



SEED SECTOR IN TURKEY

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COUNTRY PROFILE TURKEY

TOTAL AREA: 81 m. ha

POPULATION: 76.6 m. (2013)

RURAL POPULATION: 27,7 % (2013)

AGRICULTURAL SECTOR

ARABLE LAND: 26 m. ha

IRRIGABLE LAND: 8,5 m. ha

IRRIGATED LAND: 5,6 m. ha

AGRICULTURAL SECTOR

➤ CULTIVATED LAND	: 15,6 m. ha
➤ MEDOWS AND RANGES	: 14,6 m. Ha
➤ FALLOW AREAS	: 4,1 m. ha
➤ ORCHARDS	: 1,9 m. ha
➤ VEGETABLE GARDENS	: 0,8 m. Ha
AGRICULTURAL LAND (TOTAL)	: 38,4 million ha

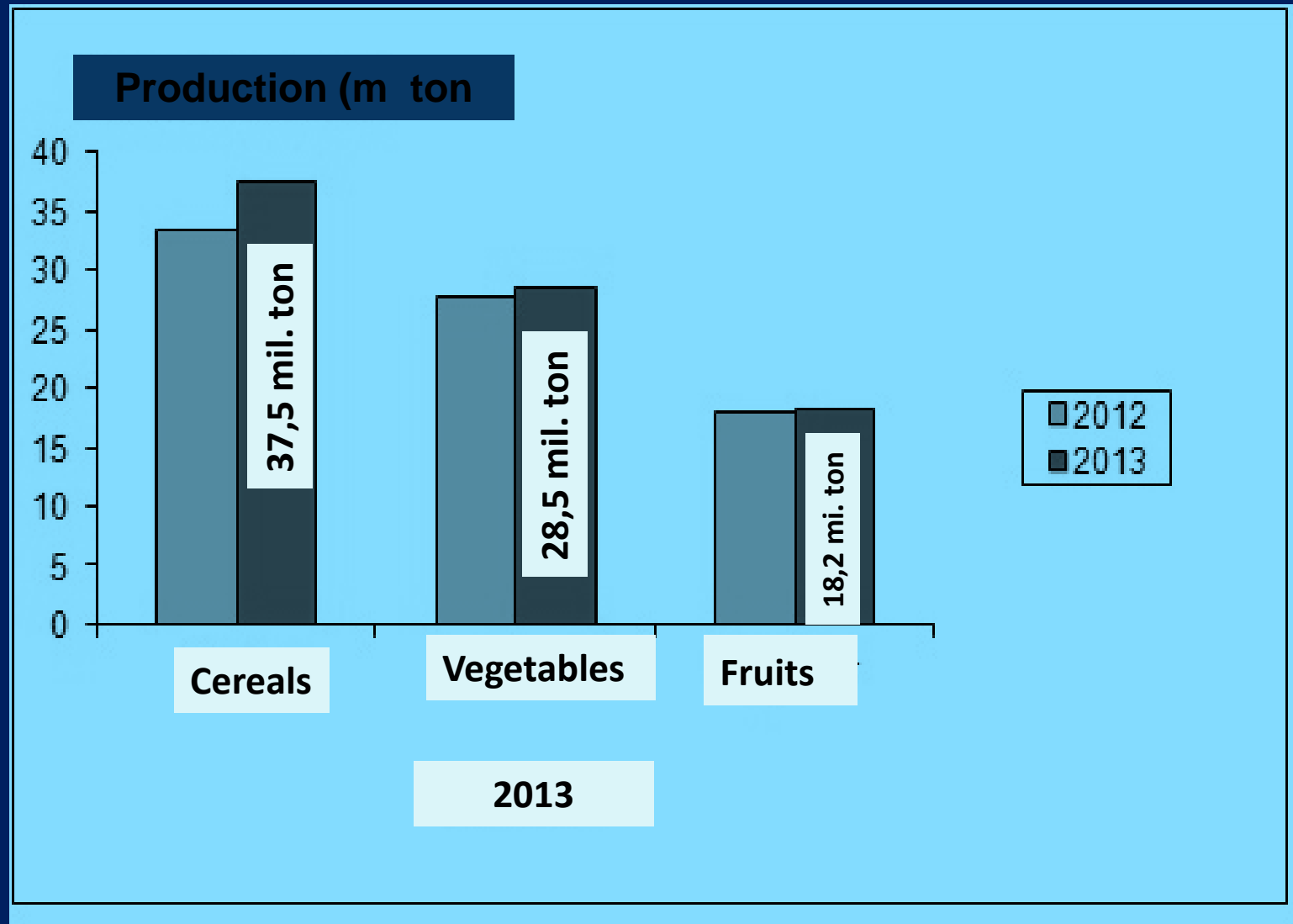
TURKISH AGRICULTURAL SECTOR

IMPORTANT PRODUCTS

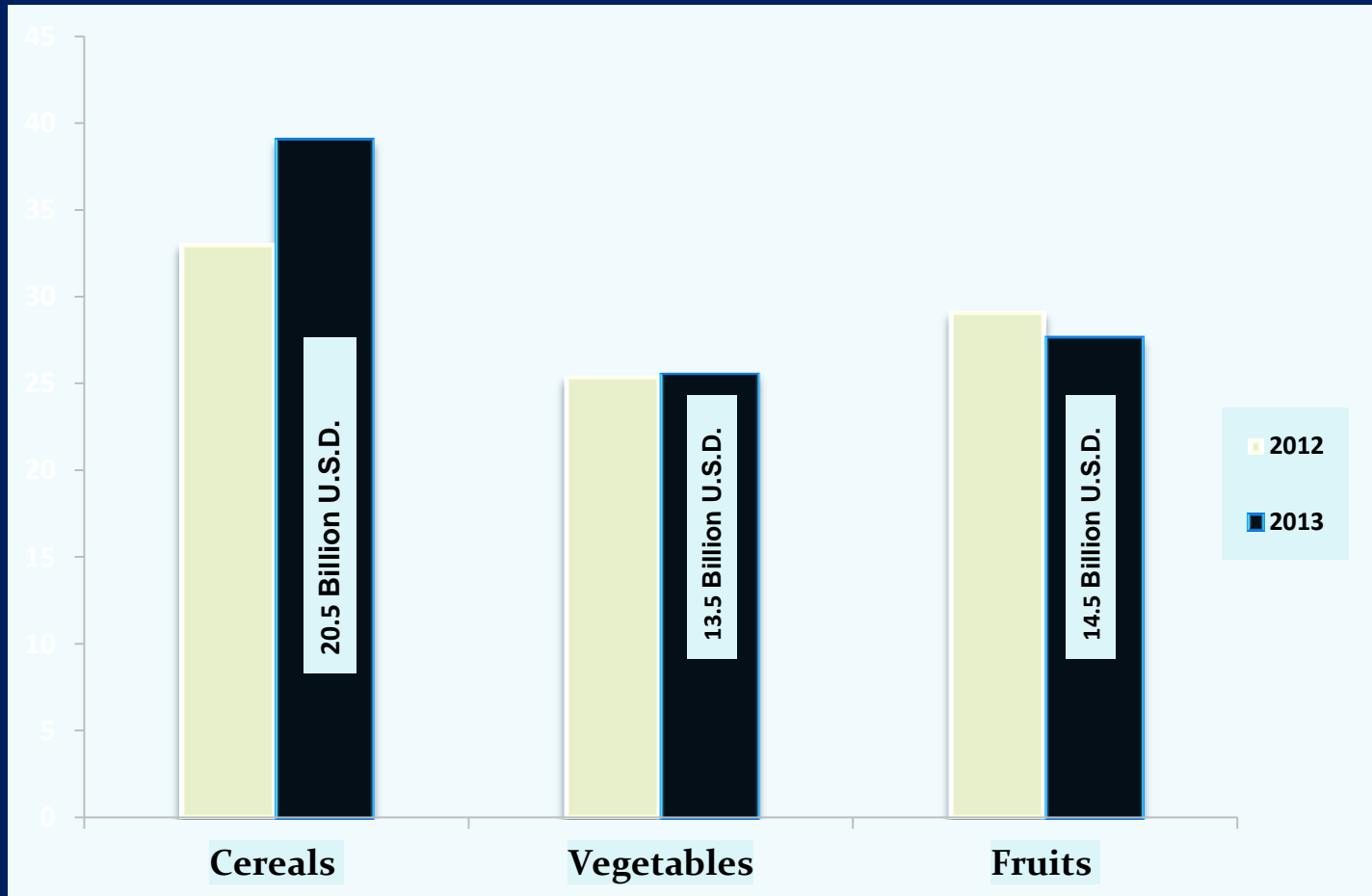
Crops	Total Production (million ton)			Total Area (1000 ha)		
	2011	2012	2013	2011	2012	2013
Wheat	21,8	20,1	22,05	8.096	7.529	7.700
Barley	7,6	7,1	7,9	2.869	2.749	2.721
Maize	4,2	4,6	5,9	589	623	660
Sunflower	1,3	1,3	1,5	656	605	610
Cotton	2,5	2,3	2,2	542	488	451
Potato	4,6	4,7	3,9	145	124	126
Sugar Beet	16,1	15	16,2	297	281	291

