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Turkey

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The Turkish Beekeeping and Honey Sector

Report Categories:

Honey

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Report Highlights:

Turkey is a major honey producer and consumer. Despite the difficulties facing the sector, production is expected to reach 110,000 metric tons in 2015.

General Information:

Production:

Turkey is one of the biggest honey and bee wax producers of the world. In fact, Turkey produces 92 percent of the world's pine honey, specifically in its West Mediterranean and South Aegean regions. According to the Beekeepers' Association of Turkey, there are 57,000 registered beekeepers and 6.6 million registered hives in Turkey as of 2014.

Beekeeping is a traditional agricultural activity that is carried out in almost every region of Turkey. Twenty percent of the world's 25 bee sub-species can be found in Turkey. Due to this diversity, bee farmers are encouraged to breed bee species native to their region instead of commercial bees. However, Turkish breeders face the challenge of erratic weather changes, so they request support from the Ministry of Food, Agriculture, and Livestock (MinFAL) to accommodate for unexpected conditions. These conditions also affect the *Marchalina hellenica*, which is the most important insect for the production of pine honey and honeydew. Since 2006, *M. hellenica* has been included in the European and Mediterranean Plant Protection alert list. In addition, the Turkish Ministry of Forestry has taken under protection the forests, mostly located in Mugla Province, in which this insect lives. Turkey has strong prospects in beekeeping since all regions of Turkey are available for this activity and 75 percent of beekeepers are migratory. The honey derived from different regions within Turkey has different local traits. Approximately 70 percent of plants in Turkey are floristic and it is believed that apicultural production has great potential, but faces difficulties.

It is believed that Turkey will be stronger against global competition with the National Honey Bee Improvement Strategy. This strategy is being prepared by MinFAL, in conjunction with opinions of associations and stakeholders in order to improve beekeeping in Turkey. However, producers in Turkey are not consistent and effective with quality, standards and marketing issues.

The number of new hives is rising as a result of the subsidy program given by the Ministry. For the year of 2015, 10 Turkish Lira (TL) per hive will be given to beekeepers who register with the Beekeeping Registration System (AKS) and 60 TL to beekeepers who use bumblebees registered with the Agriculture Greenhouse System (OKS) in order to provide natural pollination within the greenhouses (As of May 26, US\$1=2.63 TL). Since 2015, farmers have been subsidized if they have at least 30 hives and the hives have plates for traceability. According to MinFAL, 2.6 million TL was paid for 52,000 hives in 2011 within the scope of the subsidy payment program. A 50 percent grant subsidy is also given for beekeeping activities within the scope of IPARD (the Instrument for Pre-Association Assistance Rural Development Program). The subsidy range is 5,000-250,000 euros.

Beekeeping was taken under insurance by TARSIM (Agricultural Insurance Pool) carried out by the MinFAL. However, beekeepers are discontented and they believed that the subsidies are not sufficient. This is in large part because yield per hive is lower than the world average (20 kg per hive). In comparison, the yield per hive in Turkey is approximately 15-17 kg. Furthermore, producers are not able to sell their products at very profitable prices since the input costs are too high and there are difficulties with marketing. In Turkey, there is little demand for other apicultural products like pollen, royal jelly, and bee venom. In addition, local consumers maintain concerns about use of agricultural chemicals and livestock medicines over safety limits in local bee farms.

Figure 1: Honey Production and market values by years

Year	Honey (MT)	Value* (TL/kg)
2005	82,336	10.51
2006	83,842	11.77
2007	73,935	12.89
2008	81,364	15.17
2009	82,003	16.86
2010	81,115	17.60
2011	94,245	17.77
2012	89,162	19.23
2013	94,694	19.94
2014	102,486	19.77

Source: TurkSTAT, 2015

Note*: \$1 = 2.63 TL as of May 26, 2015.

Figure 2: The number of hives and the farms in Turkey.

Year	Number of villages dealing with beekeeping	Number of farms dealing with beekeeping	Number of new hives	Number of old hives	Hives in total	Honey Production (MT)	Bee wax Production (MT)
2010	20,845	-	5,465,669	137	5,602,669	81,115	4,148
2011	21,131	-	5,862,312	149,02	6,011,332	94,245	4,235
2012	21,307	-	6,191,232	156,777	6,348,009	89,162	4,222
2013	-	79,934	6,458,083	183,265	6,641,348	94,694	4,241
2014	-	104,709	6,867,531	193,442	7,060,973	102,486	4,024

Source: TurkSTAT, 2015

The most widely consumed, and thus most important, honey types in Turkey are flower honey, pine honey, chestnut honey, thyme honey, astragalus honey, citrus honey, cotton and sunflowers honey.

