

Country Market Study: Turkey



Directorate International Trade
Sub-directorate: Europe, Russia and Middle East
Department of Agriculture, Forestry and Fisheries
March 2014

Author

Gert van Rensburg (GertVR@daff.gov.za)

Editor

Xolani Nqaba (XolaniN@daff.gov.za)

Disclaimer

Although everything has been done to ensure the accuracy of the information in this study, the DAFF accept no responsibility for the accuracy of this publication or the opinions contained therein. The DAFF will not be held accountable for the consequences of any actions taken on the basis of this information.

Acknowledgements

Various sources were used during the composition of this document, which are acknowledged under paragraph headings or in the text.

OUTLINE

The main purpose of this market study of Turkey is to determine which products have the potential to be exported by South Africa (SA) to Turkey.

The study starts with a historical background, followed by some country facts and an economic overview of Turkey. This is followed by mentioning the trade policy of Turkey, looking at Turkey's international trade and agricultural production. The introduction is concluded by looking at the trade of Agricultural/Forestry/ Fisheries products by Turkey with the world.

The second section is a discussion of trade relations between SA and Turkey with a look at total trade between the countries.

This is followed by a section on agricultural/forestry/fisheries trade between the two countries, looking at the imports and exports of agricultural/forestry/fisheries products and an analysis to determine which products have the potential to be exported by SA to Turkey. The techniques used are the trade potential index (TPI) and the "trade chilling concept". This section is concluded by looking at import tariffs.

The fourth section looks at trade barriers, some trade events and the trade related infrastructure is also discussed.

The study is ended with a conclusion.

Various annexes are attached, which include the following: a description of the Trade Potential Index (TPI), the Trade Potential Index and the Indicative Trade Potential (ITP) of agricultural/forestry/fisheries products traded between South Africa and Turkey, Trade Chilling of agricultural/forestry/fisheries products traded between South Africa and Turkey, internet addresses and the contact details of the embassies.

INDEX

1.	INTRODUCTION	4
1.1	Historical background	4
1.2	Country facts	4
1.3	Economic overview	4
1.4	Trade Policy, regional and international relations	5
1.5	International Trade	6
1.6	Agricultural Production	11
1.7	Agricultural/forestry/fisheries imports and exports by/from Turkey from/to the world	11
2.	SOUTH AFRICA – TURKEY TRADE RELATIONS	15
2.1	Total Trade between SA and Turkey	15
3.	AGRICULTURAL/FORESTRY/FISHERIES TRADE BETWEEN TURKEY AND SA	17
3.1	Agricultural/forestry/fisheries products trade between Turkey and SA	17
3.2	Analysis to determine possible exports to Turkey	21
3.2.1	Trade potential index (TPI)	21
3.2.2	"Trade chilling concept"	24
3.3	Tariffs	25
4)	TRADE BARIERS	25
4.1	Trade events	26
4.2	Trade related infrastructure	26
5.	CONCLUSION	26
ANNEXES		
	Annex 1: Description of the Trade Potential Index	29
	Annex 2: The Trade Potential Index (TPI) and the Indicative Trade Potential (ITP) of agricultural/forestry/fisheries products traded between South Africa and Turkey	30
	Annex 3: Trade chilling of agricultural/forestry/fisheries products traded between South Africa and Turkey	35
	Annex 4: Internet addresses	37
	Annex 5: Contact details of the embassies	37

1. INTRODUCTION

1.1 Historical background^{1 2}

Turkey was founded from the Anatolian remnants of the defeated Ottoman Empire. Two historical experiences influenced the formation of modern Turkey: 1) the foundation by Mustafa Kemal (who assumed the surname Atatürk, "father of Turks", in 1936) of a secular, unitary republic in the 1920s and 2) the establishment of a multiparty democratic regime since 1945. The latter has been interrupted by three periods of military rule in 1960-61, in 1971-73 and in 1980-83, but the once powerful military has now almost completely withdrawn from the political sphere and is largely under control of civilian authorities.

1.2 Country facts²

- Turkey has a parliamentary republic as a form of state and the Unicameral Meclis (parliament) that consists of 550 members. The legal system is based on European models.
- The current head of state (president) is Abdullah Gul, who was elected by parliament for a single seven-year term in August 2007. The next presidential election will be by universal direct suffrage and the president will serve a maximum of two consecutive five-year terms. The current prime minister is Recep Tayyip Erdogan, and it is expected that he will stand for the presidential elections in 2014. Both the current president and prime minister are from the Justice and Development Party (AKP).
- The total land area of Turkey is 783 562 km² (including lakes and islands) and the population at the end of 2011 was 74.7 million. Ankara is the capital city, with a population of 4.9 million and Istanbul is the largest city with a population of 13.6 million.
- Turkish is the official language and the climate is Mediterranean on the South coast and continental inland. Measurement is metric, the time is two hours ahead of GMT (three hours ahead in summer) and the currency is the Turkish Lira (TL1.796:US\$1 - avg. 2012).
- Turkey is a unitary, secular republic, although Sunni Muslims is the biggest religious grouping in Turkey.
- Public holidays are as follows: January 1st; April 23rd; May 19th; three days for Ramadan and four days for Kurban or Eid (dates vary according to the Muslim calendar); August 30th; October 28th (half-day); October 29th. The fiscal year is a calendar year.
- Weather in Ankara (altitude 861 meters): Hottest month, August, 15-31° C (average daily minimum and maximum); coldest month, January, -44° C; driest month, August, 10 mm average rainfall; wettest month, December, 48 mm average rainfall.

1.3 Economic overview

Table 1 indicates that the nominal Gross Domestic Product (GDP) at Purchasing Power Parity (PPP) of Turkey was US\$1 120 billion in 2012, with a GDP per head of US\$14 995. Turkey has large international financing needs and there was a deficit of US\$65 628 million in the trade balance of 2012.

Table 1: Some economic indicators for Turkey (2008 - 2012)

	2008	2009	2010	2011	2012
Nominal GDP PPP (US\$ bn)	914	875	969	1 076	1 120
Real GDP growth (%)	0.8	-5.2	9.3	8.8	2.2

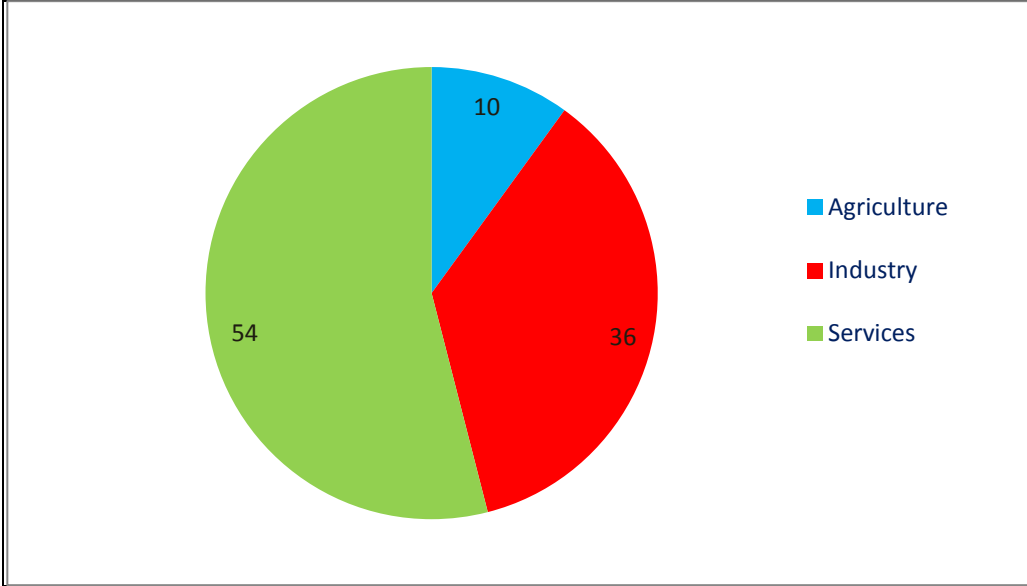
¹ Turkey Country Profile, 2007. EIU

² Turkey Country Report, August 14th 2013. EIU

GDP per head (US\$ at PPP)	12 711 ^a	12 044 ^a	13 209 ^a	14 540 ^a	14 995 ^a
Consumer prices (end-period; %)	10.1	6.5	6.4	10.4	6.2
Trade balance (US\$ million)	-52 915	-24 768	-56 324	-89 038	-65 628
Exchange rate TL:US\$ (end-period)	1.526	1.491	1.541	1.894	1.782

Source: Economist Intelligence Unit

Graph 1 indicates that 11% of the origin of Turkey's GDP in 2012 was from agriculture.



Graph 1 - Origin of GDP in 2012 (%)

Source: Economist Intelligence Unit (EIU) Country Forecast - Aug 2013 as adapted

Table 2 draws a comparison between Turkey and South Africa. The population of SA is about 65% of that of Turkey, while SA's GDP is about 52% of Turkey's GDP. The GDP per capita in 2012, was about US\$3 000 higher in Turkey than in SA.

Table 2: Comparison of some data between Turkey and South Africa

Basic information	TURKEY	SOUTH AFRICA
Land area:	783 562 km ² (including lakes and islands)	1.220 million km ²
Population (2012):	74.7 million. (End 2011)	48.8 million (2012)
Nominal GDP PPP (2012):	US\$1 120 billion	US\$582 billion
GDP/ head PPP (2012):	US\$14 995	US\$11 930
GDP real change p a (2012):	2.2	2.5%

Source: Economist Intelligence Unit

1.4 Trade Policy, regional and international relations^{3 4}

Turkey has taken action to address the trade deficit by stimulating local production. This included the import of a certain amount of cars duty free from abroad if local productive capacity is increased. Vision Turkey 2023 is also part of this and entails the promoting of the exports of high value added products.

³ Turkey Country Commerce, 2013. EIU

⁴ <http://www.economy.gov.tr/index.cfm?sayfa=722CFA6D-FF56-46D7-3AB02218DB9FDDA3>

Turkey has a Customs Union agreement with the European Union (EU) since 1996. The EU is Turkey's largest export partner. Exports to the EU were 39% and 46% of total exports in 2012 and 2011 respectively. Turkey's imports in 2011 and 2012 from the EU were respectively 38% and 37% of total imports.

