Organic Agriculture in Turkey

Trade opportunities for organic fruit and vegetables

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Summary

The aim of this project was to research trade opportunities which support the development of the organic produce in Turkey and the cooperation of the between trade companies. The project was focused on organic fruit and vegetables.

Fruit and vegetables, together with cereals, make up the biggest Turkish agricultural products. The availability of different climates results in growing under temperate, subtropical and sometimes tropical conditions. Turkey therefore has a wide range of agricultural products to offer. The Aegean is a leading region regarding the open field production, followed by Mediterranean and Marmara (north-west part) regions. The processing industry is mostly developed in the western part of the country (Istanbul, Bursa, Kocaeli, and Balikesir), here the main processing facilities are located. Their main activities are canning, in glass and tins, but the share of deep frozen products is growing.

Turkish agriculture is characterised by the great amount of small, family-owned and fragmented farms. Due to this fact a great number of Turkish citizens have a relationship to agriculture. Turkish agriculture is also the biggest sector regarding employment. The labour force is big and relatively cheap, although the economic development has lead to an increase in wages.

Organic farming and in-conversion land constitute a small proportion of the total agricultural land. Before 1997 the number of organic farmers was limited and knew a little growth. Since 1997 a strong increase of organic agriculture in Turkey was seen. The share of organic agriculture related to the total agriculture is around 0.5%. The major organic products which are produced in Turkey are apples, wheat, tomatoes, lentils and olives. The total production of organic products is around 209,000 tons. The biggest amount of the organic production is exported. This is around 80 till 90% of the total organic production. The high level of export is brought about by two factors. First is the limited domestic market for organic produce in Turkey. The domestic market for organic produce is limited to the larger cities in Turkey. This is due to the limited interest of people in organic produce. Second factor is the higher price level for organic products, which is around 50 – 300% depending on the product.

The Turkish trade companies named hazelnut, tomatoes (in all kind of ferias), apricot, beans, cherries, lentils, olives, peaches, raisins and figs as most exported products the Netherlands. Mostly the exported food is dried or frozen fruit and vegetables.

Turkish trade companies seen export possibilities for the following organic produce: broccoli, nectarine, citrus and fresh vegetables. These products are not exported at this time, or in very small volumes. Olive or olive oil was actually mentioned as most promising, but due to import restrictions of the EU on olives/olive oil this is mentioned.

The Turkish trade companies named two barriers;

- The toxin content for cereals is for the Turkish companies very difficult to for fill. Therefore it is not possible to export all organic products to Europe.
- Some products (for example olive oil) have high import taxes. The products from Turkey are too expensive for export markets. These high import taxes are mainly to protect the European market. Production costs from for example Olive oil is lower in Turkey than in European Union.

The barriers which the Dutch trade companies named were;

- At the import of Dutch products to Turkey, a Dutch company has to comply with the requirements of the Turkish law - and legislation and customs authorities. These regulations can be difficult and unclear because they are regularly changing.
- The reliability of the organic produce is of great importance to the Dutch traders. The products have to be organic and certified as so. The reliability from the products may be more guaranties.

Most all the trade companies have two or three long-term trade relationships. The Turkish traders gave there preference to doing business with larger traders instead of small. Mostly the trade companies import the products and sell and distribute them in there own country. Usually the Dutch companies arrange the transport from Turkey to the Netherlands. Dutch companies are also price driven. All parties are interested in stimulation of trade relationships. A meeting during the Biofach was mentioned as an example. The meeting is a chance to bring the Turkish and Dutch trade organisations together. The traders are all looking to expand their network and product palette.

Samenvatting

Het doel van dit project was inzicht te krijgen in de mogelijkheden voor biologische handel in groente en fruit tussen Turkije en Nederland.
Groente en fruit vormen, samen met granen, de belangrijkste agrarische exportproducten. Binnen Turkije zijn verschillende klimaten te vinden waarin geteeld kan worden, gematigd, subtropisch en soms tropisch. Turkije kan daarom een grote variëteit aan agrarische producten bieden. De regio aan de Egeïsche zee is de leidende regio in de open teelten, gevolgd door de Middellandse zee en Marmara (noordwestelijke deel) regio. De verwerkingsindustrie is vooral te vinden in het westelijke deel van Turkije (Istanbul, Bursa, Kacaeli en Balikesir). Een groot deel van de verwerkingsfaciliteiten zijn hier gevestigd. Het verwerken en inblikken is de grootste deel van de verwerkingsfaciliteiten, vooral verpakken in glas of blik. Het aandeel diepvriesproducten is stijgende.
De Turkse landbouw wordt gekenmerkt door een grote hoeveelheid kleine, ongeorganiseerde, familiebedrijven. Hierdoor is het aandeel Turken die binding hebben met de landbouw aanzienlijk. Het grootste deel van de Turkse bevolking is werkzaam in de landbouw. Personeelaanbod is groot en relatief goedkoop. Dit ondanks het feit dat door de economische groei heeft geleid tot stijging van de lonen.
Biologische landbouw en bedrijven in omschakeling vormen een klein deel van de Turkse landbouw. Voor 1997 het aandeel van de biologische landbouw was beperkt en kende nauwelijks groei. Sinds 1997 is er een sterke groei van de biologische landbouw. Het aandeel biologische landbouw ligt rond de 0,5%. Belangrijke biologische producten zijn appels, tarwe, tomaten, linzen en olijven. De totale biologische productie ligt rond de 209.000 ton. Het grootste deel van de biologische productie wordt geëxporteerd. Ongeveer 80 tot 90% van de biologische productie wordt geëxporteerd. Dit hoge aandeel in de uitvoer wordt veroorzaakt door een tweetal factoren. Ten eerste is de Turkse markt voor biologische producten beperkt. De biologische producten worden vooral afgezet in de grotere steden. Dit wordt vooral veroorzaakt door de beperkte interesse in biologisch product in andere delen van Turkije. Tweede factor is het hogere prijsniveau van biologische producten. Prijzen liggen, afhankelijk van het product, 50 tot 300% hoger als gangbaar product.
De Turkse handelsbedrijven hebben hazelnoten, tomaten (in verschillende vormen), abrikozen, bonen, kersen, linzen, olijven, perziken, rozijnen en vijgen als meest geëxporteerde biologische producten naar Nederland. De geëxporteerde producten zijn veelal gedroogd of ingevroren groente en fruit. Turkse bedrijven zien mogelijkheden in de export van biologische producten als broccoli, nectarines, citrusvruchten en verse groenten. Deze producten worden momenteel niet of nauwelijks geëxporteerd. Olijven en olijfolie werd eigenlijk als meest veelbelovend product benoemd, maar door de importrestricties van de EU op deze producten zijn deze buitenbeschouwing gelaten.
Door Turkse handelsbedrijven zijn een aantal barrières benoemd:

- De toxinegehalte grens erg hoog ligt, voor veel Turkse bedrijven is het lastig om aan deze grens te voldoen.
- De importheffingen en belastingen zijn erg hoog voor de Turkse producten. Hierdoor zijn de producten afkomst uit Turkije duur voor de Europese markt.

De Nederlandse handelsbedrijven noemen als barrière het volgende:

- Import tarieven van Turkije zijn erg hoog, dit bemoeilijkt de export van Nederland naar Turkije.
- De douane en grenscontrolerende instantie bepalen zelf hun import tarieven.
- De betrouwbaarheid van de producten of deze daadwerkelijk wel biologisch zijn of niet gegarandeerd.

