

Turkey's Agricultural Sector

Agritech Meeting, London
November 17, 2016

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OECD Report (2011)

- World's 7th largest agricultural producer
- Has 24 million hectares of agricultural **land**, which represents about 20% of the EU-27 agricultural land.
- The agricultural sector represents 8.3% of the **GDP** (in 2009), very close to Bulgaria (8% in 2009) and Romania (7% in 2009)
- **Employment** in agriculture is 24% of total employment (5,2 million people in 2010), whereas the EU-27's average is only 5.5% (12,2 millions in 2009)
- Agriculture supplied 9.9% of **exports**, and accounts for 5.3% of **imports** in 2012.
- Average **farm size** is 6 hectares, very close to the EU-12's average (6.0 ha) but less than half of the EU-27's average (14 ha in 2010);
- **Rural population** is 24% of the total population (2009), whereas it is 19% in the EU-27 (96.9 million people in 2009)
- Turkey's main **trading partners** are the European Union, the United States and the Middle East.

Turkey: Macro Indicators (2013-2015)

GDP per capita (current US\$)	9,130	
GDP per capita growth (annual %)	2.5	
GINI index (World Bank estimate)	40.2	
Inflation, consumer prices (annual %)	7.7	
Population, total (million)	78.7	
Population growth (annual %)	1.5	
Rural population (% of total population)	26.6	
Agriculture value added per worker (constant 2010 US\$)	9,792	
Agriculture, value added (% of GDP)	8.59	
Agriculture, value added (annual % growth)	7.61	
Agriculture, value added (constant 2010 million US\$)	73,600	
Agriculture, value added (current US\$)	54,518	7.3%
Industry, value added (current US\$)	168,140	22.5%
Manufacturing, value added (current US\$)	111,926	15.0%
Services, etc., value added (current US\$)	412,043	55.2%

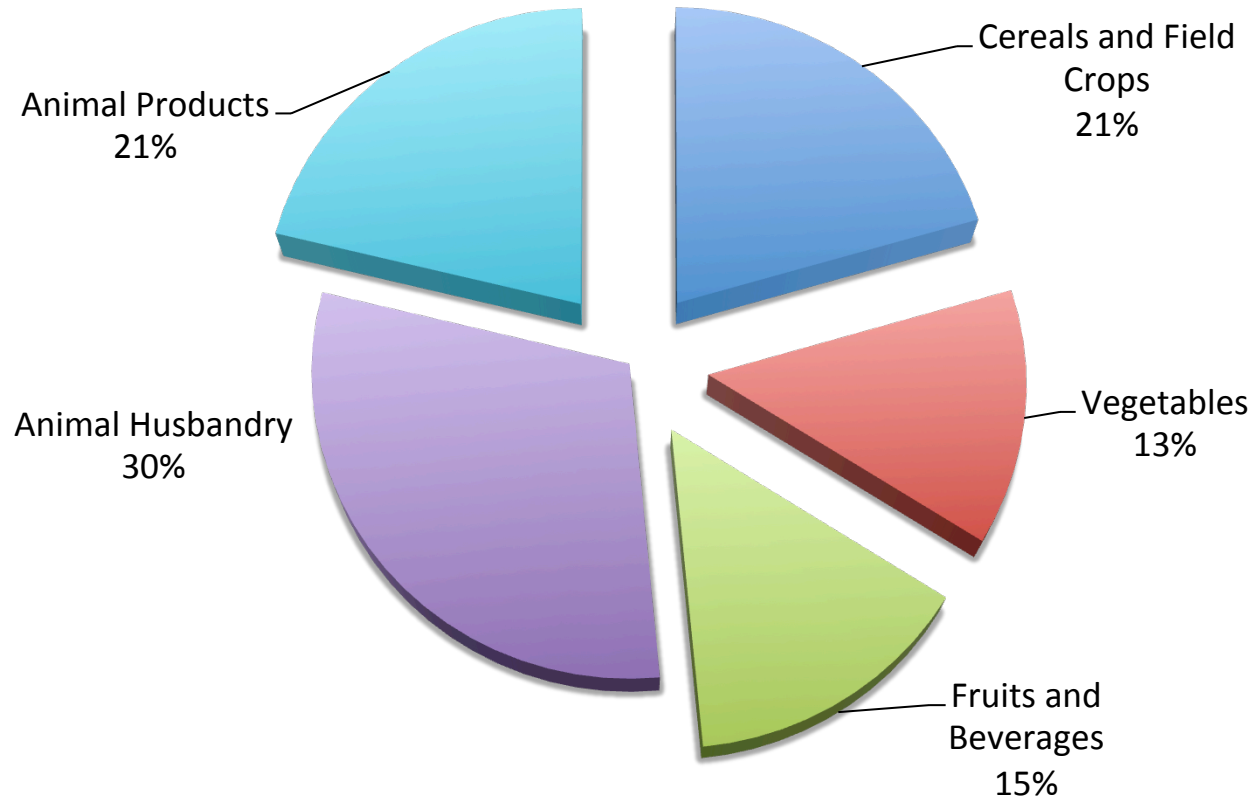
Turkey: Macro Indicators (2013-2015)

