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Turkey

Food Service - Hotel Restaurant Institutional

Turkey's Tourism Industry is Recovering

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Report Highlights:
There has been an increase in incoming tourists in 2017 compared to 2016 when there were several security problems. Fast food restaurants have been performing better compared to full service and fine-dining outlets. There are approximately 140,000 food service outlets in Turkey in all segments. The industry is very fragmented with mostly small stand-alone restaurants. Five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises.

Post:
Ankara

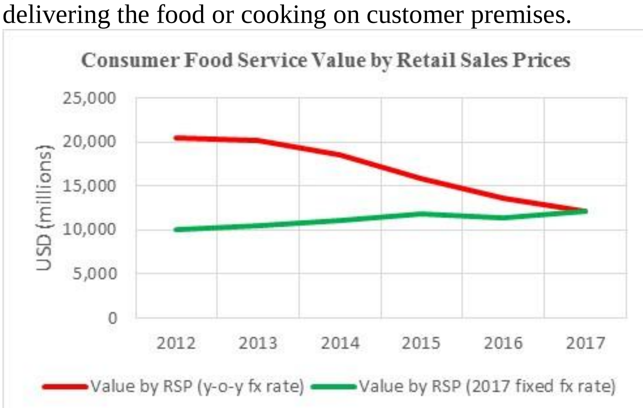
MARKET FACT SHEET: TURKEY

Executive Summary

The Republic of Turkey has a young population of 80 million people fueling consumption. It is in a Customs Union with the European Union (EU) and is the 17th largest economy in the world. Annual GDP growth was 7.4 percent in 2017 but 3.0 and 1.0 percent is forecast for 2018 and 2019, respectively. Geopolitical challenges continue simultaneously with increasing inflation and a significant depreciation of the Turkish Lira over the past year. Nevertheless, there are opportunities in the food sector.

Food Service: Hotel, Restaurant & Institutional

There has been an increase in incoming tourists in 2017 compared to 2016 when there were several security problems. Fast food restaurants have been performing better compared to full service and fine-dining outlets. There are approximately 140,000 food service outlets in Turkey in all segments. The industry is very fragmented with mostly small stand-alone restaurants. Five thousand institutional food service companies are serving corporations, hospitals, schools, universities, state and municipal offices, nursing homes, and some military bases, either via cooking in their own facilities and delivering the food or cooking on customer premises.



Source: Euromonitor International. See Table 1 for data.

Tourism Industry in Turkey

Tourism is an important industry for Turkey. As of 2017 3.1 percent of the GDP and 16.7 percent of all exports are from tourism income. On the Mediterranean coast around the province of Antalya, the coast line is full of all-inclusive hotels in varying sizes and qualities with different amenities. Due to the all-inclusive approach, the restaurant sector is not well-developed in that area, which is mainly dominated by foreign tourists. On the other hand, on the Aegean coast in several vacation resorts where domestic tourists are the majority, hotels vary between hostels to large-size luxury hotels. Food service in these towns such as Bodrum, Datca, Cesme, Kas, Kusadasi is more developed than the Mediterranean coast. Business hotels can be found in large cities where industry and trade are well-developed.

Imports of Consumer-Oriented Agricultural Products

EU contries are the major suppliers of consumer-oriented agricultural products, with the advantage of proximity and the Customs Union. Turkey imports some consumer oriented products such as rice, dried beans, walnuts, almonds, bananas, coffee, cocoa, meat, fish and different kinds of processed/packaged food items.

Quick Facts on Turkey's Food Sector

Consumer Food Service, 2017

US$ 12.2 billion (by retail sales prices)

List of Top 10 (by market share in 2017) Foreign Fast Food Chain Brands in Turkey

1. Burger King (USA)	**6.** Carl's Jr. (USA)
2. Mc Donald's (USA)	**7.** Arby's (USA)
3. Popeye's (USA)	**8.** Sbarro (USA)
4. Kentucky Fried Chick. (USA)	**9.** Krispy Kreme (USA)
5. Subway (USA)	**10.** Duran Sandwiches (USA)

List of Top 10 (by market share in 2017) Domestic Fast Food Chain Brands in Turkey