A Transatlantic Free Trade Area (TAFTA) was proposed to create a transatlantic free-trade area covering Europe and North America. Once completed, if combined with free trade agreements with Canada, Mexico and the European Free Trade Association it could form a free trade area covering the whole of both continents.⁵ In July 2013 the USA and the European Union (EU) started negotiations on the Transatlantic Trade and Investment Partnership (TTIP). Turkey has expressed a strong interest of joining the agreement, although Turkey is not yet a member of the EU. Under the Customs Union between Turkey and the EU, Turkey must abide by the terms of trade agreements the EU makes with third countries and open its markets to those countries without being permitted to enter those countries' markets on reciprocal terms, as it is not an EU member⁶

Turkey's uncompromising stance on the Republic of Cyprus has led to the suspension of the yearly negotiations with the EU about membership.

Turkey has FTAs with EFTA Countries, Albania, Bosnia-Herzegovina, Chile, Croatia, Egypt, Georgia, Israel, Jordan, Lebanon, Macedonia, Mauritius, Montenegro, Morocco, the Palestinian Authority, Serbia, South Korea, Syria, Tunisia and South Korea. In mid 2013 Turkey had either begun or started initiatives for FTAs with 22 countries (Algeria, Cameroon, Canada, Colombia, the Democratic Republic of Congo, Ecuador, Faroe Islands, Ghana, India, Indonesia, Japan, Kosovo, Libya, Malaysia, Mexico, Moldova, Peru, Seychelles, South Africa, Ukraine, the US and Vietnam) and four trading blocs (Caribbean Forum, Mercosur, Gulf Co-operation Council and ASEAN).

Turkey is a member of the World Trade Organization (WTO) since 1995.

1.5 International Trade

Table 3 indicates that the agricultural, forestry and fisheries products that fall under the top 25 imports of all products by Turkey from the world in 2012 are cotton (HS⁷ 520100), wheat (HS 100199) and sunflower oil (HS 151211). Table 4 indicates the two agricultural products that fall under the export of all products to the world by Turkey as hazelnuts (HS 080222) and wheat flour (HS 110100). Various clothes manufactured from cotton also fall under the top 25 exports to the world.

⁵ http://en.wikipedia.org/wiki/Transatlantic_Free_Trade_Area

⁶ Turkey Country Commerce, 2013. EIU. p55

⁷ HS Refer to the Harmonized System Code

Table 3: Top 25 imports of all products by Turkey from the world (R million - Array based on 2012)⁸

Code	Product label	2006	2007	2008	2009	2010	2011	2012
TOTAL	All products	935 755	1 194 582	1 638 304	1 168 348	1 352 221	1 731 769	1 934 626
'999999	Commodities not elsewhere specified	62 267	76 740	133 390	89 534	92 359	254 713	333 116
'271019	Other petroleum oils and preparations	31 145	43 041	78 593	60 725	70 226	93 958	113 838
'720449	Ferrous waste and scrap, iron or steel, nes	26 200	39 237	72 679	35 148	51 865	69 124	75 734
'710812	Gold in unwrought forms non-monetary	26 897	37 397	40 470	13 398	18 184	44 048	62 433
'870332	Automobiles with diesel engine displacing more than 1500 cc to 2500 cc	9 966	12 031	12 988	10 471	18 018	24 929	24 884
'271119	Petroleum gases and other gaseous hydrocarbons nes, liquefied	10 437	12 220	18 004	13 064	16 565	20 559	23 223
'740311	Copper cathodes and sections of cathodes unwrought	9 250	13 967	16 191	12 153	18 335	21 675	23 015
'880240	Aircraft nes of an unladen weight exceeding 15,000 kg	8 282	5 256	9 804	4 485	16 064	21 663	19 237
'300490	Medicaments nes, in dosage	11 492	13 904	20 541	19 602	18 193	18 014	17 057
'390210	Polypropylene	7 083	9 339	11 263	7 922	10 586	13 439	15 671
'840820	Engines, diesel, for the vehicles of Chapter 87	12 127	16 148	19 287	9 998	12 920	16 122	14 415
'851712	Telephones for cellular networks mobile telephones or for other wirele	0	12 122	11 674	8 893	9 501	12 559	14 056
'271012	Light petroleum oils and preparations	0	0	0	0	0	0	13 696
'870323	Automobiles w reciprocating piston engine displacing > 1500 cc to 3000 cc	6 774	7 126	7 594	9 781	10 583	10 845	11 290
'847130	Portable digital computers <10kg	4 207	5 897	6 610	8 047	8 172	8 532	10 574
'760110	Aluminium unwrought, not alloyed	4 692	6 415	7 470	5 518	7 802	10 405	10 509
'520100	Cotton, not carded or combed	6 502	8 975	8 113	8 318	12 535	13 302	10 427
'870331	Automobiles with diesel engine displacing not more than 1500 cc	5 937	7 055	7 688	5 460	9 034	12 489	10 412
'390120	Polyethylene having a specific gravity of 0.94 or more	3 524	5 013	6 415	4 862	5 778	7 466	9 156

⁸ Source: Trade Map

'870322	Automobiles w reciprocating piston engine displacg > 1000 cc to 1500 cc	3 157	3 490	4 995	7 144	8 037	8 091	8 923
'720711	Semi-finished products, rectangular cross-section containing by weight < .25% carbon, width < 2X thickness	2 329	5 849	15 064	8 504	7 001	7 120	8 563
'100199	Wheat and meslin (excluding seed for sowing, and durum wheat)	0	0	0	0	0	0	8 522
'270112	Bituminous coal, whether or not pulverised but not agglomerated	12 891	17 411	25 568	24 903	22 390	7 972	8 107
'151211	Sunflower-seed or safflower oil, crude	1 577	966	5 246	3 883	1 978	4 523	8 075
'853120	Indicator panels incorporating liquid crystal device/light emitting diode	6 238	8 374	9 404	10 627	12 101	12 801	7 944

Table 4: Top 25 exports of all products by Turkey to the world (R million - Array based on 2012)⁹

Code	Product label	2006	2007	2008	2009	2010	2011	2012
TOTAL	All products	573 447	753 515	1 070 802	847 123	830 681	970 118	1 247 552
'710812	Gold in unwrought forms non-monetary	3 719	6 766	29 399	38 449	15 089	10 599	109 138
'721420	Bars & rods, in various forms or shapes, containing indentations, ribs, etc., produced from various metals ¹⁰	21 693	31 431	70 137	31 642	23 911	32 804	42 622
'271019	Other petroleum oils and preparations	11 836	22 482	39 187	18 803	17 985	23 014	30 718
'271012	Light petroleum oils and preparations	0	0	0	0	0	0	24 751
'870421	Diesel powered trucks with a GVW not exceeding five tonnes	18 149	25 990	36 735	16 791	21 538	26 291	23 693
'711319	Articles of jewellery and thereof of or of precious metal with plating or clad with precious metal	7 352	10 471	12 861	9 018	10 534	13 278	20 973
'852872	Reception apparatus for television, colour, whether or not incorporated		16 325	15 329	14 140	12 455	13 130	17 323
'999999	Commodities not elsewhere specified	7 154	8 080	10 992	10 512	11 660	15 209	16 430
'870323	Automobiles w reciprocating piston engine displacg > 1500 cc to 3000 cc	12 115	13 156	18 742	10 976	11 886	12 996	15 018
'610910	T-shirts, singlets and other vests, of cotton, knitted	15 782	16 868	18 373	14 474	14 021	14 016	14 702

⁹ Source: Trade Map

¹⁰ Nes – Not elsewhere specified

'870322	Automobiles w reciprocating piston engine displacg > 1000 cc to 1500 cc	8 057	10 109	14 478	14 515	12 223	13 762	13 490
'570242	Carpets of man-made textile mat,of woven pile construction,made up,nes	449	742	6 232	6 037	6 648	8 689	13 157
'870331	Automobiles with diesel engine displacing not more than 1500 cc	7 936	11 499	16 295	16 350	14 297	11 520	12 200
'854449	Electric conductors, for a voltage not exceeding 80 V, nes	1 019	6 368	9 091	6 667	8 017	9 578	11 823
'620462	Womens/girls trousers and shorts, of cotton, not knitted	7 895	9 291	10 351	7 862	7 595	8 592	10 725
'610990	T-shirts,singlets and other vests,of other textile materials,knitted	3 445	4 820	5 190	5 422	6 092	7 913	10 570
'620342	Mens/boys trousers and shorts, of cotton, not knitted	5 674	6 904	8 851	7 569	7 053	7 429	8 832
'080222	Hazelnuts or filberts, fresh or dried, shelled or peeled	6 095	6 386	6 319	5 896	6 503	7 488	8 623
'720711	Semi-fin prod,i/nas,rect/sq cross-sect cntg by wgt<.25% c,width<2X thk	2 371	3 504	12 799	6 615	10 671	7 705	8 386
'870210	Diesel powered buses with a seating capacity of > nine persons	5 591	8 870	11 697	7 878	6 149	7 499	8 370
'870899	Motor vehicle parts nes	3 778	4 955	6 599	4 825	5 475	6 809	8 169
'841810	Combined refrigerator-freezers, fitted with separate external doors	288	1 723	1 823	1 593	1 997	4 624	7 409
'110100	Wheat or meslin flour	1 829	2 982	5 010	4 823	4 359	6 413	6 881
'730890	Structures&parts of structures,i/s (ex prefab bldgs of headg no.9406)	2 476	4 025	6 670	5 134	3 888	4 622	6 731
'870332	Automobiles with diesel engine displacing more than 1500 cc to 2500 cc	9 726	13 260	11 019	8 576	6 819	7 685	6 671
'840999	Parts for diesel and semi-diesel engines	6 058	8 514	9 757	6 332	6 979	7 226	6 453
'870829	Parts and accessories of bodies nes for motor vehicles	2 765	4 009	5 303	4 119	4 108	4 972	5 950
'720720	Semi-fin prod,iron/non-alloy steel,containg by weight .25%/more carbon	1 877	1 976	2 631	806	2 589	3 019	5 819
'851660	Ovens;cookers,cookg plates,boilg rings,grillers & roasters,elec,nes	2 084	2 971	4 574	3 985	4 050	4 864	5 798

'845011	Automatic washing machines,of a dry linen capacity not exceeding 10 kg	3 882	4 523	5 398	5 506	4 832	4 909	5 652
'611020	Pullovers, cardigans and similar articles of cotton, knitted	5 403	6 282	6 641	5 082	4 902	4 845	5 634
'200819	Nuts&seeds nes incl mx,o/w prep o presvd,sugard,sweetend,spiritd o not	2 914	3 438	4 218	3 430	3 941	4 585	5 407
'961900	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar arti	0	0	0	0	0	0	5 343

1.6 Agricultura/forestry/fisheries Production¹¹

In 2007 Turkey was the world's largest producer of hazelnuts, cherries, figs, apricots, quinces and pomegranates. It was the second largest producer of watermelons, cucumbers and chickpeas and the third largest producer of tomatoes, eggplants, green peppers lentils and pistachios. It is also an important producer of the following: onions, olives, sugar beet, tobacco, tea and apples. In 2011 the total wheat and barley production were 18.8 and 7 million tons respectively¹².