De bestaande relaties tussen de handelsbedrijven zijn langdurig van aard, de contactpersonen van deze bedrijven hebben veel vertrouwen in hun leverancier of afnemer. Over het algemeen hebben de bedrijven een relatie met 2 of meerdere handelsbedrijven per land. De Turkse bedrijven geven aan de Nederlandse bedrijven zeer prijsbewust zijn, de aankoop van producten is vooral gebaseerd op de prijsafspraak.
De bedrijven zouden elkaar graag willen ontmoeten in het kader van een netwerkbijeenkomst. De voorkeur gaat uit naar de Biofach 2008, de meeste bedrijven hadden een bezoek aan dit evenement al gepland staan.

Türkçe özet

Bu yapılan araştırmanın amacı Türkiye ve Hollanda arasında organik ticarette sebze ve meyve dalında olanakları araştırmaktır.

Sebze, meyve ve tahıl Türkiye'nin çiftçilikte en önemli ihracat ürünleridir.
Türkiye'de bu ürünleri farklı iklimlerde yetiştirmek münkündür, örneğin ılık, yarı tıropikal ve tıropikal iklimlerde. Bu nedenle, Türkiye çok çeşitli tarım ününleri sunabilmektedir. Ege bölgesi başta olmak üzere Akdeniz ve Marmara (kuzey batısı) bölgeleri bu ürünleri yetiştirmek için elverişlidir. Bu ürünler genelde ülkenin batısında işlenmektedir (Istanbul, Bursa, Kocaeli ve Balıkesir). Ürünün işlenmesi, ve kutulanmasi genellikle ürünlerin cam ve tenekelenmesi büyük bir alan oluşturmaktadır. Dondurulmuş ürünlerin payında da yükselme görülmektedir.
Türkiye'de tarım daha çok küçük, organize edilmemiş, küçük şirketler tarafından yapılmaktadır. Bu nedenle tarımla uğraşan türklerin oranı oldukça yüksektir.
Nüfusun yaklaşık yüzde otuzbeşi tarımla uğraşmaktadır. Ülke ekonomisinin büyümesi ve ücretlerin artmasına rağmen tarım işçisi bulmak kolaydır ve ücretler düşüktür.
Organik tarım alanları ve organik tarımla uğraşan çiftçi sayısı azdır. 1997'den önce organik tarımla uğraşan çiftçi yok denecek kadar azdı ve bu alande büyüme görünmüyordu. 1997'den ihtibaren bu alanda büyüme başladı. Organik tarımla uğraşan çiftçi yüzdesi halen sadece binde beştir. Bu alanda elma, buğday, domates, mercimek, ve zeytin gibi ürünler önem taşımaktadır.
Yılda elde edilen biolojik ürün 209.000 tondur. Bu ürünlerin yüzde doksana yakın bir bölümü ihrac edilmektedir. Bu ürünlerin bu yüksek düzüyde ihrac edilmesinin iki nedeni vardır. Ilk olarak, Türkiye içinde organik ürünler için sınırlı bir Pazar vardır. Organik ürünler genelde büyük şehirlerde satışa sunulmaktadır. Zira, Türkiyen'in diğer kesimlerinde organik ürünlere ilgi gösterilmemektedir.
Ikinci neden ise organik ürünlerin pahalı olmasıdır. Ürününe göre bazen fiyat farkı yüzde elliden yüzde üçyüze kadar çıkmaktadır.

Türk ticari şirketleri en fazla organik ürün olarak fındık, domates (çesitleri) kayısı, fasulye, kiraz, mercimek, zeytin, şeftali, üzüm kurusu ve incir ihrac etmektedirler. Ihrac edilen ürünler genelde kurutulmuş veya dondurulmuş olarak ihrac edilmektedir. Türk şirketleri brokoli, nektarin narincigiller ve taze sebze gibi ürünlerin ihracatını düşünmektedirler. Bu ürünler henüz çok az veya hiç ihrac edilmemektedir. Zeytin ve zeytinyağı ihrac etmek için çok uygun görülmektedir, ancak Avrupa Birliği'nin bu ürünleri ihrac etmek için koyduğu kotalar bunu şimdilik zor kılıyor.

Türk şirketleri ihracatta aşağıdaki engellerle karşılaştıklarnı dile getirmekteler:

- Toksin içeriği sınırının yüksek olması, Türk firmalarının çoğu için bu kriteri tutturmak zordur.
- Türk ürünlerinde ithal harcı ve vergilerin yüksek olması. Bu nedenle şirketler Avrupa pazarinda fiyat rekabetinde zorlanmaktadır.

Hollanda ticari şirketleri ise aşağıdaki engellerle karşılaştıklarını dile getirmekteler:

- Türkiye'nin ithalat vergilerinin yüksek olması.
- Gümrüklerde sınır kontrolu yapan firmanın ithal tarifini belirlemesi.
- Ihrac edilen ürünlerin ne derece biolojik olduğuna dair garanti verilmemesi.

Şu anda var olan şirketler arası ilişkiler uzun sürelidirler ve şirketler güven ortamında ticaret yapmaktadırlar. Şirketler genellikle bir ülkeden iki veya daha fazla şirketle ticari ilişki içerisindedir. Türk şirketlerinin Hollandalı şirketler hakkındaki düşüncesi onların fiyatlar konusunda çok titiz olduklarıdır. Alımlar fiyat anlaşmasından sonra gerçekleşmektedir.
Şirketler, çevre genişletme toplantıları aracılığıyla daha sık sık bir araya gelmek istemektedir. Bu konuda Biofach 2008 organizasyonu tercih edilmektedir. Şirketlerin büyük bir bölümü bu organizasyon için yer ayırtmış bulunmaktadır.

1 Introduction

1.1 Background

In Turkey, many agricultural areas are (still) managed without the use of synthetic pesticides and fertilizers. Due to its favourable climate and geographical position, there is a great chance for Turkish organic produce on the European market but also on the Turkish home market. Next to the traditional organic export of dried fruits and nuts there are also chances for vegetables and processed products. Although in development, there still is a lack of capacity in standardization, transfer of knowledge, research, functional certification systems, and market cooperation. These topics were mentioned and affirmed in a workshop with Wageningen UR-representatives and Turkish stakeholders in June 2006 in Ankara.
The Turkish ministry of Agriculture is being supported by the Netherlands during the last few years in building up capacity in this area. In this framework, several working visits to the Netherlands took place. However this support did not lead yet to a more structural cooperation. Still there are great opportunities for Dutch business, especially in the area of knowledge and input supplier, certification, development of standards and marketing.
A thorough inventory of the current state of Turkish organic production, focused on the chances for Turkish-Dutch cooperation, would provide a firm basis for further cooperation. Next to that, the initial contacts and exchange between the Netherlands and Turkey on mainly ministry level, should be spread out to a wider group of stakeholders.

1.2 Objectives

The general objective of this research is to stimulate the organic trade market between Turkey and the Netherlands. To stimulate the relationship of the trade companies the insight of the current cooperation has to be intelligible. This report has to be a basis for networks to trade companies in the organic agriculture.

1.3 Method

Through a desk research an overview of the Turkish agriculture, especially the organic agriculture in Turkey has been brought in chart. The literature is the base for an analysis of the state of art and development of Turkish organic agriculture in the last five years. But also from the literature an of the internal market and the export of Turkish organic produce in general and specially to the Netherlands has been made. By means of interviewing the Turkish en Dutch traders there has been received insight in the relationships the traders have.

1.4 Bookmark

Which crops are the most important products of the total value of the agriculture products. How many people earn there many in the agricultural sector? Through a desk research this kind of questions will give a overview of the current situation of the agriculture in Turkey. Chapter 2 will present these answers. The majority (about 80 – 90%) of the production of organic agricultural is being exported, mostly to Europe. Since 1997 there was a strong increase of organic agriculture in Turkey (Gulay, 2005). Chapter 3 is presenting this overview. The business in organic produce is a small world. How does relationships rises in the organic fruit en vegetables business. These answers are described in chapter 4, these are the results of interviews that has been hold under Turkish and Dutch traders. Chapter 5 closes these report with the conclusions of this research.

