

**Non-exhaustive list of issues and questions to facilitate preparations for
bilateral meetings: HOP SECTOR**

TURKEY

1. Production and marketing figures

Please provide information by variety on the following issues for the period 1998-2005:

-Variety:

Brewers Gold,
Late Clusters,
Efes Aroma,
Ege,
Erciyas,
Tarbes 99,
Anadolu 99,
Pazaryeri 2000

-area (ha), production (tonnes), yield (kg/ha):

Plant area and amounts of production of Hop in Turkey

	1998	1999	2000	2001	2002	2003	2004
Area (ha)	342	308	318	215	200	250	240
Production (ton)	1.794	930	740	710	750	900	1.100
Yield (kg/ha)	5246	3019	2327	3302	3750	3600	4583

Source: Turkey Statistical Institute (TURKSTAT)

-Alpha Production (tonnes):

Years	Alpha Production (Ton)
1998	16,160
1999	21,920
2000	10,400
2001	15,200
2002	17,891
2003	19,643
2004	22,744

Source: TARBES Company

- the use and number of forward contracts:

The production of hops in Turkey is implemented with the model of contractual farmer. In Turkey, only two institutions have fresh hop processing establishment. These two institutions are the firm and the Cooperative. Cooperative produce actively with **total 552 contractual farmers in 2005**

- the volume of unsold hops (in tones):

Hops production doesn't meet demand so **there is no unsold hops.**

- average contract prices in local currency (and indicating EUR exchange rate on 1.1.2006):

Purchasing Prices of Hop with Years

Years	Exchange Prices (YTL/Kg)	Exchange Price (Euro/Kg)
1998	0,29	0,99
1999	0,4	0,90
2000	0,55	0,95
2001	0,98	0,89
2002	1,35	0,94
2003	1,73	1,02
2004	1,95	1,10
2005	2,15	1,28

Source: TURKSTAT

- average prices on the free market (spot market) in local currency (and indicating EUR exchange rate on 1.1.2006):

There is no hops trade in free market.

2. Is there a system of declaration and registration of areas? If so, please describe.

The registers of contractual producers are kept continuously by the firm and Cooperative. The registers kept by these institutions which make production with the model of contractual production are hold in comprehension with producer name, variety of hop produced, production area, and amount of production.

3. Is there a certification procedure for hops and how does it work?

There is no certification system.

4. Are the producers organised in producers groups? If yes, what is the precise function of these groups?

In Turkey, there is only hops cooperative. The cooperative operating with contractual production model provides members and non-contractual farmers with machine, equipment and rhizome. Furthermore, the co-op. purchases hops produced by farmers/own members and sells hops to beer fabrics, by processing hops in own processing establishment.

5. If there is an aid system in place, how are controls on the implementation of this system organised?

There is no specific aid system for hops.

6. Trade with third countries?

Please provide figures for both export and import and countries concerned (in tonnes and in value) for the following products during the period 1998-2005:

- Hop cones, fresh or dried (NC 1210 10)
- Hop powders and pellets (NC 1210 20)
- Hop extracts (NC 1302 13)

There is no hops export. Import values are submitted in the Annex 1.

Are there quality requirements for products imported from third countries? If so, which ones?

Normal import requirements for hops imported from third countries, no quality requirement is requested.

7. Local breweries?

Are there any breweries producing domestically, and if so, please describe the following:

- name:

There are seven beer producer firms.

- type of beer produced:

They produce Pilsner and Home brewers type of beer

- quantity:

They produce nearly 1,500 tonnes beer.

- varieties used:

There is no registration

- hopping rate:

There is no registration

- beer consumption:

Years	Consumption (tones)
1999	713.239
2000	745.728
2001	781.131
2002	819.536
2003	813.172
2004	830.000

Source: Tobacco. Tobacco Product and Beverage Market Regulatory Authority

- future trend:

Hops is a marginal product in Turkey. Fewer producers deal with the hops production. Therefore there will not be a tendency to hops production in future

Annex 1

Import

CN 1210 10	1998		1999		2000		2001		2002		2003		2004		2005/10	
	kg	usd	kg	usd	kg	usd	kg	usd	kg	usd	kg	usd	kg	usd	kg	usd
India	1.000	9.634														
S.Korea	50	1.288														
CN 1210 20																
France	2	10														
Germany	257.885	1.928.232	170.240	1.201.265	233.213	1.490.176	159.745	939.967	291.559	1.986.944	209.295	1.623.399	213.300	2.085.983	171.900	1.592.349
Austria															120	2.498
U.S.A.					10.206	59.964	18.400	105.032			9.000	42.175	52.790	244.082	57.460	293.153
CN 1302 10																
Germany	5.195	99.716	8.649	177.682	10.757	178.501	11.285	196.310	6.242	96.388	5.911	91.381	1.181	18.674		
United Kingdom	20	794	2.800	53.320					530	12.503	575	13.001	2.160	26.103	530	11.994
Belgium											2.709	31.198				
Czech Rep.			190	1.021												
U.S.A					2.548	37.887	1.913	57.334	49	2.533	89	3.586	5.842	140.778	3.300	83.007
Australia													915	17.736	358	19.635
Total	264.152	2.039.674	181.879	1.433.288	256.724	1.766.528	191.343	1.298.643	298.380	2.098.368	227.579	1.804.740	276.188	2.533.356	233.668	2.002.636

Source: TIS