

BEEF AND VEAL SECTOR

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

1. General information

(1) Balance sheet for beef and veal sector in head and/or carcass weight equivalent (cwe):

	2002	2003	2004	2005 (f) ² (Jan-Oct)
Bovine Livestock (December) ¹	9,925,000	9,902,000	10,173,246	11,890,127
Bovines less than 1 year of age of which calves for slaughter	n/a	n/a	2,476,290	1,204,500
Bovines aged between 1 and 2 years	n/a	n/a	2,685,808	2,501,564
of which male animals	n/a	n/a	1,167,376	
female animals	n/a	n/a	1,518,432	
Bovines over 2 years of age of which	n/a	n/a	5,011,148	8,184,063
heifers	n/a	n/a		
cows (total)	n/a	n/a		
dairy cows ³	4,444,194	5,097,740	3,915,083	
Net production ⁴				
Total slaughtering				
Head (in total)	1,784,217	1,600,566		
Tons	329,260	292,165	1,866,407	
			366,948	
Import ⁵				
Live animals (head)	0	2,128	0	1,468
Live animals (live weight tons)	0	958	0	665
Meat (ton)	3	0	9	0
Export ⁵				
Live animals (head)	279	0	1	0
Live animals (live weight tons)	135	0	0.4	0
Meat (ton)	32	91	39	26
Public Stocks	0	0	0	0
Total domestic Use ⁶	550,486	447,423	497,489	
Net production + meat imports –meat exports + stock variation				
Per capita consumption ⁷				
kg/head/year	8 kg/year	6.3 kg/year	6.9 kg/year	
Self sufficiency ⁸	1.0	1.0	1.0	
Ratio between gross indigenous production and total use				

(¹) The figures include cattle and buffaloes. 2002-2003 and 2004 figures are taken from the Turkish Statistics Institute (TURKSTAT), the figures for year 2004 represent estimated data. Data regarding the number of animals according to the given age classes are not available before the year 2004. The

data collection in line with EU age sub-classes started in 2004. The information provided for animals slaughtered in years 2002, 2003 and 2004 are based on slaughterings under veterinary supervision at municipal and private slaughterhouses (integrated plants).

(²) Data provided for 2005 are based on the database for the Registration and Identification (I&R) System of the Ministry of Agriculture and Rural Affairs (MARA).

(³) The figure for dairy cows is the cattle and buffaloes that are milked. The number of milked animals is calculated by multiplying the number of female mature animals by milking ratios.

(⁴) The figures include cattle and buffaloes. The meat production figure for bovine animals is also received from TURKSTAT includes the meat from the municipal and private slaughterhouses (integrated plants) and the meat during Moslem festival of sacrifice. The meat production is calculated by multiplying the number of the bovine animals by their carcass weights provided by slaughterhouses. Figures for meat production is very low due to unregistered meat and meat products which mostly includes the meat produced and consumed to meet own needs of rural population. The meat production was calculated as 450.783 tons in 2003 and 498.362 tons in 2004 by Agricultural Economics Research Institute of the Ministry of Agriculture and Rural Affairs. These amounts include unregistered production and the number of animals slaughtered is predicted about 2.458.368 in 2003 and 2.660.368 in 2004 if unregistered slaughtering (slaughtering for self consumption) and illegal animal movements are taken into consideration.

(⁵) The figures are obtained from Undersecretariat for Foreign Trade (UFT).

(⁶) Calculation of Agricultural Economics Research Institute. See Annex 1.

(⁷) Records of MARA (includes unregistered production)

(⁸) Calculated on the basis of Records of Agricultural Economics Research Institute.

(2) Farm structure (livestock production)

– Number of holdings for beef production:

Number of holdings that engaged with animal husbandry	2001*
	2,147,068
The number of holdings engaged with both crop production and animal husbandry	2,074,439
The number of holdings engaged with only animal husbandry	72,629

2001*	
The number of holdings engaged with fattening of cattle and buffaloes	71,216
The number of holdings engaged with milk production from cattle and buffaloes as well as plant production	1,746,927

Total agricultural holdings in Turkey 2001*	3,076,649
* TURKSTAT results of 2001 Agriculture Census, Agricultural Holdings (Households) Survey ¹ .	

¹ In Agricultural Holdings (Households) Survey the coverage is all agricultural holdings in the villages and in the centers of districts having less than 5,000 inhabitants and this survey is a sampling survey. The agricultural census is conducted every ten years. The next one will be conducted on 2011.

