

## HONEY SECTOR

### Non-exhaustive list of issues and questions to facilitate preparations for bilateral meetings

COUNTRY: TURKEY

#### 1. Marketing structures

- **Production <sup>1</sup>:**

##### **Total honey production**

<b>Total Honey Production * (Tons)</b>			
	<b>2002</b>	<b>2003</b>	<b>2004**</b>
<b>Total honey production</b>	74,555	69,540	73,929

Source: TURKSTAT

\* Data for honey production and the number of bee hives is collected annually via Provincial and District Directorates of the Ministry of Agriculture and Rural Affairs (MARA) by means of data collection forms provided by the Turkish Statistics Institute (TURKSTAT).

\*\* The figure for the year 2004 is provisional.

**Direct sales to consumers in %**

**Direct sales to retailers in %**

Sales to	[packers	]	
	[traders	]	in %
	[industry (food, cosmetics...)	]	

Not available.

- **Imports**

##### **Total honey imported in volume and in value**

<b>TOTAL HONEY IMPORTED IN VOLUME AND IN VALUE</b>						
<b>IMPORT</b>	<b>2002</b>		<b>2003</b>		<b>2004</b>	
<b>CN Code</b>	<b>\$</b>	<b>KG</b>	<b>\$</b>	<b>KG</b>	<b>\$</b>	<b>KG</b>
0409 Natural honey	689,844	396,615	1,211,637	473,217	639,020	179,896

Source: TURKSTAT

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<sup>1</sup> Where possible please indicate type of honey and size of holding

### Imports by origin in volume and in value

IMPORT BY COUNTRY OF ORIGIN		2002		2003		2004	
		\$	KG	\$	KG	\$	KG
<b>040900 Natural Honey</b>		<b>689,844</b>	<b>396,615</b>	<b>1,211,637</b>	<b>473,217</b>	<b>639,020</b>	<b>179,896</b>
04090000 Natural Honey	Austria						
	Belgium	72,347	20,922				
	Bulgaria						
	Canada					19,827	4,155
	China						
	Denmark			22,575	5,858		
	France					72,313	17,240
	Germany	299,929	149,258	239,888	74,207	466,549	133,686
	Iran	360	770				
	Israel						
	Kazakhstan						
	Kyrgyzstan			25,360	22,600		
	Mexico	265,739	199,908	383,275	148,400		
	Netherlands	10 867	3 422	25 240	9 490		
	Saudi Arabia	27 060	17 553				
	Spain			232,250	93,000	80,331	24,815
	Switzerland						
	Turkmenistan						
	U.A.E						
	United Kingdom	6,990	1,782	1,232	262		
	USA			266,164	111,600		
	Uzbekistan						
	Other	6,552	3,000	15,653	7,800		

Source: TURKSTAT

Sales to [packers  
[traders  
[industry (food, cosmetics...)] in %

Not available.

### • Exports

### Total honey exported in volume and in value

TOTAL HONEY EXPORTED IN VOLUME AND IN VALUE							
EXPORT CN Code	2002		2003		2004		
	\$	KG	\$	KG	\$	KG	
0409 Natural honey	32,834,738	16,348,730	37,089,550	14,980,385	16,329,349	5,685,646	

Source: TURKSTAT

**By destination in volume and in value**

<b>EXPORT BY COUNTRY OF DESTINATION</b>							
		<b>2002</b>		<b>2003</b>		<b>2004</b>	
		<b>\$</b>	<b>KG</b>	<b>\$</b>	<b>KG</b>	<b>\$</b>	<b>KG</b>
<b>0409 Natural honey</b>		<b>32,834 738</b>	<b>16,348,730</b>	<b>37,089,550</b>	<b>14,980,385</b>	<b>16,329, 349</b>	<b>5,685,646</b>
040900 Natural honey							
04090000 Natural Honey							
	Afghanistan			4,520	1,080	1,500	500
	Algeria			147,922	45,628	444,189	144,754
	Australia	29,976	13,768	46,191	27,159	5,289	1,246
	Austria	241,980	89,107	405,217	124,150	447,686	115,418
	Azerbaijan	1,332	357				
	Bahrain	429	62				
	Belgium	536,627	232,201	827,747	243,022	628,356	163,258
	Canada	6,675	1,695	69,288	20,817	81,748	23,223
	Co.Terr.Not Spec.	869	287	288	72		
	Denmark	60,427	19,884	131,222	32,210	145,742	31,219
	Europe Free Zone			920,289	305,984	77,004	31,440
	France	1,389,178	677,143	3,092,579	1,138,025	982,341	308,456
	Germany	15,382,789	7,143,716	13,153,627	5,083,387	5,365,646	1,658,538
	Greece	22,486	10,500	82,371	31,999	121,075	44,127
	Hong Kong	540	200	10 888	3 425	2 950	700
	Indonesia	2,683	1,057				
	Iraq					10,813	2,313
	Ireland			1,520	252		
	Israel	2,146	960	10,464	6,036		
	Italy	1,178,672	615,120	2,569,187	1,125,043	1,088,780	482,100
	Japan	13,156	2,458	68,678	16,177	20,199	4,509
	Jordan	3,138	2,213	1,056	720		
	Kazakhstan	538	180	1,153	319		
	Kuwait	42,380	21,190	15,265	5,103	54,474	13,657
	Lebanon	1,579	929				
	Libya			4,084	522		
	Makedonia	5,115	1,551	3,890	1,236	24,440	10,844
	Malaysia			31,751	13,200		
	Malta	102	36	8,798	3,000		
	Netherlands	565,102	204,518	431,760	132,963	771,172	212,299
	Norway	42,743	11,055	1,633	491	31,988	6,658
	Pakistan			13,835	5,945		
	Qatar	615	185				
	Saudi Arabia	2,204,423	1,697,725	3,539,934	1,969,595	2,687,782	1,356,268
	Serbia and Montenegro	2,206	750	4,206	1,250		
	Singapore			3,728	630		
	Spain	5,279,760	2,699,732	6,164,100	2,550,502	1,060,256	378,615
	Sudan	1,976	456				
	Sweden	208,197	88,819	258,916	103,224	115,741	39,512
	Switzerland	53,355	14,588	34,470	8,264	81,784	17,839
	Turkmenistan	4,588	1,635			46,586	10,514
	U.A.E	20,862	24,970	61,782	38,480	189,769	65,348
	United Kingdom	716,359	296,074	946,274	334,270	1,022,762	266,566
	USA	4,611,683	2,364,469	3,188,786	1,314,347	471,773	135,786
	Uzbekistan	216	42	1,605	216		
	Yemen			308,547	95,846	149,187	67,871
Other		200,705	109,385	1,442,556	501,852	275,321	123,508