Livestock products including meat, wool, eggs and milk contribute more than a third of the value of agricultural output. In 2005, 545 673 tons of fish and aquaculture were harvested.

The agricultural sector accounted for 29.5% employment in 2009 and according to the 1990 census "85% of agricultural holdings were less than 10 hectares and 57% of these were fragmented into four or more non-contiguous plots". Since the 1980s, agriculture has been declining in terms of its share in the total economy.

1.7 Agricultural/forestry/fisheries imports and exports by/from Turkey from/to the world

Table 5 and 6 respectively indicate the top 25 imports and exports (on average from 2008 - 2012) of agricultural, forestry and fisheries products by Turkey from/to the world. It is noted that cotton (HS 520100), wheat (HS 100190), sunflower seed oil (HS 151211), soya beans (HS 120100) and sunflower seeds (HS 120600) were the top 5 imports from the world, while hazelnuts (HS 080222), wheat flower (HS 110100), nuts and seeds (HS200819), dried grapes (HS 080620) and tobacco (HS 240110) were the top 5 exports to the world.

¹¹ en.wikipedia.org/wiki/Category:Agriculture_in_Turkey

¹² <http://www.indexmundi.com/agriculture/?country=tr&commodity=barley&graph=production>

Table 5: Top 25 imports of Agricultural, Forestry and Fisheries products by Turkey from the World (R'000 - Array based on avg. imports)

HS code	Product label	Value in 2008	Value in 2009	Value in 2010	Value in 2011	Value in 2012	Avg. Turkish imports from the World 08-12
'520100	Cotton, not carded or combed	8 113 093	8 318 244	12 535 416	13 302 360	10 427 262	10 539 275
'100190	Wheat nes and meslin	11 337 609	7 074 770	4 589 036	11 602 876	0	6 920 858
'151211	Sunflower-seed or safflower oil, crude	5 246 170	3 883 326	1 978 434	4 523 329	8 074 790	4 741 210
'120100	Soya beans	5 255 758	3 560 546	5 410 793	4 943 502	0	3 834 120
'120600	Sunflower seeds, whether or not broken	2 962 053	1 995 909	2 548 537	4 239 395	3 631 007	3 075 380
'151190	Palm oil and its fractions refined but not chemically modified	3 750 473	2 192 955	2 320 583	3 262 484	3 594 375	3 024 174
'480100	Newsprint, in rolls or sheets	3 207 586	2 446 067	2 182 287	2 420 310	2 410 966	2 533 443
'240120	Tobacco, unmanufactured, partly or wholly stemmed or stripped	2 263 699	2 311 756	1 947 300	2 097 583	2 840 896	2 292 247
'210690	Food preparations nes	1 986 643	1 858 198	1 887 859	2 354 761	2 696 550	2 156 802
'230400	Soya-bean oil-cake&oth solid residues,whether or not ground or pellet	1 285 142	1 263 918	1 231 109	1 747 517	4 346 357	1 974 809
'470329	Chemical wood pulp,soda/sulphate,non-coniferous,semi-bl/bleachd,nes	1 897 184	1 247 264	1 791 570	2 086 250	2 136 162	1 831 686
'470321	Chemical wood pulp,soda or sulphate,coniferous,semi-bl or bleached,nes	1 650 190	1 416 915	1 897 326	1 917 207	2 156 298	1 807 587
'180100	Cocoa beans, whole or broken, raw or roasted	1 284 079	1 423 824	1 683 358	1 980 801	1 988 921	1 672 196
'410210	Sheep or lamb skins, raw, with wool on, nes	1 306 112	660 730	1 107 621	2 039 059	2 475 210	1 517 746
'100590	Maize (corn) nes	2 940 994	974 794	806 482	874 826	1 867 909	1 493 001
'071340	Lentils dried, shelled, whether or not skinned or split	1 979 058	1 107 388	1 412 638	1 478 058	867 956	1 369 020
'480411	Paper, Kraftliner, in rolls, unbleached, uncoated	1 252 134	960 794	1 325 168	1 558 074	1 585 907	1 336 416
'481190	Paper,in rolls o sheets,ctd,impreg,cov,surf-col,surf-dec o printd,nes	1 260 433	1 313 374	1 182 688	1 166 066	1 234 289	1 231 370
'020120	Bovine cuts bone in, fresh or chilled	0	0	1 665 459	3 639 536	737 964	1 208 592

'010290	Bovine, live except pure-bred breeding	0	0	1 518 985	3 996 397	0	1 103 076
'120740	Sesamum seeds, whether or not broken	994 944	1 065 205	1 033 947	1 006 780	1 308 044	1 081 784
'440710	Lumber, coniferous (softwood) 6 mm and thicker	896 196	534 407	678 410	1 171 128	1 470 980	950 224
'230630	Sunflower seed oil-cake&oth solid residues,whether/not ground/pellet	392 393	385 789	860 755	1 020 026	1 513 640	834 521
'440320	Logs, poles, coniferous nes	1 035 990	593 260	731 481	840 585	858 379	811 939
'120991	Seeds, vegetable, nes for sowing	741 030	812 674	717 430	752 090	1 002 136	805 072

Source: Trade Map

Table 6: Top 25 exports of Agricultural, Forestry and Fisheries products by Turkey to the World (R'000 - Array based on avg. exports)

HS Code	Product label	Exported value in 2008	Exported value in 2009	Exported value in 2010	Exported value in 2011	Exported value in 2012	Avg Turkish exports to the world 08-12
'080222	Hazelnuts or filberts, fresh or dried, shelled or peeled	6 318 956	5 895 641	6 502 738	7 488 468	8 622 738	6 965 708
'110100	Wheat or meslin flour	5 009 738	4 822 639	4 358 991	6 412 651	6 881 337	5 497 071
'200819	Nuts&seeds nes incl mx,o/w prep o presvd,sugard,sweetend,spiritd o not	4 218 356	3 429 818	3 941 265	4 585 132	5 406 587	4 316 232
'080620	Grapes, dried	2 835 457	3 379 847	3 043 450	3 642 017	4 256 073	3 431 369
'240110	Tobacco, unmanufactured, not stemmed or stripped	3 440 117	4 038 878	2 908 564	2 632 856	3 461 921	3 296 467
'070200	Tomatoes, fresh or chilled	3 152 190	3 371 496	3 475 453	3 109 641	3 278 056	3 277 367
'481840	Sanitary articles of paper,incl sanit towels&napkin (diapers) f babies	3 174 295	3 384 956	3 779 952	4 090 564	0	2 885 954
'081310	Apricots, dried	2 543 076	2 312 876	2 555 184	2 595 127	2 425 925	2 486 438
'210690	Food preparations nes	2 419 141	2 110 016	1 897 924	2 872 208	2 972 606	2 454 379
'080550	Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus	1 645 712	2 303 545	2 280 813	2 547 547	2 180 867	2 191 697
'151620	Veg fats &oils&fractions hydrogenatd,inter/re-esterifid,etc,ref'd/not	2 126 461	1 439 109	757 004	2 662 682	3 930 446	2 183 140
'080520	Mandarins(tang&sats)clementines&wilkg&sim citrus hybrids,fresh/drid	1 590 648	2 100 918	2 117 810	2 430 585	2 397 103	2 127 413
'180690	Chocolate and other food preparations containing cocoa nes	1 957 886	1 856 597	1 782 096	2 088 479	2 657 440	2 068 500

'170490	Sugar confectionery nes (includg white chocolate),not containg cocoa	1 850 807	1 813 809	1 668 170	1 949 097	2 694 481	1 995 273
'240220	Cigarettes containing tobacco	1 871 233	1 645 344	1 752 193	1 781 190	2 726 590	1 955 310
'151219	Sunflower-sed/safflower oil&their fractions refind but nt chem modifid	1 335 088	918 230	730 650	2 432 002	3 403 386	1 763 871
'190590	Communion wafers,empty cachets f pharm use&sim prod&bakers' wares nes	1 372 605	1 479 119	1 503 476	1 665 803	2 297 119	1 663 624
'190219	Uncooked pasta, not stuffed or otherwise prepared, nes	1 235 034	1 075 747	1 122 190	1 723 961	2 534 375	1 538 261
'190531	Sweet biscuits	1 216 060	1 152 166	1 247 194	1 843 986	2 173 604	1 526 602
'200799	Jams,fruit jellies,fruit/nut purée&paste,ckd prep,sugard,sweetend/not	1 573 483	1 110 929	1 319 163	1 536 841	1 902 349	1 488 553
'080420	Figs, fresh or dried	1 518 581	1 466 487	1 345 931	1 300 328	1 609 192	1 448 104
'020712	Fowls (gallus domesticus), whole, frozen	266 300	839 845	1 016 121	1 897 512	3 175 176	1 438 991
'080510	Oranges, fresh or dried	776 147	1 402 467	1 142 218	1 890 415	1 884 798	1 419 209
'210210	Yeasts, active	1 162 318	1 486 550	1 271 929	1 268 805	1 571 128	1 352 146
'080610	Grapes, fresh	1 374 228	1 290 475	1 486 211	1 260 687	1 330 576	1 348 435

Source: Trade Map

2. SOUTH AFRICA – TURKEY TRADE RELATIONS

Turkey and South Africa have signed a number of agreements, including the Agreement on Economic, Scientific and Technical Cooperation (2005), and the Agreement on Prevention of Double Taxation (2005). Up to now two Joint Economic Commission meetings have been held between Turkey and SA.¹³ The Turkish-South African Business Council has been established in 1998.

Turkey has launched initiatives to start negotiations on a free trade agreement with SA.¹⁴

2.1 Total Trade between SA and Turkey

Table 7 indicates the top imports by SA from Turkey on a HS 2 level. Paper & paperboard (HS 48), edible fruit and nuts (HS 08) and preserved food (HS 20) are the agricultural/forestry/fisheries products that fall under the top 25 of all products imported by SA from Turkey.

Table 7: Top 25 of all products imported by SA from Turkey (R million - Array based on avg.)