2 Turkish Agriculture

The information in this chapter is taken from the “Turkish Horticultural Sector”, a publication of the office of the Agricultural Counsellor of the Royal Netherlands Embassy at Ankara. Other information used is the Country report Turkey of the Directorate-General for Agriculture of the European Commission. The use of information from this report is indicated.

2.1 Horticultural sector

In Turkey the horticultural sector is a leading sub-sector. The availability of different climates results in growing under temperate, subtropical and sometimes tropical conditions. Turkey is a leading producer of fruits and vegetables (hazelnut, tomato, fig, grapes, apples, pear, apricot, peaches, potatoes, melons, onions etc.) Main options lies in the fruits and vegetable production and less in the ornamentals. In the last decade, due to fast developing retail chains, the growing processing industry and the growing export possibilities, the number of greenhouses shows a rapid increase. The more important greenhouse products are; tomatoes, cucumbers, green peppers, green beans and eggplants. In recent years also the strawberry production in greenhouses showed a remarkable increase. Based on these developments, many foreign seed suppliers especially from the Netherlands showed interest in the Turkish market and established their trade relations with local distributors or by investing directly.

2.2 Vegetable production

The crops are in Turkey the most important products of the total value of agricultural production. Of the total crop production fruits (17.4%), vegetables (13.7%) and cereals (11.6%), with wheat as most important cereal, are the most produced. These fruits and vegetables are mainly exported as dried products to the European Union. In the last 30 years, the planted area for vegetable growing showed a 70% increase.
The Aegean is a leading region regarding the open field production, followed by Mediterranean and Marmara (north-west part) regions for protected crops. With the covered production, the Mediterranean is the leading region of which Antalya, Adana and Mersin are the most important provinces. Of all vegetables around 87% are produced in open fields. The total covered area, vegetable production is around 3 million tons. Tomato takes the lead both in open field and covered area production. The other important products are; cucumbers, melon, eggplant, squash, green peppers and watermelon. The share of these products in covered area production is close to 99%.
The following table shows the planting areas of vegetables by production, regions and yield figures. The regions mentioned in table 1 shown on the attached map, figure 1.

Table 1.: Distribution of vegetable production by region

Region	**Planten Area (1,000 Ha)**	**%**	**Share in production (%)**	**Location on map**
Central North	114	14	12	1
Aegean	170	21	24	2
Thrace	106	13	15	3
Mediterranean	146	18	24	4
Northeast	8	1	1	5
Southeast	61	8	6	6
Black sea	52	6	7	7
Middle east	105	13	6	8
Middle south	48	6	5	9
Total	**810**	**100**	**100**	

Source: Royal Netherlands Embassy, Ankara

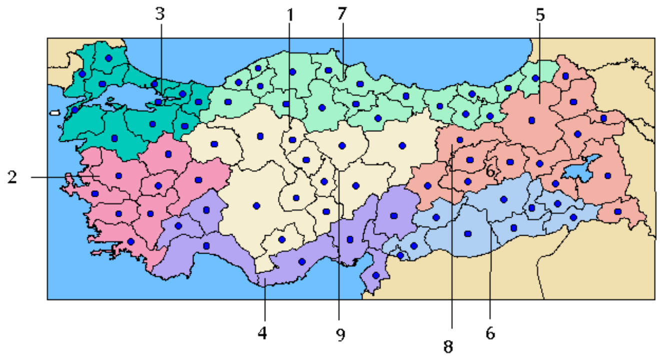

Figure 1.: Map of vegetable production regions (see table 1 for the names)

The supply of the processing industry is sometimes based on contract growing and shows a significant development especially in tomato production. The percentage of industrial processing of tomatoes is around 30-35%, which is close to 2.5 million tons (tomato paste production is around 230,000 tons). The industrial production is mostly developed in the western part of the country (Istanbul, Bursa, Kocaeli, and Balikesir) where the main processing factories are located. Their main activities are canning, in glass and tins. The share of deep frozen products is growing. The most popular frozen vegetables are; peppers, potatoes and tomatoes. Turkish frozen fruits and vegetables exports are destined mainly to the European ethnic markets and are sensitive to foreign demand as long as domestic consumption still is low. The national demand for frozen food will grow with the expansion of the modern supermarket chains.

2.3 Agricultural holdings

As far as the 1991's census results are concerned, mixed cropping-livestock holdings constitute the greatest share of all farm types with about 1 million holdings (25.6%). Field cropping with 931,460 holdings (22.9%) is the second most important specialisation, followed by the specialist grazing livestock with 847,310 holdings (20.9%) and specialist permanent crops with 535,185 holdings (13.2%) (EU,2003). Farms in Turkey are generally family-owned, small and fragmented. The average cultivated area per holding increased during the 1990s to reach about 6 ha in 2001 (Burrel, 2005).

Table 2.: Holdings by size classes (x 1,000 holdings)

Size classes	**1991**		**2001**	
	Number	**% of total**	**Number**	**% of total**
Total	**4,060**	**100%**	**3,022**	**100%**
0 – 2 ha	1,454	35.8%	1,008	33.4%
2 – 5 ha	1,260	31.0%	951	31.5%
5 – 10 ha	722	17.8%	560	18.5%
10 – 20 ha	399	9.8%	327	10.8%
20 – 50 ha	185	4.6%	154	5.1%
50 ha and more	38	0.9%	22	0.7%

Source: EU, 2003

2.4 Labour force

In terms of employment, agriculture is the most important sector in the Turkish economy. Turkey has the highest agricultural labour force of all OECD-countries. The labour cost in agriculture sector is still cheap in Turkey compared to the EU countries. However, Turkey started to loose this advantage in the last decade due to the rise in living conditions. Turkey is the leading country, which creates the highest labour tax cost to the employer (around 43.2%). Although the labour costs are relatively cheap in Turkey, it is difficult to find skilled workers for specialised work. For this reason, many foreign investors bring their own professional teams to Turkey. There are also seasonal workers who work during the harvest period on daily and/or weekly contracts. The average salary of unskilled agricultural labour varies between TRL 15.000.000 and TRL 20.000.000 per day, which is between EUR 8.25 and 10.95 based on old Turkish Lira rate of February 2007.

2.5 Marketing and distribution

The marketing of fresh vegetable and fruits is regulated according to the Decision of 27 June 1995 "Law on Regulating the Trade of Fresh Vegetable and Fruits and Wholesale-markets" and the Regulation of 28 December 1997 "Regulation on Management and Functioning of Wholesale-markets". Upon that regulation the producers will be charged 5% VAT by the tax officers. According to this law the wholesale marketing of fresh fruits and vegetables has to go through recognised wholesale markets. The commissioners are the intermediary party between the producer and the buyer. The prices are established freely in the wholesale markets. The most common methods for determining the price are negotiations and / or auctions. Within the wholesale market it is forbidden to sell the products between the commissioners. The wholesale markets are controlled by main cities or municipalities and / or regional municipalities. Both the commissioners and the municipalities receive a certain percentage of commission during the trade of the products. The wholesale markets for vegetable and fruits are mostly established by the municipalities, but it can be also established by private parties. During the retail sale of the products, it has to be proven that the products were registered in the wholesale market of that province. As soon as the products are registered in the wholesale market, they are free for the retail sale. However, the producers can also market a limited amount of their products in producers' open markets, which are run by municipalities. A Producers' Union, with a minimum of 50 members and registered in the Chamber of Agricultural Union, may sell their products directly to the retail market. However they have to inform the wholesale market concerning the kind, quantity and the amount of the products within 1 day in order to register them.
The export-oriented products may also be marketed without physically entering the wholesale markets; however, exporter unions have to inform the wholesale markets about their export in order to determine real market prices of the products. When the products are registered in the wholesale markets, the commissioners sell the product directly to the traders and/or the retailers. Products reach the customers through open bazaars, supermarket channels and groceries. The inspections of the products whether they are registered or not are carried out by the municipality officials.