Agricultural irrigated land (% of total agricultural land)	13.6
Agricultural land (% of land area)	49.9
Arable land (% of land area)	26.7
Agricultural land (sq. km)	384,230
Arable land (hectares per person)	0.3
Arable land (million hectares)	20.6
Land under cereal production (million hectares)	11.5

Turkey and the UK

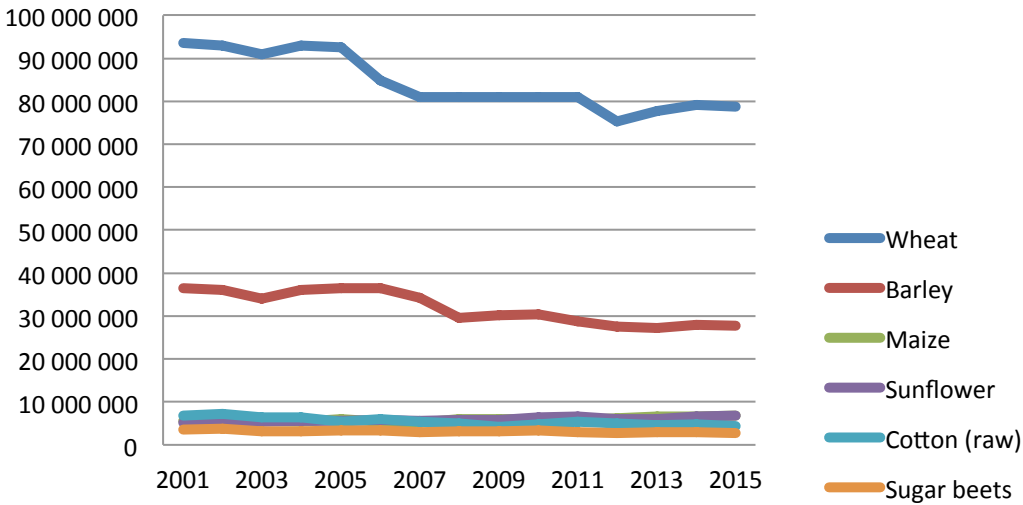
	Turkey	UK
GDP nominal (billion USD; Turkey 2016 estimate, UK 2015)	751	2,849
GDP nominal per capita (USD, 2016)	9,562	43,771
Population (million)	79	65
Area	783,356 km ²	242,495 km ²
Employment in Agriculture	6,000,000 (20%)	476,000 (1.5%)
Farm Holdings	3,100,000 (2001)	212,000
Gross Value Added-Contribution	£ 10 billion (8.6%)	£ 10 billion (0.6%)