HS	Description	2008	2009	2010	2011	2012	Avg 2008-2012
27	Mineral Fuel, Oil Etc	2 827	1 094	4	843	456	1 045
84	Machinery	411	298	363	847	1 189	622
87	Vehicles, Not Railway	497	274	356	414	489	406
71	Precious Stones, Metals	866	10	13	17	17	185
85	Electrical Machinery	187	97	113	133	140	134
72	Iron And Steel	148	5	11	337	56	111
48	Paper, Paperboard	206	139	88	65	19	104
40	Rubber	92	88	61	108	134	97
68	Stone, Plastr, Cement, Etc	115	96	85	49	70	83
98	Special Other	52	44	95	103	104	79
59	Impregnatd Text Fabrics	101	95	79	66	52	79
94	Furniture And Bedding	129	39	55	74	75	74
39	Plastic	44	57	74	93	103	74
73	Iron/Steel Products	70	32	39	91	83	63
55	Manmade Staple Fibers	49	29	40	62	80	52
62	Woven Apparel	36	30	32	50	85	46
28	Inorg Chem; Rare Erth Mt	39	36	44	46	66	46
30	Pharmaceutical Products	31	39	40	46	55	42
08	Edible Fruit And Nuts	48	47	41	26	34	39
29	Organic Chemicals	12	12	6	51	100	36
70	Glass And Glassware	14	18	24	52	54	32
61	Knit Apparel	38	35	0	33	54	32
32	Tanning, Dye, Paint, Putty	14	28	29	29	44	29
90	Optic, Nt 8544; Med Instr	18	16	29	33	43	28

¹³ Turkish Ministry of Economy - <http://www.economy.gov.tr/index.cfm?sayfa=countriesandregions&country=ZA®ion=0>

¹⁴ Turkish Ministry of Economy - <http://www.economy.gov.tr/index.cfm?sayfa=tradeagreements&bolum=fta®ion=0>

20	Preserved Food	23	28	25	27	34	27
----	----------------	----	----	----	----	----	----

Source: WTA Revised data

Table 8 indicates the top exports by SA to Turkey on a HS 2 level. Food waste; animal feed (HS 23), hides and skins (HS 41), miscellaneous grain, seed and fruit (HS 12), animal hair and yarn (HS 51) and paper and paperboard (HS 48) are the agricultural/forestry/fisheries products that fall under the top 25 of all products exported by SA to Turkey.

Table 8: Top 25 of all products exported by SA to Turkey (R million - Array based on avg.)

HS	Description	2008	2009	2010	2011	2012	Avg 2008-2012
27	Mineral Fuel, Oil Etc	834	830	1 267	2 097	2 244	1 454
87	Vehicles, Not Railway	1 521	284	30	91	322	450
72	Iron And Steel	261	281	483	449	437	382
84	Machinery	540	238	360	429	314	376
26	Ores,Slag,Ash	153	108	173	271	588	259
29	Organic Chemicals	161	111	177	162	146	152
28	Inorg Chem;Rare Erth Mt	90	33	41	177	67	81
23	Food Waste; Animal Feed	35	7	66	78	77	53
41	Hides And Skins	45	61	44	61	24	47
85	Electrical Machinery	21	31	29	47	81	42
38	Misc. Chemical Products	46	28	11	17	21	25
12	Misc Grain,Seed,Fruit	96	0	1	1	1	20
90	Optic,Nt 8544;Med Instr	33	27	13	6	14	19
51	Animal Hair+Yarn,Fabrc	8	13	16	29	26	18
32	Tanning,Dye,Paint,Putty	9	6	19	20	29	17
40	Rubber	25	10	6	11	24	15
39	Plastic	45	3	5	8	9	14
25	Salt;Sulfur;Earth,Stone	11	11	10	15	19	13
75	Nickel+Articles Thereof	0	0	7	35	18	12
48	Paper,Paperboard	5	10	41	0	0	11
70	Glass And Glassware	5	6	15	14	13	11
76	Aluminum	5	5	9	19	11	10
54	Manmade Filament,Fabric	21	15	1	2	3	8
42	Leathr Art;Saddlry;Bags	0	0	1	24	14	8
88	Aircraft,Spacecraft	36	1	0	0	0	7
73	Iron/Steel Products	5	3	11	7	3	6

Source: WTA Revised data

Table 9 indicates that SA had an average trade deficit of R 357 million per year with Turkey for the period 2008 to 2012. Over the last three years SA however had a trade surplus with Turkey.

Table 9: Trade balance in the trade of all products between Turkey and SA (R million)

Description	2008	2009	2010	2011	2012	Avg 2008-2012
Imports from Turkey	6 460	2 928	2 017	4 110	4 116	3 926
Exports to Turkey	4 064	2 177	2 902	4 129	4 574	3 569
Trade surplus (deficit)	(2 396)	(751)	885	19	458	(357)

3. AGRICULTURAL/FORESTRY/FISHERIES TRADE BETWEEN TURKEY AND SA

There are no agricultural agreements between SA and Turkey. A draft Agreement on Cooperation in the Veterinary field is however under consideration¹⁵.

3.1 Agricultural/forestry/fisheries product trade between Turkey and SA

Table 10 indicates the most important agricultural/forestry/fisheries products imported by SA from Turkey. Agricultural/forestry/fisheries products with an average value of R10 million or more that were imported by SA from Turkey over the period 2008 to 2012 are: sanitary napkins and tampons and diapers (HS 481840), nuts (HS 200819), hazelnuts or filberts (HS 080222), tobacco, not stemmed/stripped (HS 240110) and pasta (HS 190219).

The most important agricultural/forestry/fisheries products exported by SA to Turkey are indicated in table 11. Average annual exports from 2008 to 2012 with a value of more than R10 million are: flours, meals and pellets, of fish or of crustacean (HS 230120), sheep or lamb skins with wool on (HS 410210), sunflower seeds (HS 120600) and sheep or lamb skins, without wool on (HS 410221).

Table 12 indicates that SA had a trade deficit in the trade of agricultural/forestry/fisheries products between the two countries over the period 2008 to 2012. The average trade deficit for SA over the period was R119 million.

¹⁵ Directorate: Americas, Australasia, Europe and Middle East Relations, DAFF

Table 10: Imports of agricultural/forestry/fisheries products with a value of more than R2 million by SA from Turkey (R million - Array based on avg.)¹⁶

HS	Description	2008	2009	2010	2011	2012	Avg 2008-2012
Total	Agri/Fish/Forest Products	374	289	229	197	183	254
481840	Sanitary Napkins And Tampons, Diapers, Diaper Line	189	117	72	46	0	85
200819	Nuts (Other Than Peanuts (Ground-Nuts)), And Other	19	25	22	22	30	24
080222	Hazelnuts Or Filberts (Corylus Spp.) Fresh Or Drie	21	10	23	8	22	17
240110	Tobacco, Not Stemmed/Stripped	10	17	10	4	17	12
190219	Pasta (Spaghetti, Macaroni, Etc.), Uncooked, Not S	9	4	6	18	13	10
210690	Food Preparations Nesoi	12	9	11	6	3	8
080620	Grapes, Dried (Including Raisins)	0	22	7	4	0	7
081310	Apricots, Dried	5	6	4	5	6	5
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	8	1	6	3	7	5
150910	Olive Oil And Its Fractions, Virgin, Not Chemicall	9	9	3	2	0	5
240220	Cigarettes Containing Tobacco	1	6	5	5	3	4
170490	Sugar Confectionary (Including White Chocolate), N	4	1	2	6	7	4
091099	Spices, Nesoi	3	4	4	3	6	4
190531	Cookies (Sweet Biscuits)	2	1	1	8	8	4
480300	Toilet, Facial Tissue, Towel Or Napkin Stock And S	6	9	3	0	0	4
180631	Chocolate And Other Cocoa Preparations In Blocks,	2	1	5	3	6	3
481920	Folding Cartons, Boxes And Cases, Of Non-Corrugate	0	0	3	8	4	3
481820	Handkerchiefs, Cleansing Or Facial Tissues And Tow	6	4	2	2	3	3
080420	Figs, Fresh Or Dried	5	3	3	3	3	3
080290	Nuts, Nesoi, Fresh Or Dried, Whether Or Not Shelle	12	3	0	1	0	3
170410	Chewing Gum, Whether Or Not Sugar Coated	3	4	1	0	2	2
071290	Vegetables, Nesoi, Dried And Vegetable Mixtures, D	3	2	3	1	2	2
110100	Wheat Or Meslin Flour	0	1	3	3	3	2
482110	Paper And Paperboard Labels Of All Kinds, Printed	0	2	1	2	4	2

¹⁶ WTA – Revised data

210220	Yeasts, Inactive; Other Single-Cell Micro-Organism	3	1	2	2	2	2
121190	Plants And Parts Of Plants (Including Seeds And Fr	1	1	1	2	3	2
170250	Chemically Pure Fructose In Solid Form	6	2	0	0	0	2
190590	Bread, Pastry, Cakes, Biscuits And Similar Baked P	4	0	0	2	2	2
071310	Peas (Pisum Sativum), Dried Shelled, Including See	0	0	0	2	6	2
220300	Beer Made From Malt	6	2	0	0	0	2
190230	Pasta, Prepared, Nesoi	2	1	1	1	2	2

Table 11: Exports of agricultural/forestry/fisheries products with a value of more than R1 million by SA to Turkey (R million - Array based on avg.)¹⁷

HS	Description	2008	2009	2010	2011	2012	Avg 2008-2012
Total	Agri/Fish/Forest Products	191	103	130	138	115	135
230120	Flours, Meals And Pellets, Of Fish Or Of Crustacea	23	5	66	78	77	50
410210	Sheep Or Lamb Skins With Wool On, Fresh, Salted, D	37	49	25	10	0	24
120600	Sunflower Seeds, Whether Or Not Broken	96	0	0	0	0	19
410221	Sheep Or Lamb Skins, Without Wool On, Pickled, Whe	7	3	5	31	20	13
480419	Kraftliner, Uncoated, Bleached, In Rolls Or Sheets	0	9	10	0	0	4
470200	Chemical Woodpulp, Dissolving Grades	4	4	2	2	3	3
240120	Tobacco, Partly Or Wholly Stemmed/Stripped	1	10	1	0	0	2
230910	Dog And Cat Food, Put Up For Retail Sale	7	2	0	0	0	2
080410	Dates, Fresh Or Dried	0	0	5	0	4	2
220421	Wine Of Fresh Grapes (Other Than Sparkling Wine) A	2	0	2	3	2	2
220710	Ethyl Alcohol, Undenatured, Of An Alcoholic Streng	1	5	0	0	0	1
200819	Nuts (Other Than Peanuts (Ground-Nuts)), And Other	0	5	0	1	0	1
080610	Grapes, Fresh	1	2	1	0	1	1
230990	Animal Feed Preparations (Mixed Feeds, Etc.), Othe	5	0	0	0	0	1
410150	Whole Hides And Skins, Of A Weight Exceeding 16 Kg	1	2	2	0	0	1
240310	Smoking Tobacco, Whether Or Not Containing Tobacco	0	0	1	2	0	1

