

7 September 2006

# Screening report

# Turkey

## Chapter 11 – Agriculture and Rural Development

**Date of screening meetings:**

Explanatory meeting: 5 – 8 December 2005

Bilateral meeting: 23 - 26 January 2006

## I. CHAPTER CONTENT

The agricultural chapter covers a large number of binding rules, many of which are directly applicable. The proper application of these rules and their effective enforcement by an efficient public administration are essential for the functioning of the Common Agricultural Policy. This includes the setting up of management systems such as a paying agency and the Integrated Administration and Control System, and also the capacity to implement rural development actions. EU membership requires integration into the common market organisations of a range of agricultural products, including arable crops, sugar, animal products and specialised crops.

The implementation, management and control of the Common Agricultural Policy (CAP) require the creation, modification and/or reinforcement of appropriate administrative structures. In some cases the *acquis* sets out, to a greater or lesser extent, detailed specifications for the required administrative structures.

These structures are not always specified in the *acquis*. In many cases the *acquis* simply uses terms such as the “competent authority” to refer to the administrative structure needed. This means that it is left to each Member State to decide which institution is responsible for effective implementation of the *acquis*. However, the functions that EU Member States must have the capacity to carry out - through the administrative structures they establish - are clearly specified in the *acquis*.

## II. COUNTRY ALIGNMENT AND IMPLEMENTATION CAPACITY

This part summarises information provided by Turkey and the discussion at the screening meeting. The exchange rate applied is 1€=1.25 US \$.

Turkey indicates that it can accept the *acquis* regarding Agriculture and Rural Development

Turkey has 27 million hectares of agriculture land (excluding pastures and meadows), which represents about 20 % of the EU-25 agriculture land. The agricultural sector can be summarised by the following key figures (2004): the sector represents 11 % of the Gross Domestic Production; employment in agriculture is 33 % of total employment; average farm size - 6 hectares; number of farms - 3 million (according to the 2001 census); rural population - 39 %. In 2004 the total value of the Turkish agricultural output reached 29 billion € hence 9 % of total output in the EU-25. Turkey is a net exporter in agricultural products with a 2.35 € billion surplus in 2004, the EU-25 being the first destination. The agriculture budget reached in 2004 approximately 2.3 €billion.

The main legal acts governing the agriculture sector in Turkey are amongst others the *Turkish Constitution*, legislation establishing agriculture related institutions, a number of commodity laws<sup>1</sup>, a "Law on soil conservation and land use" (No. 5403), "Agricultural insurance law" (No. 5363), "Law on agricultural credit cooperatives" (No.1581), "Law on agricultural sales cooperatives" (No. 4572), "Law on producer unions" (No. 5200), "Law on chambers of agriculture" (No.6964), "Law on registration, control and certification of seeds" (No. 308), "Law on organic farming" (No. 5262), "Law on production, consumption and control of foodstuffs" (No. 5179), "Law on animal breeding" (No. 4631). A new *Law on agriculture* (No. 5488) was adopted on 25 April 2006 by the Parliament.

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<sup>1</sup> Cotton (No.2903), Tobacco (No.4733), Sugar (No.4634), Olive (No.3573), Hazelnuts (No.2844), Tea (No.3092), Rice (No.3039), Silkworms (No.859), Spirits (No.4250)

Since the year 2000 the government adopted strategy papers providing the ground for reforms of the agricultural sector. The major objective of the 2001-2005 Agricultural Reform Implementation Project (ARIP)<sup>2</sup> was the move towards a market oriented agriculture policy by abolition of administered prices and of input and credit subsidies, a restructuring of agricultural state-owned enterprises and agricultural sales cooperatives, the introduction of the Direct Income Support scheme (DIS) and the restructuring of the agricultural production. The 2006-2010 Agricultural Strategy Paper sets objectives and priorities moving the agricultural policy to secure and develop a sustainable agricultural production, product quality, food security and safety, competitiveness of agricultural holdings, markets and marketing, rural development and producers' organizations.

The agricultural sector is governed by a very large number of institutions. The main political actors in the agricultural sector are the Ministry of Agriculture and Rural Affairs (MARA), State Planning Organization (SPO) (including the High Planning Council Money-Credit Coordination Council), Undersecretariat for Foreign Trade, Undersecretariat of Treasury, Committee on Restructuring and Support in Agriculture. Affiliated to the Ministry of Agriculture and Rural Affairs are the Turkish Grain Board, Directorate General of Agricultural Enterprises, Meat and Fish Company, Tea Company, Agricultural Credit Cooperatives and Agricultural Development Cooperatives. Affiliate to the Ministry of Industry and Trade are the Agricultural Sales Cooperatives, Sugar Authority, Commodity Exchanges, Fresh Fruit and Vegetables Wholesale Markets, Turkish Standards Institute, Turkish Statistics Institute and the Turkish Accreditation Authority. In addition, other institutions, such as, for tobacco, the "Tobacco Products and Alcoholic Beverages Market Regulatory Authority", currently under the authority of the Prime Minister, play an important role.

## **II.a. Horizontal**

As regards *direct support* and *EAGF*, Turkey has a number of mechanisms to support the agricultural sector: Direct Income Support Scheme (DIS), premium payments (for cereals and oleaginous seeds and raw cotton crops), livestock premium payments, farmer transition programme (for tobacco and hazelnut). A number of new schemes were presented in 2005, such as an environmentally based agricultural land protection program (ÇATAK), agricultural insurance payments and rural development grants. Beneficiaries (natural and legal persons) for DIS, premium and input support need to be registered in the National Farmer Registration System (NFRS), a data base managed by the Ministry of Agriculture and Rural Affairs comprising 2.75 million farmers (90 % of the farm households) and 17 million hectares of agriculture land (63 % of total agriculture land of 27 million hectares).

Direct Income Support is based on the By-law on National Farmer Registration System Decree No. 2005/8629, Decree No. 2005/9065, Communiqué No. 2005/21, and Communiqué No. 2005/38. The Direct income support is provided on a per hectare basis and allocated once per production period directly to producers registered in the NFRS for the areas between 0.1 to 50 hectares. DIS payments are made to the farmers (natural or legal persons) who deal with land-based agricultural activity regardless of the status of land tenure. Agricultural land either needs to be tilled (cultivated to produce crops) or otherwise sustained for agricultural use. DIS payments are independent from crop type and quantity of agricultural production. Additional DIS payments are granted to the farmers who undertake soil analysis, utilize organic farming or certified seeds on their land. Farmers must be associated with agricultural activity for minimum one production season (8-10 months) on the same land. The DIS payment for 2004 was 92.6 €/ha. State-owned land, deserted or

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<sup>2</sup> Supported by the World Bank

stranded agriculture land with no current use, forestry areas and communal property such as pastures are excluded from DIS payments.