Source: TURKSTAT

## 2. Farm structure

- **Total hives**

	<b>2002</b>	<b>2003</b>	<b>2004*</b>
Primitive type	180,232	190,538	162,660
Modern type	3,980,660	4,098,315	4,237,065
<b>Total hives</b>	<b>4,160,892</b>	<b>4,288,853</b>	<b>4,399,725</b>

Source: TURKSTAT

\*The figures for the year 2004 are provisional.

### **Professional beekeeper's hives**

The number of professional beekeepers' hives was 2,138,000 in 2002 (MARA).

- **Professional beekeepers<sup>2</sup>**

The number of professional beekeepers was 34,452 in 2002 (MARA).

- **Total beekeepers**

The total number of beekeepers prior to the establishment of the Turkish Beekeepers Association was 153,000 in the year 2002. The number of beekeepers registered at the Turkish Beekeepers Association is 17,000 by 2005 (MARA).

- **Type of ownership:** private, cooperative or state

All hives located in Turkey are of private ownership (MARA).

	<b>2002</b>	<b>2003</b>	<b>2004*</b>
<b>The number of villages engaged with beekeeping</b>	22,423	22,110	22,133

Source: TURKSTAT

\* The figure for the year 2004 is provisional.

## 3. Prices

- **Is there a state trading monopoly for honey?**

No

- **If there is any public price quotation for a standard quality of honey noted at representative markets, please give a summary of last three years.**

No

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<sup>2</sup> A professional beekeeper is one running more than 150 hives

#### 4. Production and market preparation costs

Fixed and variable costs are indicated in both YTL (New Turkish Liras) and € (Euros). Conversion of YTL into Euros was performed in accordance with the exchange rates published by the State Planning Organisation (SPO) for the year 2004. Accordingly, 1 YTL equals to 1.767.331 €.

- **Fixed costs**

	<b>New Turkish Liras YTL</b>	<b>Euros €</b>
<b>Live Fixtures</b>	110	62.24
<b>Hive Costs</b>	60	33.94
<b>Machinery and Equipment</b>	33.5	18.96
<b>Total</b>	203.5	115.14

Source: MARA

- **Variable costs**

<b>The Annual Working Capital Requirements of 1 Hive</b>			
		<b>New Turkish Liras YTL</b>	<b>Euros €</b>
<b>Honeycomb</b>	1 Kg	13	7.35
<b>Winter Feeding</b>	15 Kg	27	15.28
<b>Varroasis Control</b>	Fixed price	10	5.66
<b>Labour</b>	Fixed price	7	3.96
<b>Amortization</b>	10%	9	5.09
<b>Transhumance</b>	5 Transports	15	8.48
<b>General</b>	5%	4.5	2.54
<b>TOTAL</b>		85.5	48.38

Source: MARA

#### 5. Premium

**Type of subsidies (If yes, please include description)**

**Income support**

Not provided.

**Marketing support**

In accordance with the “Implementing Communiqué and Decision of the Ministerial Council on Support for Stockbreeding, issued in the Official Gazette dated February 24, 2005 and numbered 25737” that will be implemented for a period of six years;

Per kg filtered honey, for which standards to be applied will be laid down by means of a Communiqué, a premium of:

- 0.4 YTL (0.25 €) shall be paid to beekeepers registered at the Beekeepers Association,
- 0.3 YTL (0.19 €) shall be paid to non-registered beekeepers.

### **Export support**

65 \$/ton export refund is provided to honey with a quantitative limitation of 32%, indicating the share of exported quantity eligible to receive the refund (Communique No.2005/1, issued in the Official Gazette dated March 15, 2005 and numbered 25756) (The Undersecretariat of the Prime Ministry for Foreign Trade-UFT).

### **Structural support**

Not provided.

### **Other**

In accordance with the “Implementing Communiqué and Decision of the Ministerial Council on Support for Stockbreeding, issued in the Official Gazette dated February 24, 2005 and numbered 25737” that will be implemented for a period of six years;

Among those who have bought and used queen bees from holdings that have been granted permission for production by MARA for the production season of that year, a premium of:

- 15 YTL (9.3 €) shall be paid per queen bee to beekeepers registered at the Beekeepers Association,
- 7.5 YTL (4.6 €) shall be paid to non-registered beekeepers.

A premium of 20 YTL (12.4 €) shall be paid per colony to beekeepers who buy and use Bombus bees for pollination.

## **6. Representative beekeeping organizations**

Name and address

The Turkish Beekeepers Association  
Tarım Kampüsü, Bağdat Caddesi, No. 27 Yenimahalle-ANKARA/TURKEY  
Tel. +90 312 327 72 10  
Fax +90 312 327 72 13