Agricultural Production Values

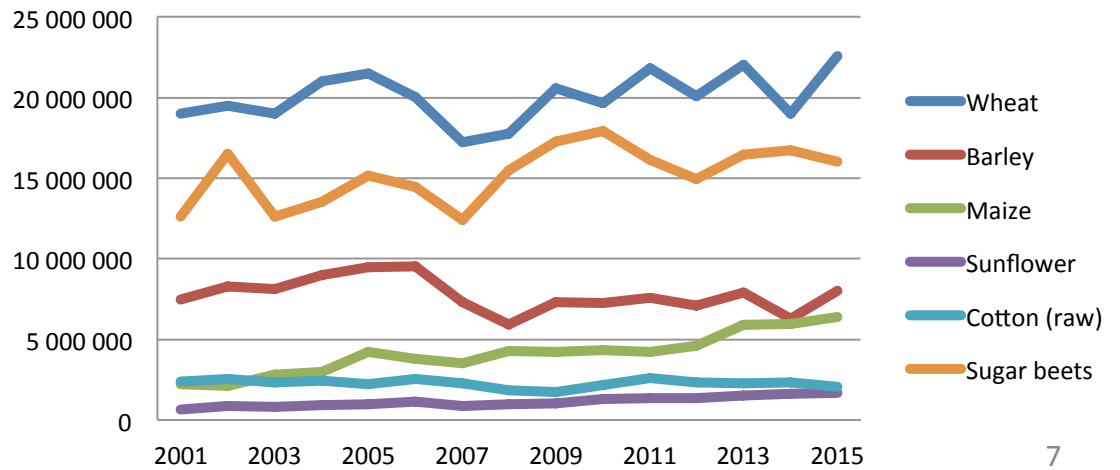


Cereals and Other Crops

Major Crops: Area Sown (Decare)

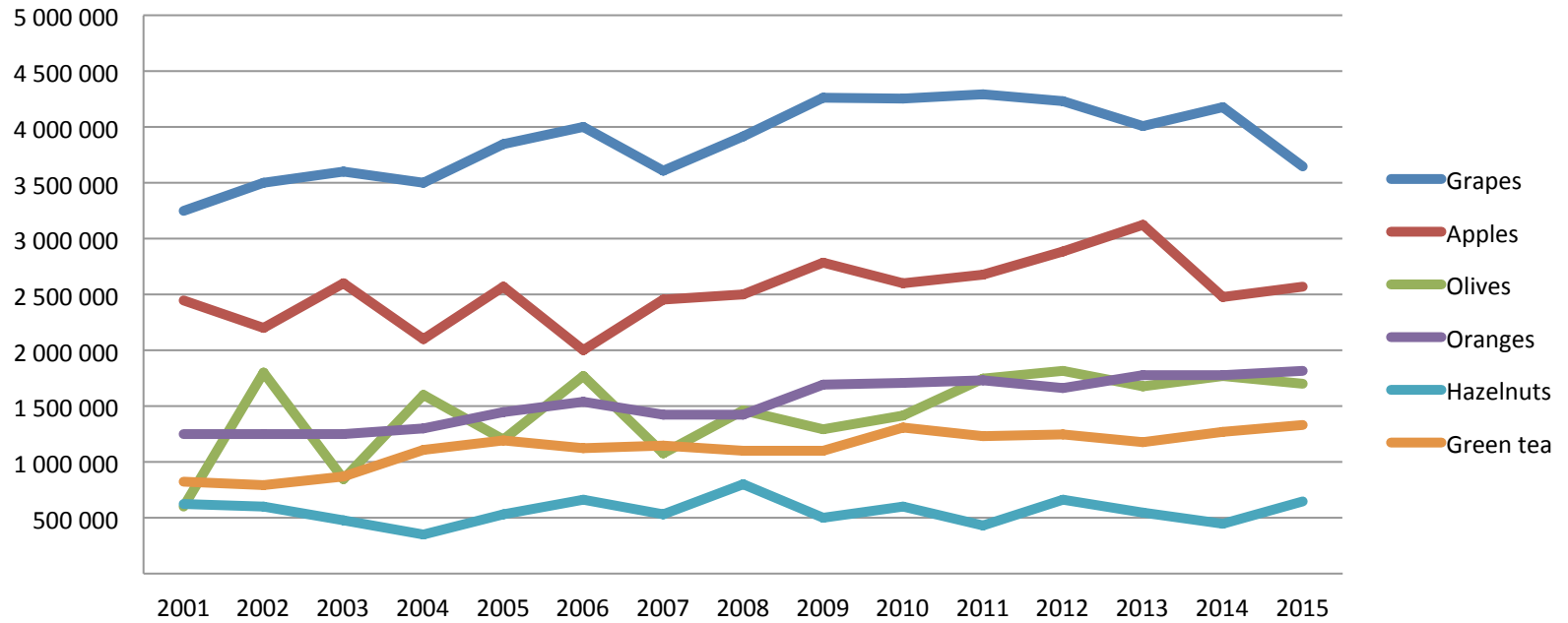


Major Crops: Production (Tons)