1. Tavuk Dunyasi	**6.** Sultanahmet Koftecisi
2. Oses Cigkofte	**7.** Usta Doner
3. Simit Sarayi	**8.** Komagene Cigkofte
4. Bay Doner	**9.** Kahta Cigkofte
5. Kofteci Ramiz	**10.** Bereket Doner

Top 10 Retailers (by market share in 2017)

1. Bim	**6.** M- Jet (a Migros Brand)
2. A 101	**7.** Ekomini
3. Migros	**8.** Hakmar
4. Şok	**9.** Onur
5. CarrefourSA	**10.** Yunus

GDP/Population 2017

Population: 80.1 million
GDP, PPP: US $2,133 billion
GDP Per Capita, PPP: US $26,500

Sources: CIA World Fact Book; Euromonitor International; Turkish Statistical Institute; Global Trade Atlas

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Solid GDP and disposable income growth	Domestic and international political challenges
Large population base: young and growing	Economic instabilities such as exchange rate fluctuations
Opportunities	**Threats**
Unsaturated market, open for new items	Complex and time consuming import procedures
Growing demand for high value packed food, ready to-eat/cook meals as the share of working women increases	Strong traditional food and cuisine affecting consumption habits

Sources: CIA World Fact Book; Euromonitor International; Turkish Statistical Institute, Economist Intelligence Unit

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MARKET FACT SHEET: TURKEY

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I. MARKET SUMMARY

Turkey has registered the highest Gross Domestic Product (GDP) growth since 2013 with 7.4 percent annual real growth rate in 2017 after stagnation in 2016 caused by a series of terrorist attacks and an attempted coup against the Government of Turkey (GoT) in July 2016. The strong recovery in 2017 mostly depended on a short-term fiscal stimulus and an economic slowdown has been observed in 2018. The Economist Intelligence Unit forecasts about 3 percent and 1 percent GDP growth for 2018 and 2019, respectively. The annual inflation rate has risen to 24.52 percent as of September 2018 and the Turkish Lira (TL) has depreciated against major foreign currencies quickly. The TL/USD exchange rate was 3.76 on January 2nd, 2018 and 5.98 TL/USD as of October 11, 2018.