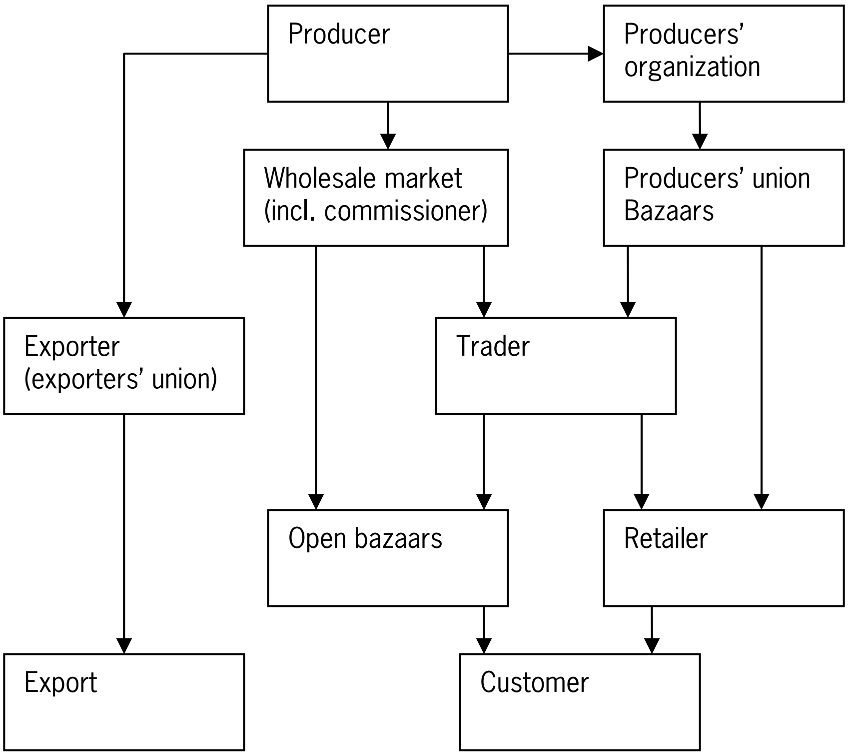

Figure 2.: Distribution scheme
Source: Royal Netherlands Embassy, Ankara

2.6 Trade with The Netherlands

Within the first five months of 2006, the agricultural trade between Turkey and The Netherlands has grown 15% in reference with 2005. The growth was the agricultural trade in both ways. The value of the exported goods from The Netherlands was EUR 72.7 million against an import of EUR 90.9 million. The export of Dutch products grew 16.5%. Most significant growth areas were the following product groups; Margarines, fats and oils (323%), dairy (205%), preparations of potato, vegetable and fruit products (155%), sugar (138%) and tobacco (49%).
The five most important export products from The Netherlands:

- Tobacco, growth of 49% to a value of EUR 13.2 million;
- Coffee, tea and cacao, decline of 17% to a value of EUR 7.5 million;
- Preparations of cereals and starch, growth of 11% to a value of EUR 7 million;
- Horticultural seeds, growth of 7% to a value of EUR 6.9 million;
- Flowers and perennials, growth of 35% to a value of EUR 4.4 million.

The import of Turkish products by The Netherlands grew 14.4%. Most significant growth areas were the following product groups; wood and cork (458%), oilseed products (452%), fodder excluding cereals (106%), fish (94%) and flowers and perennials (31%).
The five most important import products to The Netherlands:

- Preparations of potato, vegetable and fruits, growth of 7% to a value of EUR 24.4 million;
- Fruits, nuts and spices, growth of 12% to a value of EUR 22.4 million;
- Tobacco, decline of 2.7% to a value of EUR 21.2 million;
- Fish, growth of 94% to a value of EUR 9.2 million;
- Flowers and perennials, growth of 31% to a value of 2.1 million.

(Source: LBA, 2006)

3 Turkish Organic Agriculture

Organic farming is becoming more popular due to international demand for organically processed juices, mainly by the international baby and diet food industry. Turkey has an advantage for organic farming, based on the still existing traditional extensive production methods. The modern organic farming is mainly concentrated in Aegean region. There are about 30 kinds of agricultural products supplied under organic label.

3.1 Organic Agriculture in general

Organic farming and in-conversion land constitute a small proportion of the total agricultural land. Organic agriculture was initiated in Aegean region in 1985 and has expanded to all regions. The number of farmers in Turkey dealing with organic agriculture is also increasing year by year (IGEME, 2005).
In 1994, the Regulation on "The Production, Processing and Marketing of Plant and Animal Products produced by Organic Farming Methods" was introduced by the Ministry of Agriculture and Rural Affairs (MARA). This regulation stated the contents of organic agricultural activities, the duties of the Control and Certification Bodies and other rules to be applied in organic agriculture. This regulation was in accordance with Council Regulation (EEC) No. 2092/91. A revision of the Regulation was introduced in 2002 and is still in force today (IGEME, 2005).

3.2 Development of Organic Agriculture in Turkey

Before 1997 the number of organic farmers was limited and knew a little growth. Since 1997 there was a strong increase of organic agriculture in Turkey (Gulay, 2005). The following table shows the development of organic agriculture in Turkey from 1997 till 2001.

Table 3.: Development of Organic Agriculture in Turkey

	Number of Producers	**Number of Product Varieties**	**Organic land (ha)**
1997	7417	53	15.906
1998	8199	67	24.042
1999	12.275	92	46.523
2000	13.187	95	59.649
2001	15.795	124	111.324

Source: Gulay, 2005

In 2001 the total number of agricultural holdings was approximately 3.1 million. The number of organic agricultural holdings is therefore a relatively modest 0.5%. The total agricultural sector is 26,000,000 hectares. The organic agricultural sector is 0.4% of the total agricultural production area (Gulay, 2005).

3.3 Organic agricultural products

The major organic products which are produce in Turkey are apples, wheat, tomatoes, lentils and olives. The total produce of organic products is for four years variations around the 209,000 tons. The following table shows the organic production in tons in Turkey.

Table 4.: Production of major Organic Agricultural Products of Turkey (Quality in Tons)

Products	**2001**	**2002**	**2003**	**2004**
Apples	45,040	69,187	71,928	52,670
Cotton	19,511	21,793	34,877	30,269
Wheat	31,139	19,752	21,379	31,194

Tomatoes	90,472	82,809	26,493	22,897
Figs	8,293	9,473	8,112	15,793
Table grapes	12,894	10,469	9,505	13,988
Lentils	5,862	17,012	11,781	13,015
Olives	7,343	10,744	6,456	10,997
Apricots	13,634	5,940	13,278	9,019
Nuts	6,965	7,667	5,662	4,821
Strawberries	3,353	3,293	3,497	4,098
Chickpeas	3,691	3,102	4,885	4,085
Sour cherries	3,769	6,580	5,994	4,020
Capsicums	3,202	3,355	3,909	2,643
Onions	2,680	388	1,020	1,412
Cherries	1,375	1,335	1,830	1,348
Honey	557	923	1,100	937
Total (Incl. others)	**280,328**	**310,125**	**291,876**	**279,663**

Source: Dilek, 2005

3.4 Export of Organic Agricultural product to The Netherlands

The majority (about 80 – 90%) of the production of organic agricultural is being exported. Domestic consumers show only little interest in the organic products, due to the high price margin between organic and conventional products. The price margins are estimated to be between 50 and 300% depending on the product (Gulay, 2005).