The inputs diesel and the use of chemical fertilisers are supported through area based schemes for DIS beneficiaries. The fuel payment varies between 8.9 €/ha for fruit and vegetable production and can reach 26.9 €/ha for industrial crops. Fertiliser payments are between 5.9 €/ha for fruit and vegetable production and 17.9 €/ha for industrial crops.

The Premium Support is based on the Decree No. 2004/6946, Decree No. 2005/8670 and yearly adopted Premium Communiqué (for the year 2004: No 2004/36). The objective is to increase the production of products with shortage of supply. Premium payments are provided directly to producers once per production period. Premium payment exists for cereals, raw cotton and oleaginous crops (levels are indicated in part II.b and d). The livestock sector benefits from animal improvement support, fodder crop support, apiculture support, animal health and encouraging registration support, supports for protection of animal gene sources, aquaculture support, dairy premium and milking units support. These support programmes are production-based (per head, litre or kg) or project based for fodder crop support (levels are indicated in part II.c).

All legal persons established in Turkey and natural persons holding Turkish citizenship and residing in Turkey may be a beneficiary of financial aid and other forms of aid for agriculture.

Turkey has currently no *Integrated Administration and Control System (IACS)* as defined by the *acquis*. Controls are undertaken through the NFRS (document checks, approval of local authorities, spot checks of cadastral areas, preliminary checks by Inspection Board of the Ministry of Agriculture and Rural Affairs). Livestock related payments are controlled by the Ministry of Agriculture and Rural Affairs through the animal registration System and by the Cattle breeders' Association through pedigree system. A 2004 EU Pre-accession funded project will explore the options available for the creation of an EU compatible IACS.

Turkey has currently no operational *Paying Agency*. Direct payments are managed by the Ministry of Agriculture and Rural Affairs; cereals and rice intervention is assumed by the Turkish Grain Board; and export refunds by the Undersecretariat for Foreign Trade and the Exporters Union. DIS entitlements are collected by the local branches of the Ministry of Agriculture and Rural Affairs, processed by the NFRS and sent to the "Ziraat Bank" (public bank selected by the Ministry of Agriculture and Rural Affairs for its operations) for payment to the individual farmers.

The Undersecretariat for Foreign Trade is the competent authority as regards *trade mechanisms*. It carries out trade policies regarding agricultural products such as custom duties to be applied on importation, managing tariff quotas and import licences. The legal basis provided by The *Constitution* (Art. 167, 90), "*Law on Customs Tariff Code*" (No 474), "*Law on Regulating Foreign Trade*" (No 2976) "*Import Regime Decree*" (No 95/7606) and the "*Export Regime Decree*" (No 95/7623). A review of customs duties by products and countries is published annually. Turkey applies the Combined Nomenclature for classification of products since 1 January 1996. Turkey does apply export refunds in accordance to the WTO agreement for the following products: cut flowers, frozen vegetables, dehydrated vegetables, frozen fruits, preserved vegetables and fruits, tomato pastes, homogenized fruit preparations, fruit juices, olives and olive oil, prepared or preserved fish, poultry meat, eggs, honey, chocolate and other food preparations containing chocolate, biscuits, waffles and pasta. In case of inward processing, only inputs of Turkish origin are eligible for refunds.

Turkey has signed in addition to the *EU Turkey Association Council Decision 1/98 for trade of agriculture products* a number of multilateral and bilateral agreements on free trade defining preferential trade conditions with EFTA, Morocco, Tunisia, Israel, Bulgaria, Romania, Bosnia and Herzegovina, Croatia and the former Yugoslav Republic of Macedonia. Import licences are only required for the importation of agricultural products under the tariff quotas resulting from bilateral agreements and autonomous tariff quotas. The licences have to be submitted to the Customs with the import declaration form and have to be used within the validity period indicated in license. They need to be returned after the expiration date of the license. No securities are required.

A *Farm Accountancy Data Network (FADN)* does not exist yet but a 2006 EU Pre-accession funded project will support its establishment in a pilot project covering 9 provinces in Turkey.. The Turkish Institute of Statistics will conduct a farm structural survey (FSS) in 2006. Farms participate in the FSS on a voluntary basis and payments are granted to encourage participation.

Current *state aid* schemes in Turkey differ significantly from the Community provisions. State aids in Turkey are based on the Law on Agriculture (No. 5488), which lays down the objective and principles of agricultural supports and identifies basic support programs. Various institutions carry out these aids. Major support includes the so called "operating aids", of which the more important are: Direct Income Support, Premium payments, Milk Premium, Tea Support, Farmer Transition Payments, Cereal Premium, Mohair Support, Silk Cocoon Support and Export Refunds. In addition, Turkey has some further aids: investment aid for primary producers through subsidised credits, aids for processing and marketing of agriculture products; aids for damages caused by natural disasters, for fight against animal and plant diseases, for animal registration, for insurance schemes, for social assistance programmes in rural areas, for agricultural research as well as for land consolidation and parcelling activities.

In the framework of its obligations under EC-Turkey Association Council Decision 1/95, Turkey adopted Community's tariff system regarding non-Annex I products. Turkey aligned its import regime accordingly and introduced separate duties for agricultural and industrial components of non-Annex I products. Regarding the industrial component Turkey applies the Community's common customs tariff vis-à-vis third countries.

*Cocoa and chocolate products.* There is no production of cocoa beans in TR, nevertheless the country counts 6 manufactures for cocoa and cocoa products and 30 manufactures for chocolate and chocolate products. This sector is regulated by the Turkish Food Codex – "*Communiqué on Cocoa and Cocoa Products*" (2000/10) and the Turkish Food Codex – "*Communiqué on Chocolate and Chocolate Products*" (2003/23), both based on EU Directive 2000/36/EC. This legal framework provides definitions, rules for sales name, composition, fat content and labelling. The use of vegetable fats other than cocoa butter is allowed up to a limit of 5%.

*Coffee and chicory extracts.* There is no production of coffee beans in TR, but the country has 58 manufacturers of coffee and 1 manufacturer of coffee extract. The sector is regulated by the "*Turkish Standard on Soluble Coffee*" (TS 5389) "*Turkish Food Codex Regulation*". It provides rules for definitions, labelling, and content of coffee and coffee extracts. The regulation for chicory extract is currently under review.

