

COMMON MARKET ORGANISATION IN RAW TOBACCO

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

Information to be provided by tobacco variety

TURKEY

1. TOBACCO VARIETY NAME: **SUN CURED-ORIENTAL**

2. COMPLETE BOTANICAL DESCRIPTION: **NICOTIANA TABACUM**

3. TENTATIVE TOBACCO VARIETY GROUP:

4. STATISTICAL INFORMATION:

4.1. BASIC INFORMATION

Production [tonnes]

| Harvests | | | | | | |
|----------|---------|---------|---------|---------|---------|---------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 251.107 | 242.912 | 199.658 | 144.712 | 155.101 | 107.339 | 126.902 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK

• **Area [ha]**

| Harvests | | | | | | |
|----------|---------|---------|---------|---------|---------|---------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 275.233 | 267.465 | 234.465 | 195.960 | 191.200 | 181.237 | 192.255 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK

• **Yield [tonnes/ha]**

| Harvests | | | | | | |
|----------|-------|-------|-------|-------|-------|-------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 0,912 | 0,908 | 0,852 | 0,738 | 0,811 | 0,592 | 0,660 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK

- **Imports [tonnes]**

All varieties

| Harvests | | | | | | |
|----------|--------|--------|--------|--------|--------|--------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 42.174 | 48.846 | 62.195 | 50.113 | 41.368 | 48.949 | 46.254 |

Source : UFT

- **Exports [tonnes]**

Oriental

| Harvests | | | | | | |
|----------|---------|--------|--------|--------|---------|---------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 123.693 | 107.949 | 89.701 | 94.285 | 84.922 | 106.270 | 107.869 |

Source : UFT

Others(Varieties except Oriental/Sun Cured, Light Air Cured, Flue Cured)

| Harvests | | | | | | |
|----------|--------|-------|--------|--------|-------|-------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 29.736 | 20.651 | 9.570 | 10.541 | 10.356 | 7.241 | 6.903 |

Source : UFT

- **Existing stocks [tonnes]**

All varieties

| Harvests | | | | | | |
|----------|---------|---------|---------|---------|---------|---------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 458.167 | 520.955 | 543.951 | 528.508 | 527.446 | 535.225 | 492.864 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK

- **Total domestic use [tonnes]**

Oriental

| Harvests | | | | | | |
|----------|--------|--------|--------|--------|--------|--------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 53.518 | 42.118 | 43.246 | 43.111 | 41.780 | 42.401 | 45.868 |

Source :1998-2002 TEKEL 2003-2004 TAPDK.

All varieties

| Harvests | | | | | | |
|----------|---------|---------|---------|---------|---------|---------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 108.850 | 118.630 | 114.200 | 114.200 | 104.124 | 109.330 | 105.744 |

Source : 1998-2001 MARA , 2002-2004 TAPDK

self sufficiency (%)

Oriental

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 142 | 162 | 150 | 105 | 122 | 72 | 82 |

4.2. FARM STRUCTURE

- Average tobacco area per farm

0,69 ha (2004 TAPDK data)

- Average total area per farm

No data available

- Number of producers

278.907 (2004, TAPDK data)

- Recognised production areas

There is no recognised production areas

4.3. MARKET TOOLS

- Trade and price fixing

- Number of producers associations

41

Number of first processing enterprises

12

- Cultivation contracts

98 % of the raw tobacco are bought and sold under contractual system in Turkey.

- Quality standard

Quality standards of the Oriental tobaccos are determined by the Institute of Turkish Standards. These standards are demanded in the contracts which are made between producers and buyers.

- Average price * (mention appropriate exchange rate to EUR)

2,69 € (2004 harvest)

- National authorities responsible for the controls

- Does a land registration exist allowing the identification of agricultural parcels?

No.

- Does an intervention agency exist (name of the responsible institution)?

No.

- Is there a planned programme for the implementation of EU rules concerning the tobacco production of your country?

EU rules will be adopted in the accession process.

4.4. NATIONAL LEGISLATION (All varieties)

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

There is a state tobacco trade company (TEKEL), but not monopoly in the market.

- Is there a planned programme for its abolition?

Yes, it is under privatisation programme .

- Is there a licence system for tobacco trade with third countries?

Under the current Import Regime, no import licenses are required for tobacco.

If so, can you describe this system (delivery documents, type of control etc.).

- Is there an aid system for exports (export subsidies, direct aids for traders, assurance on credits etc.)?

There is no aid system for export.

- Are there import agreements with third countries (WTO and others with reduction rate applied in front of normal duties for a certain quota)?

There are preferential trade agreements with the EU, Bulgaria and Bosnia and Herzegovina.

