol ve Sertifikasyon Hizmetleri Ltd.
6	CU Sertifikasyon Ltd. Şti.	20	KAYOS Uluslararası Sertifikasyon ve Denetim Hizmetleri Ltd. Şti.
7	ORSER Organik Ürünler Kontrol ve Sertifikasyon Ltd. Şti.	21	Biobel Sertifikasyon Denetim Gözetim ve Eğitim Hiz. Ltd. Şti.
8	ANADOLU Ekolojik Ürünler Kontrol ve Sertifikasyon Ltd. Şti.	22	Mehmet BIYIK-TUSCERT Organik Ürünler Kontrol ve Sertifikasyon Hizmetleri
9	KALİTEST Belgelendirme ve Eğitim Hizmetleri Ltd. Şti.	23	BAŞAK Ekolojik Ürünler Kontrol ve Sertifikasyon Hiz.
10	EGETAR Kontrol ve Sertifikasyon Hizmetleri Ltd. Şti.	24	CTR Uluslararası Belgelendirme ve Denetim Ltd. Şti.
11	BCS ÖKO-GARANTIE Organik Tarım Sertifikalandırma Hizmetleri Ltd. Şti.	25	ICCS Kontrol ve Sertifikasyon A.Ş.
12	IMO Control ve Sertifikasyon Ltd. Şti.	26	Likya Organik Uluslararası Organik Ürünler Kontrol ve Sertifikasyon Hizmetleri Ltd. Şti.
13	ICEA İNSTİTULO PER LA CERTİFİCAZİONE ETİCA E AMBİENTALE Türkiye İzmir Şubesi	27	EKOİNSPEKT Uluslararası Belgelendirme Denetim Gözetim Teknik Kontrol ve Eğitim Hiz. Ltd. Şti.
14	CERES CERTIFICATION OF ENVIROMENTAL STANDARTS GmbH Türkiye İzmir Şubesi	28	TMENA Uluslararası Denetim Gözetim Sertifikasyon Hizmetleri LTD. ŞTİ.

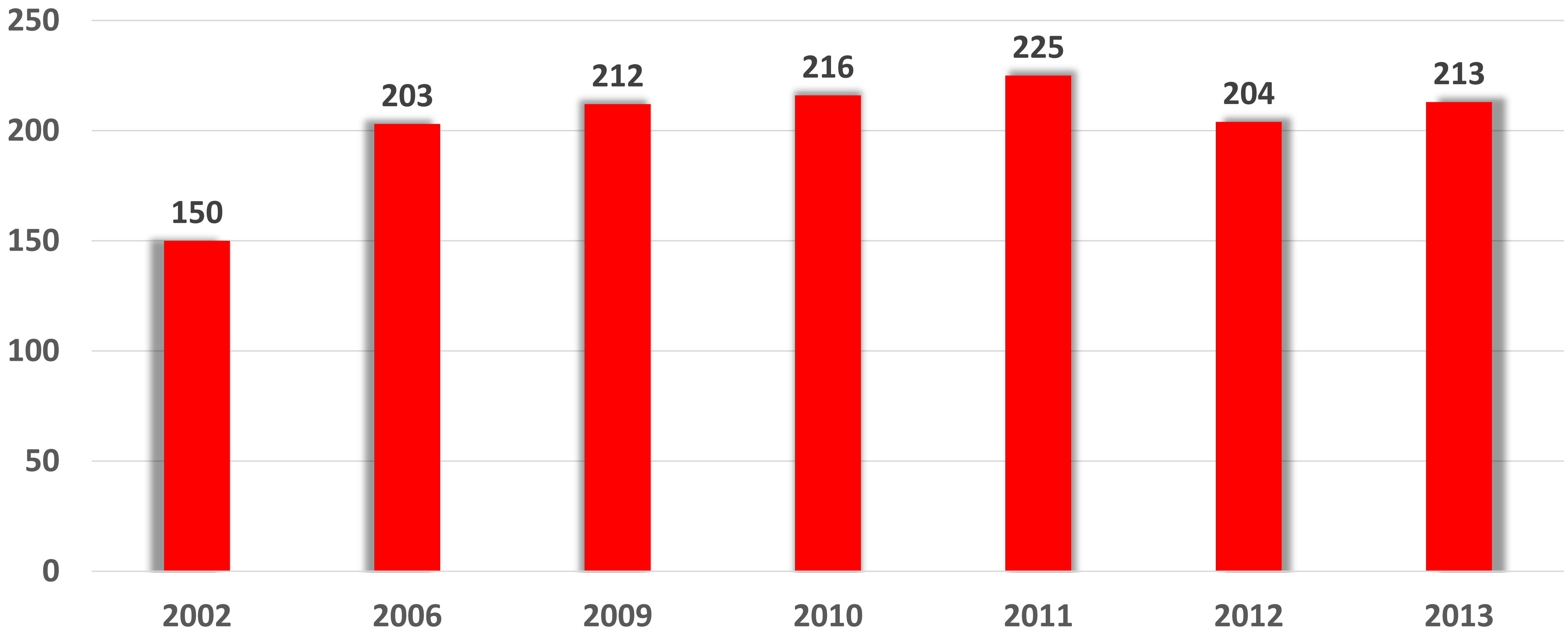
Number of farms in organic plant production