As regards *nuts*, Turkey is a major world player in nuts production and largest world exporter. The hazelnut production reached in the year 2002 about 0.6 million tonnes.

## II.b. Arable crops, fibre, sugar

Arable crops, fibres and sugar markets are covered by the general agriculture policy framework elaborated under horizontal aspects ("*Agriculture Act*" (Official Gazette 66/2001, 83/2002) and the "*Act on State Aid in Agriculture, Fisheries and Forestry*" (Official Gazette 87/2002, 117/2003, 82/2004, 12/2005).

The state-driven Turkish Grain Board (TMO), an independent authority governed by the Decree Law No. 233 on the State Economic Enterprises, acts as the intervention agency and controls the cereals and rice markets. It was established in 1938 as a State Economic Enterprise.

TMO aims at preventing cereal prices from fluctuation by carrying out intervention purchases and keeping emergency stocks. The decisions of the TMO Board of Directors fix the purchasing prices for cereals and paddy rice. The TMO's objectives are to control prices, to take regulative measures for the market of cereals and, where necessary, to execute the functions assigned by Decrees related to pulses and oil seeds other than grains, and to manage the emergency stock reserves (storage cost are provided by the state budget). TMO also has the state monopoly to control the production of opium and other narcotic substances for medical use. Current storage capacities amount to 4.5 million tonnes. The TMO can be authorized by the Council of Ministers to provide food aid to third countries - costs are then paid by the state budget.

The average production of *cereals* in Turkey during 2001 – 2004 was for: wheat - 19.6 million tonnes (9.2 million hectares), barley - 8.2 million tonnes (3.5 million hectares), maize - 2.5 million tonnes (545,000 hectares), rye - 246,000 tonnes (143,000 hectares) and oats - 275,000 tonnes (141,000 hectares). The total cereal area of about 13.6 million hectares is about 25% of the EU-25 cereal area. Turkey counts 2.1 million holdings producing cereals, and at present there are three producers' associations. Cereals are marketed through 64 commodity exchanges in the country. Turkey stated that no export subsidies are granted for the cereals and flours. Turkey is self-sufficient in wheat, barley and oats. There is no separate data available for durum and soft wheat. The following premiums were paid: 0.014 €/kg for maize in 2004 and 0.017 €/kg for wheat and rice; 0.011 €/kg for barley, rye and oats in 2005.

The production of artificially *dried fodder* does not exist in Turkey. The fodder (lucerne, sainfoin, common vetch, vetch and lupin) are sun dried. The fodder crop cultivation is supported by the "*Animal Husbandry Support Decree No 2005/ 8503*" and provides for perennial fodder crops 40 % of the production costs as well as cost of machines and equipments purchased; for annual fodder crops cultivation, 30 % of production costs are paid directly to farmers. Dried fodder is not controlled on its content of protein and moisture.

The average *oilseeds* production in Turkey for the years 1998-2004 was: rapeseed - 2,000 tonnes (1,707 hectares); sunflower - 830,000 tonnes (554,000 hectares) and soybeans - 61,500 tonnes (20,000 hectares). In addition to the area based payments in the agriculture sector (Direct Income Support system, diesel support, chemical fertilisers support) a special premium on oil seeds is paid once a year to producers registered in the National Farmer Registered System; for 2004 figures are: 0.08 €/kg for sunflower, 0.07 €/kg for rapeseed, 0.098 €/kg for soybeans. There is no public intervention; prices are fixed in the commodity exchanges. Cotton seed has a particular importance for Turkey. The average production in the years 1998-2004 was: 686,000 hectares; 1.27 million tonnes. Although Turkey is an important producer of oilseeds, imports are necessary to meet the internal demand on vegetable oil.

As regards *protein crops*, in the years 2001-2004 Turkey cultivated on average 17,300 hectares of protein crops (sweet lupin and peas, there is no field beans production), producing 41,000 tonnes. No subsidy is paid for protein crops.

There is no data available on *potato starch* production in Turkey. The average maize starch production in the years 2000-2004 was 56,000 tonnes produced by 6 companies.

Over the years 1998-2004 Turkey cultivated on average 62,000 hectares of *rice* (90 % long grain) producing about 370,000 tonnes. There are approximately 25,000 holdings and 4 newly established producer unions for paddy rice. The Turkish Grain Board fixes purchasing prices for paddy rice and keeps emergency stocks. Rice is subject to public intervention but not to export subsidies. The intervention prices decreased during the last years. While in 2004 500 €/tonne were paid, in 2005 the price went down to 420 €/tonne. The majority of the rice production is traded through the 29 commodity exchanges. Turkey counts 104 rice mills with a capacity of 2.2 million tonnes.

The *flax* and *hemp* production in Turkey is limited. The average production for the years 1998 – 2004 of flax was 30 tonnes on 295 hectares and for hemp 900 tonnes on 660 hectares. The "*Law on Inspection of Narcotic Material, No: 2313*" and "*By-Law for Hemp Sowing and Controlling, No: 20672/1990*" regulates the production of hemp (e.g. compulsory registration). The legislation does not limit the THC (tetrahydrocannabinol) content. No distinction is made for long or short fibres. No specific subsidy is paid for flax and hemp producers. There is no central registration system for processing plants, no producers' organisations and no system for regulating authorised varieties.

*Cotton* is a strategic sector in Turkey. For the years 2004/2005, Turkey cotton sector represented approximately 4 % of total world cotton production (637,000 hectares producing 2.4 million tonnes of unginned cotton), 6 % of total world cotton consumption and 8 % of the total world cotton imports. Turkey's cotton production is about 1.5 times of the EU-25 cotton production. Cotton constitutes the essential raw material of the Turkish textile industry, which is one of the leading economic sectors of the country. Approximately 130,000 farmers cultivate cotton with an average size of 5.58 hectares. Standards are regulated by the "*Communiqué No 2001/20*". A premium of 0.137 €/kg (certified seeds) or 0.114/kg (non-certified seeds) is granted to registered farmers. There are no guarantee price or production quotas. About 89 cooperatives representing 20 % of the cotton production are grouped in four associations. Cotton is marketed through commodity exchanges.