The tariff quotas stemming from the agreement between Turkey and Bulgaria are shown below.

| Country of Origin | CN Code | Tariff Quota | Customs Duty For TRQ | Customs Duty |
|-------------------|-------------|--------------|----------------------|--------------|
| Bulgaria | 2401.10, 20 | 100 Tonnes | 15 % | 25 % |

The customs duty for tobacco originating in Bosnia and Herzegovina is 0 % due to free trade agreement.

Even though there is no tariff preference for import into Turkey the raw tobacco originating in the EU, processed tobacco products are subject to Customs Union between Turkey and the EU. Import duty for the processed tobacco products (CN 24.02, 24.03) from the EU is 0%, and Turkey applies Common Custom Tariff to the third countries.

Turkey has an export subsidy commitment for tobacco under the WTO Agreement, which is as follows:

| Years | Ton | US \$ |
|--------------|--------------|----------------|
| 2004 | 49763 | 6200706 |

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Information to be provided by tobacco variety

1. TOBACCO VARIETY NAME: FLUE CURED
2. COMPLETE BOTANICAL DESCRIPTION: NICOTIANA TABACUM
3. TENTATIVE TOBACCO VARIETY GROUP:
4. STATISTICAL INFORMATION:

4.1. BASIC INFORMATION

- **Production [tonnes]**

| Harvests | | | | | | |
|----------|-------|-------|-------|-------|-------|-------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 4.949 | 5.683 | 5.161 | 4.783 | 4.333 | 3.567 | 3.865 |

Source :1998-2002 TEKEL, 2003-2004 TAPDK.

- **Area [ha]**

| Harvests | | | | | | |
|----------|-------|-------|-------|-------|-------|-------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 1.980 | 2.139 | 2.026 | 1.671 | 1.548 | 1.307 | 1.954 |

Source :1998-2002 TEKEL, 2003-2004 TAPDK.

- **Yield [tonnes/ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 2,50 | 2,66 | 2,54 | 2,86 | 2,80 | 2,72 | 1,98 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

- **Imports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Exports [tonnes]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 870 | 684 | 754 | 754 | 450 | 4 | 1 |

Source : UFT

- **Existing stocks [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Total domestic use**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

self sufficiency (%)

Because records cannot give chance to data selection in variety base, it cannot be calculated.

4.2. FARM STRUCTURE

- Average tobacco area per farm

0,94 ha (2004, TAPDK data)

- Average total area per farm

No data available

- Number of producers

2.075 (2004, TAPDK data)

- Recognised production areas

There is no recognised production areas

4.3. MARKET TOOLS

- Trade and price fixing

- Number of producers associations

-

- Number of first processing enterprises

- 1**

- Cultivation contracts

- 100 % of the raw tobacco are bought and sold under contractual system in Turkey.**

- Quality standard

- Quality standards are demanded in the contracts which are made between producers and buyers.**

- Average price * (mention appropriate exchange rate to EUR)

- 2,07 € (2004 harvest)**

- National authorities responsible for the controls

- Does a land registration exist allowing the identification of agricultural parcels?

- No.**

- Does an intervention agency exist (name of the responsible institution)?

- No.**

- Is there a planned programme for the implementation of EU rules concerning the tobacco production of your country?

EU rules will be adopted in the accession process.

4.4. NATIONAL LEGISLATION

It is shown on paper on Oriental tobacco.

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Information to be provided by tobacco variety

1. TOBACCO VARIETY NAME: LIGHT AIR CURED
2. COMPLETE BOTANICAL DESCRIPTION: NICOTIANA TABACUM
3. TENTATIVE TOBACCO VARIETY GROUP:
4. STATISTICAL INFORMATION:

BASIC INFORMATION

- **Production [tonnes]**

| Harvests | | | | | | |
|----------|-------|-------|-------|-------|-------|-------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 2.462 | 1.898 | 2.443 | 2.229 | 2.047 | 1.192 | 2.480 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

- **Area [ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 985 | 869 | 847 | 742 | 762 | 428 | 959 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

- **Yield [tonnes/ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 2,50 | 2,18 | 2,88 | 3,00 | 2,69 | 2,78 | 2,59 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

- **Imports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Exports [tonnes]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 988 | - | 363 | 191 | 194 | 151 | 1 |

Source : UFT

- **Existing stocks [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

Total domestic use

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

self sufficiency (%)

Because records can not give chance to data selection in variety base, it cannot be calculated.

4.2. FARM STRUCTURE

- Average tobacco area per farm

0,745 ha (2004, TAPDK data)

- Average total area per farm

No data available

- Number of producers

1.286 (2004, TAPDK data)

- Recognised production areas

There is no recognised production areas

4.3. MARKET TOOLS

- Trade and price fixing

- Number of producers associations

-

- Number of first processing enterprises

- 1**

- Cultivation contracts

- 100 % of the raw tobacco are bought and sold under contractual system in Turkey.**

- Quality standard

- Quality standards are demanded in the contracts which are made between producers and buyers.**

- Average price * (mention appropriate exchange rate to EUR)

- 1,83 € (2004 harvest)**

- National authorities responsible for the controls

- Does a land registration exist allowing the identification of agricultural parcels?