Change as fold 4.89 since 2002

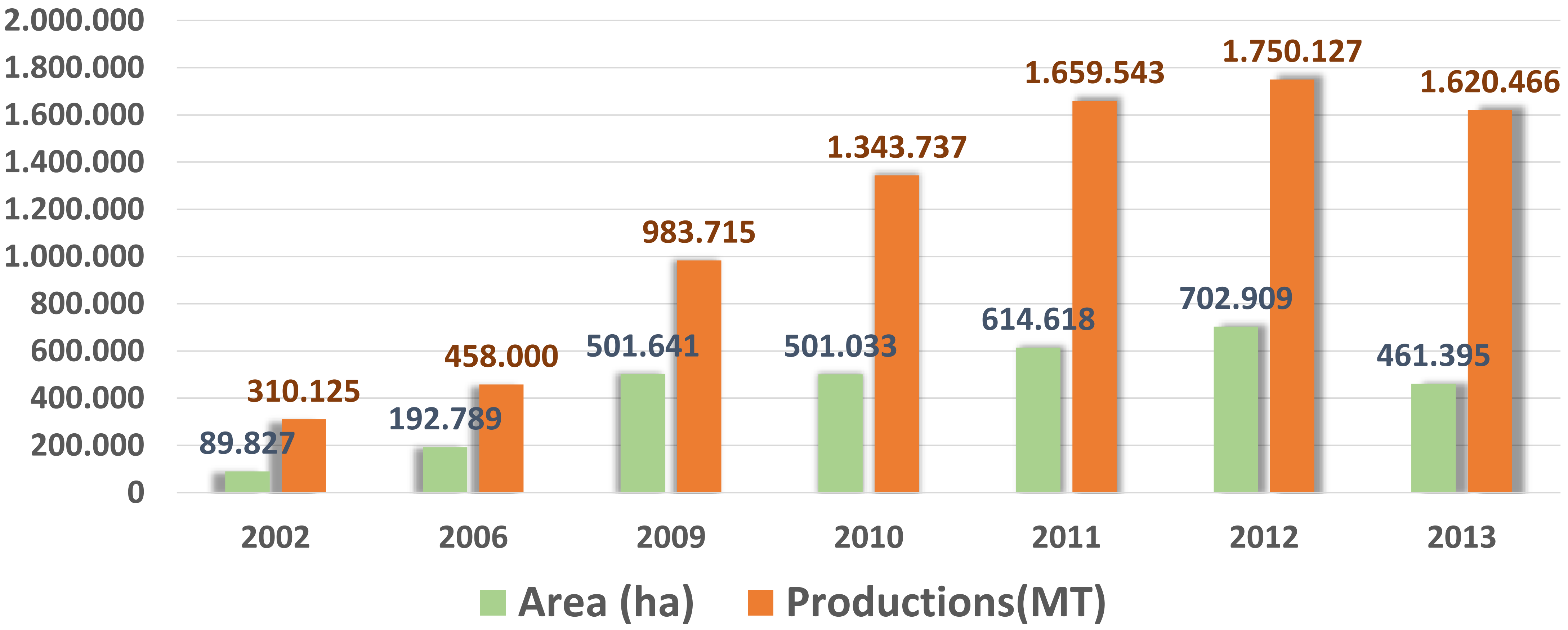
Ahmet Altindisli, 26.02.2015 Paris

Number of organic plant products



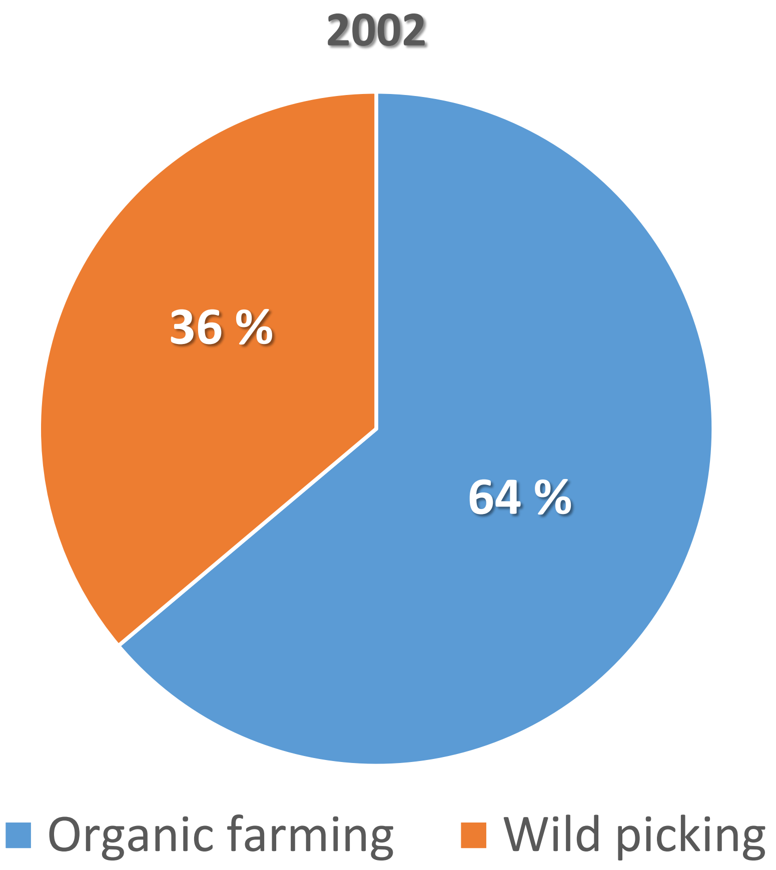
Change as fold 1.42 since 2002

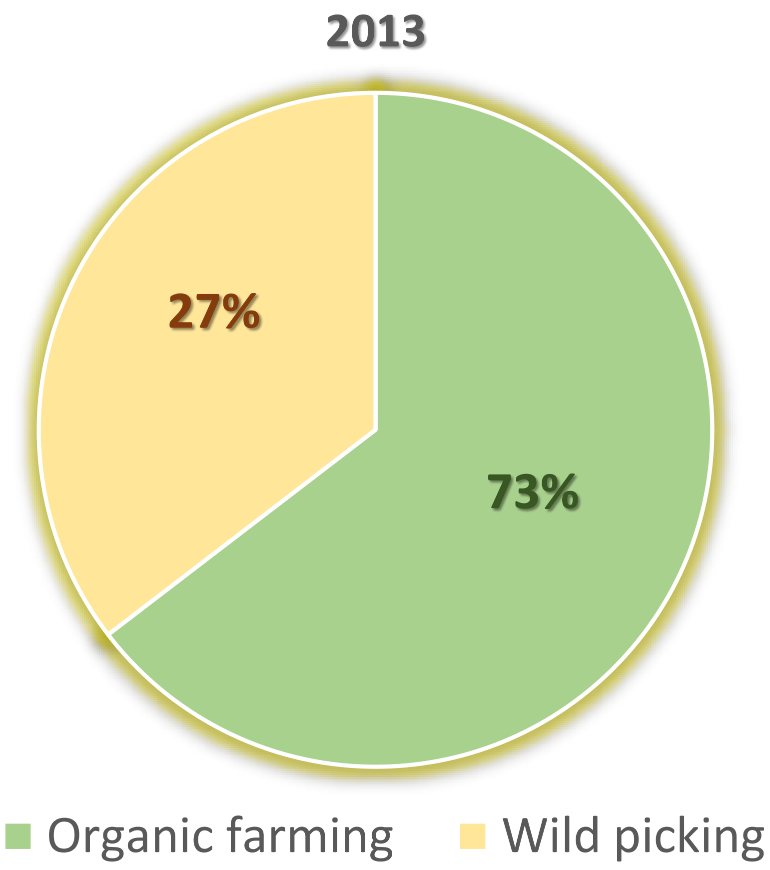
Organic plant production



Change as fold 8.56 for area and 5.22 for production since 2002

Distribution of organic farming and wild picking area





Organic fruit production (2013)

	Number of farms	Area (ha)	Production (MT)
Olives	3 348	17 738	39 661
Apple	1 567	1 824	37 291
Apricot	682	2 857	32 598
Grape (including dried grapes)	1 274	3 851	24 355
Fig (including dried fig)	2 064	5 753	22 477
Hazelnut	2 007	5 901	9 865
Pistachio nut	69	1 260	1 653
Walnut	438	605	1 182
Almond	136	572	649
Pine nut	149	1 551	627
TOTAL	11 734	41 905	165 358
Share in total organic (%)	*19.30*	*9.08*	*10.20*

Vegetable production (2013)

Crop	Number of farms	Area (ha)	Production (MT)
Tomatoes	223	262	9 003
Carrot	30	119	6 804
Pepper	164	187	3 141
Potatoes	96	54	968
Beans (including dry beans)	231	211	671
Spinach	43	36	665
Soybean	5	151	665
Eggplant	92	52	378
Cabbage	55	44	208
Squash	63	23	192
TOTAL	1 002	1 139	22 695
Share in total organic (%)	*1.65*	*0.25*	*1.40*

Organic field crop (2013)