The *silkworm* production in Turkey is under the monopoly of the Bursa Association of Agriculture Sales Cooperative for Silk Cocoons (KOZABIRLIK). This association, counting 10,881 producers and 5 cooperatives, controls the market by producing silkworm eggs and being the sole purchaser of fresh cocoons. This egg production is subsidised by the Government which paid to the Association 10.25 €/per box in 2005. Producers receive the eggs free of charge from the Association. The average production of the years 2002-2005 amounted to 142 tonnes for 4,875 boxes. An annually fixed direct support payment is paid to the producers (5.28 €/kg in 2005).

The Turkish *sugar* production (based on sugar beet) reached in 2004/2005 about 1.9 million tonnes (about 11 % of the EU-25 production), produced by 348,278 farmers. In the same year Turkey produced also 276,000 tonnes of isoglucose and 38,688 tonnes of fructose. Turkey counts 7 beet sugar companies operating 31 sugar factories, and 7 starch-based sugar companies with 8 plants. The sugar production is governed by the "*Sugar Law No 4634*". Production quotas are allocated annually to the individual sugar companies by the Sugar Board, an independent public authority established in 2001. Quota allocations include A and

B quotas for beet sugar and 10 % of the A quota can be increased up to 15% by Council of Ministers for starch-based sugars. The A quotas correspond to domestic demand; the B quotas correspond to the compulsory reserve. Production outside the quotas (so-called C sugar) has to be exported without subsidies. Sugar beet price are fixed without state intervention between sugar companies and farmers. The B quota sugar beet price is 10-30 % lower than that for A quota sugar.

### **II.c. Livestock products**

The *milk* sector in Turkey counted in 2004 about 3.8 million dairy cows producing 9.6 million tonnes of milk (in addition 771,716 tonnes of sheep milk, 259,087 tonnes of goat milk and 39,279 tonnes of buffalo milk). The sector is highly fragmented since approximately 60 % of the holdings involved in cow milk production have less than 4 animals. Only 60 % of the raw milk is delivered to the dairies. On farm consumption and direct sales prevail in rural areas. Producer price for the year 2004 amounted to 0.24 €/litre. 44 % of the milk is used for cheese production, 20 % for yoghurt, 19 % butter or milk powder and only 14 % for liquid milk. There are no production quotas or public intervention. Incentives are provided to stimulate high quality milk production. Dairy farmers are helped with both direct income support and structural support if the milk is delivered to milk processing plants licensed by Ministry of Agriculture and Rural Affairs. As income support a special premium of 0.018 €/litre is paid to producers delivering their milk to a processing plant with pasteurisation or UHT system and registered in cattle breeders' unions. An additional premium of up to 0.027 €/litre is allocated for structural improvement. A structural support can be paid to producers registered with pedigree or pre-pedigree, with a minimum of 10 cows, having a milking and refrigeration systems. In that case, 40 % of the invoiced cost of milking units and refrigerating tanks up to €47,930 is paid to the respective producers.

With regard to the *beef* and *veal* sector, Turkey counted 10.2 million heads of bovine animals in 2004 and a total slaughtering of 2.6 million heads. Out of the 2.2 million cattle holdings, about 50 % of the cattle are kept by small holders (1-4 cattle). The marketing takes place in 47 authorised animal bourses and markets. Turkey has a non-compulsory national beef carcass classification system. There is no intervention or public price reporting system and no market regulation. The premium payment varies during the year between 0.28-0.57 €/kg for beef carcasses from registered cattle with a minimum weight of 190 kg. A livestock support scheme provides annual subsidies for the use of artificial insemination (15-21 €/head), for calves conceived by artificial insemination (24-48 €/head) and for keeping cattle with breeding certificates (300 €/head for pedigree, 150 €/head for pure race). A national bovine identification registration and monitoring system was prepared but is not yet operational.

The *sheep and goat* production in Turkey is predominantly undertaken in family holdings. In 2004, Turkey had 25.2 million sheep and 6.6 million goats kept in 570.000 farms. 97 % of meat production is realised from combined breeds that are also providing milk and wool. The marketing takes place in 47 authorised animal bourses and markets. Turkey has a non-compulsory national carcass classification system. No price support is granted for meat production. A premium (0.018 €/litre) is paid for ewe's milk.

*Pigmeat* consumption and production is very limited in Turkey. Only 5 holdings produce about 2,700 pigs per year targeting the tourism industry. The market is not regulated.

The *eggs and poultry* production is significant in Turkey. During the years 2002-2004, Turkey counted about 60 million laying hens, 215 million broilers, 3.6 million turkeys, 1.3



million geese and 0.8 million ducks. During the same years, Turkey produced 11.7 billion eggs. In 2004 the total number of registered farms involved in poultry and egg production reached 10,000 (97 % active in the eggs/poultry production; 2.3 % in breeding stocks). Registration is on a voluntary basis; about 50 % of the sector is already registered. In 2004, Turkey produced about 900,000 tonnes of poultry meat. Eggs in shell are classified following national standards. There is no price monitoring, public intervention or other structural and income support available in the sector. Export refunds are paid for eggs (4.8 €1000 pc with quantitative limitation of 78 %), for poultry meat (148 €/tonne with quantitative limitation of 14%) and processed products (200 €/tonne with quantitative limitation of 22 %).

Turkey's *honey* production counts currently 4.4 million beehives kept by about 153,000 beekeepers (25 % being professional beekeepers) producing about 74,000 tonnes of honey (average product per beehive is 17 kg). This sector is characterized by a strong increase in production in the last 20 years making Turkey one of the leading honey producers in the world. The "*Implementing Communiqué and Decision of the Ministerial Council on Support for Stockbreeding, No. 25737*" provides three different types of support. Marketing support to filtered honey amounting to 0.25 €/kg paid to beekeepers registered in the Beekeepers Association and 0.19 €/kg to non-registered beekeepers. Secondly, premiums are given for queen-bees and bombus-bees – the premium for beekeepers registered in the Beekeepers Association that uses queen-bees from approved holdings is 9.3 €/queen-bee and 4.6 € to non-registered beekeepers. A premium of 12.4 € is paid per colony to beekeepers who purchase and use bombus-bees for pollination. Finally, export support: 52 €/tonne of honey, limited to 32 % of the relevant exported quantity.