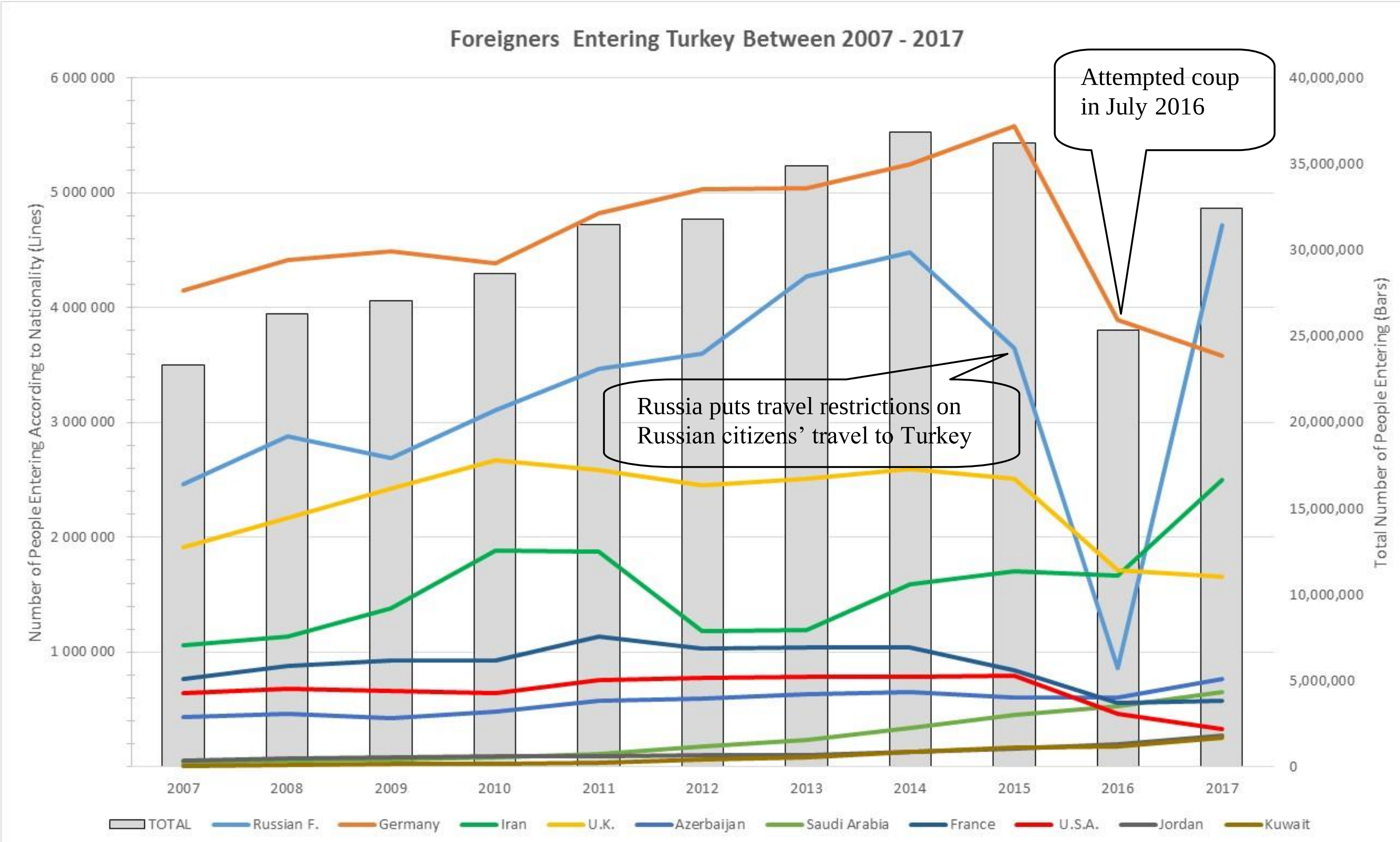
Tourism registered relatively a better performance in 2017 compared to 2016 when domestic security issues nearly halted tourism. The real value of tourist receipts rose by 23.9% in 2017 after a steep fall the previous year. Gains of 3.8% are forecast for 2018 according to Euromonitor International (EMI). Russian tourists started to come back to Turkey as a result of improved relations between the two countries. However incoming arrivals from other European countries continue to stagnate even though it is getting cheaper for them to holiday in Turkey due to the depreciating TL against the Euro. The occupancy levels in hotels continued to be low compared to recent years. This led to a poor performance of food service through hotels, especially at holiday resorts in 2017. The composition of tourists in Istanbul has shifted from European to Middle Eastern tourists, from countries such as Iran, Saudi Arabia, Jordan, Iraq, Tunisia, and UAE. Russian, German and British tourists generally choose Antalya and surroundings for beach resorts, a major proportion of which are all-inclusive hotels.

According to the GoT, there have been about 32 million foreign national entrants to Turkey in 2017, among whom a large number were from Germany. Due to the historical migration from Turkey to Germany, a portion of German nationals visiting Turkey are second and third generation Turkish migrants to Germany carrying German passports. Some of these may be considered tourists but the majority are in the country to visit friends and family.

Table 1: Consumer Food Service Value, Number of Outlets and Number of Transactions

Consumer Food Service	Unit	2012	2013	2014	2015	2016	2017
Value by Retail Sales Price (RSP)	USD (mill.) with y-o-y FX rates	20,520	20,248	18,506	15,855	13,709	12,213
Value by Retail Sales Price (RSP)	USD (mill.) with 2017 fixed FX rates	10,122	10,576	11,097	11,840	11,369	12,213
Number of Outlets	count	136,592	138,036	138,086	139,861	138,723	140,354
Number of Transactions	millions	3,306	3,339	3,378	3,376	3,089	3,078

Source: Euromonitor International.