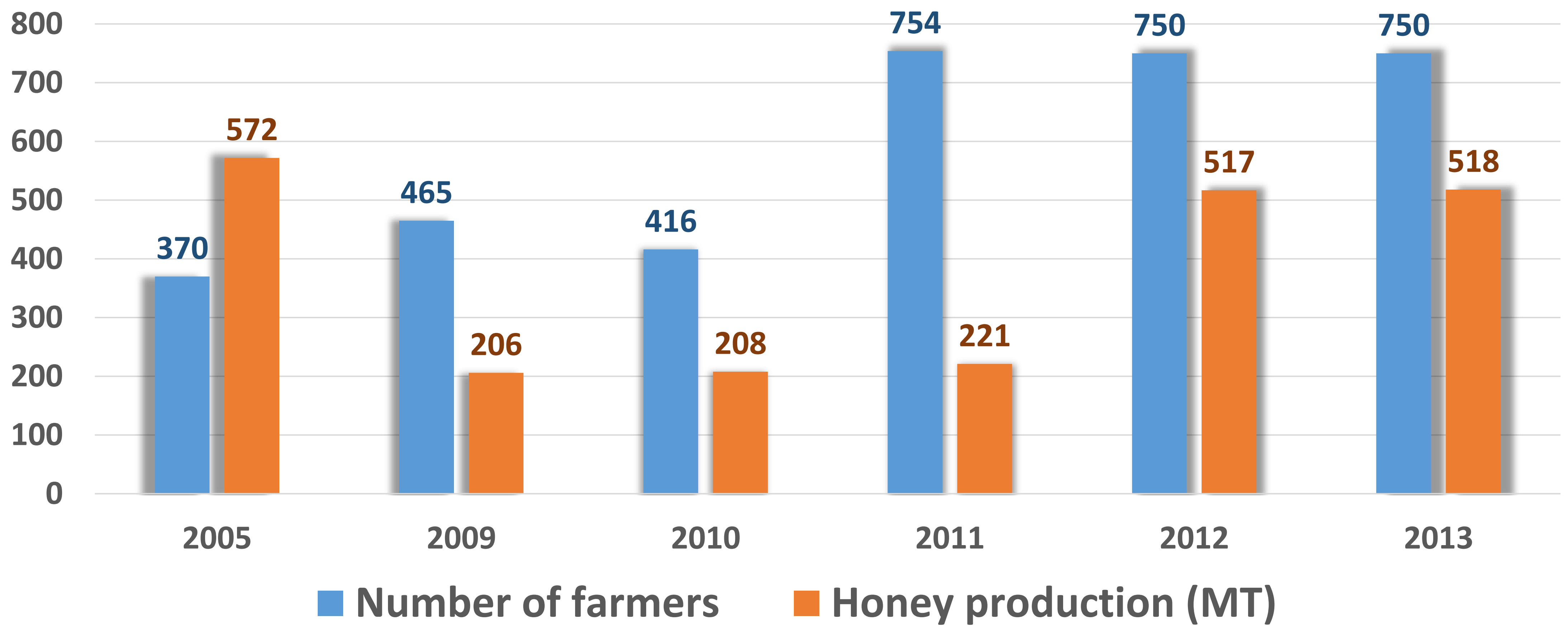
Crop	Number of farms	Area (ha)	Production (MT)
Clover	6 775	42 456	196 031
Wheat	9 150	80 643	169 287
Trefoil	3 898	21 788	81 944
Vetch	2 111	13 030	47 175
Grass	1 941	8 351	30 657
Corn	338	3 089	28 818
Barley	3 266	13 676	27 626
Cotton	220	4 435	20 602
Lentil	410	3 204	5 867
Chickpea	495	3 008	4 640
Sunflower	113	915	1 487
TOTAL	28 717	229 312	813 446
Share in total organic (%)	*47.23*	*49.70*	*50.20*