The subdivision of the holdings engaged with fattening of cattle and buffaloes are:

2001*		
Size of holding (the number of cattle and buffaloes)	Number of holdings engaged with fattening of cattle and buffaloes	The number of cattle and buffaloes
Total	71,216	1,172,753
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

* TURSTAT results of 2001 Agriculture Census, Agricultural Holdings (Households) Survey

The distribution of holdings according to the average number of animals as of December 2005 is given below: 1789553

2005	
Size of holding (the number of cattle and buffaloes)	Number of holdings keeping cattle and buffaloes
Total	2,240,576
1-4	1,136,050
5-9	469,302
10-15	184,201
15 +	451,023

Source: MARA, Animal Identification and Registration Database

(3) Slaughterhouses structures with representative rate

- Describe briefly the slaughtering industry (number of abattoirs for bovines; capacity; annual throughput; ownership; etc.)

There are a total of 627 slaughterhouses for bovine animals and the daily capacity according to years is given below:

	2002	2003	2004	2005
daily capacity (in head)	15,223	17,393	18,285	26,637

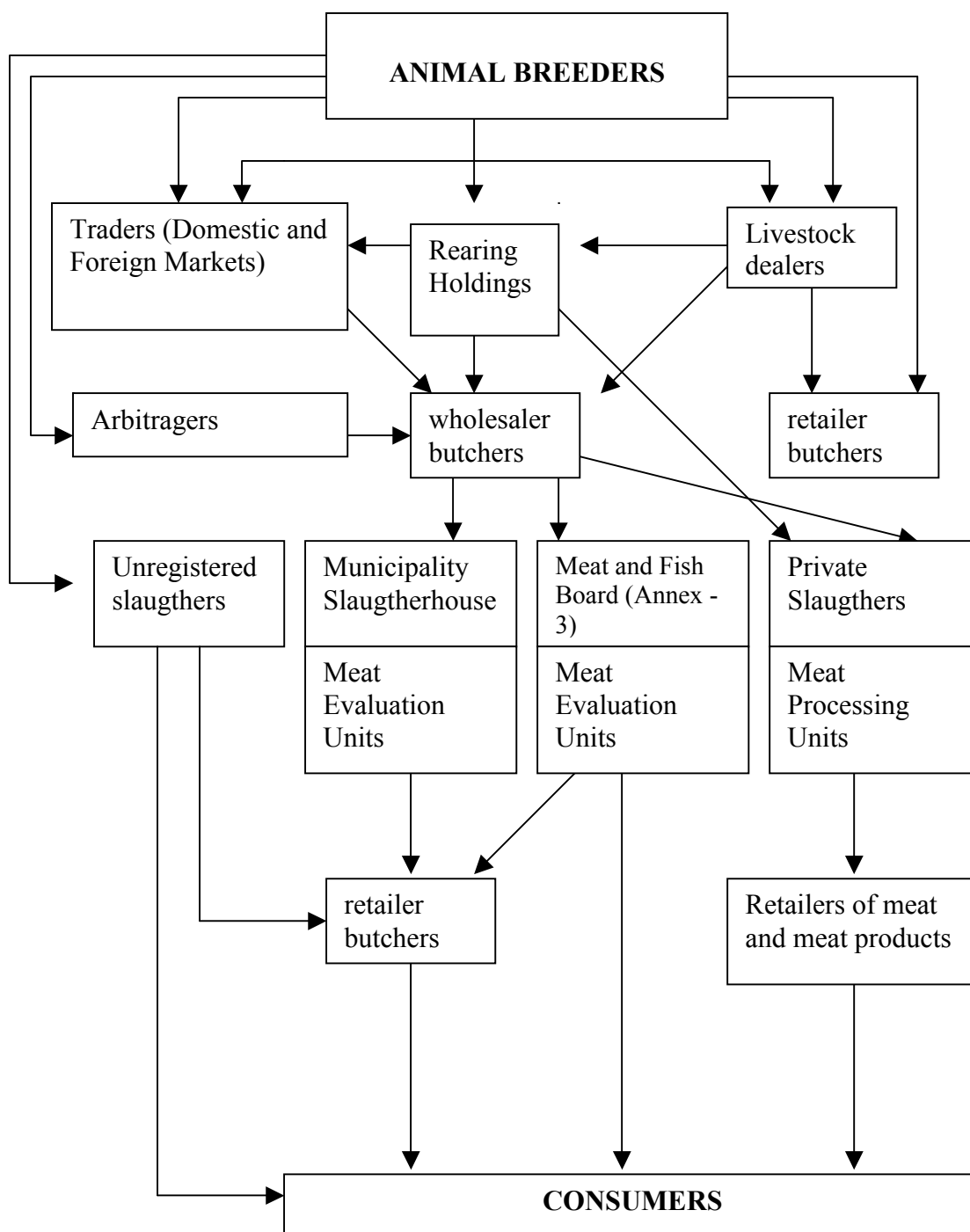
Source: MARA

The number of private slaughterhouses is 150. The number of slaughterhouses operated by state, local administrations and municipalities is 477. Although the number of slaughterhouses is high, most of them are 3rd class and their capacities are very limited to meet the local needs. Also only 15-20 % of the slaughtering is made at these slaughterhouses while 75-80 % in private slaughterhouses. Slaughterhouses are classified according to their technical and hygienic conditions which are defined and listed in Communiqué on the Operation, Monitoring Conditions and Principals of the Red Meat/Poultry Meat and Meat Products Producing Premises. Official veterinarians are employed at the publicly owned slaughterhouses (veterinarians working for the municipalities). For the private slaughterhouses officially authorized and accredited private veterinarians are contracted and paid by the government. The legal basis regarding authorized veterinarians is Communiqué on the Implementation of the support to private veterinarians that are working for the health production of meat at slaughterhouses and processing plants (No: 2005/26). The number of First Class slaughterhouses is 173 and their total capacity is equal to 17,177 bovine animal units. The list of 1st class slaughterhouses is given in Annex-2. The total number of second class slaughterhouses is 19. Amongst these slaughterhouses one of them belongs to private sector. The slaughterhouse's capacity is equal to 40 bovine animal units. The total number of third class slaughter houses is 435. Among these 8 slaughterhouses belong to private sector. This kind of slaughterhouse's capacity is equal to 20 bovine animal units and this capacity is also equal to 160 ovine animal units.

2. Market tools

- **How is the commerce organised? Are there physical live markets or are the purchases of animals realised directly on the farms by traders or slaughterhouses, or both?**