Table 5.: Exports of organic agricultural products to The Netherlands in 2003

Products	Quality (in tons)	Value (x 1,000 USD)
Raisins	771	843
Processed Hazelnuts	47	166
Shelled Hazelnuts	142	494
Chickpeas	184	118
Canned cherries	34	37
Tomato paste	58	55
Frozen vegetables	177	140
Apple juice	1,530	1,673
Total	**2,943**	**3,526**

Source: Gulay, 2005 and edited by Van der Voort

4 Inventory of Turkish-Dutch trade

In this chapter the results of the interviews with the Turkish and Dutch companies are presented.

4.1 Method

After gathering and analysing the information about the trading of organic produce between the Netherlands and Turkey, a questionnaire was formulated for Turkish and Dutch companies. Based on the desk-research there was a list composed with possible Turkish and Dutch trade companies to interview. In the first and second enclosure the address register of the companies which are interviewed. In the third enclosure the questionnaire for the Turkish and Dutch companies that where used during the research are presented. During this researches there are four kinds of traders distinguish: Turkish companies who exports products, Turkish companies which imports products, Dutch companies importing products and Dutch companies that exports products. In this research the group of Turkish companies that imports products has not been interviewed. The trade companies were interviewed about their experiences. The Turkish and Dutch companies were approach by telephoning. The interviews inventories' the needs and possible bottlenecks in the export market of organic produce. The amount of companies that was phoned depended of how many market players there were in the concerning country. Mostly all traders in organic produce which were import organic produce from Turkey or exporting organic products towards the Netherlands has been interviewed. Also few branch or government institutions has been interviewed. The Turkish companies that were interviewed were selected from a list received from the Export Promotion Centre of Turkey (IGEME). The interviews started in English, but during the interviews there was as switch into Turkish. The companies were contacted by a native speaker. A number of companies had no employees who spoke English. The companies were very surprised to speak in there own language. In the next table an overview is showed.

Table 6.: Overview of the amount of interviews.

Dutch companies		Turkish companies	
Association of organic production and trading companies	1	Turkish Trade Promotion Organisation	1
Seed company	4	IGEME	1
Organic trade company	8	Organic trade company	14

The questions for the Dutch companies were divided in the subjects: regular, experience and chances. The questions for the Turkish companies were divided into four subject groups: the local organic market, exporting, legislation, ideas for new product to export and if they like to participate in a meeting between Dutch and Turkish traders. The questions are selected based on the project plan. The results as described in the next paragraph are visualized in figures, these figures are not quantified on the answers that have been given.

4.2 Findings

4.2.1 General

The general products that are imported to the Netherlands are hazelnut, tomatoes (in all kind of variation apricot, beans, cherries, lentils, olives, peaches, raisins and figs. The Dutch Ministry of Agriculture, Nature and Food Quality has set up a list of products which have a import dispensation (the Dutch Ministry of Agriculture "Dienst Regelingen"). The list of products with dispensation is attached as the fourth enclosure. The list is not just for organic, but for all agricultural products. Mostly the exported food is dried or frozen fruit and vegetables. Changes for new export products would be fresh fruits and vegetables. The most potential product which is not yet exported to the Netherlands according the Turkish companies is olive oil. Olive oil is a product what is not yet exported to the Netherlands because in Europe there is a surplus production of olive oil and because of the high import taxes the olive oil from Turkey. Therefore olive oil is too expensive to import to the European Union. Products that also were mentioned as possible export produce are: broccoli, nectarine, citrus and fresh vegetables.

4.2.2 Organic market in Turkey

Turkey is a big country where a lot of people still have connection with the production of food, or better a connection with agriculture. A lot of people have there own vegetable garden. Most people do not realise that they are producing organic vegetables. The supermarkets in the big cities have started to sell organic products. Those organic products are more expensive than non-organic products. For a lot of Turkish people organic products are too expensive to buy. Also the information to the Turkish consumers about the difference between organic and non-organic produce is not promoted as in Europe. Almost 99% of all organic products are exported to foreign countries (mostly Europe).

To characterise the Turkish market the description would be a small market that is demand driven. The organic market in Turkey is very small, but has a good potential to grow according the Turkish companies.

4.2.3 Trade barriers and regulations for Turkish companies

The Turkish companies did mention barriers in export of produce:

- The toxin content for cereals is for the Turkish companies very difficult to for fill. Therefore it is not possible to export all organic products to Europe.
- Some products (for example olive oil) have high import taxes. Therefore the Turkish products are too expensive in comparison to EU products. These high import taxes are to protect the European market. Production costs from for example olive oil is lower in Turkey than in European countries.

4.2.4 Trade barriers and regulations for Dutch companies

Bottlenecks for Dutch companies who are the doing business with Turkey:

- At the import of Dutch products to Turkey, a Dutch company has to comply with the requirements of the Turkish law - and legislation and customs authorities. These regulations can be difficult and unclear because they are regularly changing. It is important to recognize the following matters:
  - Import tariffs: the import tariffs for certain products can be very high for protection of the Turkish market;
  - Customs authorities: the Turkish customs authorities can enforce higher prices for imported goods then agreed between the agents. The customs authorities call themselves thereby on appraisal reports or comparisons, this takes place for protection of its own industry;
  - Import licenses: to certain products there is an import restrictions;
  - Product requirements: Turkey does not accept entirely the standards and product requirements of the European Union, such as CE- certification;
  - ATR-certificate: By the customs union between the EU and Turkey can practically all industrial products of EU of import duties in Turkey be introduced. This applies also to industrial goods from third countries which have been brought in the free movement of the EU and are introduced in Turkey. Goods to have accompanied go of ATR-certificate what shows the origin of goods.
- The reliability of the organic produce is very important for the Dutch traders. The products really have to be organic. The reliability from the products may be more guaranties.

4.2.5 Relations between Turkish and Dutch traders

Most all the trade companies have two or three relations which they have a prolonged relationship. In figure 3 the partition of the amount of relations with traders in the other country.

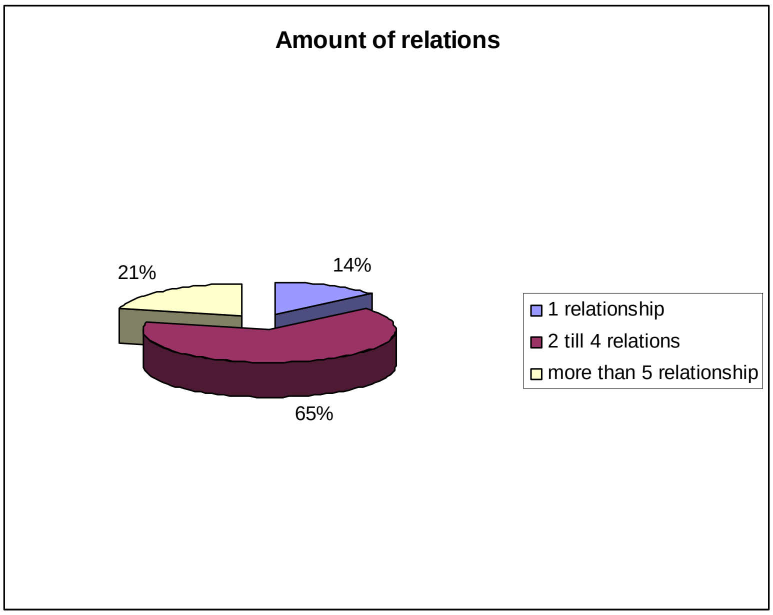

Figure 3.: The amount that the companies have with there clients

The traders give there preference to doing business with bigger traders instead of small trader. Mostly the trade companies imports the products and sell and distribute them in there own country. In most cases the Dutch companies arrange the transport from Turkey to the Netherlands.