¹⁷ WTA – Revised data

220429	Wine Of Fresh Grapes (Other Than Sparkling Wine) A	0	0	1	1	1	1
200870	Peaches, Prepared Or Preserved, Whether Or Not Con	0	0	2	1	0	1

Table 12: Trade balance in the trade of agricultural/forestry/fisheries products between Turkey and SA (R million)¹⁸

Description	2008	2009	2010	2011	2012	Avg 2008-2012
Imports from Turkey	374	289	229	197	183	254
Exports to Turkey	191	103	130	138	115	135
AFF trade surplus/(deficit)	(183)	(186)	(99)	(59)	(68)	(119)

3.2 Analysis to determine possible exports to Turkey

The methods that were used to determine which products have the potential to be exported from South Africa to Turkey are the trade potential index (TPI) and the "trade chilling concept". The TPI concentrates on products that are already traded between countries (trade deepening), while "trade chilling" concentrates on products that are not currently traded between countries, but have the potential to be traded (trade widening). Point 3.2.1 discusses the TPI and point 3.2.2 the "trade chilling concept".

When looking at Turkey's imports from the world (table 5), the current exports to Turkey by SA (table 11), the TPI (table 13 and annex 2), the Indicative Trade Potential (ITP) (table 13 and annex 2) and trade chilling (table 14 and annex 3), it is clear that there is a potential for trade to increase between the two economies.

3.2.1 Trade potential index (TPI)¹⁹

The Trade Potential Index uses a scoring system based on data obtained from the Trade Map database to determine which products have the potential to be exported to a country. The trade indicators contained in the database used were: Did Turkey import from SA, is the exports by SA to Turkey growing, is SA exports to the world growing, is Turkey's imports from the world growing and is the avg. indicative potential trade larger than R 1 million. The TPI concentrates on products that are already traded between countries (trade deepening). The TPI is measured against a potential score of 5. A score of 0 would represent the lowest end of the scale and the least trade potential whilst a score of 5 would indicate the greatest trade potential. Annex 1 gives a more comprehensive description of the TPI.

Table 13 indicates the top 20 agricultural/forestry/fisheries product tariff lines according to the TPI. In the ranking of importance (from most important to least important) the TPI has been used as the most important criteria, followed by the indicative trade potential (ITP)²⁰, in R thousand as the second most important criteria. The TPI indicates the following as the top 5 products to export to Turkey: Food preparations (HS 210690), Paper, Kraftliner (HS 480419), Books, brochures, leaflets and similar printed matter (HS 410221), Sheep or lamb skins, pickled, without wool on (HS 410221) and Seeds, vegetable, nes²¹ for sowing (HS 120991). Note that other agricultural/forestry/fisheries products that have a full or high TPI score can also be considered for potential exports.

¹⁸ WTA –Revised data

¹⁹ Trade Map - www.trademap.org

²⁰ The indicative trade potential is defined as the lower of the value a selected country exports to the world or the value the partner country imports from the world minus the current trade between the two countries under review. The trade potential is indicative only and serves as a departure point for further research. It gives an overview of the complementarities of the two economies.

²¹ Not elsewhere specified

Annex 2 indicates the TPI for agricultural/forestry/fisheries product tariff lines between SA and Turkey. It is important to note, that there are more product tariff lines that score high in the TPI (products identified for possible exports by SA to Turkey), than indicated in table 13, and it may be worthwhile to look at the products identified in annex 2.

Table 13: The Trade Potential Index (TPI) and the Indicative Trade Potential (ITP)¹⁵ of the top 20 agricultural/forestry/fisheries products traded between South Africa and Turkey (R '000)

Product code	Product label	ITP p/a (Avg. 2008-2012) R' 000	Total TPI Score	Did Turkey import from SA ²²	Is the exports by SA to Turkey growing	Is SA exports to the world growing	Is Turkeys imports from the world growing?	Is the avg. indicative potential trade larger than R 1 million?
'210690	Food preparations nes	865 310	5	1	1	1	1	1
'480419	Paper, Kraftliner, in rolls, o/t unbleached, uncoated	349 815	5	1	1	1	1	1
'490199	Books, brochures, leaflets and similar printed matter, nes	258 231	5	1	1	1	1	1
'410221	Sheep or lamb skins, pickled, without wool on	148 576	5	1	1	1	1	1
'120991	Seeds, vegetable, nes for sowing	139 194	5	1	1	1	1	1
'220720	Ethyl alcohol and other spirits, denatured, of any strength	122 514	5	1	1	1	1	1
'481920	Cartons,boxes and cases,folding,of non-corrugated paper or paperboard	114 127	5	1	1	1	1	1
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings	109 975	5	1	1	1	1	1
'080510	Oranges, fresh or dried	81 525	5	1	1	1	1	1
'482110	Paper labels of all kinds, printed	77 193	5	1	1	1	1	1
'060290	Plants live, nes	57 350	5	1	1	1	1	1
'080410	Dates, fresh or dried	39 926	5	1	1	1	1	1
'200870	Peaches nes,o/w prep o presvd whether o not sugard,sweetend o spiritd	38 746	5	1	1	1	1	1
'510130	Carbonised wool, not carded or combed	37 937	5	1	1	1	1	1
'200799	Jams,fruit jellies,fruit/nut purée&paste,ckd prep, sugard, sweetend/not	37 086	5	1	1	1	1	1
'482010	Registers,account books,note books,diaries & similar articles of paper	35 010	5	1	1	1	1	1
'330129	Essential oils, nes	33 158	5	1	1	1	1	1
'220870	Liqueurs and cordials	32 210	5	1	1	1	1	1
'080620	Grapes, dried	32 124	5	1	1	1	1	1
'080810	Apples, fresh	27 624	5	1	1	1	1	1

²² If the average value of imports by Turkey from SA was more than R10 000, it is assumed that imports have taken place.

3.2.2 "Trade chilling concept" ²³

The Trade chilling concept is a method used to indicate which products have the highest potential to be traded between countries, if current trade flows are excluded. Because current trade flows are excluded, this refers to trade widening, rather than to trade deepening as in the TPI.

The trade chilling concept refers to products which Turkey and South Africa are trading with the rest of the world, but not with each other. The trade chilling took the following into consideration: (i) average global exports from South Africa between 2008 and 2012 which were at least R15 million and (ii) global average imports into Turkey between 2008 and 2012 that were also at least R15 million (iii) where the average product trade between Turkey and South Africa were less than R6 000 between 2008 and 2012, no trade is assumed.

Table 14 indicates the top 20 agricultural/forestry/fisheries products Turkey and South Africa are trading with the rest of the world, but not with each other (trade chilling²⁴) [Array based on average Turkish imports from world]. It is noted that cotton (520100), wheat (HS 100190), sunflower seed oil (HS 151211), soya beans (HS 120100) and palm oil (HS151190) are the top 5 products identified for potential export. Annex 3 indicates all the products identified by the trade chilling exercise. All the products identified in the "trade chilling" exercise can be considered for potential exports, not only those in table 14).

Table 14: Trade chilling of the top 20 agricultural/forestry/fisheries products between South Africa and Turkey (Array based on average Turkish imports from world R '000)

HS code	Product description	Avg Turkey imp2008 - 2012 from SA R'000	Avg Exp to world by SA R'000	Avg Turkish imports from the world R'000
'520100	Cotton, not carded or combed	0	122 658	10 539 275
'100190	Wheat nes and meslin	0	267 694	6 920 858
'151211	Sunflower-seed or safflower oil, crude	0	147 340	4 741 210
'120100	Soya beans	0	227 309	3 834 120
'151190	Palm oil and its fractions refined but not chemically modified	0	25 070	3 024 174
'480100	Newsprint, in rolls or sheets	0	263 648	2 533 443
'230400	Soya-bean oil-cake&oth solid residues,whether or not ground or pellet	0	32 610	1 974 809
'470329	Chemical wood pulp,soda/sulphate, non-coniferous, semi-bl/bleachd,nes	0	873 783	1 831 686
'100590	Maize (corn) nes	0	3 481 261	1 493 001
'020120	Bovine cuts bone in, fresh or chilled	0	33 246	1 208 592
'010290	Bovine, live except pure-bred breeding	0	44 907	1 103 076
'440710	Lumber, coniferous (softwood) 6 mm and thicker	0	53 518	950 224
'350510	Dextrins and other modified starches	0	29 898	631 610

²³ This section was adapted from a contribution by: Bonani Nyhodo. Senior Economist - Supply Chain/Trade. National Agricultural Marketing Council - Republic of South Africa. The original contribution can be seen in Annex 3

²⁴ The authors of this report are of the opinion that some of the products identify by the trade chilling, may be disturbed by the functioning of SA as a trade hub for exports to Africa (e.g. coffee, milk products). It is however still a good indicator of products for potential export...

'100630	Rice, semi-milled or wholly milled, whether or not polished or glazed	0	67 954	612 684
'230990	Animal feed preparations nes	0	195 325	599 090
'190110	Prep of cereals,flour,starch/milk f infant use,put up f retail sale	0	71 110	579 974
'090111	Coffee, not roasted, not decaffeinated	1	21 401	404 458
'480421	Paper, sack kraft, in rolls, unbleached, uncoated	0	84 333	376 450
'180690	Chocolate and other food preparations containing cocoa nes	0	122 437	364 224
'071333	Kidney beans&white pea beans drid shelld,whether o not skinnd o split	0	15 209	345 070

3.3 Tariffs^{25 26}

Traditionally Turkey's agricultural sector had high tariffs. From 2000 the Turkish agricultural policy has started to change and had lead to lower agricultural tariffs, but the average applied MFN tariff is still substantially higher in agriculture than other sectors.

In 2007 the average applied tariff was between 0-225% for agriculture, between 0-81.9% for fish and fishery products and between 0-10% for wood, pulp, paper and furniture. This may represent a skew picture because duty-free items represent 23.6% of all tariff lines.