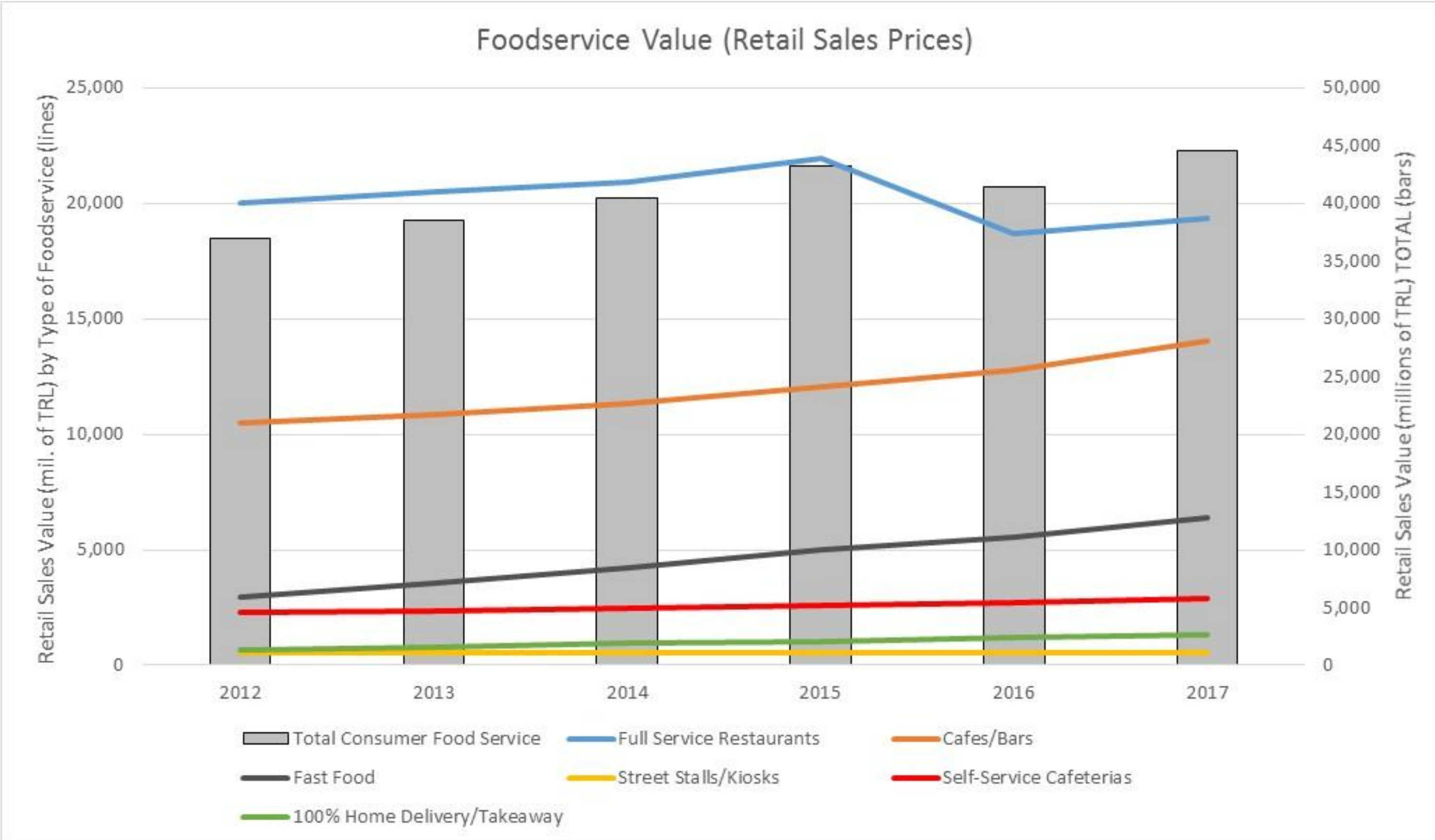
Source: Turkish Border Police via Turkish Statistical Institute. Total number of entrants are shown on the right axis via the bars.

The Turkish food service sector is large and highly fragmented; it can be divided into two categories as commercial and institutional food service. Commercial food service consists of full-service restaurants, self-service restaurants (mostly restaurants called *esnaf lokantasi* serving Turkish home-style cooking), fast-food restaurants, cafes/bars, home-delivery/takeaway outlets, street stalls/kiosks; serving approximately at 140,000 locations throughout the country in 2017 according to EMI.

Table 2: Number of Outlets per Type of Foodservice

Number of Outlets	2012	2013	2014	2015	2016	2017
Full Service Restaurants	43,560	43,871	44,016	44,452	44,324	44,440
Cafes/Bars	44,564	44,782	43,761	44,553	44,770	45,615
Fast Food	6,101	6,889	7,607	8,108	8,582	9,054
Street Stalls/Kiosks	36,915	36,934	37,033	37,036	35,292	35,463
Self-Service Cafeterias	4,473	4,490	4,499	4,505	4,490	4,502
100% Home Delivery/Takeaway	979	1,070	1,170	1,207	1,265	1,280
Total Consumer Food Service	**136,592**	**138,036**	**138,086**	**139,861**	**138,723**	**140,354**

Source: Euromonitor International.