Organic animal production between 2004 and 2013

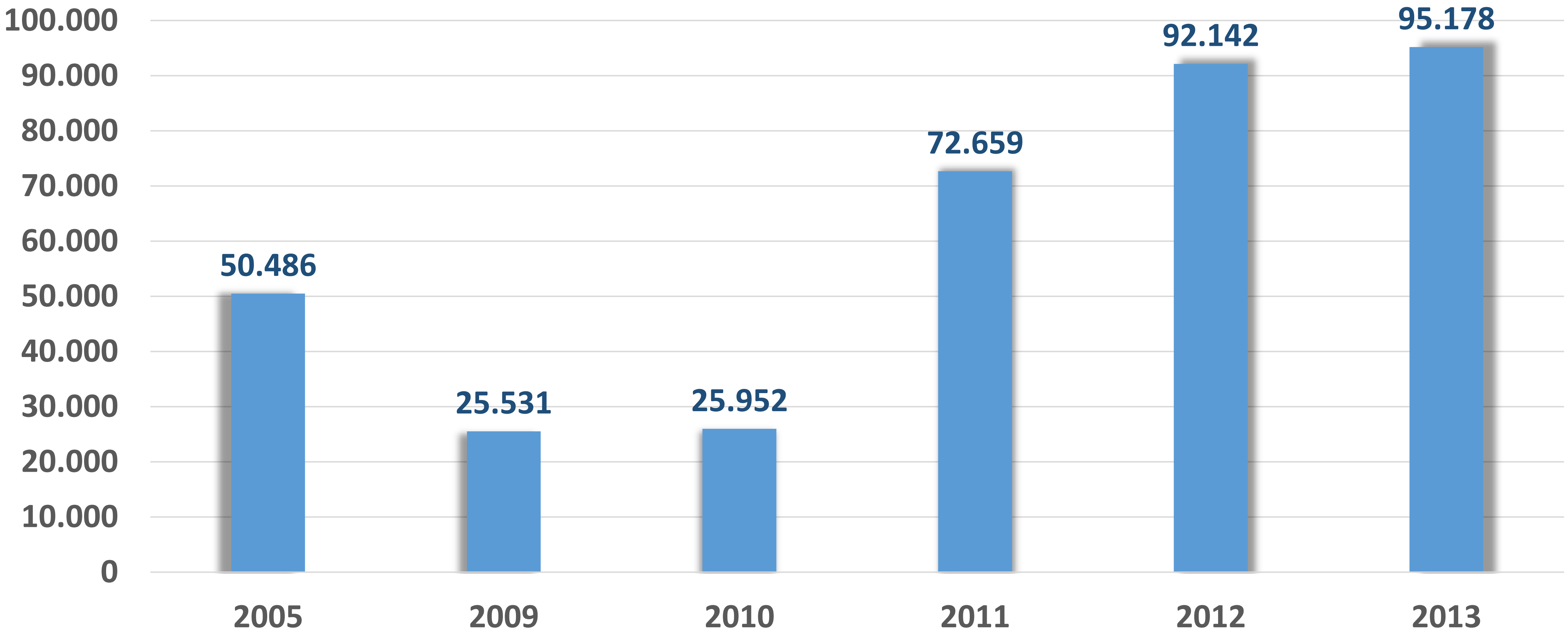
Total organic production of animal origin (including those in transition)				
Years	Number of animal farms	Number of cattle	Number of sheep and goats	Number of chicken
2004	6	1 953	10 060	890
2013	3 270	100 217	174 737	893 864
Change (x fold)	545	51.31	17.37	1004.34

Meat: 4 970 MT, Milk: 54 780 MT, Eggs: 48 040 778 (2013)

Organic bee keeping



Organic Bee Keeping (Number of beehives)



Subsidies per unit organic certified area or animal (2013)

Production	Products	Subsidy
Organic Plant Production	Fruit & Vegetable Field crops, Forage	259 €/ha 37 €/ha
Organic Animal Production	**Species**	
	Cattle, Buffalo Calf	55 €/head 18 €/head
	Sheep, Goat Bee hive	4 €/head 2 €/bee hive

Milestones

- Umbrella organization on organic agriculture: 'Ekolojik Tarım Organizasyonu Derneği' (ETO) Association of Organic Agriculture (http://www.eto.org.tr/) established in 1992
- National Symposia on Organic Agriculture is held at intervals starting from 1999 to discuss scientific results,
- 18th World Organic Congress organized in Istanbul-Turkey 13-15 October 2014.

Marketing of Organic Products

Domestic market

- Weekly organic markets (fresh fruit and vegetables, food, cosmetics, textile etc.) organized mainly in metropolitan cities,
- Organic animal production is increasing for the domestic market,
- Organic shelves exist in retail chains,
- Specialized shops (very few),

Export market

- Plant products except honey,
- Mainly achieved as contracted farming,
- Europe is still the major market,
- Product diversification especially of processed products,
- Among non-food organic products, importance of organic textiles increasing

Total:

25 Open Market

Bostanlı-IZMIR Open Market

Local market in Turkey

Over 50 specialized shops and retail chains

SERENTE
ORGANİK GIDA PAZARI

EKOOrganik

ecolife ORGANİK
HEALTH FOOD SHOP

ambar

Online shopping

Turkish organic market distribution

- **Export market**; Production designed by contracted farming according to the demand coming from abroad (> 75 %, 100 % in some products),