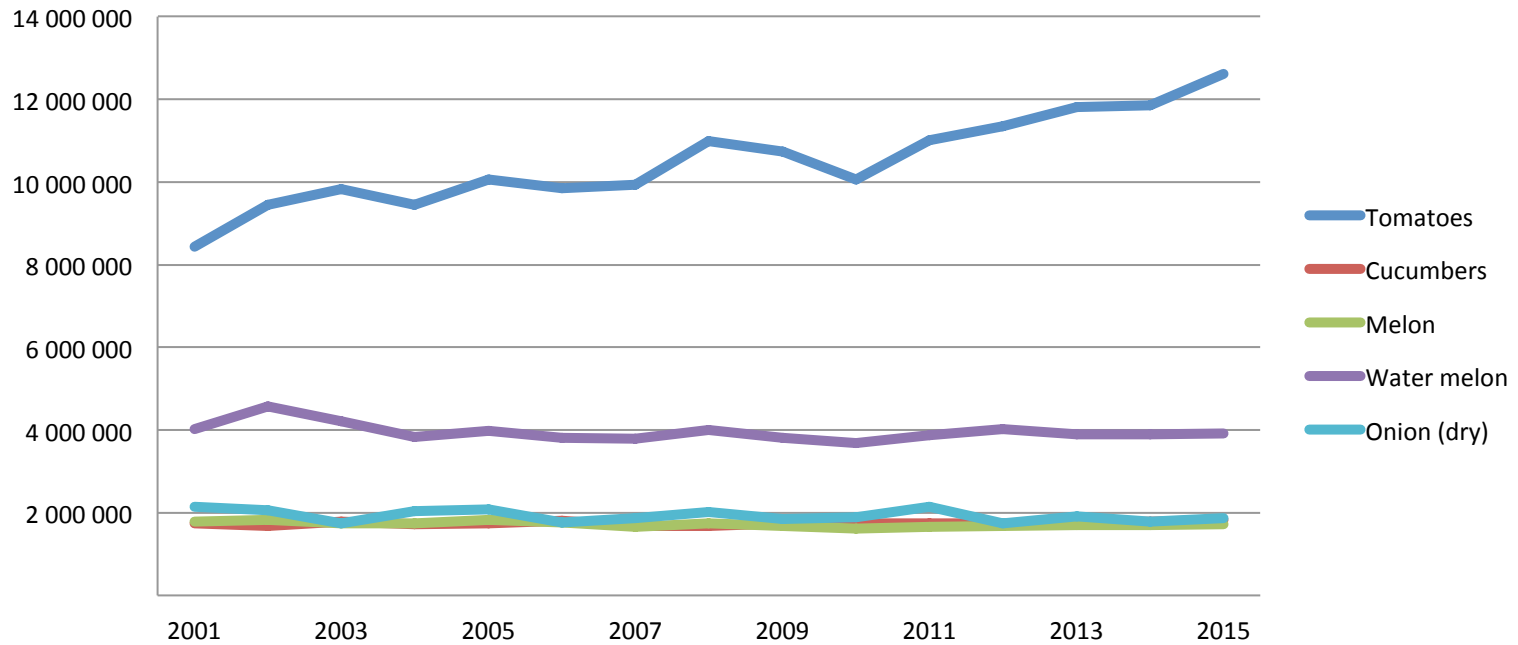
Fruits

Production of fruits, beverage and spice crops (Tons)