Source: Euromonitor International. Total retail sales value (RSP) is shown on the right axis via the bars. Year on Year exchange rates are used.

Due to the changing profile of tourists and the economic difficulties in the country, with high food inflation rates and the depreciating Turkish Lira, spending in full-service restaurants has declined. At the same time, the increasing number of double income households with less time for cooking at home in this time of economic slowdown caused cheaper options such as fast food outlets, home delivery, and street stalls to become more attractive. Consumers are expected to remain price-sensitive in the near term.

During the last decade, foreign full-service restaurants/brands that entered the Turkish Market (including US origin), such as El Torito, TGI Friday's, Chili's, Jamie Oliver, Tom's Kitchen, Spice Market Hakkasan, Benihana, Armani Café, Ciprani, Bice, Nando's, Laduree, De Silvano, Hard Rock Café, have since exited Turkey. While some of these stayed for longer periods, such as TGI Friday's, others exited after just a short trial period like Chili's. Some others shrank their operations, decreasing their number of outlets down to a single one, such as Zuma and P.F. Chang's which each had two restaurants previously. Foreign cafés such as Paul's and Baskin Robbin's also left Turkey. Cheese Cake Factory has decided not to get into the market[1] due to restrictions on some ingredients. Turkey has not authorized use of any biotech products in food and maintains a zero tolerance policy. Many local fine dining restaurants also closed or reduced their number of outlets. This can be partly attributed to the decreasing number of western tourists in large cities and shrinking purchasing power of the upper-middle class has caused these exits and cut-backs in the foreign chain restaurant brands and non-casual full-service and especially fine-dining segment. On the other hand, foreign fast food chains such as McDonalds, Arby's, Popeye's etc. and café chains such as Starbucks continued expansion through opening more outlets in the last decade, including over the last few years.

There are also food service companies serving institutional needs since the late 1970s; these catering companies serve corporate canteens, schools, hospitals, nursing homes, events in different venues, and more recently even some military facilities. According to the Federation of Food Industrialist Associations (YESIDEF), there are

[1] Hurriyet Daily Newspaper, June 23, 2016. Cheesecake Factory'e Turkiye Izini Cikmadi.

5,000 companies in Turkey in the institutional food service field as of 2017 and this number has been pretty stable for the last few years, with about an equal number of exits and entries from the industry. According to the same Federation, the sales volume of these 5,000 firms is six billion USD annually in 2017. The size of these companies varies significantly from small local firms to large international ones such as ISS, Sodexo. These companies either cook at their facilities and deliver the food to the respective institution or cook on the premises of the institution. The institutional food service companies in general do not use imported ingredients except some bulk commodity agricultural items such as rice, pulses and vegetable oils.

Table 2: Advantages & Challenges of the Turkish Food Service Market

ADVANTAGES	CHALLENGES
Large population base, approx. 80 million: young and growing; middle and upper middle classes are growing. Consumers are quality-conscious.	Importing can be complex: Lack of transparency in rules and regulations, time consuming import procedures, and a zero tolerance for genetically engineered products or ingredients for food use in Turkey
Recent strong and steady GDP growth, as well as more dual income households, drives new demand for food service. especially fast-food, self-service food service and casual full-service as well as home delivery/takeaway	The depreciation of the TL and high food inflation is increasing the costs of restaurants and therefore less people are dining out -especially in full service and fine-dining venues. Consumers are becoming more price-conscious
With many Turks traveling abroad compared to a decade ago, people are more aware of new cuisines and new ingredients	There is strong demand for local cuisine. Foreign restaurant brands have faced difficulty succeeding in the market.
Some local casual full-service restaurants are updating and improving menus with new tastes every season. This is an opportunity for new ingredients to enter.	There is misinformation among higher end consumers and bad publicity in the media about processed food ingredients and additives.

Source: Market observations of FAS Istanbul Office.