Results of the interviews showed that Dutch Traders experience more problems with the regulations than the Turkish Traders. In figure 4 shows that 85% of the interviewed Turkish companies say that they do not have a problem exporting there products. It is interesting to notice that Dutch traders have a different kind of experience than the Turkish Traders. Why they have a different kind of experience didn't become clear during this research. The problems that the Dutch Traders noticed are described in paragraph 5.2.4.

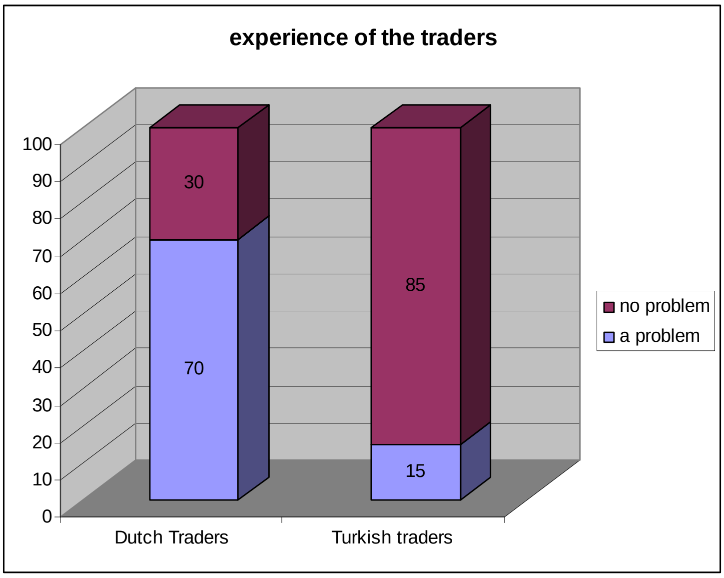

Figure 4.: Experience of the traders with regulations

The reliability of their contact person in both countries is high. The business relationship they have with each other is a long term relationship. Trust is the imported featuring on both sides. Figure 5 shows the most important character profile mentioned by the traders.

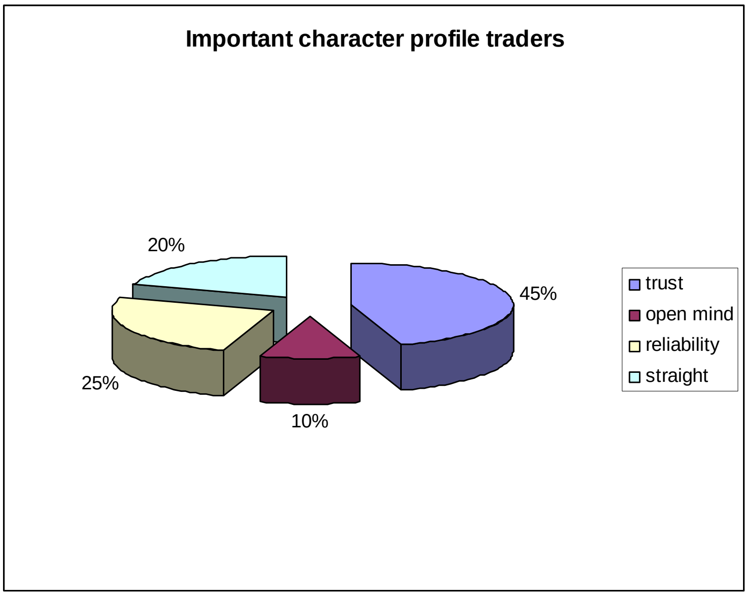

Figure 5.: The important character profile of the traders

4.2.6 A meeting between Turkish and Dutch traders

During the interviewing of the Dutch traders, the branch organization VBP (Vereniging Biologische Producenten, Society Organic Producers) Mr. B. van den Idsert suggest to hold a meeting of workshop where all Dutch and Turkish trader would meet on the Biofach 2008 in Germany. This proposal was proposed to all interviewed companies. Almost all companies agreed with this proposal. Most companies had planned to go to the Biofach 2008, so to combine this they were enthusiastic.

Also a few Turkish companies would like to have the workshop in Turkey, the question would be where in Turkey this workshop could be certificate.

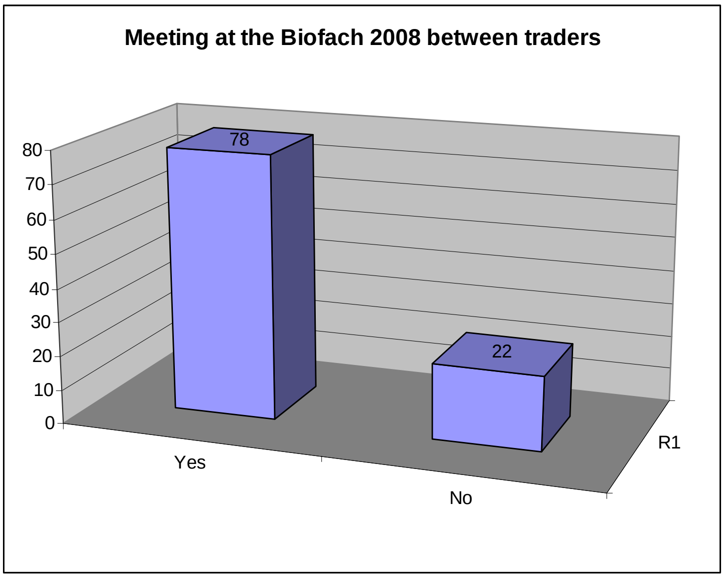

Figure 6.: Attitude towards meeting at the Biofach 2008 between traders

5 Conclusions and recommendations

The crops are in Turkey the most important products of the total value of agricultural production. Of the total crop production fruits (17.4%), vegetables (13.7%) and cereals (11.6%), with wheat as most important cereal, are the most produced. These fruits and vegetables are mainly exported as dried products to the European Union. Turkey is a leading producer of fruits and vegetables (hazelnut, tomato, fig, grapes, apples, pear, apricot, peaches, potatoes, melons, onions etc.) The possibilities for exporting organic products would be fresh fruits and vegetables. The Turkish traders suggest broccoli, nectarine and citrus as possible prosperous export products. The export market is the main focus of the Turkish organic producers and trade companies. The national market which is centralized in big city's, has only a small percentage of the country's food market. The Turkish producers and traders do believe in a growth of the local market, the government could stimulate the Turkish people to eat (more) organic.

The relationship between the trading companies of both countries is based on trust. The traders have a lang-term trade relationship with each other. Most traders have got two or more different relationships with other traders in the same country. According the Turkish traders the Dutch trade companies are cost-conscious.

There are some differences between the answers the respondents gave. In general the interviewed companies decline that there is no problem to import or export. Especially the Dutch traders mention more issues than the Turkish traders. This perception can be the result of a cultural affects for the situation in the business environment or even giving one's opinion by telephone. Another reason for this result can be the fact that Dutch traders are importing the products form Turkey, this research was not focused on exporting to Turkey (because there is no organic produce exported form the Netherlands to Turkey).

Export of food form the Netherlands towards Turkey is not common. Raw materials are exported from the Netherlands towards Turkey, these raw materials are not organic. Turkey wants toe have disinfected raw materials. The Dutch organic companies are not pleased with this departure.

