



BEEF



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I.GENERAL INFORMATION



Common Breeds in Turkey:

- **Pure Bred :**
 - Holstein, Brown Swiss,
 - Jersey, Simmental

- **Domestic Breeds:**
 - Anatolian Black,
 - Turkish Grey (North Western Turkey),
 - Eastern Anatolian Red (Eastern and North Eastern Anatolia) ,
 - Southern Yellow-Red (Mediterranean and South Eastern Turkey)

- **Cross-breds**

Source: MARA

■ **Bovine Animals : 10,173,246 heads in 2004**

Cattle- Pure Bred	2,1 million	21%
Cattle- Cross Bred	4,3 million	43%
Cattle- Domestic Breeds	3,5 million	35%
Buffaloes	0,1 million	1%
Total	10,1 million	100%

■ **Total slaughtering (2004) : 2,6 million heads/
498,362 Tons**

Source: MARA



Legal Framework

LAW ON ANIMAL HEALTH AND SURVEILLANCE (No. 3285)

LAW ON ANIMAL PROTECTION (No. 5199)

LAW ON FOOD PRODUCTION, CONSUMPTION AND INSPECTION
(No.5179)

LAW ON ANIMAL BREEDING (No. 4631)

DECREE REGARDING THE SUPPORT FOR ANIMAL HUSBANDRY
(No. 2005/8503)



- By-law on the Identification, Registration and Monitoring of Bovine Animals (2002, 24829)
- 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: 21/2004 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 Labelling as Regards Nutrition and General Labelling of Foodstuffs
- Communiqué No:4/2000 on Meat Products Fresh meat, Meat Preparations and Meat Mixtures
- The classification Standards TS 668 (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
- Chambers of Agriculture
- Producers' Unions (5 for meat)
- Cooperatives
- Animal Markets and Animal Bourses



Farm Structure

# of holdings that engaged with animal husbandry	2,147,068
# of holdings (crop production + animal husbandry)	2,074,439
# of holdings (only animal husbandry)	72,629

# of holdings (fattening of cattle and buffaloes)	71,216
# of holdings (milk production from cattle and buffaloes)	1,746,927
Total agricultural holdings	3,076,649

Source: TURKSTAT-2001 Agricultural Census



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Size of holding (number of cattle)*	Number of holdings engaged with fattening of cattle*	Number of cattle*
1-4	33,205	89,816
5-9	15,151	101,762
10-19	13,246	156,082
20-49	6,684	195,862
50-149	2,067	118,986
150-299	240	60,417
300+	623	449,828
TOTAL	71,216	1,172,753

* TURKSTAT 2001 Agricultural Census (including buffaloes)



Slaughterhouses

627 slaughterhouses for bovine animals
(150 private + 477 public)

daily capacity 26,637 heads in 2005

1st class: 173

2nd class: 19

3rd class: 435

- Municipal veterinarians for public slaughterhouses
- Officially authorized and accredited veterinarians for private slaughterhouses
- Cold storage facilities are available at the slaughterhouses