#### **II.d. Specialised crops**

As far as the *wine* production is concerned, Turkey has no specific legislation; it is covered by the Law 4733 "*Law on Establishment of Tobacco, Tobacco Products and Alcoholic Beverages Market Regulatory Authority*" and the Law 4250 "*Law on Alcohol and Alcoholic Beverages*". The market is controlled by the Tobacco, Tobacco Products and Alcoholic Beverages Market Regulatory Authority (TAPDK) and the Ministry of Agriculture and Rural Affairs. Due to the missing vineyard register, no information on areas can be provided. Production data is very limited; figures are only available for the years 2003-2005, indicating an average production of 239,000 hectolitres. Vine growing does not need authorisation. Changes of vineyard areas and density of vines are not recorded. Oenological practices and labelling are not regulated according to EU standards. Sweetening with sugar and other sweeteners is not permitted. No market intervention or price support is provided to the sector. The Turkish grape production is mainly used for fresh table grapes (45 %), dried grapes (35 %) and only 15 % for alcoholic beverages. Most of the grape production used for alcoholic beverages is used for spirit production and only one fourth is used for wine.

The *spirit drinks* market is regulated by the Law No 4733 "*Law on Establishment of Tobacco, Tobacco Products and Alcoholic Beverages Market Regulatory Authority (TAPDK)*" and the Law No 4250 "*Law on Alcohol and Alcoholic Beverages*". The state monopoly TEKEL was abandoned in 2001 but the production requires a certificate issued by the TAPDK. The *Turkish Food Codex – Communiqué on Spirit Drinks No 25757* provides the general rules for definitions, quality standards, labelling and production methods of spirit drinks. The officially recorded production of spirit drinks (in hectolitres of alcohol) in the years 2002-2004 was on average 3,455 hectolitres of wine spirits, 250 hectolitres of whisky, 8,500 hectolitres of gin, 25,500 hectolitres of vodka, 2,200 hectolitres of liqueurs and 244,000 hectolitres of "raki". The production is undertaken by 4 registered

companies. "Turkish Raki" was protected as Turkish geographical indication in the field of spirit drinks by the Turkish Patent Institute in 1996.

As regards *fruits and vegetables*, Turkey cultivated in 2003 on a surface of 1.5 million hectares about 14 million tonnes of fruits (mainly citrus fruits) and on 818,000 hectares a total of 24 million tonnes of vegetables. The figures underline the key role this sector plays for the Turkish export markets (2.07 billion €). The "*Decree No. 552 on Regulation of Trade of Fresh Fruits and Vegetables and Wholesale Markets*" obliges all producers to pass all fresh fruit and vegetables through wholesale markets except for export, processing or direct sales (up to a certain quantity) by producers on retail markets. Quality inspections are only performed at import-export stages based on standards by the Turkish Standardisation Institute. Turkish Producers Organisations (PO) have similar structures, based on *Law No. 5200 on Agricultural Producer Organizations, By-law on Fundamentals and Rules of the Establishment of Agricultural Producer Unions, By-law on Inspection of Agricultural Producers and Unions, Law No. 4572 on Agricultural Sales Cooperatives and Associations, Law No. 1163 on Cooperatives*. The 46 POs cover the entire range of fruits (32 POs) and vegetables (14 POs). The sector has no inter-branch organisations or intervention systems (price monitoring, withdrawals from the market) in place. No price support is granted to producers.

Turkey produces *bananas* mainly in greenhouses. A total of 927 producers have increased their production from 32,000 tonnes in 1998 to 135,000 tonnes in 2005. The total production surface reached in 2004 about 3,000 hectares. The predominant varieties are Cavendish and Gross Michel. The relevant non-mandatory standard is TS 1802. Producer Organisations (PO) have not yet been established. Two bananas producers associations exist but are not active in the marketing of their products. The sector does not benefit from subsidies or market intervention.

The production of *flowers and plants* started to develop after 1985, reaching today 3,930 hectares, of which 2,820 hectares of ornamental plant production on fields, 1,025 in plastic green houses and 85 hectares in glass greenhouse. Cut flowers are produced on 364 hectares open air and 772 hectares in plastic green houses. Production of rose oil (covering 1,661 hectares), and carnation (816 hectares) is predominant. The sector is organised in numerous cooperatives and producers associations managing the markets. Export refunds are paid for products covered by CN 060310. There is no specific support mechanism for floriculture production other than a special credit facility. In order to improve quality, productivity and development, the "Ziraat Bank" is providing specific credit facilities for floriculture farmers. Turkey signed the CITES convention.

As regards *olive oil*, Turkey counted in 2001 about 196,000 producers, cultivating about 107 million olive trees on 644,000 hectares (density 166 trees/ha). The average production over the years 1992-2004 was 106,000 tonnes. 35 % of the producers are organised in cooperatives covering 16 % of the olive oil production. Olives are processed in 1,005 olive press facilities. Olive oil is marketed through commodity exchanges. Besides the area based payments in the agricultural sector (Direct Income Support, Diesel Support, Chemical Fertilizer Support) there is also a premium support for olive oil to registered producers on every production period (0.15 €/kg in 2004). Export refunds are granted to olive oil and table olives. Definitions of quality, labelling marketing standards and chemical and physical characteristics are regulated by the *Communiqué on "Turkish Food Codex"*, related horizontal communiqués and *communiqués on "Cooking Olive Oil and Cooking Pomace Oil"* specifying besides physical and chemical features of olive oil the provisions on contaminants, residues, additives, hygiene, packaging and labelling. Turkey submitted an application to rejoin the Olive Oil Council (OOC).

The *tobacco* production is regulated by the *Tobacco Law No 4733*. About 337,000 holdings produced over the years 2002-2004 on average 135,000 tonnes of tobacco on 192,000 hectares, of which 95 % Oriental variety. This represents about 40 % of the EU-25 production. The Tobacco Law provides the legal basis for the State Tobacco Monopoly (TEKEL) and the establishment of the Tobacco, Tobacco Products and Alcoholic Beverages Market Regulatory Authority (TAPDK). The share of state purchase through TEKEL has diminished in 2004 to 30 % of the total market. About 98 % of the production is based on contract farming. There is no special subsidy paid to tobacco producers.

The *seed* market in Turkey is free of price intervention. The variety and seed certification has been largely harmonised with UPOV, OECD and ISAT rules. The basic legal framework consists of *Decree Law No. 441 defining the Ministry of Agriculture and Rural Affairs as competent authority*, *Law No. 308 regulating the registration of new varieties, certification, production and marketing of seeds*, *Law No. 6968 regulating the activities of plant quarantine* and *Law No. 5042 regulating plant breeders' rights*. As regards seeds covered by the Community Common Market organisations, Turkey does not produce "*oleagineae*" type of seeds. During the years 2002-2005, Turkey produced on average 1905 tonnes of "*leguminosae*" on 4874 hectares. There is no market intervention. Support to seed production is foreseen by the Decree No 8503/2005 for the species: Alfalfa, Sainfoin, *Vicia sativa* and Hungarian vetch. Support to seed use is foreseen by Decree No. 8629/2005 for rice, barley, wheat, oat, rye, triticale, lentils, chickpeas, beans and potatoes.