Tariffs are regularly revised and it is recommended that the tariff is confirmed just before exports take place. The latest tariffs in English (and other import information) are available at <http://www.tariff-tr.com/> (This is a pay site). The website of the Turkish Ministry of Economy is at <http://www.economy.gov.tr/index.cfm?-sayfa=index>, but the page is not always up to date in English.

4) TRADE BARIERS^{27 28}

Traditionally there was a high level of interference by the Turkish government in the agricultural sector, but this is changing. Currently the Turkish Government is supporting the "privatisation of markets, reduction of agricultural subsidies, the removal of trade barriers and the integration of Turkey into the global economy".²⁷

Some of the remaining barriers are:

The import of live cattle is only allowed from Australia, New Zealand, USA and Uruguay.

Sensitivities within the agricultural communities and bureaucracy in government may prevent the identification of projects for international collaboration.

"Harmonisation of the Turkish agricultural sector with the Common Agricultural Policy (CAP) is a priority in Turkey-EU relations agenda but in providing incentives for European agribusiness suppliers to the market, could stymie a "real" reform agenda"²⁷.

The Ministry of Agriculture, Food and Livestocks (General Directorate of Protection and Control)²⁹ [GDPC] is responsible for:

- Managing import and domestic controls (plant, animal and their products)

²⁵ Austrade <http://www.austrade.gov.au/Export/Export-Markets/Countries/Turkey/Industries/Agriculture>

²⁶ WTO. Trade Policy Review Turkey - WT/TPR/S/192

²⁷ Austrade <http://www.austrade.gov.au/Export/Export-Markets/Countries/Turkey/Industries/Agriculture>

²⁸ Country Commerce August 2013- www.eiu.com The Economist Intelligence Unit Limited

²⁹ GDPC <http://www.tarim.gov.tr>

- Food and feed safety
- Preparing relevant regulations and laws
- Animal health and quarantine

The GIPC requires proper documentation on food imports and certain steps must be undertaken. An understanding of these provisions and laws concerning the sector, will avoid unnecessary delays.

The establishment of the Directorate-General for Aquaculture and Fisheries in the Ministry of Food, Agriculture and Livestock in 2012 will further improved administrative capacity, the organisation of tasks and enforcement.³⁰ Forestry is a function of the Ministry of Forestry and Water Works.³¹

The Ministry of Economy publishes each year an Import Regime Decree in the Official Gazette. Custom duties and communications that relates to imports are published in this communication.³¹ For example alcoholic beverages were banned from imports in 2013.

Importers must usually register with their local chamber of business and obtain an import certificate from the Ministry of Economics. Import certificates are normally valid until the end of the following year it was issued (e.g. certificate issued during 2012, will expire on 1st of January 2014). According to the WTO, imports into Turkey may be subject to 5 taxes: custom tariffs, excise taxes, the mass Housing fund, the special consumption tax and value-added tax (VAT).

Turkey is trying to reduce the burden of support and move it policies closer to those of the EC. Some of the possible most distorting production measures (e.g. administered output prices) are being phased out and replaced by a less distorting direct support system. However the relative high tariff protection on some agricultural products, may impedes the exposure of some of the sector to greater competition.³²

4.1 Trade Events

Some agricultural trade fairs that will be held in Turkey in 2014 are:

Animalia Istanbul – June 2014

Agro Eurasia Fair – October 2014

4.2 Trade Related infrastructure^{33 34}

Turkey's infrastructure is well below the European average, but is broadly adequate for doing business. Over the past few years there was considerable investment in infrastructure, but further investment is needed. "Shortcomings include interruptions to power and water supplies, the inadequacy of the rail network and some inter-city roads, urban traffic congestion, and high prices for energy, telecommunications and motorway usage owing to inefficiencies, weak competition and high levels of taxation"²⁷.

The development of port infrastructure also needs attention, given the importance of maritime transport for Turkey's economy.

³⁰ http://ec.europa.eu/enlargement/pdf/key_documents/2013/package/tr_rapport_2013.pdf

³¹ Country Commerce August 2013- www.eiu.com The Economist Intelligence Unit Limited

³² WTO. Trade Policy Review Turkey - WT/TPR/S/192

³³ Turkey's Competitiveness in a European Context © 2006 World Economic Forum

³⁴ Economic Outlook. Turkish Ministry of Economy – May 2013

Some logistic information of Turkey as in an economic outlook presentation by the Turkish Ministry of Economy in May 2013:

Have Europe's biggest truck fleet - (45 thousands trucks and 1,420 companies)

Almost 1.1 million flights in 2012 - (2.4 million tonnes freight and 130 million passengers)

Have 48 airports and 76 ports

Total length of divided highways will reach 15 thousand kilometers.

High-speed railway projects are carried out rapidly.

5. CONCLUSION^{35 36}

Turkey is self-sufficient in the production of many agricultural products (hazelnuts, cherries, figs, apricots, quinces, pomegranates, watermelons, cucumbers, chickpeas, etc). As the per capita income and education levels in Turkey are rising, the acceptance of international products is increasing. Turkey's agricultural productivity can increase significantly if poor efficiency and the lack of technical capability that is not yet on par with international averages, are being addressed. The Turkish market with 75 million people, a trend for higher value products, an increasing changing regulatory environment and easing international trade, make Turkey an attractive export destination.

Current trade (with the world and with SA), the Trade Potential Index, Indicative Trade Potential and Trade Chilling were used to identify which products have the potential to be exported to Turkey. However to utilize this potential some SPS and TBT would need to be addressed by SA. (The contact details of commercial sections at the countries embassies are indicated in annex 4.)

The top five agricultural/forestry/fisheries products identified according to the techniques mentioned are:

a) based on Turkey's imports from the world - cotton (HS 520100), wheat (HS 100190), sunflower seed oil (HS 151211), soya beans (HS 120100) and sunflower seeds (HS 120600),

b) based on SA exports to Turkey: flours, meals and pellets of fish or of crustacean (HS 230120), sheep or lamb skins with wool on (HS 410210), sunflower seeds (HS 120600) and sheep or lamb skins, without wool on (HS 410221) and kraftliner, uncoated, bleached, in rolls or sheets (HS 480419).

c) Indicated according to the TPI: food preparations (HS 210690), paper, kraftliner (HS 480419), books, brochures, leaflets and similar printed matter (HS 410221), sheep or lamb skins, pickled, without wool on (HS 410221) and seeds, vegetable, nes for sowing (HS 120991).

d) Indicated according to the ITP: maize (HS 100590), chemical wood pulp, soda/sulphate, non-coniferous (HS 470329), food preparations (HS 210690), paper, kraftliner, in rolls, o/t unbleached, uncoated (HS 480419) and wheat (HS 100190).

e) Indicated according to trade chilling: cotton (520100), wheat (HS 100190), sunflower seed oil (HS 151211), soya beans (HS 120100) and palm oil (HS 151190)

It is important to note that there are more products that have a full score of 5 according to the TPI as indicated above. Products that have a score of 5, 4, and even 3 according to the TPI can be considered for potential exports. The more complete list of TPI scores is indicated in annex 2.

"While business relations are increasingly European in manner, it is still relevant to understand and appreciate Turkish business customs. Most notably, regardless of internet services and trans-national communications, direct and personal contact continues to drive much of the business in Turkey. Thus, it is often useful to visit the country and meet directly with potential partners and buyers."²⁵

³⁵ Austrade <http://www.austrade.gov.au/Export/Export-Markets/Countries/Turkey/Industries/Agriculture>

³⁶ Turkey Market Summary, [austrade.gov.au](http://www.austrade.gov.au)

The Turkish Government supports the privatisation of markets, the removal of trade barriers and the reduction of agricultural subsidies (although some support measures is still in place³⁷). Turkey's huge consumer market of 75 million people, an improving economy that leads to a higher GDP per capita and a booming tourist sector make Turkey an attractive export destination.

³⁷ WTO. Trade Policy Review Turkey - WT/TPR/S/192

ANNEXES

Annex 1: Description of the Trade Potential Index ³⁸

The Trade Potential Index uses a scoring system based on data obtained from the Trade Map database. This allows the analysis to focus on trade potential whilst taking cognizance of import demand, import trends, growth rates and unit values rather than focusing solely on trade potential values. A score of either 1 or 0 is assigned to five of the trade indicators contained in the database. This score is then aggregated to give a total score, which is measured against a final score of 5. A score of 0 would therefore represent the lowest end of the scale and the least trade potential whilst a score of 5 would indicate the greatest trade potential.

The criteria for scoring are as follows:

- The value of imports from a country: If trade in the form of average exports by SA to Turkey did exist between 2008 and 2012, and the value was more than R10 000, a score of 1 is allocated. The absence of trade (or trade less than R10 000) is allocated a score of 0. The existence of a trade relationship is deemed a significant factor in furthering trade.
- Growth in export demand: If the exports from SA to Turkey have registered a positive growth measured over the five year period from 2008 to 2012, a score of 1 is allocated. No growth or negative growth rates are awarded a score of 0.
- Growth in import demand: If imports by Turkey from the rest of the world have registered a positive growth measured over the five year period from 2008 to 2012, a score of 1 is allocated. No growth or negative growth rates are awarded a score of 0.
- Export growth: Growth of exports from SA to the rest of the world is indicative of supply capacity, and increased demand for locally produced goods. A positive growth rate in the value of exports over a five year period from 2008 to 2012 is awarded a score of 1, whilst no or negative growth is awarded a score of 0.
- Indicative Trade Potential: Indicative trade potential isolates total demand and total export capacity thereby providing a rough estimate of how much countries could 'theoretically' trade between them. A positive 'indicative trade potential' suggests that a trade opportunity exists. An threshold value of an average amount of R1 million for the period between 2008 and 2012, is set for the allocation of a score of 1. Trade potential with a lower value or with no or negative trade potential values are allocated a score of 0.