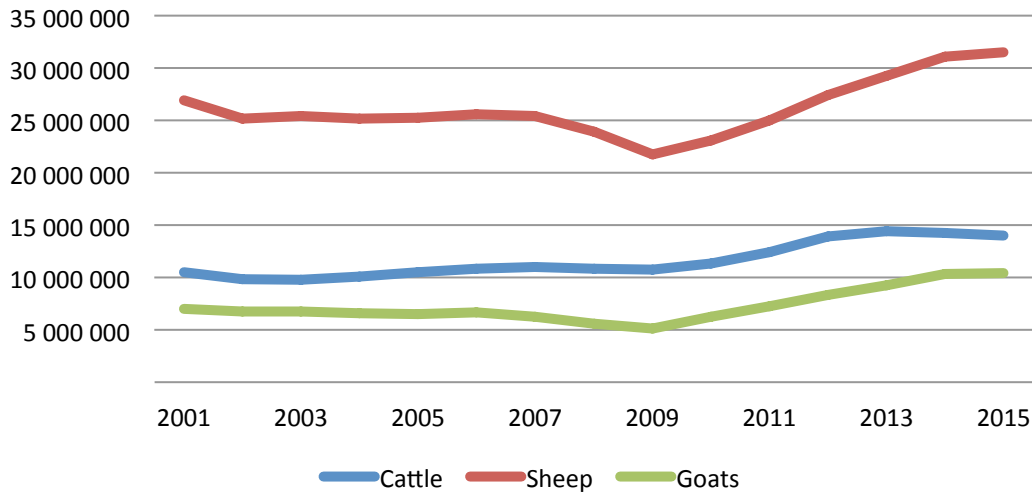
Vegetables

Production of Vegetables (Tons)

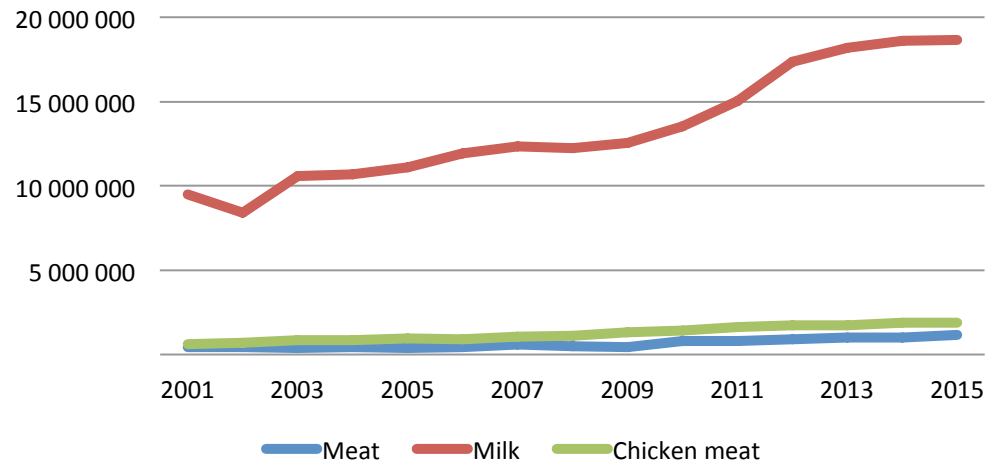


Livestock

Number of Livestock



Livestock Products (Tons)



Major Products

- World's largest producer of: Hazelnuts, cherries, figs, apricots, quinces, pomegranates
- Second-largest producer of: Watermelons, chickpeas, strawberry
- Third-largest producer of: Tomatoes, eggplants, green peppers, lentils, pistachios, cucumbers, sheep milk
- Fourth-largest producer of: Onions, olives
- Fifth-largest producer of: Sugar beet
- Sixth largest producer of: Tobacco, tea, apples
- Ninth largest producer of: Wheat, rye
- In Top-10 among 55 produce