The purchases of live animals are made through animal markets owned by municipalities and commodity exchanges. There are physical live animal markets and bourses for bovine animals and the purchases of animals can also be realized directly on the farms and slaughterhouses by traders. There are 47 authorized animal bourses and animal markets functioning 4 of which are private. The marketing channels are summarized at the chart below. The list of animal bourses and markets are given in Annex 3.



- **Is there a carcass classification system for bovine animals or another standard quality system? If yes, provide a short description.**

Yes. The classification was laid down by the TS 668 dated November 1986 of Turkish Standards Institute. The standard includes the 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. The standard 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). The standard also includes sampling procedures. But the implementation of the standard is not compulsory.

- **On what basis are animals purchased? Live weight? Price per head? Dead weight? Carcass grading system? Flat price for batch of animals? Flat price per kilogram carcass weight?**

Price on basis of live weight, price per head, price for dead weight and flat price per kg carcass weight are used. Also traditionally a price for a couple of cattle may be used at animal markets. Prices are determined in the market.

- **Is there a price reporting system requiring abattoir or traders to communicate regularly beef prices? If yes, provide a short description.**

There is no price reporting system for market regulatory purposes.

- **Is there an intervention system for the beef market like public intervention, private storage aid or other? If yes, provide a short description.**

No.

- **Are there any other market support measures available/used for the beef sector?**

Subsidies were granted to the cattle breeders in the form of price support. A new structural support system has been established with the objective to stabilize markets of the sector, to increase production and productivity and to decrease cost, to increase the income of the breeders, to prevent unregistered and uncontrolled slaughtering, to promote slaughtering at registered and licensed slaughterhouses and to increase the number of animals slaughtered at those slaughterhouses. The new structural support system has not been implemented yet. Only in year 2004 subsidies were granted for the carcasses of male cattle slaughtered at registered slaughterhouses (Communiqué No: 2004/21). The carcass weight was set at 190 kg. minimum to be eligible for payment. An animal should be registered on the I&R database was the pre-conditionality for the payment of subsidy.

The subsidies paid in the previous years are given below:

YEARS	Amount Granted For Each Animal (€)	Total Amount Granted (€)
2000	34.82	48,751,166.16
2001	18.30	28,371,556.13

Source: MARA

Meat Support Premium

YEAR	For each kg. weight of the carcass (€)	Total Amount Granted (€)
2004 (22.05.2004-30.09.2004)	0.57	22,057,344.12
2004 (01.10.2004-01.01.2005)	0.28	10,034,825.24
TOTAL		32,092,169.35

Source: Ziraat Bank

No support was granted to the breeders in 2005. MARA may support breeders on the occasion of sharp price falls.

