

COMMON ORGANISATION OF THE MARKET IN SEEDS

TURKEY

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

1. BASIC INFORMATION

1.1. Balance sheet

- Production of the following species or group of varieties (x 100 kg):

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- . CERES								
Triticum spelta L.								
Oryza sativa L.	6,950	10,385	9,964	16,248	9,591	13,164	7,295	12,210
- . OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- . GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.			150	225		219	317	
Arrhenatherum elatius (L.)								
Dactylis glomerata L.					191	220	333	280
Festuca arundinacea Schreb.	50	10	130	210	420	350	320	650
Festuca ovina L.	20		50	50	80	80	130	150
Festuca pratensis Huds.								
Festuca rubra L.	50		140	180	180	180	280	430
Festulolium								
Lolium multiflorum Lam.	300	350	550	190	280	100	190	450
Lolium perenne L.	700	520	1,710	1,850	2,200	1,910	2,790	3,410
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.								
Poa nemoralis L.								
Poa pratensis L.	20		100	150	250	250	400	350
Poa palustris et Poa trivialis L.								
- . LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	16,224	26,190	17,267	26,908	1,748	224	2,106	4,210
Onobrichis viciifolia Scop.					1,400	1,155	1,400	1,1650
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.								
Trifolium repens L.					450	450	550	20
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (fêverole)			4,610	3,930	9,460	8,000	13,000	8,420
Vicia sativa L.	16,580	19,750	14,250	11,990	3,000	7,580	3,870	10,890
Vicia villosa Roth.								

* Source: Ministry of Agriculture and Rural Affairs (MARA)

- Area of the following species or group of varieties (in ha)

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- CERES								
Triticum spelta L.								
Oryza sativa L.								
- OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.								
Arrhenatherum elatius (L.)								
Dactylis glomerata L.								
Festuca arundinacea Schreb.								
Festuca ovina L.								
Festuca pratensis Huds.								
Festuca rubra L.								
Festulolium								
Lolium multiflorum Lam.								
Lolium perenne L.								
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.								
Poa nemoralis L.								
Poa pratensis L.								
Poa palustris et Poa trivialis L.								
- LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	665.7	749.9	677.5	708.1	1,002.2	588.6	495.1	376.1
Onobrichis viciifolia Scop.	1,190.6	1,054.3	1,402	1,443.4	1,315.5	2,428.7	2,185.2	2,170.7
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.								
Trifolium repens L.								
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (fêverole)	832.8	872.7	856.1	1,024.6	1,365	1,977.2	2,071.6	1,275.3
Vicia sativa L.	420	355	303.5	275	388.5	447.7	184	1,228
Vicia villosa Roth.								

- Export of the following species or group of varieties (x 100 kg):

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- CERES								
Triticum spelta L.								
Oryza sativa L.								
- OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.	4	2		16			1	
Arrhenatherum elatius (L.)								
Dactylis glomerata L.								
Festuca arundinacea Schreb.					70	10	120	10
Festuca ovina L.	1			10			79	2
Festuca pratensis Huds.				36	1			1
Festuca rubra L.	7	6	22	40	134	51	118	65
Festulolium								
Lolium multiflorum Lam.	12	30	9	124	27	68	85	30
Lolium perenne L.	43	193	122	115	194	158	255	88
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.								
Poa nemoralis L.								
Poa pratensis L.	17	26	34	15	1	2	30	11
Poa palustris et Poa trivialis L.								
- LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	453		110	20	10			
Onobrichis viciifolia Scop.					1			
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.								
Trifolium repens L.					13	1	1	6
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (féverole)								
Vicia sativa L.								
Vicia villosa Roth.								

Source: Undersecretariat of Foreign Trade (UFT)

- Import of the following species or group of varieties (x 100 kg):

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- CERES								
Triticum spelta L.								
Oryza sativa L.	300	150						210
- OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.	284	190	281	186	220	165	225	331
Arrhenatherum elatius (L.)								
Dactylis glomerata L.	17	28	97	15	80	128	80	147
Festuca arundinacea Schreb.					1,680	1,880	1,620	2,670
Festuca ovina L.	255	71	371	282	279	342	526	672
Festuca pratensis Huds.	124		30	30		20	20	29
Festuca rubra L.	3,508	2,982	3,682	3,832	6,480	4,924	4,867	5,513
Festulolium								
Lolium multiflorum Lam.	426	200	883	1046	708	998	380	254
Lolium perenne L.	6,354	5,522	6,773	6,806	8,048	6,063	4,649	6,623
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.		25	35		15	19	69	61
Poa nemoralis L.								
Poa pratensis L.	2,132	2,153	2,320	1,859	1,903	1,789	1,918	2,367
Poa palustris et Poa trivialis L.	88	46	53		21	1	12	68
- LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	683	464	818	873	801	655	2,587	9,887
Onobrichis viciifolia Scop.			30	1,397	2,600	1,200	3,378	3,640
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.						23	20	1
Trifolium repens L.	1,052	163	210	485	142	172	268	370
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (féverole)	195	430	320	600			160	400
Vicia sativa L.	1					214		
Vicia villosa Roth.								