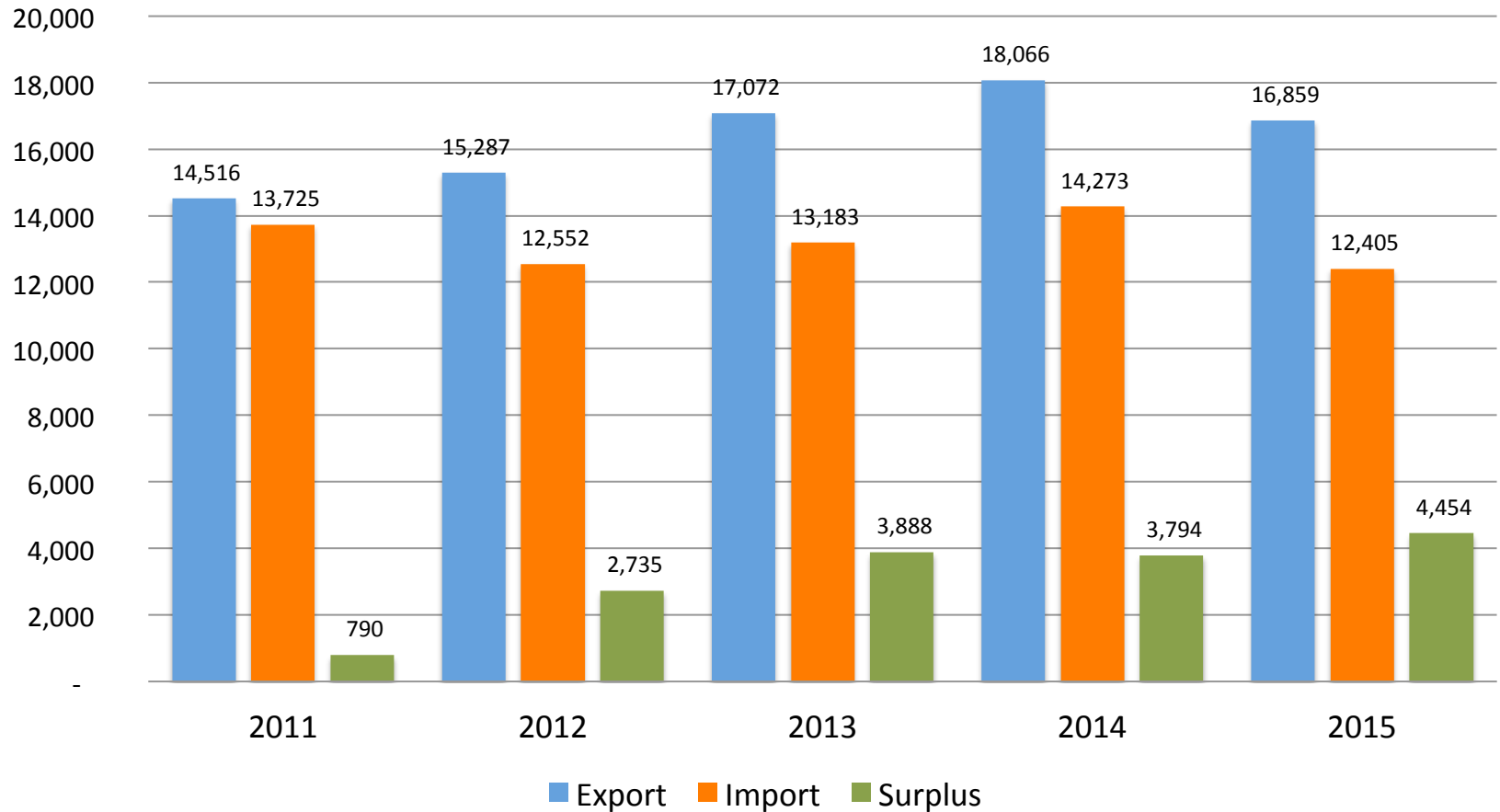
Livestock Inventory (2011)

- Cattle: 12.4 million herd (41% cross-bred, 39% culture and 20% domestic)
- Sheep: 25.0 million herd (95% domestic versus 5% merino)
- Ordinary Goat: 7.1 million herd
- Milking Cows: 4.8 million herd
- Species composition of milking cows: 41% cross-bred, 39% culture and 20% domestic

Export-Import Balance (2015)

(Million USD)	Exports	Imports
Agriculture and Animal	5,736	7,036
Fisheries	368	88
Food and beverages	10,222	5,134
Tobacco	532	146
TOTAL	16,859	12,405

Agro-food External Trade (Million USD)



2014: Agricultural Exports-Imports

Exports	%	Imports	%
Iraq	19	Russia	23
Germany	8	USA	9
Russia	7	Ukraine	7
Italy	5	Brazil	5
Syria	4	Indonesia	4
USA	4	Germany	33
UK	2.6		

PSE as a share of Gross Farm Receipts

Averages	1986-88	2007-09	2011-13
OECD	37.0%	21.0%	18.4%
Turkey	20.4%	24.3%	19.3%
New Zealand	10.4%	0.6%	0.7%
Australia	10.1%	4.1%	2.3%
USA	21.9%	9.8%	7.6%
Mexico	28.5%	12.9%	12.3%
Canada	35.8%	15.7%	13.6%
EU	39.2%	23.2%	19.2%
Japan	64.0%	47.8%	54.0%
Korea	69.7%	51.0%	52.0%
Iceland	77.2%	51.7%	44.2%
Switzerland	77.7%	56.6%	53.2%
Norway	70.4%	58.0%	57.1%

Productivity of Agricultural Labor (2012)