The production of *hops* in Turkey is limited. A total of 552 contracted producers cultivated on average over the years 1998-200 about 250 hectares producing 990 tonnes of fresh hops. No specific subsidies or export refunds are granted. There is only one hops cooperative active in Turkey. The prices are determined by a technical committee in which the government is playing a coordinating role. Quality standards are not mandatory and there is no certification system in place.

## **II.e. Rural development**

The population in rural areas is estimated at 39% by TURKSTAT for the year 2004. About 67.5 % of the rural labour force is employed in agriculture. Rural areas face problems of human resources (poor level of education and skills), ineffective institutional structure and farmer organisations (cooperatives, producer unions etc.) to support rural development, scattered settlement pattern in some regions, insufficient development and maintenance of physical, social and cultural infrastructure, a high rate of dependence on subsistence agriculture, high rate of hidden unemployment, insufficient diversification of agricultural and non-agricultural income generating activities, low income level and relatively low quality of life for rural population, migration (rural to urban areas and interregional) and ageing of rural population.

The framework for the existing and prospective Agriculture and Rural Development Policies is laid down in the following basic reference documents: Long Term Strategy (2001-2023) and Eighth Five-Year Development Plan (2001-2005); Preliminary National Development Plan (2004-2006); Medium Term Programme (2006-2008); Agriculture Strategy Paper (2006-2010).

Rural development policy has been seen until recently in the context of overall development policy; development plans prepared under the coordination of the State Planning Organisation, have been up to now the main basis for rural development initiatives. The three-year rolling Medium Term Programme (first prepared for the years 2006-2008), annual programmes and annual investment programmes are the main means for the implementation

of the development plans. The main activities towards rural development have been the implementation of integrated rural development projects, regional development plans together with sectoral implementations which mainly aim to improve rural and agricultural infrastructure, increase agricultural production, improve health and education services, and as a result increase the income and welfare of the rural community.

Apart from the development plans, there have also recently been various programmes aiming at contributing to rural development such as: Environmentally Based Agriculture Land Protection Programme; Agriculture Insurance Payments; Rural Development Grants; and Village based Rural Development Programme. Turkey has only lately (end of January 2006) adopted a National Rural Development Strategy (NRDS) providing the first rural development strategy plan for the country. It will serve as a basis for the National Rural Development Plan and the IPARD Plan within which the targeted interventions and national, international and EU financial dimensions are to be elaborated.

The existing and prospective Agricultural and Rural Development Policies are laid down in the following documents:

- Long Term Strategy (2001-2023) and Eighth Five-Year Development Plan (2001-2005),
- Preliminary National Development Plan (2004-2006),
- Medium Term Programme (2006-2008),
- Agriculture Strategy Paper (2006-2010).

The purpose of the NRDS is the "improvement and ensuring sustainability of living and job conditions of rural community in their territory, in harmony with urban areas, basically by utilizing local resources and potential, while protecting the environmental and cultural assets".

The four strategic objectives and the priorities of the NRDS are:

- (1) Economic development and job creation by the diversification of the rural economy and the creation of a competitive agriculture and food sector through: the enforcement of producer organisations, an efficient utilisation of water and land resources, increasing the competitiveness of the Turkish agro-food industry, strengthening of consumers rights and food safety.
- (2) Improvement of human resources, organisation level and local development capacity by strengthening education and health services, combating poverty and increasing the employability of disadvantaged groups.
- (3) Improving rural physical infrastructure services and quality of life by getting better rural infrastructure and developing and protecting of rural settlements.
- (4) Protection and improvement of rural environment by improving environment-friendly agricultural practices, protecting forest ecosystems and sustainable utilisation of forest resources and the management and improvement of protected areas.

In addition to the new strategy, Turkey has developed a number of integrated rural and regional development programmes. Integrated rural development programmes have been implemented since 1970s at provincial or regional level. These programmes were co-financed by national and international funds (EU-MEDA, WB, OPEC, IFAD, UNDP, FAO, IDB and JICA, etc.). The main responsible body for the implementation of integrated rural

development projects is the Ministry of Agriculture and Rural Affairs and its affiliates in cooperation with other public institutions. The main responsible body for coordination and implementation of regional development programmes, which also aim to accelerate rural development in the respective regions, is the State Planning Organisation. On the other hand, the Southeastern Anatolia Project (GAP) is being carried out by the GAP Regional Development Administration. These programmes are carried out in cooperation with other Ministries and their affiliates, local administrations and their unions, universities and related non-governmental organisations. Other individual projects and support schemes provide support to rural areas; among others: credit schemes, livestock support, training, land consolidation, water and irrigation, agri-environmental activities, forestry, rural infrastructure, diversification of rural economy and development of local services.

## **II.f. Quality policy**

The Decree-Law No. 555 pertaining to the Protection of Geographical Indications from 1995 provides the legal framework for the protection of names of natural, agricultural, mining and industrial products and handicrafts. The body authorised for the registration of Geographical Indications is the Turkish Patent Institute. All applications are to be filed with the Turkish Patent Institute.

Designations of Origin depend on the quality or characteristics of the product based on essentially or exclusively on inherent natural and human factors of that geographical area. The production, processing and preparation of the product have to take place within the geographical area. Geographical Indications are conditioned to specific quality, reputation or other characteristics of the product attributable to that specific geographical area; at least one of the activities of the production, processing or preparation of the product has to take place within the geographical area. Generic names, names of plant varieties, animal breeds or similar names, if misleading, names contrary to cultural principles cannot be registered.

Producers (natural or legal person) of the product, consumers associations and public institutions related with the product or the geographical region are entitled to apply for protection. According to the Turkish authorities, 76 names are already protected in Turkey as Designations of Origin or Geographical Indications, many of them designating agricultural products and foodstuffs.

The Turkish authorities also mentioned a significant number of pending applications currently under examination, including "Kanyak" (alcoholic spirit) homonymous with "Cognac".