Source: Undersecretariat of Foreign Trade (UFT)

- Stocks at the end of marketing year of the following species or group of varieties (x 100 kg):

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
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- . CERES							
Triticum spelta L.							
Oryza sativa L.	430	90	1420		800	510	2070
- . OLEAGINEAE							
Linum usitatissimum L. (lin textile)							
Linum usitatissimum L. (lin oléagineux)							
Cannabis sativa L.							
- . GRAMINEAE							
Agrostis canina L.							
Agrostis gigantea Roth.							
Agrostis stolonifera L.							
Agrostis capillaris L.			40		40	90	50
Arrhenatherum elatius (L.)							
Dactylis glomerata L.			100		60	70	50
Festuca arundinacea Schreb.			120	70	310	430	370
Festuca ovina L.			160	150	50	50	80
Festuca pratensis Huds.			20	20	10	10	20
Festuca rubra L.			600	530	970	660	890
Festulolium							
Lolium multiflorum Lam.			100	70	40	50	50
Lolium perenne L.			1,160	840	2,360	1,160	1,790
Lolium x boucheanum Kunth							
Phleum Bertolinii (DC)							
Phleum pratense L.			20	20	10	20	380
Poa nemoralis L.							
Poa pratensis L.			280	170	290	610	520
Poa palustris et Poa trivialis L.							
- . LEGUMINOSAE							
Hedysarum coronarium L.							
Medicago lupulina L.							
Medicago sativa L. (écotypes)							
Medicago sativa L. (variétés)		2,990	1,820	430	870	390	610
Onobrichis viciifolia Scop.		830	1140	10	360	6,370	1,350
Pisum sativum L. (partim) (pois fourrager)							
Trifolium alexandrinum L.							
Trifolium hybridum L.							
Trifolium incarnatum L.							
Trifolium pratense L.							20
Trifolium repens L.			10	40	50	30	
Trifolium repens L. var. giganteum							
Trifolium resupinatum L.							
Vicia faba L. (partim) (féverole)			400		460	3,190	5,030
Vicia sativa L.		1374	4,080	3,620	1360	1,520	210
Vicia villosa Roth.							

Source: MARA

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- . CERES								
Triticum spelta L.								
Oryza sativa L.								

- OLEAGINEAE Linum usitatissimum L. (lin textile) Linum usitatissimum L. (lin oléagineux) Cannabis sativa L. - GRAMINEAE Agrostis canina L. Agrostis gigantea Roth. Agrostis stolonifera L. Agrostis capillaris L. Arrhenatherum elatius (L.) Dactylis glomerata L. Festuca arundinacea Schreb. Festuca ovina L. Festuca pratensis Huds. Festuca rubra L. Festulolium Lolium multiflorum Lam. Lolium perenne L. Lolium x boucheanum Kunth Phleum Bertolinii (DC) Phleum pratense L. Poa nemoralis L. Poa pratensis L. Poa palustris et Poa trivialis L. - LEGUMINOSAE Hedysarum coronarium L. Medicago lupulina L. Medicago sativa L. (écotypes) Medicago sativa L. (variétés) Onobrichis viciifolia Scop. Pisum sativum L. (partim) (pois fourrager) Trifolium alexandrinum L. Trifolium hybridum L. Trifolium incarnatum L. Trifolium pratense L. Trifolium repens L. Trifolium repens L. var. giganteum Trifolium resupinatum L. Vicia faba L. (partim) (féverole) Vicia sativa L. Vicia villosa Roth.								
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* Since Law No.5042 on Protection of Breeders' Rights of New Plant Varieties entered into force in 2005, no data is available.

• Total domestic use : (net prod. + imports – esport +/- variation stocks x 100 kg)

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- CERES								
Triticum spelta L.								
Oryza sativa L.	7,250	10,965	10,054	17,668	9,591	13,964	7,805	14,490

- OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.	280	188	431	435	220	424	631	381
Arrhenatherum elatius (L.)								
Dactylis glomerata L.	17	28	97	115	271	408	483	477
Festuca arundinacea Schreb.	50	10	130	330	2,030	2,530	2,250	3,680
Festuca ovina L.	274	71	421	482	509	472	627	900
Festuca pratensis Huds.	124		30	14	19	30	30	
Festuca rubra L.	3,551	2,976	3,800	4,572	7,056	6,023	5,689	6,768
Festulolium								
Lolium multiflorum Lam.	714	520	1,424	1,212	1,031	1,070	535	724
Lolium perenne L.	7,011	5,849	8,361	9,701	10,894	10,175	8,344	11,735
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.		25	35	20	35	29	89	441
Poa nemoralis L.								
Poa pratensis L.	2,135	2,127	2,386	2,274	2,322	2,327	2,898	3,226
Poa palustris et Poa trivialis L.	88	46	53		21	1	12	68
- LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	16,454	26,654	20,965	29,581	2,969	1,749	5,083	14,707
Onobrichis viciifolia Scop.			860	2,537	4,009	2,715	11,148	16,640
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.						23	20	1
Trifolium repens L.	1,052	163	210	495	619	671	847	390
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (féverole)	195	430	320	4,930	9,460	8,460	16,350	13,850
Vicia sativa L.	1		15,624	16,070	6,620	9,154	5,390	11,100
Vicia villosa Roth.								