- No.**

- Does an intervention agency exist (name of the responsible institution)?

- No.**

- Is there a planned programme for the implementation of EU rules concerning the tobacco production of your country?

EU rules will be adopted in the accession process.

4.4. NATIONAL LEGISLATION

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Information to be provided by tobacco variety

1. TOBACCO VARIETY NAME: TOMBAK
2. COMPLETE BOTANICAL DESCRIPTION: NICOTIANA PERSICA
3. TENTATIVE TOBACCO VARIETY GROUP:
4. STATISTICAL INFORMATION:

4.1. BASIC INFORMATION

- **Production [tonnes]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 153 | 221 | 118 | 74 | 86 | 60 | 54 |

Source :1998-2002 TEKEL, 2003-2004 TAPDK.

- **Area [ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 96 | 135 | 93 | 38 | 152 | 70 | 56 |

Source :1998-2002 TEKEL, 2003-2004 TAPDK.

- **Yield [tonnes/ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 1,59 | 1,64 | 1,27 | 1,95 | 0,57 | 0,86 | 0,96 |

- Source :1998-2002 TEKEL, 2003-2004 TAPDK

- **Imports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Exports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Existing stocks [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Total domestic use**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

self sufficiency (%)

Because records can not give chance to data selection in variety base, it cannot be calculated.

4.2. FARM STRUCTURE

- Average tobacco area per farm

0,20 ha (2004, TAPDK data)

- Average total area per farm

No data available

- Number of producers

280 (2004, TAPDK data)

- Recognised production areas

There is no recognised production areas

4.3. MARKET TOOLS

- **Trade and price fixing**

- Number of producers associations

-

Number of first processing enterprises

1

- Cultivation contracts

100 % of the raw tobacco are bought and sold under contractual system in Turkey.

- Quality standard

Quality standards are demanded in the contracts which are made between producers and buyers.

- Average price * (mention appropriate exchange rate to EUR)

1,94 € (2004 harvest)

- National authorities responsible for the controls

- Does a land registration exist allowing the identification of agricultural parcels?

No.

- Does an intervention agency exist (name of the responsible institution)?

No.

Is there a planned programme for the implementation of EU rules concerning the tobacco production of your country?

EU rules will be adopted in the accession process.

4.4. NATIONAL LEGISLATION

It is shown on paper on Oriental tobacco.

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Information to be provided by tobacco variety

- 1. TOBACCO VARIETY NAME:** HASANKEYF
- 2. COMPLETE BOTANICAL DESCRIPTION:** NICOTIANA RUSTICA
- 3. TENTATIVE TOBACCO VARIETY GROUP:**

4. STATISTICAL INFORMATION:

4.1. BASIC INFORMATION

• **Production [tonnes]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 139 | 356 | 622 | 774 | 2016 | 1637 | 155 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

• **Area [ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 55 | 142 | 311 | 416 | 1021 | 573 | 88 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

• **Yield [tonnes/ha]**

| Harvests | | | | | | |
|----------|------|------|------|------|------|------|
| 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 2,52 | 2,51 | 2,00 | 1,86 | 1,97 | 2,86 | 1,76 |

Source :1998-2002 TEKEL , 2003-2004 TAPDK.

• **Imports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Exports [tonnes]**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

Existing stocks [tonnes]

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

- **Total domestic use**

Because records can not give chance to data selection in variety base, it is shown on oriental section as all varieties.

self sufficiency (%)

Because records cannot give chance to data selection in variety base, it cannot be calculated.

4.2. FARM STRUCTURE

- Average tobacco area per farm

0,486 ha (2004, TAPDK data)

- Average total area per farm

No data available

- Number of producers

181 (2004, TAPDK data)

- Recognised production areas

There is no recognised production areas

4.3. MARKET TOOLS

- **Trade and price fixing**

- Number of producers associations

5

Number of first processing enterprises

Processing is carried out by farmers, with traditional methods.

- Cultivation contracts

100 % of the raw tobacco are bought and sold under contractual system in Turkey.

- Quality standard

Quality standards are demanded in the contracts which are made between producers and buyers.

– Average price * (mention appropriate exchange rate to EUR)

0,60 € (2004 harvest)

- National authorities responsible for the controls

– Does a land registration exist allowing the identification of agricultural parcels?

No.

– Does an intervention agency exist (name of the responsible institution)?

No.

- Is there a planned programme for the implementation of EU rules concerning the tobacco production of your country?

EU rules will be adopted in the accession process.

4.4. NATIONAL LEGISLATION

It is shown on paper on Oriental tobacco.