## **II.g. Organic farming**

The sector of organic production developed significantly over the past years in a strictly regulated environment. The "*Law on Organic Farming*" from 2004 and the "*By-Law on Principals and Application of Organic Farming*" of 2005 regulate the organic production of agriculture products and is similar to the EU Regulation (EEC) 2092/91. A significant number of other laws and by-laws contribute also to the legal framework for organic production<sup>3</sup>. The Ministry of Agriculture and Rural Affairs with its Department of

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<sup>3</sup> *Laws:*

No. 5179, Food Production, Consumption and Audit,  
No. 6968, Plant Protection and Agricultural Quarantine  
No. 4631, Livestock Breeding  
No. 1734, Fodder  
No. 3285, Animal Health and Registration

Alternative Agricultural Production Techniques is the competent authority for the coordination and implementation of organic production policy.

In 2004, Turkey increased the surface of organic cultivation from 6,789 hectares in 1996 to 209,573 hectares in 2004 (about 0.8 % of the total agricultural land), producing 378,803 tonnes of organic products, major products being apples (52,600 tonnes), wheat (31,100 tonnes), cotton (30,200 tonnes), tomatoes (22,800 tonnes), figs (15,700 tonnes), grapes (13,900 tonnes), lentils (13, 600 tonnes), and olives (10,900 tonnes). In total Turkey cultivates 174 organic products, mainly for the export market (95 %). There were 12,806 producers registered by the Ministry of Agriculture and Rural Affairs in 2004.

Since 2004 Turkey is a member of the European Information System for Organic Market (EISfOM). The Ministry of Agriculture and Rural Affairs undertakes large information campaigns to increase awareness and interest in organic production among farmers and consumers

So far, nine control and certification bodies with their corresponding accreditation agencies (most being from EU Member States) have been authorised by the Ministry of Agriculture and Rural Affairs. The sector lacks sufficient laboratory capacities for residue testing. A 2004 EU Pre-accession Project will support the alignment of the Turkish policy on Organic Farming with the *acquis*, improve supervision of the certification bodies and train MARA staff in organic farming.

### **III. ASSESSMENT OF THE DEGREE OF ALIGNMENT AND IMPLEMENTING CAPACITY**

Overall, Turkey has reached a low level of alignment in the preparedness for accession. Turkey has not provided indications as regards its timetable for the completion of transposition and harmonisation of the legislation. The quality, quantity and completeness of available reliable and comparable official statistics are very limited in many sectors of the chapter Agriculture and Rural Development. This makes a detailed assessment of the current situation in the agriculture sector and comparison with EU policies and structures difficult. The Turkish authorities should address this issue as a matter of priority. The progress of negotiations under this chapter will also depend on the availability of consistent and reliable statistics.

Turkey's agriculture sector has a developed policy framework, a very complex and heavy legal and administrative structure which reflects the importance of the sector in the economy and society. This complexity, existing state monopolies and the large number of institutions involved in shaping Turkish agriculture policy make the sector rigid and difficult to reform. Turkey's agriculture markets are not in line with the EU Common Market Organisations.

The large number of direct aid mechanisms, state aid provisions, rural development measures and other financial support systems needs to be harmonised and aligned with the EU approach that gives priority to direct support measures. The approach of a decoupled support, as already initiated with parts of the DIS payments, should be strengthened and further developed. Similarly

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No. 1380, Aquatic Products

No. 1734, Animal Food

No. 4703, Preparation and Implementation of Technical Regulation for the Products

*By-Laws:*

No. 24736, Audit of Chemical Fertilisers

No. 25406, Chemical Fertilisers Used in Agriculture

No. 25452, Production, Import, Export, Putting into Market and Inspection of Soil Regulators and Organic Fertilisers

to the recent developments in the EU, Turkey should further develop the "second pillar" of its agricultural policy; hence increase the attention given to rural development and shift resources accordingly.

### **III.a. Horizontal**

Turkey needs to further align with the *acquis* in the areas of horizontal issues. Missing legal provisions and institutional capacities (paying agencies, IACS) need to be developed.

The recent reforms of the Turkish agricultural policy (Agriculture Strategy 2006-2010) did not follow the developments of the EU Common Agricultural Policy. Turkey is moving from decoupled *direct support* back to more coupled direct support and price support, while the EU is moving in the opposite direction. In particular, the change from coupled direct support to decoupled direct support should be further developed as decoupled income support is the main tool to support farming in the EU, counting for most of the agricultural expenditure on direct support. For a large number of arable crops and livestock significant premium payments are coupled to the production, hence are stimulating production to increase self-sufficiency levels. Subsidy and direct aid policies need to be significantly revised and institutional capacities to be strengthened. Cross compliance and modulation are not developed.

There is no direct Turkish legislation that corresponds to an *Integrated Administration and Control System* – IACS. However, there are some regulations within the framework of the National Farmer Registration System (NFRS) and the Animal Identification and Registration System for bovine animals (I&R) that have some similarities to IACS. Current controls in Turkey are carried out by: the NFRS, the Animal I&R System, the Pedigree System, the Controlled Greenhouse system and the Organic Farming Information System. Nevertheless, the National Farm Register only covers farmers that have applied for premium and it is unclear to what extent the total of the holdings with bovine animals are covered by the Animal Registration Register. Furthermore, the animal identification and registration system should also be extended to other species. A Land Parcel Identification System needs to be created. The existing farm parcel register is only based on cadastral records is not computerised, and an effective control system is not in place. Turkey should develop/establish a *paying agency*.

The legislation and provisions as regards *trade mechanisms* are not in line with the *acquis*. No *FADN* exists in Turkey. With the Farm Structure Survey, the collection and processing of data should be strengthened, at national, regional, local and farm levels, and brought in line with the EU standards and methodology. *State aids* are currently not in line with the *acquis*, but Turkey will have sufficient time to adapt them to the *acquis*.

*Non-annex I products, cocoa and chocolate products and coffee and chicory extracts* are sectors with a partial level of alignment. The legislation reflects to a great extent the EU *acquis*.