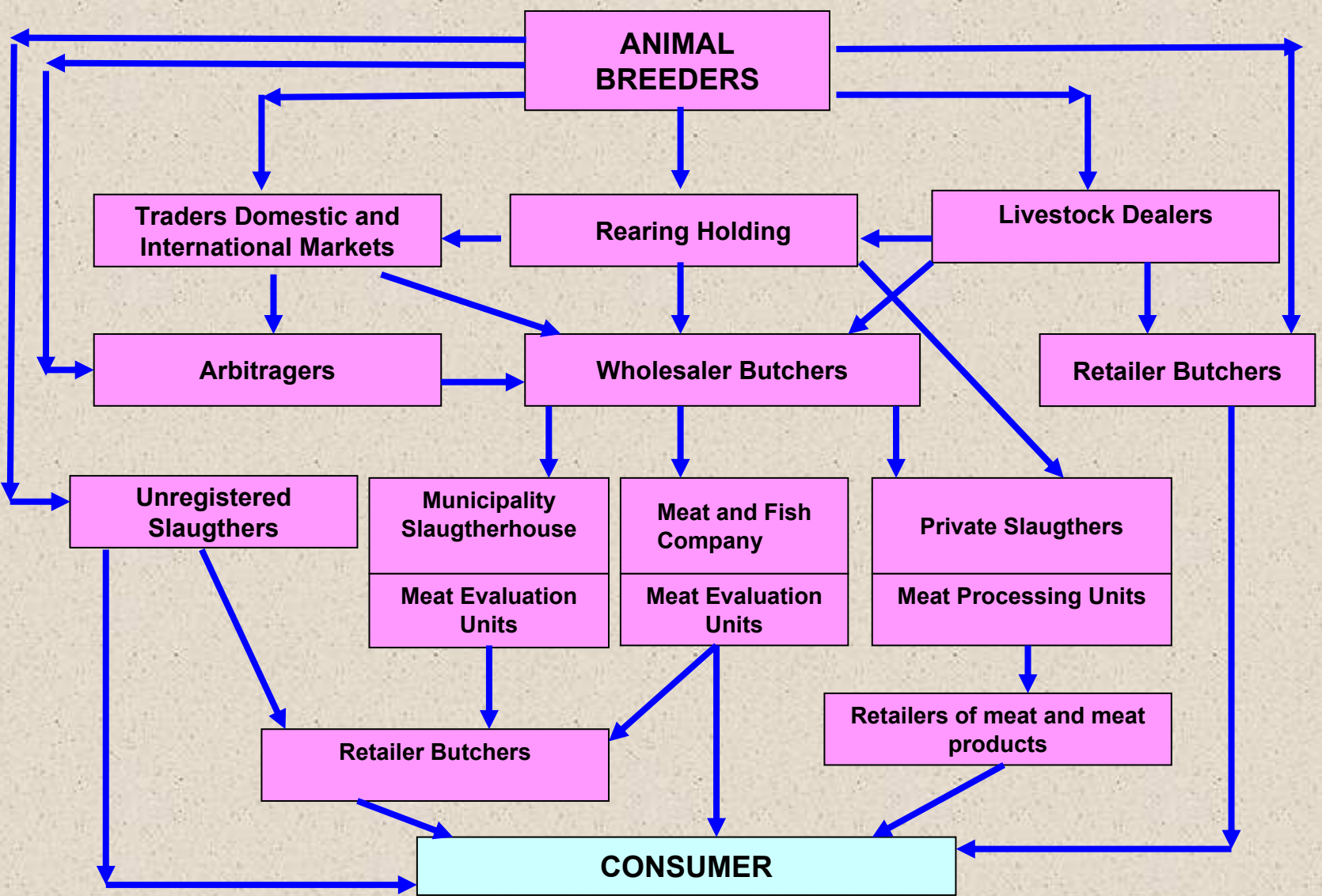


II. MARKET TOOLS

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



Carcass Classification

- TS 668 (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 young bull and heifer carcasses into 4 classes (Extra, 1st, 2nd and 3rd class) and divides cattle, steer and bull carcasses into 3 classes (1st, 2nd and 3rd class)
 - sampling procedures



Prices

- Determined on the basis of
 - live weight
 - price per head
 - price for dead weight
 - flat price per kg carcass weight
 - traditionally a price for a couple of cattle
- No price reporting system for the regulation of markets

Support

- Subsidies were granted to the cattle breeders in the form of price support.
- A new structural support system (Decree No:2005/8503) aims to:
 - stabilize markets of the sector,
 - increase production and productivity,
 - decrease production cost,
 - increase the income of the breeders,
 - prevent unregistered and uncontrolled slaughtering,
 - promote slaughtering at registered and licensed slaughterhouses,
 - increase the number of animals slaughtered at those slaughterhouses,
- The new structural support system has not been implemented yet.



- Only in 2004 subsidies were granted for the carcasses of male cattle slaughtered at registered slaughterhouses
- Communiqué No: 2004/21- meat support premium
- Minimum carcass weight was set at 190 kg.
- Animals should be registered on the Identification and Registration Database



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Year	Weight of the carcass (€/kg)	Total Amount Granted (€ 000)
2004 (22.05.2004- 30.09.2004)	0.57	22
2004 (01.10.2004- 01.01.2005)	0.28	10
TOTAL	-	32



III. IDENTIFICATION/REGISTRATION AND LABELLING

By-law on the Identification, Registration and Monitoring of Bovine Animals (In compliance with 1760/2000)

Established in 2001. System requirements:

- double eartags
- individual eartag number
- a register on each holding (farm, market etc.)
- cattle-passports
- a computerized database at national level
- registration of the holdings with specific holding numbers



- No national beef labelling system establishing link between meat and individual animal or carcass and the individual holding.
- 3 Communiqués are in force regarding the labelling of beef which lay down the information to be included on the labels.



IV. IMPORT/EXPORT ARRANGEMENTS



Imports/Exports

- no import/export licenses are required for beef and veal or bovine animals.
- import licenses are required for the importation of beef and veal under the tariff quotas resulting from bilateral agreements



Export Refunds

CN Code	Final Outlay Commitment Level US\$	Final Quantity Commitment Level (t)	Current Situation	
			Refund Amount	Eligible Quantity
0102 10	-	-	-	-
0102 90 05 to 0102 90 79	-	-	-	-
0102 90 79	-	-	-	-
0201			-	-
0202	81,302.50	544.40	-	-

No export refunds are paid



Preferential Trade

EU COUNTRIES

Turkey has preferential import arrangement for:

- pure bred breeding bovine animals (unlimited, 0% duty)
- bovine animals for slaughter (6,285 tonnes, 0% or reduced duty)
- frozen beef (19,100 tonnes with reduced duty)

Turkey has no preferential export possibility for live bovine animals and beef



CANDIDATE COUNTRIES

Under Turkey-Romania FTA Turkey has preferential import possibility for

- bovine animals for slaughter (6,500 tonnes, 0% or reduced duty)
- beef (1,000 tonnes with 50% duty)

THIRD COUNTRIES

No preferential export or import arrangement



V. FUTURE PLANS



- **Administrative structure to implement relevant acquis**
- **Carcass classification**
- **Price reporting system**
- **Labelling system**



THANK YOU FOR
YOUR ATTENTION