3. Labelling of beef products

- **Is it presently possible to apply the system for the identification and registration of bovine animals providing for eartags to identify animals individually; computerized databases, with location of each animal; animal passports and individual register kept on each holding?**

A system is used for the identification and registration of animals which was established in 2001 with the Regulation on the Identification, Registration and Monitoring of Bovine Animals (Official Gazette No: 24829, dated 28 July 2002). The system requires the application of double eartags to each bovine animal on which a individual eartag number is given, maintaining a register on each holding (farm, market etc.), cattle-passports and a computerized database at national level. When eartagged each animal is recorded on the computerized database and an animal passport is issued for each bovine animal to accompany animal on movements. Also the system requires the registration of the holdings with specific holding numbers. Holdings are also obliged to keep records.

- **Is there a national labeling system of beef products? If so, provide a brief description.**

The regulation on the Identification, Registration and Monitoring of Bovine Animals is in compliance with the EU legislation (Regulation (EC) 1760/2000) except the labeling of beef. There is no national beef labeling system used establishing the link between meat and individual animal or carcass and the individual holding.

3 Turkish Food Codex Communiqué's are in force regarding the labeling of beef which are "Labeling as regards nutrition and General Labeling of Foodstuffs" (Official Gazette No: 24857 dated 25.08.2002), "Meat Products" (Official Gazette No: 23960 dated 10.02.2000) and "Fresh meat, Meat Preparations and Meat Mixtures" (last amendment Official Gazette No: 24345 dated 17.03.2001). These communiqués lay down the information to be included on the label.

4. Import/export

- **Please provide statistical overview of external trade (import and export) in terms of live bovines and beef during last 5 years by specifying type of products and the main countries of origin (for imports) and of destination (for exports). Please provide the data expressed in number of heads (live trade) and in carcass weight equivalent (for beef trade).**

EXPORTS OF LIVE BOVINE ANIMALS OTHER THAN PURE-BRED BREEDING (0102.90.05-79)

	2000		2001		2002	
	Head	Usd	Head	Usd	Head	USD
Algeria	3	3,911				
Lebanon			7,724	4,520,412	279	161,700
Total	3	3,911	7,724	4,520,412	279	161,700

Source: UFT

EXPORTS OF PURE-BRED BREEDING LIVE BOVINE ANIMALS (0102.10)

	2004	
	Head	Usd
Russian Federation	1	184

Source: UFT

EXPORTS OF MEAT (0201 and 0202)

	2000		2001		2002		2003		2004		2005 (Jan-Oct)	
	Tons	usd	Tons	usd	Tons	usd	Tons	usd	Tons	usd	Tons	usd
Germany	0		0		0		0		0	607	0	
Italy	0		0	132	0		0		0		0	
Norway	0		0	306	0		0		0		0	
Malta	0		0	1,149	1	1,822	0		0		0	
Russian Federation	0		0		0	1,199	0		0		0	
Kazakhstan	0		0		0		0		0		2	33,655
Serbia Montenegro	52	262,217	28	106,619	28	105,042	14	75,686	0		0	
Macedonia	0		14	51,683	0		22	126,756	0		0	
Antigua Bermuda	0		0	235	0		0		0		0	
St. Vincent	0		0		0	368	0		0		0	
Iraq	0		0		0		54	381,768	36	176,965	24	199,372
Kuwait	0		0		0		1	5,171	0		0	
UAE	1	5,460	0		0		0		0		0	
Other	5	27,272	11	62,245	3	11,042	0	1,876	2	8,663	0	3,497
TOTAL	59	294,949	54	222,369	32	119,473	91	591,257	39	186,235	26	236,524

Source: UFT

IMPORTS OF PURE-BRED BREEDING LIVE BOVINE ANIMALS (0102.10)

	2000		2001		2003		2005(Jan-Oct)	
	Head	Usd	Head	Usd	Head	Usd	Head	Usd
Germany	70,853	2,897,177	66	96,652				
Italy	36,309	166,742						
Denmark	67	77,127						
Sweden							501	1,169,289
Austria	2	10,431						
USA	33	114,297	224	732,868	2,128	3,279,260		
Uruguay							397	676,422
North Korea							570	983,250
TOTAL	107,264	3,265,774	290	829,520	2,128	3,279,260	1,468	2,828,961

Source: UFT

IMPORTS OF MEAT (0201 and 0202)

	2000		2002		2004	
	Tons	Usd	Tons	Usd	Tons	Usd
Macedonia					9	73,961
People's Rep China	5	13,629				
Other			3	5,286		
TOTAL	5	13,629	3	5,286	9	73,961

Source: UFT

- **Is there a system of import licenses for beef meat or bovine animals for trade with third countries?**

If so, provide a short description (Delivery documents, degree of utilization, security, type of control).