In continuation of this research project companies would like to meet each other. As proposal for a network meeting was mentioned Biofach 2008 or a meeting in Turkey.

5.1 Recommendations

The interviewed trade companies do believe that there is a possibility for more development in the cooperation between the trade companies of both countries. The most potential organic products, which are not yet exported to the Netherlands, according the Turkish companies are olive oil, broccoli, nectarine, citrus and fresh vegetables. The recommendations of the Turkish trade companies are:

- More stimulations of the government towards the production of organic produce, for example supporting farmers during conversion periods.
- Open the market to decrease the import license, for European countries as well as for Turkey.
- Meeting Dutch traders for a network meeting in Turkey or at the Biofach 2008.

From the Dutch trading companies are the recommendations below this sentence formulated:

- The Turkish government has to invest in reliability of the Turkish organic market. In the Dutch samples of the products shows that sometimes they contain residues that are not allowed in organic products.
- Meeting Turkish traders for a network meeting at the Biofach 2008.

The trade companies were very positive for a network meeting at the annual organic fair in Germany, the Biofach 2008. Most of the trade companies account obliged in their agenda.

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- http://www.aegeanexporters.com

Enclosure 1: Dutch companies

Company	Contactperson	Product	Sort of company
Do It BV, Prins Hendrikweg 10, 3771 AK Barneveld, +31 342 429 051 www.organic.nl E. vincent@organic.nl	Mr. Evers	Citrus, cereals, nuts, Peas, pasta, soya beans, Lentils, Pulses, en more	Organic trade company
Doens Food Ingredients BV, Oranjestraat 40/A, 4515 CA IJzendijke +31 117 302 020 www.doensfood.com E. jeroen@doensfood.com	Mr. J. Meijering	Dried fruits and vegetables, flakes, grains, cacao, beans en more	Organic trade company
Tradin Organic, Prins Hendrikkade 14, 1012 TL Amsterdam, +31 20407 4499 www.tradinorganic.com E. info@tradingorganic.com	Mr. Floot and Mrs Broers	Dried fruits, grains rice, cacou, beans en more	Organic trade company
Ariza B.V. Korendijk 13, 5704 RD Helmond, +31 492 528 364 www.ariza.nl E. ak@ariza.nl	Mr. A. Kempe	Citrus fruit, exotic fruits, vegetables, juices.	Organic trade company
Enes Groente en Fruit Venrayseweg 116E, 5928 Venlo T. +31 773 961197 www.enes.nl	Mr. Ecrument Saka	Import groente en fruit	Organic trade company
Organic Trade Company Holland, Bronsweg 7, 8211 AL Lelystad +31 320 289 030 www.otcholland.com E. info@otcholland.com	Mr. M. Hendrikse	Salads, onions, vegetables	Organic trade company
Biocore Postbus 293, 8200 AG Lelystad +31 320 290 029 www.biocore.nl E. info@biocore.nl	Mr M. de Rooy	Frozen vegetables, grain, oil grains	Organic trade company
Udea BV, Transportweg 7, 2742 TD Veghel, T. +31 413 256 700 www.udea.com E. info@udea.nl	Mr. J. Maassen	Organic fresh and deep fozen vegetable	Organic trade company
Bejo Zaden, P.O. Box 50, 1749 ZH Warmenhuizen +31 226 396162 www.bejo.nl E. g.struik@bejo.nl	Mr. G. Struik	Organic vegetalesseeds	Seed company
Holland Select BV, Postbus 27 1619 ZG Andijk T. +31	Mr. de Boer	Holland-Select has specialised in breeding	Seed company

228 591 578 www.holland-select.nl E. info@holland-select.nl		vegetable products for over 100 years.	
Enza Zaden BV, P.O. Box 7, 1600 AA Enkhuizen T. +31 228 315 844 www.enzazaden.nl E. info@enzazaden.nl	Mr. R. Tempel	breed and select an increasing number of varieties in trials	Seed company
(Agrico) Bioselect Duit 15, 8305 BB Emmeloord T. +31 527 www.agrico.nl E. info@agrico.nl	Mr. H. Iwema	Potatoes seeds	Seed company
VBP (Vereniging Biologische Productie en handelsvereniging T. +31 263 257 817 www,vbpbiologisch.nl E. b.idsert@worldonline.nl	Mr. B. van den Idsert		Association of organic production and trading companies

Enclosure 2: Turkish companies

Company	Contact person	Product	Sort of company
TİRYAKİ AGRO GIDA SAN. ve TİC. A.Ş. M.Batallı Bulv. 13 Nolu Cad. No:8 Başpınar / Gaziantep / TURKEY T.: +90 342 337 97 00 F. : +90 342 337 97 09 E. info@tiryaki.net	Ahmet Tiryanakioglu	Pulses, grain, dried fruit & nuts	Export en handelsbedrijf in biologische voedingsmiddelen.
Yerlim, Atatürk Cad. No : 128 Davutlar / Kuşadası T. +90 256 681 61 30 Fax : +90 256 681 61 34 ÇİFTLİK GIDA HATTI Yıldız SAATÇİ T: +90 256 681 61 30 Dahili 315	Gursel Tonbul	Wine, dried and fresh fruit.	Export/ trader
Selim Uludağ Organik Tarım A.Ş. Cumhuriyet cad. No113 63040 Şanlıurfa/TÜRKİYE Tel:+90 414 3147878 (pbx) Fax:+90 414 3132838 E. info@selimuludag.com.tr www.selimuludag.com.tr	Mehmet Sait Uludag	Cereals, dried fruit, herbs, spices, nuts, oil seed	Produce, processe and exporting organic products
SUNDER Deri Sanayi, Gida, Turizm ve Dis Ticaret Ltd. Co. Tire Industrial Zone, 35900 Tire Izmir / TURKEY P; + 90 232-513-5150, + 90-232-513-5152	Yavuz Suner	Dried herbs and spices, medicinal plant and vegetables.	Production, processing and exporting
Pan Tarim , Dogal ve Organik Gida Ur. San. Ve Tic Ltd. Sti Cemalpasa Mah . VailiYolu cad No. 17 Menemencioglu apt. A. Blok D1 Seyhan Adana T. +90 322 3328920 E. zeynep@pantarim.com, W. pantarim.com	Zeynep Oztekin	Citrus and tomatoes	Producing en exporting fresh fruit en vegetables
Yakatarla Gökçeovacık Köyü Göcek - Fethiye Muğla Fabrika Telefon: 0252 644 01 65 E. yakatarla@yakatarla.com	Semih Dinler	Herbs, dried fruit, walnut tree, cereals	Exporting organic products
Entegre Gida Sanayi A.S. Fatih Mah. Hanimin Ciftligi Mevkii. 44070 Malatya E. ali@entegre.com w.entegre.com	Ali Savas	Dried tomatoes, nuts, raisin, herbs	Producing and exporting Not yet to Holland
Pakisa, Bor, Kazim Dirik Mah. 364 Sk. No 21/A Bornova IZMIR T. +90 2324612039		Figs	Producing and exporting
Boyrazoglu Tarim Tic San Ltd. Sti 1372 sk no 15/702 Nukhet Hanim is hani Cankaya IZMIR Turkey T. +90 23248303		Bulgur, chick peas, lentils	Producing and exporting