Bulgaria	15,031
France	72,440
Greece	13,882
Italy	47,896
Poland	3,085
Romania	9,117
Spain	33,198
Turkey	6,573

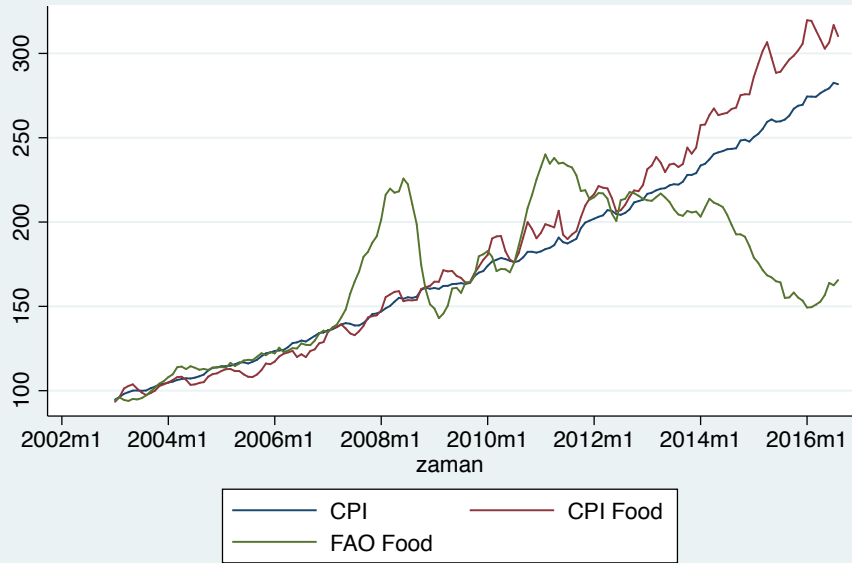
Problems

(see; Burrell and Kurzweil, 2007; OECD, 2011, 2013, 2014)

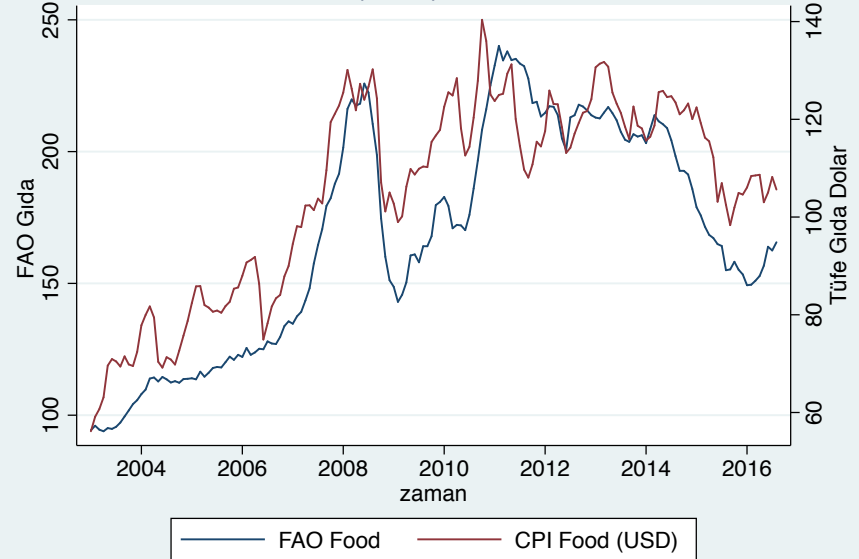
- **Major structural problems:**
 - small size of agricultural holdings,
 - fragmented and scattered farms,
 - low efficiency,
 - insufficiencies regarding production and marketing infrastructures.
- **Rural development problems:**
 - low levels of professional agricultural activity,
 - low investment capacity,
 - low level of education and relatively high levels of illiteracy,
 - a large proportion of the agricultural workforce working as unpaid family labor,
 - low income levels and lack of alternative income sources,
 - significant rural out-migration.
- The EU Commission **adds** to this list:
 - ineffective institutional structures and farmer organizations,
 - scattered settlement patterns in some regions,
 - insufficient development of physical, social and cultural infrastructures,
 - a high rate of subsistence farming,
 - a high rate of hidden unemployment

Food Prices

CPI, CPI Food and FAO Food Index



CPI Food (USD) and FAO Food



PPI Agriculture and CPI Food