II. ROAD MAP FOR MARKET ENTRY

a. ENTRY STRATEGY

After conducting market research determining that there is a potential market in Turkey for your product addressing the needs of the HRI industry, it is important to develop a good strategy for market entry. Turkey straddles southern European and Middle Eastern cultures, and relationships are very important for business. This makes already existing relations and connections in the country especially important. Finding a local agent is a safe approach for entry into the market, especially for medium and small enterprises that would like to start exporting to Turkey. Agents in Turkey are sometimes an importer, distributor, wholesaler, a commission-based trader or some combination thereof. Local representatives will have experience in market development and contact information of potential buyers, such as the food processors that are likely to use your products. A good representative can guide you in the market, including on import rules and regulations, which ports to utilize, local business practices, conducting market intelligence formally or informally, starting sales calls, etc. Before selecting any local agent, personally visiting them in Turkey is highly recommended. One should do meetings with several of them before selecting one. For larger companies with more resources, it might be an option to establish a company in Turkey and hire some local personnel.

Import procedures are complicated and burdensome in Turkey[2]. This makes a local business ally more essential. For details on the requirements, please refer to our Exporters Guide to Turkey and FAS Turkey reports on Food and Agricultural Import Regulations and Standards and Required Certificates. The U.S. Foreign Commercial Service also gives some general information on import procedures to Turkey, and on doing business in Turkey.

[2] FINAL IMPORT APPROVAL OF ANY PRODUCT IS SUBJECT TO THE IMPORTING COUNTRY'S RULES AND REGULATIONS AS INTERPRETED BY BORDER OFFICIALS AT THE TIME OF PRODUCT ENTRY. Please verify the whole set of import requirements with the customer and officials.

Local agent companies typically attend large shows such as Anuga in Germany, Sial in France, or Gulf Food in Dubai. Food trade shows in Turkey can be helpful to visit before deciding to enter the market. Anfas Food Product, World Food Istanbul, IbaTech and Food Ingredients Fi Istanbul are good shows to visit and meet importers. Travel Turkey Izmir Expo and Eastern Mediterranean International Tourism & Travel Exhibition are two local tourism related exhibitions.

Entering the Turkish market often requires a long-term perspective and persistence, as building trust is important. Correct market analysis must be done thoroughly before entry. Turkey is a large country and has a very diverse set of consumers and food processing entities. We recommend reviewing our other reports and contacting the FAS Turkey office with any questions.

b. MARKET STRUCTURE & DISTRIBUTION

There is a large, diverse and fragmented HRI sector in Turkey. The majority of the hotels and resorts are on the south and west coasts of Turkey and in large cities, but other cities have facilities too. Import procedures and reaching the diverse customer base is hard for an American company from a distant base, therefore a local agent is recommended. The HRI Sector is known to buy imported food stuffs from local representative companies as it is much easier for them compared to importing it themselves. Less commonly, some smaller HRI facilities, such as small restaurants might buy their needs from a cash & carry or a retailer which buys the imported food from the representative company. In some cases, a wholesaler company, for example one that is distributing food items to hotels, might purchase the imported food items from a representative company and sell to the HRI sector.

c. SUB-SECTOR PROFILES

Important HRI companies in Turkey are listed below by sector, with links to their websites. Please note that the HRI industry is very large and fragmented in Turkey and most of the restaurants and hotels are standalone. The important chains are listed below, but the list is by no means complete.

Fast Food

1. McDonald's Turkey
2. Burger King Turkey
3. Arby's Turkey
4. Kentucky Fried Chicken Turkey
5. Popeye Turkey
6. Carl's Jr. Turkey
7. Subway Turkey
8. Bereket Doner
9. Bay Doner
10. Usta Donerci
11. Tavuk Dunyasi
12. Kofteci Ramiz
13. Sultanahmet Koftecisi
14. Kasap Doner
15. Etiler Marmaris
16. Komagene
17. Kahta Cigkofte
18. Simit Sarayi
19. Sbarro Turkey

Pizza Chains

1. Pizza Hut
2. Papa John's
3. Domino's
4. Little Cesare's
5. Pizza Pizza
6. Bafetto
7. Pizza Bulls
8. Panino Pizza
9. Pasaport Pizza
10. Pizza House
11. Pizza Raffaele
12. Tadim Pizza
13. Sampi Pide (Turkish style pizza, local concept very similar to pizza)
14. Neli Pide (Turkish style)