Annex 2: The Trade Potential Index (TPI) and the Indicative Trade Potential (ITP) of agricultural/forestry/fisheries products traded between South Africa and Turkey (R '000)

Product code	Product label	ITP p/a (Avg. 2008-2012) R' 000	Total TPI Score	Did Turkey import from SA	Is the exports by SA to Turkey growing	Is SA exports to the world growing	Are Turkey's imports from the world growing?	Is the avg. indicative potential trade larger than R 1 million?
'210690	Food preparations nes	865 310	5	1	1	1	1	1
'480419	Paper, Kraftliner, in rolls, o/t unbleached, uncoated	349 815	5	1	1	1	1	1
'490199	Books, brochures, leaflets and similar printed matter, nes	258 231	5	1	1	1	1	1
'410221	Sheep or lamb skins, pickled, without wool on	148 576	5	1	1	1	1	1
'120991	Seeds, vegetable, nes for sowing	139 194	5	1	1	1	1	1
'220720	Ethyl alcohol and other spirits, denatured, of any strength	122 514	5	1	1	1	1	1
'481920	Cartons,boxes and cases,folding,of non-corrugated paper or paperboard	114 127	5	1	1	1	1	1
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings	109 975	5	1	1	1	1	1
'080510	Oranges, fresh or dried	81 525	5	1	1	1	1	1
'482110	Paper labels of all kinds, printed	77 193	5	1	1	1	1	1
'060290	Plants live, nes	57 350	5	1	1	1	1	1
'080410	Dates, fresh or dried	39 926	5	1	1	1	1	1
'200870	Peaches nes,o/w prep o presvd whether o not sugard,sweetend o spiritd	38 746	5	1	1	1	1	1
'510130	Carbonised wool, not carded or combed	37 937	5	1	1	1	1	1
'200799	Jams,fruit jellies,fruit/nut purée&paste,ckd prep,sugard,sweetend/not	37 086	5	1	1	1	1	1
'482010	Registers,account books,note books,diaries & similar articles of paper	35 010	5	1	1	1	1	1
'330129	Essential oils, nes	33 158	5	1	1	1	1	1
'220870	Liqueurs and cordials	32 210	5	1	1	1	1	1
'080620	Grapes, dried	32 124	5	1	1	1	1	1

'080810	Apples, fresh	27 624	5	1	1	1	1	1
'151590	Veg fats&oils nes&their fractions,refind or not but not chemically mod	21 506	5	1	1	1	1	1
'081310	Apricots, dried	21 145	5	1	1	1	1	1
'240399	Tobacco extracts and essences	16 347	5	1	1	1	1	1
'080550	Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus	12 433	5	1	1	1	1	1
'230230	Wheat bran, sharps and other residues, pelleted or not	8 188	5	1	1	1	1	1
'200912	Orange juice, unfermented, Brix value <= 20 at 20°C, whether or not co	4 105	5	1	1	1	1	1
'200819	Nuts&seeds nes incl mx,o/w prep o presvd,sugard,sweetend,spiritd o not	3 317	5	1	1	1	1	1
'081090	Fruits, fresh nes	1 959	5	1	1	1	1	1
'091091	Mixtures of two/more of the prods of different headgs to this chapter	1 948	5	1	1	1	1	1
'081320	Prunes, dried	1 536	5	1	1	1	1	1
'240220	Cigarettes containing tobacco	1 502	5	1	1	1	1	1
'080440	Avocados, fresh or dried	1 087	5	1	1	1	1	1
'240120	Tobacco, unmanufactured, partly or wholly stemmed or stripped	238 517	4	1	1	0	1	1
'480411	Paper, Kraftliner, in rolls, unbleached, uncoated	201 353	4	1	1	0	1	1
'410210	Sheep or lamb skins, raw, with wool on, nes	172 889	4	1	0	1	1	1
'410150	Whole raw hides and skins of bovine "incl. buffalo" or equine animals,	131 402	4	1	0	1	1	1
'100510	Maize (corn) seed	129 652	4	1	1	0	1	1
'120600	Sunflower seeds, whether or not broken	91 375	4	1	0	1	1	1
'190590	Communion wafers,empty cachets f pharm use&sim prod&bakers' wares nes	79 393	4	0	1	1	1	1
'230910	Dog or cat food put up for retail sale	76 530	4	1	0	1	1	1
'510111	Greasy shorn wool, not carded or combed	67 694	4	1	0	1	1	1
'200899	Fruits&oth edible pts of plants nes,prep/presvd,sug,sweet/spir/not	64 816	4	1	1	0	1	1
'481910	Cartons, boxes and cases, of corrugated paper or paperboard	56 278	4	0	1	1	1	1
'210500	Ice cream and other edible ice, whether or not containing	42 613	4	0	1	1	1	1

	cocoa								
'091099	Spices nes	40 432	4	1	0	1	1	1	1
'170199	Refined sugar, in solid form, nes	40 070	4	1	0	1	1	1	1
'482390	Paper and paper articles, nes	37 907	4	0	1	1	1	1	1
'121190	Plants &pts of plants(incl sed&fruit) usd in pharm,perf,insect etc nes	33 504	4	0	1	1	1	1	1
'200939	Single citrus fruit juice, unfermented, Brix value > 20 at 20°C, wheth	33 257	4	1	1	1	0	1	1
'220421	Grape wines nes,incl fort&grape must,unfermtd by add alc in ctnr</=2l	32 399	4	1	1	0	1	1	1
'442190	Wood articles nes	28 814	4	0	1	1	1	1	1
'481390	Paper, cigarette, nes	28 801	4	0	1	1	1	1	1
'050400	Guts, bladders and stomachs of animals except fish whole or in pieces	28 718	4	1	0	1	1	1	1
'441890	Builder's joinery and carpentry of wood nes	28 024	4	0	1	1	1	1	1
'080430	Pineapples, fresh or dried	26 603	4	1	0	1	1	1	1
'080290	Nuts edible, fresh or dried, whether or not shelled or peeled, nes	23 657	4	1	1	1	0	1	1
'130219	Vegetable saps and extracts nes	23 200	4	1	0	1	1	1	1
'121299	Vegetable products nes used primarily for human consumption	21 770	4	0	1	1	1	1	1
'210210	Yeasts, active	17 702	4	1	1	0	1	1	1
'080520	Mandarins(tang&sats)clementines&wilkg& sim citrus hybrids,fresh/drid	16 843	4	0	1	1	1	1	1
'510219	Fine animal hair, neither carded nor combed (excl. wool and hair of Ka	13 686	4	0	1	1	1	1	1
'470200	Chemical wood pulp, dissolving grades	12 534	4	1	1	1	0	1	1
'210320	Tomato ketchup and other tomato sauces	12 201	4	1	0	1	1	1	1
'152190	Beeswax,oth insect waxes&spermaceti whether or not refined or coloured	8 605	4	1	0	1	1	1	1
'080540	Grapefruit, fresh or dried	8 341	4	1	1	1	0	1	1
'442010	Statuettes and other ornaments of wood	8 100	4	1	1	0	1	1	1
'330112	Essential oils of orange	7 308	4	0	1	1	1	1	1
'290545	Glycerol	7 174	4	0	1	1	1	1	1

'441400	Wooden frames for paintings, photographs mirrors or similar objects	7 026	4	0	1	1	1	1
'210410	Soups and broths and preparations thereof	6 037	4	0	1	1	1	1
'240110	Tobacco, unmanufactured, not stemmed or stripped	4 182	4	1	1	0	1	1
'080610	Grapes, fresh	3 256	4	1	0	1	1	1
'220600	Fermented beverages nes (for example, cider, perry, mead, etc)	2 644	4	0	1	1	1	1
'080450	Guavas, mangoes and mangosteens, fresh or dried	1 769	4	0	1	1	1	1
'481420	Wallpaper,coatd/coverd on the face side w a decoratd layer of plastics	1 380	4	0	1	1	1	1
'010619	Live mammals (excl. primates, whales, dolphins and purpoises "mammals	1 046	4	1	1	1	0	1
'080930	Peaches, including nectarines, fresh	469	4	1	1	1	1	0
'060240	Roses, grafted or not	306	4	1	1	1	1	0
'080940	Plums and sloes, fresh	141	4	1	1	1	1	0
'080910	Apricots, fresh	102	4	1	1	1	1	0
'080222	Hazelnuts or filberts, fresh or dried, shelled or peeled	75	4	1	1	1	1	0
'440610	Ties, railway/tramway, wood not impregnated		4	1	1	1	1	0
'220210	Waters incl mineral&aeratd,containg sugar o sweeteng matter o flavourd	193 769	3	0	1	0	1	1
'441820	Doors and their frames and thresholds, of wood	43 889	3	1	0	0	1	1
'410390	Raw hides and skins of animals, nes	38 002	3	1	0	0	1	1
'030269	Fish nes, fresh or chilled excl heading No 03.04, livers and roes	28 357	3	1	1	0	0	1
'490110	Brochures, leaflets and similar printed matter, in single sheets	23 545	3	0	1	1	0	1
'090111	Coffee, not roasted, not decaffeinated	21 400	3	0	1	0	1	1
'120929	Seeds of forage plants, except beet seeds, for sowing nes	17 375	3	1	0	1	0	1
'200990	Mixtures of juices unfermentd¬ spiritd whether o not sugard o sweet	8 224	3	1	0	1	0	1
'130190	Natural gums, resins, gum-resins and balsam, except arabic gum	4 472	3	0	1	0	1	1
'200892	Fruit mixtures nes,o/w prep o presvd,whether o not sugard,sweet o spir	3 867	3	1	1	0	0	1
'080820	Pears and quinces, fresh	3 486	3	1	1	0	0	1

'060499	Foliage,branch,etc w/o flowers/buds&grass for bouquet/orn purp exc fr	2 546	3	1	1	0	0	1
'120720	Cotton seeds, whether or not broken	2 446	3	1	0	1	0	1
'440690	Ties, railway/tramway, wood nes	1 138	3	0	1	1	0	1
'152110	Vegetable waxes exclugd triglycerides,whether or not refind or coloured	532	3	0	1	1	1	0
'510320	Waste (other than noils) of wool/of fine animal hair,ex garnettd stock	298	3	1	1	0	1	0
'050710	Ivory unworked or simply prepared not cut to shape & powder & waste	24	3	0	1	1	1	0
'481840	Sanitary articles of paper,incl sanit towels&napkin (diapers) f babies	80 021	2	0	1	0	0	1
'090411	Pepper of the genus Piper,ex cubeb pepper,neither crushd nor ground	38 362	2	0	0	1	0	1
'180632	Choc&food prep cntg cocoa in blocks,slabs/bars,not filld,not over 2 kg	27 889	2	1	0	0	0	1
'442090	Wood marquetry and inlaid wood; caskets and cases for jewellery etc	8 383	2	0	1	0	0	1
'060210	Cuttings and slips, unrooted	3 300	2	0	0	0	1	1
'460290	Basketwork,wickerwork&other article made up from oth plaited materials	1 918	2	0	1	0	0	1
'442110	Clothes hangers of wood	703	2	0	1	0	1	0
'030110	Ornamental fish, live	183	2	1	1	0	0	0
'060390	Cut flowers&flower buds for bouquets or ornamental purposes,ex fresh	181	2	0	1	1	0	0
'050790	Whalebone,horns,etc unworkd or simply preparad,unshapd,and powder&waste	74	2	0	1	0	1	0
'010690	Live animals (excl. mammals, reptiles, birds, fish, crustaceans, mollu	3 572	1	0	0	0	0	1