Under the current Import/Export Regime, no import/export licenses are required for beef meat or bovine animals. Import licenses are only required for the importation of these products under the tariff quotas resulting from bilateral agreements.

- **Are there preferential import agreements with third countries? If so, please give detailed description and degree of utilization during last 5 years (e.g. type of agreement; countries and products concerned; level of import duties, etc.).**

Turkey's concessions for import of beef and veal in its preferential trade agreements are as follows:

THE EUROPEAN UNION (Turkey-EU Association Council Decision No. 1/1998)			
CN CODE	DESCRIPTION	QUOTA	DUTY
0102 10	Live bovines; pure bred breeding animals	ul	0
0102 90 29	Live bovine animals; other than pure bred breeding animals of a weight from 80 kg to 160 kg	2,260 tons	0
ex 0102 90	Live bovine animals; other than pure bred breeding animals, other than those of a weight from 80 kg to 160 kg	4,025 tons	50% red MFN
0202 20	Other cuts of bovine meat, with bone in , frozen	5,000 tons	50 % red with max duty 30%
0202 20	Other cuts of bovine meat, with bone in, frozen	14,100 tons	30% red with max duty 43%
0210	Meat and edible meat offal, salted, in brine, dried or smoked; edible flours and meals of meat or meat offal	250 tons	52% ad valorem

Source: UFT

TURKEY-ROMANIA FREE TRADE AGREEMENT (*) (Entered into force on 01.02.1998)			
CN CODE	DESCRIPTION	QUOTA	DUTY
ex 0102 90	Live bovine animals; other than pure bred breeding animals	5,500 tons	35%
excluding (0102 90 49 00 11,12; 0102 90 29)			
0102 90 29	Live bovine animals; other than pure bred breeding animals of a weight from 80 to 160 kg	500 tons	0%
0102 90 49 00 11	Live bovine animals; other than pure bred breeding animals of a weight from 160 to 300 kg	500 tons	10%
0102 90 49 00 12			
0201	Meat of bovine animals, fresh or chilled	500 tons	50%
0202 20	Other cuts of bovine meat, with bone in, frozen	500 tons	50%

(*)The concessions stated in the agreement have been temporarily compensated with concessions on other products (wheat, barley and maize) with Decision No. 9/2001 of Turkey-Romania Free Trade Agreement Joint Committee. Source: UFT

Import duties:

CN Code	Product Description	MFN %	Bound Rate (%)
0102 10	Live bovine pure-bred animals	0	0-7,8
0102 90 05 to 0102 90 79	Live animals, other than pure bred breeding	135	135
0201	Meat of bovine animals, fresh or chilled	225	225
0202	Meat of bovine animals, frozen	225	225

- **Is there an aid system for exportation? If yes, provide a short description.**

There is no aid system.

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	-	-	-	-
0201	81,302.50	544.40	-	
0202			-	-

Annex-1: (Cattle) Red Meat Supply and Disappearance 2000-2005

Turkey (Cattle) Red Meat Supply and Disappearance 2000-2005						
	2000	2001	2002	2003	2004	2005
					(estimation)	(estimation)
SUPPLY						
Beginning Stocks	45,324	44,801	44,905	43,438	46,797	47,680
Production *	561,906	544,373	549,015	450,783	498,362	582,805
Import	5	0	3	0	9	0
Total Supply	607,235	589,174	593,923	494,220	545,168	630,485
DISAPPEARANCE						
Total Domestic Disappearance	562,375	544,214	550,454	447,332	497,450	585,161
Export	59	54	32	91	39	3
Total Disappearance	562,434	544,268	550,486	447,423	497,489	585,164
Ending Stocks	44,801	44,905	43,438	46,797	47,680	45,321
Stocks/Use Ratio	8	8	8	10	10	8

Source : Agricultural Economics Research Institute. (*includes unregistered production.)