15. Bafra Bide (Turkish style)
16. Citir Usta (Turkish style)

Full Service Restaurants

1. Big Chefs (Casual)
2. Mid Point (Casual)
3. Kitchenette (Casual)
4. The House Café (Casual)
5. SushiCo (Casual)
6. Eataly Turkey (Casual)
7. Mezalluna (Non-casual)
8. Paper Moon Turkey (Non-casual)
9. Nusret (Casual, Steak)
10. Gunaydin Et (Kebap, Steak)
11. Kosebasi Kebap
12. Develi Kebap
13. Kasibeyaz Kebap
14. Gelik (Kebap)
15. Tike (Kebap)
16. Hamdi Kebap

Coffee Shops

1. Starbucks Turkey
2. Kahve Dunyasi
3. Caffé Nero
4. Tchibo
5. Caribou Turkey
6. Gloria Jean's Turkey
7. Barnie's Coffee & Tea Turkey
8. Lavazza Turkey
9. Kahveci Hacibaba
10. Gonul Kahvesi
11. Kahve Duragi
12. Kahve Diyari
13. Kahve Deryasi
14. The Espresso Lab
15. Bayramefendi Osmanli Kahvecisi
16. Kocatepe Kahve Evi

Hotels & Resorts

1. Hilton Turkey
2. Marriott Turkey
3. Best Western Turkey
4. Radisson Blu Turkey
5. Holiday Inn Turkey
6. Dedeman Hotels
7. Rixos Hotels
8. Marmara Hotels
9. Kempinski Hotels Turkey
10. Swiss Otel Turkey
11. Wyndham Hotels Turkey
12. Four Seasons Hotels
13. Club Med Turkey
14. Movenpick Hotel Turkey
15. Voyage Hotels
16. Divan Hotels
17. Anemon Hotels
18. Accor Hotels Turkey
19. Crown Plaza Hotels
20. Intercontinental Hotels

Institutional Food Service

1. Sodexo Turkey
2. ISS Turkey
3. Sofra
4. Sardunya
5. Martas
6. Keyveni
7. Basak
8. Polesan
9. Uc Ogun Catering
10. Bortar
11. Tadin Yemek

Table 3: Number of Accommodation Facilities per Type (registered with the Ministry of Tourism*)**

Facility Type	Classification	With Tourism Investment License* Facilities	With Tourism Investment License* Rooms	With Tourism Investment License* Beds	With Tourism Operation License Facilities	With Tourism Operation License Rooms	With Tourism Operation License Beds
Hotels	5 Stars	166	48,395	105,324	595	192,554	409,064
	4 Stars	253	31,892	66,885	781	110,803	228,901
	3 Stars	291	15,898	32,074	1,008	57,660	115,919
	1 & 2 Stars	115	2,575	5,191	461	16,152	31,596
	Total	825	98,760	209,474	2,845	377,169	785,480
Holiday Villages	1. Class	18	4,050	8,933	67	25,883	57,528
	2. Class	16	4,169	10,270	11	1,855	3,894
	Total	34	8,219	19,203	78	27,738	61,422
Thermal Hotels	5 Stars	16	6,717	14,667	36	9,036	19,239
	4 Stars	11	1,281	2,708	27	2,697	5,622
	3 Stars	5	473	1,147	19	1,164	2,432
	Total	32	8,471	18,522	82	12,897	27,293
Bed & Breakfast	**Total**	1	20	40	97	1,230	2,479
Apartment Hotels	**Total**	1	128	256	172	6,792	15,353
Boutique Hotels	**Total**	97	3,225	6,682	91	3,504	7,077
Special Purpose Tourism Facilities	**Total**	33	798	1,611	361	10,898	22,265
Complex Tourism Facility	**Total**	3	1,532	3,784	4	3,164	6,668
Others**	**Total**	25	1,075	3,461	41	2,836	7,249
TOTAL	**Total**	**1,051**	**122,228**	**263,033**	**3,771**	**446,228**	**935,286**

* Facilities with Tourism Investment License from the Ministry of Tourism are either under investment stage or are in trial stage (operating) before they can get the Tourism Operation License.
** Others include thermal apartment hotels, camping, golf facilities, type B holiday compounds, boutique villas, mountain houses, ranch houses/village houses, hostels, plateau houses, rural huts.
*** Many small accommodation types such as bed and breakfasts (called *pansiyon* in Turkish) are not registered with the Ministry of Tourism but they work with a license from the local Municipalities.

