

PIG MEAT

Non-exhaustive list of issues and questions to facilitate preparations for bilateral meetings:

SCREENING WITH TURKEY

1. General information

(1) **Balance Sheet (Heads or TEC tonnes equivalent carcass):**

	2002	2003	2004	2005 ⁽²⁾ (Jan-Oct)
Pig herd ⁽¹⁾				
Pig population (head)	3,600	7,090	4,399	2,692
Total size of the herd (in December)				2,692
Piglets (< 20 kg)				1,330
Pigs for fattening				1,362
Breeding pigs				
Production of meat (tons) ⁽¹⁾	37	280	174	
Imports ⁽³⁾				
Live (head)	0	1	0	0
- Live (tons)	0	0.11	0	0
- Meat (tons)	10.82	25.55	7.30	2
Exports ⁽³⁾				
- Live (head)	0	0	0	
- Live (tons)	0	0	0	
- Meat (tons)	0	1.3	0.150	
Existing stocks				
Human consumption (kg/head/year):	Because of religious beliefs, pig meat consumption is not popular in Turkey. So that, no basic researches have been carried out on this issue so far.			
Self sufficiency: (Ratio between Gross Indigenous Production and total use)	As the consumption rate is unknown, we can not provide a data regarding self sufficiency.			

⁽¹⁾ Information for the years 2002, 2003 and 2004 is taken from the statistics of Turkish Statistical Institute (TURKSTAT); the meat figure for pig includes the meat from the municipal and private slaughterhouses (integrated plants). The figures for year 2004 are provisional. The data for the number of the pigs and the number of slaughtered pigs, their carcass weights are collected yearly via Province and District Directorates of Ministry of Agriculture and Rural Affairs (MARA) by the data collection forms sent by TURKSTAT. The information for the number of animals provided by agricultural technicians in provinces and districts is based on their regional observations and existing information which is used for veterinary purposes. The meat production is calculated by multiplying the number of the pigs by their carcass weights.

⁽²⁾ Information is taken from the records of MARA

(³) Trade data is provided by TURKSTAT and Undersecretariat for Foreign Trade (UFT). Figures related to pig meat include meat and edible meat offal salted in brine, dried or smoked tariff nos. 0210.11,12,19

(2) Farm structure (pig production)

- What is the number of holdings engaged in pig production?

There are 5 holdings engaged in pig production located in Antalya, Edirne, Balıkesir, İzmir and Kırklareli provinces. The holdings are monitored in accordance with the By-law on the Establishment, Operation and Monitoring of Holdings of Animal and Animal Products (Published at the Official Gazette No: 25393 dated 05.03.2004). During monitoring it is found that these establishments are not operating in accordance with the said By-law and at present they are under the procedure to be licensed.

- What is the size of such farms? (Average number of pigs per holding)

Antalya: 72, Balıkesir: 1500, Edirne: 195, İzmir: 635, Kırklareli: 290 (Source: MARA)

- Total number of pigs in holdings of

- less than 200 pigs: 2
- 200-399 pigs: 1
- 400-999 pigs: 1
- over 1000 pigs: 1

- How big part of the pig farms are specialized piglet or fattening units and how many are combined production farms.

The holdings are not specialized for piglet or fattening units.

- Is pig production concentrated in certain areas or dispersed?

The production is concentrated in touristic areas.

(3) Consumption

- Is pig meat a traditional meat? Is the consumption concentrated at certain times of year (summer season, certain holidays) or is demand steady throughout the year?

Pig meat consumption in Turkey is very low.

- Evolution of production and consumption: Have there been reductions or increases in production or consumption (in past 5 years)?

No data available due to low rate of demand and supply.

(4) Producer and other organisations

What are the organisations in pig sector and what are their positions?

There isn't any pig meat producer organization in Turkey.

2. Markets

- How is the commerce organised?

The produced pig meat and the imported pig meat may be processed or directly delivered to the hotels or supermarkets for retail sales with a red warning sign on the products. There are 2 registered processing units placed in İstanbul and Muğla provinces. The hotels in touristic regions may also import pig meat or processed pig meat and they are officially certificated by MARA.

- **Are there live markets or direct purchases by slaughterhouses, or both?**

There isn't any specific live market for pigs. Direct purchases are made from the holdings which have special slaughtering premises.

- **Does all meat for consumption go through slaughterhouses and retail stores?**

As mentioned above, the produced pig meat and the imported pig meat may be processed or directly delivered to the hotels or supermarkets for retail sales with a red warning sign on the products.

- **Is pig industry in any extent integrated? Are there any long term contracts between producers/slaughterhouses, slaughterhouses/meat industry, meat industry/retailers? Any price guarantees?**

Not available.

- **Is the live market privately organised or does the State play a role?**

State does not play a role in the market.

- **Can a list be provided of the various markets/slaughterhouses, showing their relative importance in terms of throughput of pigs?**

Not available.

- **Prices:**

Systems for pricing (based on carcass quality or other methods)

- **Do the authorities monitor the prices on the markets?**

As the consumption rate is very low, prices are not monitored by MARA.

- **Price developments (on a basis of average quality carcasses) over the last 3 years.**

	2001	2002	2003	2004
Pig meat price (TL/kg)	2,122,000	4,000,000	6,000,000	n/a
Pig meat price (€/kg)	1.94	2.80	3.56	n/a

Information provided by TURKSTAT, and the animal product prices are compiled on the basis of factories, merchants, animal bazaars and animal trade stocks. The prices received by farmers for animal products are collected from 74 centres of provinces and 783 districts. For prices of animal products and livestock by marketing channel are the first hand average sale prices of farmers between 1-20 days of each month.