The biggest honey producing provinces in Turkey are Mugla (15,282 MT), Ordu (15,016 MT), Adana (9,715 MT), Aydın (3,447 MT), Sivas (3,039 MT) and Mersin (2,884 MT).

In 2014, the sales of honey, bee wax, and royal jelly contributed 600 million TL to the Turkish economy.

Figure 3: Turkey honey yields per hive per year

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Yield (kg)	17	15	17	15	15	16	14	14	14

Source: Turkish Ministry of Food, Agriculture and Livestock, 2015

Within the scope of reducing interest rate implementation intended for agriculture, 50 percent reduced interest and investment credit is given to the beekeepers who are willing to increase the number of their hives to 50 units or higher, or to the beekeepers registered to the Beekeeping Registration System who have 50 hives or more.

Honey production in Turkey decreased 35-40 percent in 2011, largely due to climate change-related drought. This drought may have also been the cause of unusual colony losses in 2011. However, according to the sector, honey production increased with the rainfalls in 2014 and production is expected to increase to 110,000 MT in 2015.

Another factor affecting the sector is agricultural disinfection (applying pesticide), which may have contributed to huge losses of bees in 2014, particularly in the Cukurova region. Although the MinFAL has banned the use of certain pesticides for apiculture, some companies still continue to use them in order to use up their stocks. The sector also has problems with smuggling.

Consumption:

Nearly all of the honey produced within the country per year is consumed locally. The consumption of the honey is 1.2 kg per capita while it is 800-900 grams per capita in Europe.

Recently, the MinFAL detected a rise in artificial/adulterated honey sales, which has likely been the cause of reduced domestic consumption and a loss of consumer confidence. Additionally, the Ministry of Customs and Trade has banned advertisements for honey sales due to concerns with fraud.

According to the sector, a 7,000 MT deficit in honey sales may occur in 2018 because consumer population is increasing more rapidly than honey production within the country, in addition to a projected increase in export volume by 9 percent per year.

Exports:

In 2014, Turkey exported approximately 5,000 MT (\$20 million) honey mostly to Germany, the United States, Jordan, Hungary, Iraq, Saudi Arabia, Austria, Northern Cyprus, Belgium and Spain.

According to the sector, Turkey can increase its exportation of honey by improving production of

geographically identified pine honey, protecting the pine area within Aegean Region which is the main resource for beekeeping activity, and protecting *Marchalina hellenica* living within this area. Producing monofloral honey for consumers in the United States and European Union who prefer known-origin honey, encouraging the production of other types of apiculture products, and preventing the illegal entry of honey into the country are priorities for the sector. According to the sector, reducing input costs through standardization, production controls such as honey ingredient and residue controls, and packaging should be prioritized in order to increase production and exportation.

Figure 4: Turkey's Honey Exports in Value vs. Volume

Year	HS6	HS6 name	Export Volume (kg)	Export Volume (\$)
2011	040900	Natural Honey	1,102,689	5,206,276
2012	040900	Natural Honey	1,263,375	6,006,545
2013	040900	Natural Honey	3,563,777	12,956,479
2014	040900	Natural Honey	4,969,418	18,919,192

Source: TurkSTAT, 2015

Imports:

Although Turkey has no import ban on honey, the Turkish Ministry of Economy implemented a high custom tariff on imports, thus making it difficult for Turkish businesses to import honey.

Figure 5: Turkey's Honey Imports in Value vs. Volume

Year	HS6	HS6 name	Import Volume (kg)	Import Volume (\$)
2011	040900	Natural Honey	0	0
2012	040900	Natural Honey	37	872
2013	040900	Natural Honey	0	0
2014	040900	Natural Honey	11,946	67,982

Source: TurkSTAT, 2015

Although it appears that there are imports of honey in the table (compiled from TURKSAT data), the sector believes that these are Turkish consignments which were exported and rejected by the importing country. Those consignments are brought back to Turkey after the import checks are carried out at the border if there is not any adulteration and fraud in the exported products.

Figure 6: Honey (honeycomb/extracted) Import Custom Tariff

EU and EFTA Countries	Georgia	Bosnia and Herzegovina	South Korea	Other Countries
38.5%	38.5%	0%	38.5%	38.5%

Source: Turkish Ministry of Economy, 2015

Additionally, the Custom legislation in Turkey dictates that consignments of honey originating in or shipped from Japan must receive an official clearance from the Turkish Atomic Energy Institute confirming there is no radiation in the product.