SHEEP AND GOAT
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I. GENERAL INFORMATION
Common Breeds in Turkey

- **Sheep Breeds (combined):**
  - White Karaman (Akkaraman) (46 %)
  - Red Karaman (Morkaraman) (19.6 %)
  - Daglık (Dağlıç) (15.5 %)
  - Awasi (İvesi) (1.6 %)

- **Goat Breeds:**
  - Anatolian Black Goat (combined)
  - Kilis Goat (for milk)
  - Angora Goat (for mohair and meat)
Sheep: 25.2 million heads,

- 26.3% of sheep in south eastern region of Turkey
- 73.7% dispersed
- 97% of meat production from combined breeds (meat + wool + milk)

Goat: 6.6 million heads,

Total meat production 276,557 tons,

Source: MARA - 2004
✓ breeding performed by small-scale family enterprises
✓ extensive farming is prevalent
✓ lambs fattened as light carcasses
✓ no specialised farms according to the production type
Legal Framework

THE LAW ON ANIMAL HEALTH and SURVEILLANCE (No. 3285)

THE LAW ON ANIMAL PROTECTION (No. 5199)

FOOD PRODUCTION, CONSUMPTION AND INSPECTION DECREE LAW (NO.5179)

LAW ON ANIMAL BREEDING (No. 4631)

DECREE REGARDING THE SUPPORT FOR ANIMAL HUSBANDRY (No. 2005/8503)
• By-law on the Procedures and Principles for Establishment, Opening, Operation and Inspection of Red Meat and Meat Products Processing Establishments (2005-25691)
• Communiqué No: 13/2005 on the Implementation of the Decree Law regarding the support for animal husbandry
• Communiqué No: 26/2005 on the Implementation of the support to private veterinarians that are working for the health production of meat at slaughterhouses and processing plants
• Communiqué No: 5/2006 on the Standardization on Foreign Trade
• By-law on Turkish Food Codex (2005-25861)
• Communiqué No: 58/2002 on Labeling as regards nutrition and General Labeling of Foodstuffs
• Communiqué No: 4/2000 on Fresh meat, Meat Preparations and Meat Mixtures
• The classification Standards TS 666, 667, 670, 671 (Turkish Standards Institute)
Stakeholders

- Ministry of Agriculture and Rural Affairs (MARA)
- Undersecretariat for Foreign Trade
- Municipal slaughterhouses and premises
- Private slaughterhouses and premises
- Premises operated by the Meat and Fish Company
- Private establishments producing meat products
- Agricultural Chambers
- Producers’ Unions (5 for meat)
- Cooperatives
- Animal Markets and Animal Bourses
## Farm Structure

<table>
<thead>
<tr>
<th># of holdings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>that engaged with animal husbandry</td>
<td>2,147,068</td>
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<tr>
<td># of holdings</td>
<td>2,074,439</td>
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<tr>
<td>(crop production + animal husbandry)</td>
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<tr>
<td># of holdings</td>
<td>72,629</td>
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<tr>
<td>(only animal husbandry)</td>
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<tr>
<td># of holdings</td>
<td>40,428</td>
</tr>
<tr>
<td>(fattening of sheep and goats)</td>
<td></td>
</tr>
<tr>
<td># of holdings</td>
<td>530,151</td>
</tr>
<tr>
<td>(milk production from sheep and goats)</td>
<td></td>
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</tbody>
</table>

**Total agricultural holdings in Turkey 2001***: 3,076,649

Source: TURKSTAT-2001 Agricultural Census
## Farm Structure

<table>
<thead>
<tr>
<th>Holdings engaged with fattening of sheep and goats</th>
<th># of holding</th>
<th># of sheep and goat</th>
<th>Average # of sheep and goat per holding</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>40,428</td>
<td>2,754,990</td>
<td>68</td>
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</table>

<table>
<thead>
<tr>
<th>Holdings engaged with milk production from sheep and goats</th>
<th># of holding</th>
<th># of sheep and goat</th>
<th>Average # of sheep and goat per holding</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>530,151</td>
<td>24,796,015</td>
<td>46</td>
</tr>
</tbody>
</table>

Source: TURKSTAT-2001 Agricultural Census
Slaughterhouses

564 slaughterhouses for ovine animals (96 private + 468 public)

1st class: 122 (37 public)
2nd class: 19
3rd class: 423 (8 private)

• Municipal veterinarians for public slaughterhouses
• Officially authorized and accredited veterinarians for private slaughterhouse
• Cold storage facilities are available at the slaughterhouses
II. MARKET TOOLS
Purchases

• purchases of live animals
  – physical live animal markets owned by municipalities,
  – animal bourses,
  – directly on the farms
  – slaughterhouses by traders

• 47 authorized animal bourses and animal markets (4 private)
Marketing Channels in Turkey

ANIMAL BREEDERS

Traders Domestic and International Markets

Rearing Holding

Livestock Dealers

Arbitragers

Wholesaler Butchers

Retailer Butchers

Unregistered Slaughters

Municipality Slaugtherhouse

Meat and Fish Company

Private Slaughters

Meat Evaluation Units

Meat Evaluation Units

Meat Processing Units

Retailers of meat and meat products

Retailer Butchers

CONSUMER
Carcass Classification

- TS 666, 667, 670, 671 (November 1986) of Turkish Standards Institute
  - definition of carcass, half carcass and quarter carcass and expressions like conformation, fat cover and the length of the carcass etc. used for the classification
  - divides lamb, sheep, goat and capricorn carcasses into 4 classes (Extra, 1st, 2nd and 3rd class)
  - sampling procedures
Prices

• Determined on the basis of;
  – live weight,
  – price per head,

• No price reporting system for the regulation of markets
Support/Identification/Registration

• No subsidy is granted to the sheep and goat breeders in the form of price support.

• Direct support is granted for the milk obtained from ovine animals.

• Technical studies regarding the Identification and Registration System is being carried out.
III. IMPORT/EXPORT ARRANGEMENTS
Imports/Exports

- No import/export licenses are required for sheep and goat meat or ovine animals.
### Export Refunds

<table>
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<th>CN Code</th>
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<th>Final Quantity Commitment Level (t)</th>
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<td>Refund Amount</td>
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<tr>
<td>1602 90 78</td>
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</tbody>
</table>
Preferential Trade

EU COUNTRIES

Turkey has an export arrangement for sheep and goat meat within a tariff quota (200 tonnes with 0 % duty).

CANDIDATE COUNTRIES

Under FTAs with Croatia, Turkey has preferential export arrangement for sheep and goat meat within a tariff quota (100 tonnes, 50% of MFN).

THIRD COUNTRIES

Under Turkey-Bosnia and Herzegovina FTA, Turkey has preferential export arrangement for sheep and goat meat (unlimited, 0 % duty)
IV. FUTURE PLANS
Administrative structure to implement relevant acquis
- Identification and registration system
- Labelling system
- Carcass classification
- Price reporting system
THANK YOU FOR YOUR ATTENTION