III. COMPETITION

According to Post's market observations, local processed food and agricultural products are the main competitor for U.S. origin processed food and agricultural products that would go into the Food Service Industry: Hotels, Restaurants & Institutional. Turkey has a well-developed food processing sector that is producing good quality food items for the Turkish market and to export overseas. There is also a diverse production of a variety of agricultural products such as fruits, vegetables, tree nuts, grain, pulses, poultry, dairy, fish and meat. Despite the fertile and diverse production base, demand in Turkey is above the supply for many agricultural items, therefore the country has imports in all of the above-mentioned items except fruits (other than exotic fruits), vegetables and poultry.

In addition to local production, products from European countries are also important, especially for processed food and processed food ingredients but also for meat and fish. EU has a customs union with Turkey where many European food items have low or no customs tariffs to Turkey. Furthermore, proximity is a major benefit for lower freight and shorter delivery times from Europe. Trucks are often used for transportation between Europe and Turkey. European Free Trade Association (EFTA) countries (Switzerland, Norway, Iceland, and Liechtenstein), also have a joint Free Trade Agreement (FTA) with Turkey, giving them preferential customs advantages as well. In addition, Turkey has FTAs with 19 other countries, with many including preferential tariff rates on food and agriculture products. In consumer oriented agricultural products imports to Turkey (not including bulk products such as rice and pulses), four out of top five countries were EU countries. After Netherlands and Germany, the United States was the third largest supplier, followed by Poland and Italy in 2017.

Please refer to our Retail Foods and Food Processing Ingredients reports for more detailed numbers on consumer oriented agricultural goods and processed products/ingredients exporting countries to Turkey. You can check our full set of reports for other agricultural commodities.

IV. BEST PRODUCT PROSPECTS CATEGORIES

Turkey is a highly competitive and very price sensitive market for many items. A thorough analysis should be done before prospective exporters consider Turkey as a long term market. Exporters should be sensitive in brand positioning and be prepared for sufficient marketing activities and advertising. Note that some products from the United States currently face additional tariffs, which affects competitiveness.

a. PRODUCTS PRESENT in the MARKET WHICH HAVE GOOD SALES POTENTIAL

1. Nuts: almonds, walnuts
2. Rice
3. Pulses
4. Sunflower seed (for oil and confectionary)
5. Sauces
6. Functional food
7. Gourmet/Ethnic food ingredients
8. Spices (some niche spices)
9. Dates, Cranberries and Dried Fruits
10. Beer, Wine, Whiskey, Bourbon, other alcoholic drinks
11. Non-alcoholic beverages
12. Food additives, food processing aids (especially innovative new ones)

b. PRODUCTS NOT PRESENT in the MARKET BUT WHICH HAVE GOOD SALES POTENTIAL

1. Pecans
2. Organic processed food
3. Organic coffee and different varieties of specialized coffee
4. Some dairy products like specialized cheese

c. PRODUCTS NOT PRESENT in the MARKET BECAUSE THEY FACE SIGNIFICANT BARRIERS

1. Food Items, ingredients from Genetic Engineered Crops (Please see Turkey Agricultural Biotechnology Annual Report 2017)
2. Organic sugar
3. Beef and products

V. KEY CONTACTS AND FURTHER INFORMATION

Republic of Turkey, Ministry of Agriculture and Forestry (MinAF)

Federation of All Food and Drink Industry Associations of Turkey (TGDF)

Federation of Food Industrialists Associations (YESIDEF)

All Foods Foreign Trade Association (TUGIDER)

Turkish Restaurant and Entertainment Association (TURYID)

Istanbul Food Industrialists Association (IYSAD)

Out of House Consumption Association (ETUDER)

Turkish Tourism Investors Association (TTYD)

Hotel Association of Turkey (TUROB)

Turkish Small Hotels Association

All Restaurants and Restaurant Suppliers Association (TURES)

Association of Turkish Travel Agencies (TURSAB)

Turkish Statistics Institute (TurkStat)

Union of Chambers and Commodity Exchanges of Turkey (TOBB)

Foreign Economic Relations Board of Turkey (DEIK)

Investment Support and Promotion Agency of Turkey (ISPAT)

For other agricultural industry reports on Turkey and other countries in the world you may visit Foreign Agricultural Service (FAS) webpage. Contact our office via the information below:

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