Annex-2: List of 1st Class Slaughthouses

	Name of the premises	Province
1.	Pınar Et Entegre*	İzmir
2.	AYTAÇ*	Çankırı
3.	TUNA ET*	Adana
4.	DERMAN ET*	Adana
5.	Meat and Fish Board	Adana
6.	SAFTAT ET*	Adıyaman
7.	ŞUHUT B. M.	Afyon
8.	GÖBEKLİ KARDEŞLER*	Afyon
9.	İKBAL ET*	Afyon
10.	ALPTÜRK*	Afyon
11.	KULE KARDEŞLER*	Afyon
12.	AFYON ET(Cumhuriyet)*	Afyon
13.	AFES GIDA*	Afyon
14.	AHMET MÜHSÜRLER*	Afyon
15.	PORTAKALOĞULLARI ET*	Afyon
16.	ÖZEL İTİMAT ET*	Afyon
17.	VAHDET HİPERMARKET*	Afyon
18.	MÜHSÜRLER ET*	Afyon
19.	ÖZEL EFENDİOĞLU ET*	Afyon
20.	KÜÇÜK KARDEŞLER*	Afyon
21.	YAYLA ET*	Afyon
22.	ALP ENTEGRE*	Afyon
23.	AĞRI ET*	Ağrı
24.	SULUOVA B. M.	Amasya
25.	PAN ET*	Amasya
26.	UYGUR B. M.	Amasya
27.	SULTAN ET*	Ankara
28.	AKBULUT ET*	Ankara
29.	MISIRDALI ET*	Ankara
30.	HARMANCI ET*	Ankara
31.	KAZAN B. M. (Aygüler et)*	Ankara
32.	ATB*	Ankara
33.	AL-ET*	Antalya
34.	AN-ET*	Antalya
35.	MANAVGAT B. M.	Antalya
36.	EGE ET*	Aydın
37.	AKÇAOVA B. M.	Aydın
38.	NAZİLLİ B.M.(Denen Gıda)*	Aydın
39.	AYDIN B.M.	Aydın
40.	BALIKESİR B.M.(Sönmezler)*	Balıkesir
41.	DÖRT MEVSİM*	Balıkesir
42.	GÖBEL B.M.	Balıkesir
43.	GÖNEN B.M.(Ayca Et)*	Balıkesir
44.	GÜRCAN ET*	Balıkesir
45.	SEVİLMİŞ ET*	Balıkesir
46.	SARIKIZ ET*	Balıkesir
47.	BİGADİÇ B.M.	Balıkesir
48.	PAMUKÇU B.M.(Ölmezler Et)*	Balıkesir
49.	KEPSUT B.M.	Balıkesir
50.	ERŞAN ET*	Bilecik
51.	GÜRCANLAR BEŞİ*	Bilecik
52.	EBK	Bingöl
53.	TAT ET*	Bitlis
54.	BOLU B. M.	Bolu
55.	BURDUR GÜÇ BİRLİĞİ*	Burdur
56.	EVREN ET*	Burdur
57.	BURSAM ET*	Bursa
58.	ET-SA*	Bursa
59.	BURSA ET*	Bursa
60.	AKÇLAR B. M.	Bursa
61.	BİGA B. M.	Çanakkale
62.	ÇANKIRI B.M.	Çankırı