- **Average slaughter weights**

Not available.

3. Slaughterhouses

- **Number of slaughterhouses by regions?**

None.

- **Are slaughterhouses publicly owned, private or co-operatives (semi-public)?**

There are slaughtering places at the premises of the holdings.

- **Do they purchase the meat and then market it or are they service slaughterhouses which slaughter animals for a fee?**

The holdings fatten the pigs and then slaughters at their premises and market pig meat to hotels.

- **Are the slaughterhouses certified for export to the EU?**

No.

- **Are there official personnel present in slaughterhouses (veterinarians for example)?**

On the occasion of slaughtering the animals at the provisional municipality slaughterhouses there are official veterinarians working for the municipality controlling the process.

- **Is there a classification system for carcasses, based on lean meat content?**

Not available.

- **Are storage facilities available (cold stores)?**

The holdings have their own cold stores.

4. General Market Information:

- **Is the identity of all farmers known?**

Yes there are only 5 holdings under certification process and the owners of the animals are recorded by MARA.

- **Is a census of the number of animals regularly carried out?**

No. The last Census of Livestock has been conducted in year 1984. Nevertheless, there isn't any census made specifically for pig but there are agricultural censuses are conducted every ten years, which also covers pigs. Until 2005, 7 agricultural censuses were conducted and the 8th one will be conducted on 2011.

- **Are statistics available for numbers and slaughterings? If so, on what basis? – Weekly, monthly...?**

The data for the number of slaughtered pigs, their carcass weights are collected yearly via Province and District Directorates of MARA by the data collection forms sent by TURKSTAT.

- **Are production forecasts carried out?**

Generally agricultural forecasts are carried out by Agricultural Economics Institute of MARA but these studies don't cover pig meat.

5. IMPORTS/EXPORTS

- **Are there import agreements with other countries?**

- o **Other candidate countries?**

No.

- o **EU countries?**

No. Between years 2002-2004, Turkey imported pig meat from Italy, Greece and Belgium.

- o **Non-candidate countries?**

Custom duties for pig and pig meat originating in Bosnia and Herzegovina is 0 % due to free trade agreement.

- **With regard to imports, are there quotas in operation? How are they managed? (Certificates of origin and import licences, for example).**

There are no quotas in operation. Under the current Import Regime, no import or export licenses are required for pig meat or pigs.

Import Duties

CN Code	Product Description	MFN %	Bound Rate (%)
0103 10	Live swine, pure-bred breeding	20	0-76,5
0103 91	Live swine, other than breeding	76.5	76.5
0103 92		76.5	76.5
0203		Meat of swine	225
0206 30 00	Edible offal of swine	225	225
0209	Pig fat	42.5	42.5
1501 00 11		4	15,6-50
1501 00 19		4	15,6-50
1602 41		Prepared, preserved meat and offal of swine	121.5
1602 49	121.5		121.5

- **Are there exports to other countries?**

The exports and the values are given at the table below, the information is provided by UFT.

PIG MEAT	2001		2002	2003		2004	
	KG	USD		KG	USD	KG	USD
NORWAY	66	206	0				
MALTA	115	335	0				
LIBERIA	62	194	0				
IRAQ			0	1.345	30.054	150	1.689
GREECE	678	868					
OTHER	2.721	28.232	0				

- **Other candidate countries?**
 - **Non-candidate countries?**
- **Are export refunds or credit guarantees used?**

There is no export refund provided for pig meat.

Export Refunds:

CN Code	Final Outlay Commitment Level US\$	Final Quantity Commitment Level (t)	Current Situation	
			Refund Amount	Eligible Quantity
1201	-	-	-	-
1205	-	-	-	-
1206	-	-	-	-
1507	-	-	-	-
1512	2,377,533.80	62,085.00	-	-
1514	-	-	-	-

6. Support For Pig Farmers

- Are any subsidies paid to farmers in the pig sector:

o Income support?

No.

o Structural support?

No.

- Are there indirect subsidies such as price controls on the markets (minimum price levels guaranteed for example)?

No.

- Are there any intervention mechanisms in operation, such as private or public storage?

No.

7. Sanitary Situation

- What is the veterinary situation?

- Diseases:

There isn't any notification made concerning any swine disease in Turkey, yet.

- The role of authorities:

- Legislation:

MARA is the competent authority in accordance with Law No: 3285 on Animal Health and Surveillance. The objective of the Law is to protect animal health and public health, to control and eradicate these animal diseases and zoonosis. Diseases which are included in the OIE List of notifiable diseases such as Swine Vesicular Disease (S.V.D.), Classical Swine Fever in domestic swine (C.S.F.), classical swine fever in feral pigs (C.S.F.) (W.), African Swine Fever (A.S.F), porcine enterovirus encephalomyelitis (P.E.E.) are not included in the list of notifiable diseases of Turkey. Etlik Central Control and Research Laboratory has been designated as the reference laboratory for pig diseases and this laboratory is now involved in ring tests carried out between EU reference laboratories.

- Eradication and vaccination programs:

No disease eradication or vaccination programmes established for pig diseases as there isn't any notified outbreak.