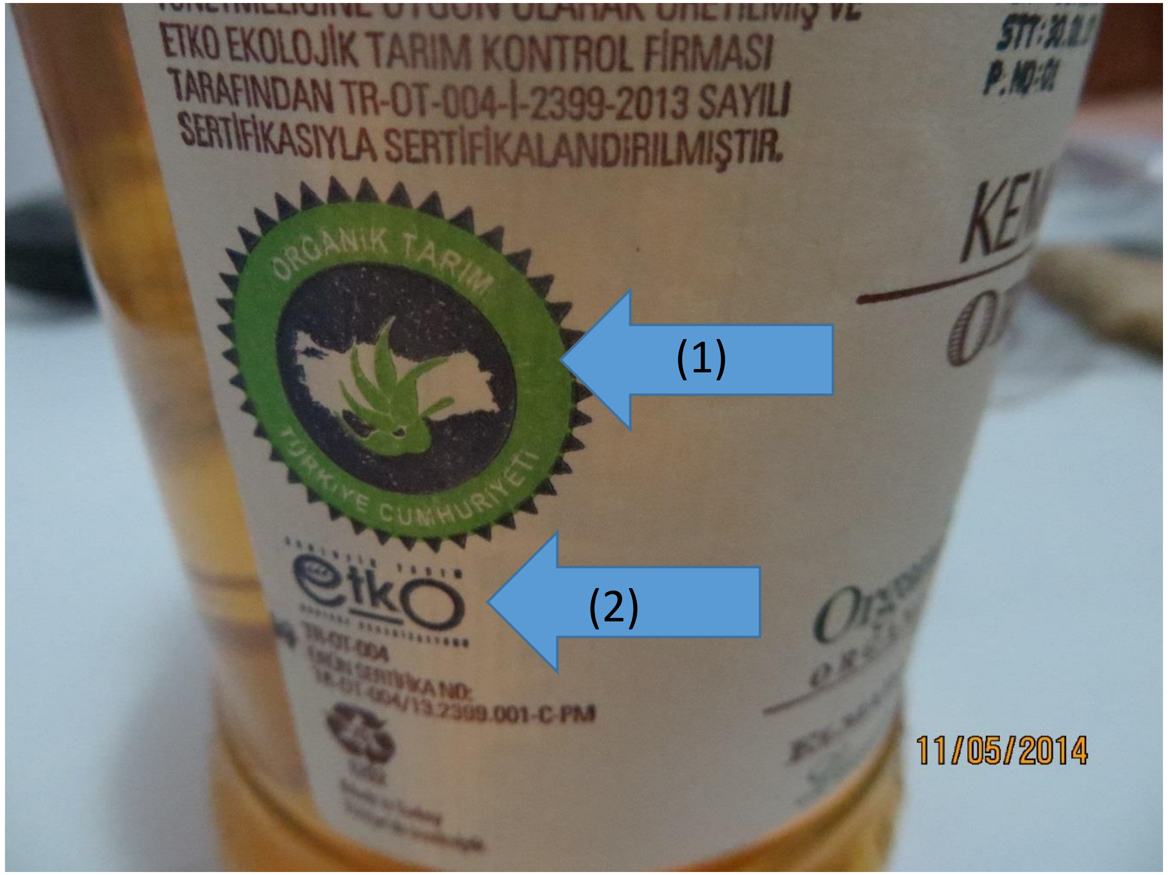
- **Domestic market** (as value, TL);
  - Retail chains (13 %)
  - Wet (open) markets in major cities (6 %)
  - Farm to farm sales of feed and fodder to animal farms (5%)
  - Specialized shops (0.3)%
  - Internet sales (0.1 %)
  - Direct sales (0.1%)

(These estimates do not include non-food organic products as textiles, pharmaceuticals, cosmetics or furniture.)

Certified organic products are labelled,

Logo (1),

Certifying CB (2).



ORGANIC APPLE VINEGAR

A well established control structure exists
However consumers lack trust,
Need to build a transparent and more informative system for consumer trust.

Conclusion

- Organic agriculture continue to develop every year.
- 19th biggest area in the World,
- Insufficient domestic consumption,
- Awareness of targeted consumer
- Expectation of increase in domestic consumption through promotion,
- Developing relation with other sectors (agro-ecotruism, green hotels, catering services, non-food goods…)

Thank you for your attention !