63.	TARIM ET*	Çorum
64.	ÇORUM B.M.(Tarım Et)*	Çorum
65.	İSKİLİP B.M.	Çorum
66.	ÖZÜİÇLİ ET BM	Denizli
67.	EBK	Diyarbakır
68.	GÜLER ET*	Diyarbakır
69.	MAY ET*	Diyarbakır
70.	KEŞAN B.M.	Edirne
71.	UZUNKÖPRÜ B.M.	Edirne
72.	ELKAS*	Elazığ
73.	YENİGÜN ET*	Elazığ
74.	EL ET*	Elazığ
75.	EĞİNLİOĞLU ET*	Erzincan
76.	ERZİNCAN B. M.	Erzincan
77.	ERSAN ET*	Erzincan
78.	ÖZBEYLİ ET*	Erzurum
79.	ÖZESAN ET*	Erzurum
80.	EBK	Erzurum
81.	ORAL ET*	Erzurum
82.	ÇELİKLER GIDA*	Eskişehir
83.	BİRLİK GIDA*	Eskişehir
84.	YEŞİLDERE B.M.	Gaziantep
85.	GÖKTAŞLAR ET*	Gaziantep
86.	GAZİANTEP ET*	Gaziantep
87.	OĞUZELİ B.M.	Gaziantep
88.	OVAŞ ET*	Hakkari
89.	GÜLKÖY ET*	Isparta
90.	MEZİTLİ B.M.	Mersin
91.	HADİ DOĞAN ET*	Mersin
92.	ETSAN GIDA*	İstanbul
93.	COŞKUN ET*	İstanbul
94.	TAT KON.*	İstanbul
95.	ÖZLEM ET *	İstanbul
96.	ELİF ET*	İstanbul
97.	BEŞLER ET*	İstanbul
98.	ENDER ET*	İstanbul
99.	ÇEKMECE ET*	İstanbul
100.	İBBM	İstanbul
101.	ÇOBAN ET*	İzmir
102.	TANSAŞ*	İzmir
103.	SS HALİLBEYLİ	İzmir
104.	ÇELİK HAYVANCILIK*	Kars
105.	KASTAMONU ET*	Kastamonu
106.	DEVRAKANI B.M.	Kastamonu
107.	ŞAHİN ET*	Kayseri
108.	İMAMOĞLU ET*	Kayseri
109.	BAYAZICIOĞLU ET*	Kayseri
110.	ÖZDANACI ET*	Kayseri
111.	TAMET*	Kayseri
112.	ÜNLÜ ET*	Kayseri
113.	KELLECİCİOĞLU ET*	Kayseri
114.	YORULMAZ ET*	Kayseri
115.	MERVE GIDA*	Kayseri
116.	MÜSLÜMOĞLU GIDA*	Kayseri
117.	TANÇ DERİCİLİK*	Kayseri
118.	DEVELİ B.M.(A. Ağca)*	Kayseri
119.	ÖZBAĞ ET*	Kırşehir
120.	İSTANBUL ET*	Kırşehir
121.	KİSMET ET*	Kırşehir
122.	KARPINAR ET*	Konya
123.	AYDOS GIDA*	Konya
124.	KONYA ET*	Konya
125.	BESLER ET*	Konya
126.	SEY ET*	Konya
127.	EBK(MERAM)*	Konya
128.	ARVASI ET*	Konya
129.	ÖZGİRAY ET*	Konya

130.	ABAZLAR ET*	Konya
131.	DOĞANBEY B.M.	Konya
132.	KÜTAHYA ET*	Kütahya
133.	ŞİRİN ET*	Kütahya
134.	MALET*	Malatya
135.	SALİHLİ B.M.	Manisa
136.	TURGUTLU B.M.	Manisa
137.	ELBİSTAN B.M.	K.Maraş
138.	NEVŞEHİR GIDA*	Nevşehir
139.	ÜRGÜP B. M.	Nevşehir
140.	AVANOS B. M.	Nevşehir
141.	UZUN KARDEŞLER	Nevşehir
142.	RİZE B.M.	Rize
143.	EBK	Sakarya
144.	DEMİRCİOĞLU ET*	Sakarya
145.	SAMES*	Samsun
146.	SIİRT ET*	Siirt
147.	TANET*	Sivas
148.	4 EYLÜL ET*	Sivas
149.	HAYROBOLU B.M.(Mahiroğlu Et)*	Tekirdağ
150.	TEKİRDAĞ B.M.	Tekirdağ
151.	HACİBEY ET*	Tokat
152.	TURHAL B.M.	Tokat
153.	ZİLE B.M.	Tokat
154.	KADIOĞLU ET*	Tokat
155.	NİKSAR B.M.	Tokat
156.	TRABZON B.M.	Trabzon
157.	DEMET*	Ş. Urfa
158.	YAYLA AKAR*	Uşak
159.	EBK	Van
160.	VANET*	Van
161.	PINAR ANODOLU*	Yozgat
162.	BAŞAK ET*	Aksaray
163.	AKSARAY B.M.	Aksaray
164.	ORHAN AĞAÇLI ET*	Aksaray
165.	KLASS ET*	Karaman
166.	KARAMAN B.M.	Karaman
167.	ARDAHAN ET*	Ardahan
168.	İŞLEROĞLU ET*	Osmaniye
169.	KADIRLI B.M.	Osmaniye
170.	DÜZCE B.M.	Düzce
171.	BOLVADİN ET*	Afyon
172.	İBRAHİM MAZLUM*	Afyon
173.	KARAKOÇANLILAR ET*	Elazığ
	* Private slaughterhouses	