Annex 3: Trade chilling of agricultural/forestry/fisheries products traded between South Africa and Turkey (R'000)³⁹

HS code	Product description	Avg Turkey imp2008 - 2012 from SA R'000	Avg Exp to world by SA R'000	Avg Turkish imports from the world R'000
'520100	Cotton, not carded or combed	0	122 658	10 539 275
'100190	Wheat nes and meslin	0	267 694	6 920 858
'151211	Sunflower-seed or safflower oil, crude	0	147 340	4 741 210
'120100	Soya beans	0	227 309	3 834 120
'151190	Palm oil and its fractions refined but not chemically modified	0	25 070	3 024 174
'480100	Newsprint, in rolls or sheets	0	263 648	2 533 443
'230400	Soya-bean oil-cake&oth solid residues,whether or not ground or pellet	0	32 610	1 974 809
'470329	Chemical wood pulp,soda/sulphate,non-coniferous,semi-bl/bleachd,nes	0	873 783	1 831 686
'100590	Maize (corn) nes	0	3 481 261	1 493 001
'020120	Bovine cuts bone in, fresh or chilled	0	33 246	1 208 592
'010290	Bovine, live except pure-bred breeding	0	44 907	1 103 076
'440710	Lumber, coniferous (softwood) 6 mm and thicker	0	53 518	950 224
'350510	Dextrins and other modified starches	0	29 898	631 610
'100630	Rice, semi-milled or wholly milled, whether or not polished or glazed	0	67 954	612 684
'230990	Animal feed preparations nes	0	195 325	599 090
'190110	Prep of cereals,flour,starch/milk f infant use,put up f retail sale	0	71 110	579 974
'090111	Coffee, not roasted, not decaffeinated	1	21 401	404 458
'480421	Paper, sack kraft, in rolls, unbleached, uncoated	0	84 333	376 450
'180690	Chocolate and other food preparations containing cocoa nes	0	122 437	364 224
'071333	Kidney beans&white pea beans drid shelld,whether o not skinnd o split	0	15 209	345 070
'040510	Butter	0	27 339	342 644
'481840	Sanitary articles of paper,incl sanit towels&napkin (diapers) f babies	2	80 023	286 340
'482390	Paper and paper articles, nes	1	37 908	266 154
'482090	Office supplies nes, of paper	0	28 692	258 988

³⁹ The trade chilling took the following into consideration: (i) average global exports from South Africa between 2008 and 2012 which were at least R15 million and (ii) global average imports into Turkey between 2008 and 2012 were also at least R15 million (iii) where the average product trade between Turkey and South Africa were less than R6 000 between 2008 and 2012, no trade is assumed.

'151620	Veg fats & oils & fractions hydrogenated, inter/ re-esterified, etc, ref'd/not	0	51 051	258 739
'220830	Whiskies	0	83 296	258 338
'190590	Communion wafers, empty cachets f pharm use & sim prod & bakers' wares nes	1	79 395	215 959
'030374	Mackerel, frozen, excluding heading No 03.04, livers and roes	0	19 450	205 985
'040690	Cheese nes	0	45 868	197 808
'220210	Waters incl mineral & aerated, containing sugar or sweetening matter or flavour	1	365 402	193 770
'151790	Edible mix/ prep of animal/ veg fats & oils/ of fractions ex hd No 15.16	0	21 956	180 744
'190410	Prep foods obtained by the swelling or roasting of cereal or cereal products	0	88 721	175 690
'440890	Veneer, non-coniferous nes, less than 6 mm thick	0	39 679	173 456
'481940	Sacks and bags, of paper, nes; including cones	0	39 125	160 763
'040210	Milk powder not exceeding 1.5% fat	0	62 941	155 469
'120890	Flours and meals of oil seeds or oleaginous fruits, except mustard, nes	0	137 648	137 676
'442190	Wood articles nes	3	28 817	128 846
'180631	Choc & food prep cntg cocoa in blocks, slabs/ bars, filled, not exceeding 2 kg	0	153 560	123 701
'480300	Paper, household/ sanitary, rolls of a w > 36 cm, sheets one side > 36 cm	0	31 254	123 387
'481890	Household or hospital supplies, of paper, nes	0	29 039	113 612
'090240	Black tea (fermented) & partly fermented tea in packages exceeding 3 kg	0	79 023	112 477
'220290	Non-alcoholic beverages nes, excluding fruit/ veg juices of heading No 20.09	0	64 568	110 914
'190190	Malt extract & food prep of Ch 19 < 50% cocoa & hd 0401 to 0404 < 10% cocoa	0	48 267	108 638
'070110	Potatoes seed, fresh or chilled	0	16 647	105 742
'490290	Newspapers, journals and periodicals, nes	0	56 493	101 826
'090121	Coffee, roasted, not decaffeinated	0	17 238	101 698
'170490	Sugar confectionery nes (including white chocolate), not containing cocoa	0	143 993	100 391
'210610	Protein concentrates and textured protein substances	0	77 561	98 463
'220710	Undenatured ethyl alcohol of an alcohol strength by vol of 80% vol/ higher	0	811 260	88 594
'441890	Builder's joinery and carpentry of wood nes	2	28 026	87 273
'200911	Orange juice, unfermented & not spirit, whether not sugared sweet, frozen	0	46 974	87 264

'040221	Milk and cream powder unsweetened exceeding 1.5% fat	0	31 136	86 370
'151800	Animal/veg fats&oils&fract boild oxid,etc,& ind mix/prep nes ex 15.16	0	23 562	84 578
'210112	Coffee preparations based on extract/essence/conc.	0	19 243	84 187
'510121	Degreased shorn wool, not carded, combed or carbonised	0	18 436	77 899
'220860	Vodka	0	27 291	77 114
'150710	Soya-bean oil crude, whether or not degummed	0	32 365	76 321
'410120	Whole raw hides and skins of bovine "incl. buffalo" or equine animals,	0	16 114	76 210
'481099	Paper, in rolls or sheets, clay coated, nes	0	74 054	73 781
'180620	Chocolate&other food preparations containg cocoa weighg more than 2 kg	0	45 207	71 331
'440130	Sawdust and wood waste and scrap	0	35 315	70 395
'120220	Ground-nuts shelld,whether or not broken,not roastd or otherwise cookd	0	112 501	70 108
'382370	Industrial fatty alcohols	0	686 182	66 467
'490110	Brochures, leaflets and similar printed matter, in single sheets	3	24 488	65 977
'040700	Eggs, bird, in shell, fresh, preserved or cooked	0	52 332	65 552
'410190	Butts, bends, bellies and split raw hides and skins of bovine "incl. b	0	37 411	63 849
'120999	Seeds, fruit and spores for sowing, nes	0	57 935	62 458
'170230	Glucose&glucose syrup nt cntg fruct/cntg in dry state <20% by wt fruct	0	45 803	57 959
'071310	Peas dried, shelled, whether or not skinned or split	0	16 530	57 067
'030749	Cuttle fish and squid,shelled or not,frozen,dried,salted or in brine	0	476 210	48 826
'170290	Sugar nes, including invert sugar	0	20 506	48 046
'470311	Chemical wood pulp, soda or sulphate, coniferous, unbleached	0	132 711	41 626
'190531	Sweet biscuits	0	155 685	41 387
'020220	Bovine cuts bone in, frozen	0	21 277	41 065
'010110	Pure-bred breeding horses and asses	0	40 186	41 034
'060110	Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, dormant	0	39 491	39 664
'441520	Pallets, box pallets and other load boards, wooden	0	29 750	37 502
'482190	Paper labels of all kinds, not printed	0	27 125	36 359
'190120	Mixes & doughs for the prep of bakers' wares of heading No 19.05, nes	0	24 191	33 719
'030371	Sardines,sardinella,brislq or sprats,frozen ex hd No 03.04,livers&roes	0	78 914	31 641

'481950	Containers, packing, nes (including record sleeves) of paper	0	24 997	30 123
'470500	Semi-chemical wood pulp	0	76 531	26 749
'200980	Fruit&veg juice nes (exc mx) unferment unspirited,whether/not sug/sweet	0	176 278	26 742
'030379	Fish nes, frozen, excluding heading No 03.04, livers and roes	0	272 791	22 794
'121020	Hop cones, ground, powdered or pelleted and lupulin	0	23 030	22 571
'121299	Vegetable products nes used primarily for human consumption	3	178 762	21 773
'441299	Panels, 1 outer ply coniferous wood nes	0	15 919	20 916
'220890	Undenatrd ethyl alc <80% alc cont by vol&spirit,liqueur&spirit bev nes	0	19 033	20 393
'220840	Rum and tafia	0	30 520	20 247
'200979	Apple juice, unfermented, Brix value > 20 at 20°C, whether or not cont	0	144 825	19 657
'470730	Waste and scrap of paper/paperboard made mainly of mechanical pulp,nes	0	48 126	19 454
'220300	Beer made from malt	0	169 972	19 015
'330190	Conc&aqueous distls of essentl oils;terpenic by-prods of essentl oils	0	36 930	17 987
'120210	Ground-nuts in shell not roasted or otherwise cooked	0	30 200	16 733
'190219	Uncooked pasta, not stuffed or otherwise prepared, nes	0	21 603	16 563
'110812	Maize (corn) starch	0	89 402	16 235

Annex 4: Internet addresses

Ministry of Agriculture, Food and Livestock - www.tarim.gov.tr

General Directorate of Food and Control - www.gkgm.gov.tr

All Food Importers Association - www.tugider.org.tr

Annex 5: Contact details of the embassies

Embassy of the Republic of Turkey
Office of the Commercial Counsellor
P.O. Box 56014
Arcadia, 0007, Pretoria
South Africa
Tel: +27 12 342 6051
Fax: +27 12 342 6058
E-mail: pretoria@ekonomi.gov.tr

South African Embassy Turkey
Trade Section:
Mr Jonathan D Passmoor, First Secretary
Tel : +90 312 405 68 74

Fax : +90 312 446 64 34
E-mail : passmoorj@dirco.gov.za

Trade Assistant

Tel : +90 312 405 68 63
Fax : +90 312 446 64 34
E-mail : onacaks@dirco.gov.za