### **III.b. Arable crops, fibre, sugar**

The legal framework and institutional requirements for the common market organisation of arable crops are not in line with the Community *acquis*. The *cereals* and *rice* sectors are strictly controlled by state interventions of the Turkish Grain Board (TMO). The role of the TMO needs to be clarified in particular with regard to the support granted to wheat flour exporters (support is provided to the exporters of wheat flour through TMO by selling wheat to those operators at a lower price than the local price). Separate production figures for soft

wheat and durum wheat should be developed. Turkey has furthermore to define minimum quality standards for intervention. The legislation on erucic acid is compliant to EU Directive 71/621/EEC. There is no intervention purchase for *oilseeds* or *protein crops*. Turkey has no support mechanisms for the *potato starch* or *dried fodder* production. *Sugar* remains a very sensitive sector for Turkey and is not aligned to the EU sugar market. The market is heavily dominated by state intervention, quotas, high import tariffs and artificially high domestic sugar prices. Whereas the provisions for the *cotton* and *silkworms* production are partially comparable with EU instruments, provisions for the production of *flax* and *hemp* are not in line with the *acquis*.

### III.c. Livestock products

The legal framework and institutional requirements in the *milk*, *beef*, *sheep and goats*, *pigmeat*, *eggs* and *poultry* sectors are not aligned with the *acquis*. Turkey has neither production quotas nor intervention systems; it has to establish a market intervention and milk production registration system in the milk sector. There is no significant surplus on the market yet the price paid to the producer is equivalent to 90 % of the milk price in Poland. However, milk producer organisations need to be reinforced. Milk collecting systems as well as milk quality need to be significantly improved. As regards the meat sector, Turkey applies premium payments. The existing beef and sheep/goats carcass classification system as well as the eggs standards need to be reviewed. Sheep farmers need to be registered. Turkey has already an animal identification system for bovine which needs to be further developed (issue to be raised in negotiation chapter 12) and extended to small ruminants. A price monitoring and intervention system is missing in the meat sector and the beef labelling system needs to be further developed. The current measures of banning the import of live bovine animals and beef from the EU constitutes a breach of the preferential trade as agreed under the EU Turkey Association Council Decision No. 1/98. The *honey* sector is partially aligned with the *acquis* given the regulations on definitions, composition criteria and origin.

Livestock figures provided by Turkey need to be reviewed as it uses a different methodology for estimation of livestock production figures. The output figures tend to be underestimated as they are estimated using fixed coefficients based on historical yields and slaughtered/milked animals.

### III.d. Specialised crops

Legal framework and institutional requirements are only to a very limited extent aligned to the *acquis* as regards specialised crops. In the *wine* sector, Turkey has to set up an EU compatible vine register and to harmonise the oenological practises, also taking into account the future results of the ongoing reform of the Common Market Organisation. Geographical indication protections are in line with Article 23 of the TRIPS agreement. With the lifting of the monopoly for *spirit drinks* in 2001 and recent legislative revisions as regards definitions, labelling and production methods, Turkey has reached a partial level of alignment with EU regulations. The ethyl alcohol market is not yet compatible with Council Regulation 670/2003. The future role of the TAPDK in the wine and spirit sector needs to be clarified. The denomination "Turkish raki" will require attention in future negotiations.

Turkey needs to bring the *fruit and vegetables* market into line with the *acquis* and is advised to further develop producer organisations and producer groups, inter-branch organisation and basic market structures (e.g. price monitoring, withdrawals systems), also taking into account the future results of the ongoing reform of the Common Market Organisation. The *banana* and *floriculture* markets are not aligned with the *acquis*. Turkey pays neither specific production subsidies nor does it imposes production limits. The *olive*



*oil* sector of Turkey has no specific legal framework and is therefore not aligned with the *acquis*. Intervention systems, producer organisations, application of appropriate marketing standards and production limits are missing. The *hops* sector has neither an EU conform certification procedure nor a spot market. Turkey's *tobacco* production is controlled by a state monopole and based on contract farming without producer groups. Inspection, certification and control measures are similar to the EU provisions. The future role of the TAPDK in the tobacco sector needs also to be clarified. The *seed* sector of Turkey is supported through aid to production or aid to consumption. This aid is granted to more species than the EU *acquis* foresees. The certification system is based on OECD and ISTA norms. Statistical data on the seeds sector in order to obtain a complete overview is not available.

### **III.e. Rural development**

The rural development policy was until recently based on carrying out large infrastructure projects and covered by national and regional development plans, under the authority of the State Planning Organisation. Turkey has only recently (end of January 2006) adopted a National Rural Development Strategy (NRDS) providing the first rural development strategy plan for the country. There have also recently been various programmes aiming at contributing to rural development; however, none of them has been directly related to the NRDS. Apart the IPARD instrument and World Bank resources (for rural infrastructures and village renewal), no additional funding from the national budget has been secured to implement the NRDS.

Although policies, strategies and programmes have been reviewed over the past years and reflect certain elements of the European rural development policies and strategies, the funding and effective implementation of the programme components are not secured. Administrative capacities are at a very early stage of implementation. It is expected that the capacities will further develop with the preparation for the future IPARD funding. The IPARD instrument will facilitate Turkey's move towards a gradual alignment with the *acquis* concerning the common agricultural policy and will support the sustainable development of the rural areas in the coming years. The current administrative set-up should be reviewed, financial and human resources need to be increased to adequately address the numerous objectives set in the rural development strategy.

### **III.f. Quality policy**

Turkey has got a national system to register and protect Geographical Indications, with some differences from the EU system. The definitions of designation of origin and geographical indication are similar to the EU *acquis*, although some details diverge, such as proof of origin which is not provided in the specifications. The extent of protection of names is similar to the EU legislation.

The scope of the Turkish legislation is wider than the scope of the EU legislation, as it includes mining and industrial products and handicraft, but could be compatible with the EU *acquis* as all products covered by the EU legislation are included. Nevertheless, some registrations for living animals are questionable as there might be possible confusion with animal breeds. Compared to EU legislation, there are additional restrictions on names, namely names contrary to public order and general principles of morality cannot be registered. Applicants can be groups of producers and natural or legal persons, but also consumers associations and public institutions. The two latter ones are not eligible under the EU *acquis*.

Inspections to check compliance with product specifications are currently carried out by public bodies; Turkey is willing to develop a system based on accredited private inspection bodies, which would be compatible with the *acquis* as well. It seems that there is no specific public authority designated to carry out controls in shops to apply *ex-officio* protection. Inspection bodies are currently in charge of this task, which means that only Turkish Geographical Indications can benefit from this protection, even if the registration system is open to third countries. Turkey does not have a scheme similar to Traditional Specialities Guaranteed to protect traditional products.

### **III.g. Organic farming**

As regards organic farming, Turkey is partially compliant with the *acquis*. The recent legal framework is based on the EU *acquis*. Turkey has a comparable registration, certification, control and infringement systems in place. The accreditation procedures for residue testing laboratories need to be completed.