Saneks kuru incir isleme ve Tic A. S., gazi Bullvari No 87/ 308 Cankaya IZMIR Turkey, T +90 2324259001		Frozen vegetables and fruit.	Producing and exporting
Bidas Gida San. VE TIC. A. S. Ankara Yolu 20 km Kestel Bursa T.+90 224 3841 022 E. bidas@bidas.com W, bidas.com		Frozen products; strawberry, orange, tomatoes, pepper, raspberry sweet cherry quince, onion, leek, plum, apricot, sour cherry, blackberry	Trading and exporting
Franko Meye Ihracat 1479 sk. No.22 Katt 4 Da 10 35220 Alsancak Izmir T. +90 232 4214 930 E. franco@francofruits.com www.francofruits.com		Dried Figs, fig paste, diced figs, dried apricots, sultanas, sun dried tomatoes	Produce and trading and export
Gencler Tarim urunleri san.ve ticUc eylul mah, mezbaha sok no 5 odemis IZMIR T.+90 232 5447296 E. genctrade@superonline.nl www.gleclertarim.com		Dried figs, sultana's dried apricots, olives	PRODUCE AND EXPORTS
Isik Organik GIDA Vali Kazim Pasa Cad. No 4/506 35210 Izmir T.+90 232 44152774 E. info@isiktarim.com www.isiktarim.com		Sultana's, raisin, figs, apricots peaches, pears prunes apples hazelnuts walnuts apricot kernels, tomatoes, poppy seeds oreganum etc.	Produce and exports

Enclosure 3: Questionnaire

Questions for Turkish companies who are exporting organic products to the Netherlands

Aim: the experience of Turkish companies with export of organic products to the Netherlands. What kind of difficulties they have for exporting the European Union and The Netherlands in particular?

1. Could you give a brief description of your company? (sales, turnover, branches, etc)
2. (onderdeel vraag 1) Do you produce, process or trade in organic products/produce?
3. Do you export organic produce to foreign countries? And if so to which countries?
4. Is there a market for organic produce in Turkey?
5. How would you characterise the market for organic produce? (buyers market, low volumes, small batches, type of buyers, regions, etc.)
6. Do you also sell the organic products for the Turkish market? Is the organic market in Turkey growing the last few years?
7. It has come to our ears that the Turkish organic products on the local market are sold as conventional. Is this correct? What is the reason of this? Don't you get a better price for organic products? Isn't there sufficient market (national/international) to sell organic?
8. What kind of organic products do you export to the Netherlands?
9. Do you have a business relationship with fixed Dutch traders?
10. How long do you have a business relation these Dutch trading companies?
11. How did you get in contact with your Dutch business partner?
12. What kind of problems or bottlenecks do you experience when you are exporting to the Netherlands?
13. What changes should be made, in order to improve trade in organic produce between Turkey and The Netherlands?
14. Can you name a number of organic products (in general) that are exported to the EU?
15. Do you see chances for organic products from that are not exported yet?

Questions for Dutch traders which are importing Turkish production.

Introduction of the reason to call

1. What is the core business of this companies? (import/export)
2. What kind of products does your company imports from Turkey?
3. Since when does this relation started with the Turkish contact person?
4. How did this relationship started?
5. Did the Dutch government stimulate this contact? If yes in which way?
6. Did you experience any difficulty at: Legislation, Logistics, Quality, Payments, Contracts, Cultural barrier, Languages barriers
7. Which role should the Dutch government has to for fill to stimulate this relationship with Turkey?
8. Which changes are there of trading organic products between Turkey and the Netherlands?
9. Do you need any kind of supporting for trading with Turkey?
10. Do you have any kind of comments that you mist in this questionnaire?

Enclosure 4: Products with an import dispensation from the Dutch government

Row 1	Row 2	Row 3
almonds dried	caraway seed	hazelnut pip chopped
anise	cherries tinned	hazelnut pip peeled
anise seed	cherries IQF	hazelnut pip roasted
apple frozen	cherries sweet dried	hazelnuts
apple Aroma	cherries sweet tinned	hazelnuts dried
apple concentrate	cherries sweet without pip	hazelnuts chopped dried
apple pulp	cherries sour	hazelnuts chopped roasted
apple puree	cherries sour dried	hazelnuts roasted
apples	cherries dried tinned	hazelnut peeled chopped
apples dried	cherries sour IQF	hazelnut peeled roasted
apples dried in pieces	cherries sour pulp	hazelnut peeled complete
apple tinned	cherries sour puree	honey
apple juice	cherries concentrate sweet	laurel leafs dried
apple juice concentrate	cherries concentrate sour	laurel leafs
apricot	cherries pulp sweet	lime
apricots	cherries pulp sour	lemons
apricot dried	cherries puree sweet	lentils
apricot dried	cherrie puree sour	lentils dried
apricot bottled	cherrie juice sweet	lentils brown
apricot IQF	cherrie juice sour	lentils brown dried
apricot concentrate	chickpeas	lentils dupont dried
apricot seed	chickpeas dried	lentils yellow
apricot pulp	chickpeas flour	lentils green
apricot purée	cotton	lentils green dried
apricot juice	cottonseed	lentils red
apricot pieces	cottonseed cake	lentils red dried
barley	fenugreek	lentil flour
bays black froze	fennel	lentils red split
bays black dried	fennel seed	lentils split dried
bays black pulp	figs	kidney beans
bays black puree	figs frozen	quince
bay concentrate	figs dried	quince dried
beans	figs chopped dried	quince concentrate
beans white	figs pasta	quince tinned
beans white dried	grape red	quince puree
beans black	grape blank	poppy
bulgur	grapefruit	blue poppy
chamomile	grapefruit "pink" tinned	poppy oil
cappers in salt water	hazelnut flour roasted	white poppy
capsule peas	hazelnut pasta	maize
caraway	hazelnut pip	maize dried

Row 4	row 5	row 6
marjoram	pears	raisins
mandarin	pears dried	raisins dried
mandarin frozen	pears chopped and dried	raisins Thompson
mandarin concentrate	pears tinned	raisins sundried
mandarin tinned	pears aroma	ryes
mandarin pulp	pears concentrate	sage
mandarin puree	pears pulp	sage dried
sweet balm	pears puree	sesame dried
mulberry	pears juice	soya beans
mulberry dried	pepper IQF	soya beans dried
nettle	pepper red roasted	strawberries frozen
oats	peaches	strawberries concentrate
oats dried	peaches dried	strawberries dried
olive oil	peaches chopped dried	strawberries IQF
olive green filled with almonds	peaches tinned	strawberries pulp
olives green filled with garlic	peaches pulp	strawberries puree
olives green filled with pepper	pine tree peas dried	sultana's
olives green big	peanuts	sunflower seed
olives in saltwater	pistachio	teff
olives black	pistachio in capsule	thyme
olives black with pip	pistachio in capsule roasted and salted	thyme dried
olive cookies	pistachio nuts	tomatoes
onion frozen	pistachio nuts dried	tomatoes concentrate
onion IQF	plum	tomatoes dried
orange	plum frozen	tomatoes dried in olive oil
orange frozen	plum dried	tomatoes granulate dried
orange concentrate	plum chopped and dried	tomatoes half dried
orange pulp	plum tinned	tomatoes half dried deep frozen
orange puree	plum concentrate	tomatoes dried powder
oregano	plum pulp	tomatoes pieces dried
oregano dried	plum juice	tomatoes sundried
sweet pepper frozen	plum puree	tomatoes pulp
sweet pepper green sweet dried	pomegranates	tomatoes puree
sweet pepper red sweet dried	raspberries pulp	tomatoes juice
sweet pepper concentrate	raspberries puree	tomatoes roasted sun-dried
sweet pepper granulate green sweet	raspberries frozen	walnut without peel dried
sweet pepper granulate red sweet	raspberries dried	wheat
sweet pepper powder green sweet	raspberries IQF	wheat durum
sweet pepper powder red sweet	raspberries concentrate	wheat dried
sweet pepper pulp	rosemary	wheat flour
sweet pepper puree	rosemary dried	