Source: MARA

Annex-3: List of Animal Markets and Bourses

1. Ankara Department of Commodity Exchange
2. Edirne Department of Commodity Exchange
3. Keşan Department of Commodity Exchange
4. İstanbul Department of Commodity Exchange
5. (İzmir) Tansaş Integrated Meat Facility and Animal Market
6. Bursa Department of Commodity Exchange
7. Kırşehir Department of Commodity Exchange
8. Live Animal Bourse of Elbistan Municipality
9. Elazığ Commodity Exchange (Live Animal Market)
10. Denizli Commodity Exchange (Live Animal Market)
11. Live Animal Market of Çorum İskilip Municipality
12. Live Animal Market of Konya Ilgın Municipality
13. Live Animal Market of Konya
14. Live Animal Market of Malatya Municipality
15. Animal Market of Kütahya Municipality
16. Animal Market of Kütahya Tavşanlı Municipality
17. Animal Market of Aydın Nazilli Municipality
18. Animal Market of Sivas Municipality
19. Animal Market of Gaziantep Municipality
20. Animal Market of Bolu Municipality
21. Animal Market of Tekirdağ Çorlu Municipality
22. Animal Market of Tekirdağ Hayranbolu Municipality
23. Animal Market of Osmaniye Municipality
24. Animal Market of Osmaniye Kadirli Municipality
25. Animal Market of Bolu Gerede Municipality
26. Animal Market of Bolu Mudurnu Municipality
27. Animal Market of İstanbul Küçüköğlü Municipality
28. Animal Market of Çorum Alaca Municipality
29. Animal Market of Düzce Center Municipality
30. Animal Market of İçel Hadi Doğan Municipality
31. Animal Market of Muğla Bayır Municipality
32. Animal Market of Denizli Çivril Municipality
33. Animal Market of Edirne Havza Municipality
34. Animal Market of Bartın Akçamescit Municipality
35. Animal Market of Kayseri Bünyan Municipality
36. Animal Market of Bilecik Bozhöyük Municipality
37. Animal Market of Kütahya Simav Municipality
38. Animal Market of Samsun Kavak Municipality
39. Animal Market of Samsun Asarcık Municipality
40. Animal Market of Samsun Havza Municipality
41. Animal Market of Samsun Kavak –Toptepe
42. Animal Market of Konya Cihanbeyli Municipality
43. Animal Market of Bartın Akçamescit
44. Animal Market of Bartın Apdipaşa Municipality
45. Animal Market of Aydın Municipality
46. Animal Market of Uşak Yaman Meat and Animal Husbandry Ltd.Co.
47. Animal Market of Adana Yüreğir Municipality

Source: MARA

Annex-4: Meat and Fish Board

Meat and Fish Board (MFB) was established with the Decree no.871 of 1952 as a State Economic Enterprise depended upon the Ministry of Commerce in order to develop meat industry and it was activated in 01/01/1953. As its aim of establishment, MFB was considered as an instrument of guidance for the economy under the structure of the government and the board was functioned to deal with trade, production and industry. With this objective, the board was entitled to purchase, sale and trade of slaughtered animals, fish and all of their natural and industrial products. The board was also functioned for the economical duties in compliance with the Decree. For instance, it had a function of the regulation on market arrangement and irregular price fluctuations, through the buying in and sale of foodstuffs directly by a municipality.

Through the period of 50 years, the board was the market guide of the controlled slaughtering and modernized slaughtering services by realizing the production and slaughtering of 9,000,000 cattle (1,390,000 tons), 77,000 buffalos (14,000 tons), 19,000,000 sheep (407,000 tons), 1,300,000 lamb (16,000 tons), 230,000 goat (4,000 tons), 85,000,000 poultry (125,000 tons).

Until recently, according to the usage of the natural breeding areas (plateau- pastures) in animal breeding, autumn season were designated as “breakdown season” and the intensive breeding industries were put on the market in that season because of their incompetence. MFB prevented the tilt of the supply-demand balance against the producers by purchasing all the excess demand animals that were put on the market because of the wide cold storage capacity. The board has implemented a triple purchasing system named as connection, free and import purchases in order to supply live animal stock for its own need and to supply marketing guarantee for the producer. Within the framework of the SEE’s privatization program, MFB has been taken in the scope of the privatization by the Decree No 3088 of 20/05/1992. High Planning Council Decision No 93/2 of 22/01/1993 the board has been transposed into “Meat and Fish Products J.C. (Joint-stock Company)” and afterwards it has been restituted to MARA in compliance with the decision of the Privatization High Council no 2005/104 of 26/08/2005. In 1992 most of the premises of the board was privatized and beginning from the year 2005, the function is carried on with 6 Meat Combination (Adana, Bingöl, Diyarbakır, Erzurum, Sakarya, Van) and 1 Meat Industry Establishment (Sincan). The applied slaughtering capacity of the existing meat combinations is 69,000 tons/year and the white meat production capacity in the poultry combination in Sincan is 9,000 tons/year.

Source: MARA-Meat and Fish Board