Source: MARA

• self sufficiency (%):

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
- CERES								
Triticum spelta L.								
Oryza sativa L.	30	46	42	74	17	50	13	22

- OLEAGINEAE								
Linum usitatissimum L. (lin textile)								
Linum usitatissimum L. (lin oléagineux)								
Cannabis sativa L.								
- GRAMINEAE								
Agrostis canina L.								
Agrostis gigantea Roth.								
Agrostis stolonifera L.								
Agrostis capillaris L.								
Arrhenatherum elatius (L.)								
Dactylis glomerata L.								
Festuca arundinacea Schreb.								
Festuca ovina L.								
Festuca pratensis Huds.								
Festuca rubra L.								
Festulolium								
Lolium multiflorum Lam.								
Lolium perenne L.								
Lolium x boucheanum Kunth								
Phleum Bertolinii (DC)								
Phleum pratense L.								
Poa nemoralis L.								
Poa pratensis L.								
Poa palustris et Poa trivialis L.								
- LEGUMINOSAE								
Hedysarum coronarium L.								
Medicago lupulina L.								
Medicago sativa L. (écotypes)								
Medicago sativa L. (variétés)	100	100	100	100	24	14	41	100
Onobrichis viciifolia Scop.			3	9	14	10	40	37
Pisum sativum L. (partim) (pois fourrager)								
Trifolium alexandrinum L.								
Trifolium hybridum L.								
Trifolium incarnatum L.								
Trifolium pratense L.								
Trifolium repens L.								
Trifolium repens L. var. giganteum								
Trifolium resupinatum L.								
Vicia faba L. (partim) (féverole)	1	2	39	52	40	43	50	55
Vicia sativa L.								
Vicia villosa Roth.								

Source: MARA

1.2. Farm structure

Harvest	1998	1999	2000	2001	2002	2003	2004	2005
Total area cultivated (for 4 species; ha)	3,109.1	3,031.9	3,239.1	3,451.1	4,071.2	5,442.7	4,935.9	5,050.1
Total number of producers	74	91	88	94	97	107	117	129

2. MARKET TOOLS

In answering the questions below, would you please be so kind to not limit the answers to a simple yes or no, but please provide an elaborate answer.

2.1. Trade and price fixing

- **How is the commerce organised?**

It is organised in accordance with free market rules.

- **Is the market privately organised or does the state play a role?**

The market is privately organised.

- **Are there standard conditions to produce seeds?**

Yes. The seed companies and institutions must have certain qualifications (mainly infrastructure, breeding programmes, technical staff etc).

- **Does an official definition of quality for seeds as ‘basic seed’ or ‘certified seed’ exist?**

Yes. The variety registration and seed certification system has been harmonised with OECD and ISTA rules and regulations for many species.

2.2. Administrative control

- **Does a land register exist allowing the identification of agricultural plots?**

No

- **Does a control agency exist (name of the responsible institution)?**

Yes. MARA

3. NATIONAL LEGISLATION

- **Is there a state trade monopoly (name of the institution)?**

No

- **Is there a planned programme for the abolition?**

- **Is there a planned programme for the implementation of EU rules concerning the seed production available?**

This will be dealt with during the accession period.

IMPORT/EXPORT

- **Is there a licensing system for seeds for trade with third countries?**

If so, please describe the system.

Under the current Import Regime, there is no import license system for seeds. However, import licenses are required for the importation of agricultural products under the tariff quotas resulting from bilateral agreements.

Is there an aid system for exportation?

If so, please describe the system.

No.

• Are there import agreements with third countries?

If so, please describe the system.

There are preferential trade agreements with certain countries as indicated in the table below. Tariff quotas resulting from these bilateral agreements are allocated to importers under import license system.

THE EUROPEAN UNION			
CN CODE	DESCRIPTION	QUOTA	DUTY
ex 1209	Seeds, fruit and spores, for sowing, except 1209 11 00	1,050 tons	0
1209 10 00	Sugar beet seed	300 tons	0

TURKEY-BULGARIA FREE TRADE AGREEMENT			
CN CODE	DESCRIPTION	QUOTA	DUTY
1209 91	Vegetable seeds	20t	10%

TURKEY-ISRAEL FREE TRADE AGREEMENT			
CN CODE	DESCRIPTION	QUOTA	DUTY
1209 91	Vegetable seeds	10t	50% red MFN

TURKEY-ROMANIA FREE TRADE AGREEMENT			
CN CODE	DESCRIPTION	QUOTA	DUTY
1209	Seeds, fruit and spores, of a kind used for sowing	75 t	0%

TURKEY-MACEDONIA FREE TRADE AGREEMENT			
CN CODE	DESCRIPTION	QUOTA	DUTY
1211 90	Other	100t	50% red MFN
(excl. 1211 90 75;			
950013; 950017;950018			

TURKEY-BOSNIA AND HERZEGOVINA FREE TRADE AGREEMENT			
DESCRIPTION		QUOTA	DUTY
All seeds		Unlimited	0