Turkish Statistical Institute

PRODUCTION, BASED ON THE GROUPS



PRODUCTION, BASED ON THE GROUPS



DEVELOPMENTS IN TURKEY SEED SECTOR

SEED POLICIES IN TURKEY

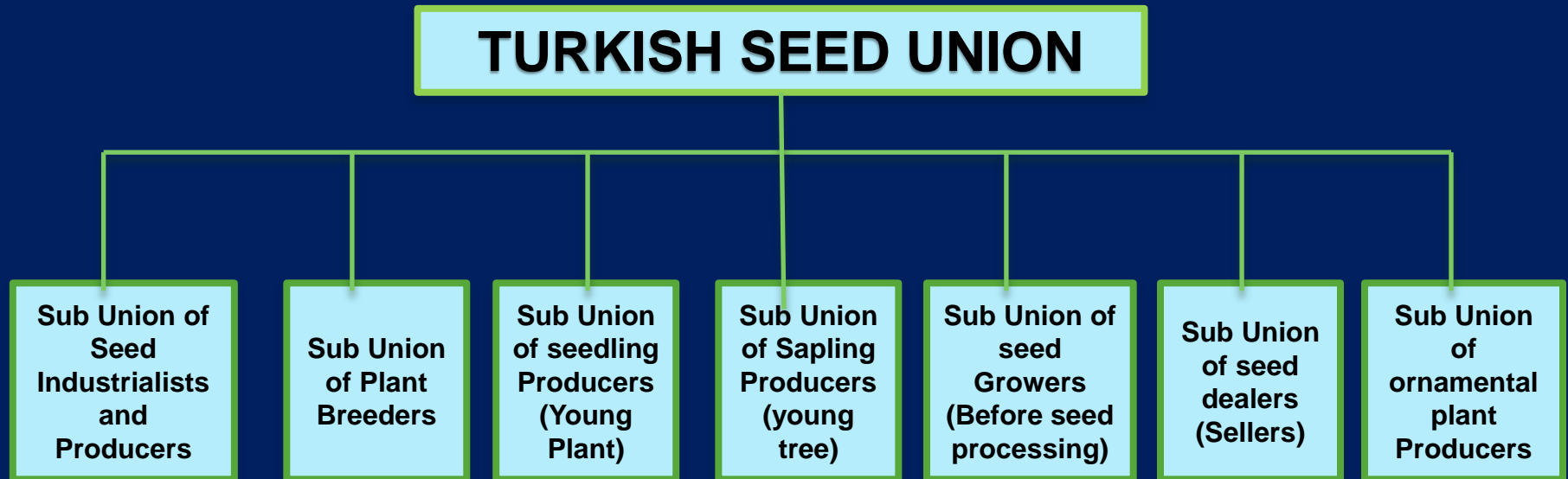
- To meet the need for quality seed
- Strengthening national seed industry
- An industry based on private entrepreneurship
- Integration with international organizations
- Supporting R&D activities, Certified seed production and utilization by farmers
- Effective public-private sector cooperation in research and production

MILESTONES IN TURKISH SEED SECTOR

1923-1960	Informal system
1963	Seed Law No 308 and ISTA membership
1960-1985	Formal System
1968	OECD membership
1982	Liberation of seed prices
1984	Liberation of seed imports
1985	Development in private sector
1998	ISF membership
2004	Law 5042 (Plant Breeders Rights)
2006	Seed Law 5553 (Replacing 308)
2007	Adoption of the UPOV Convention
2007	OECD Seed Certification System for vegetables
2008	New Organization in Seed Sector



ORGANIZATIONAL STRUCTURE OF THE SEED SECTOR



MEMBERS

(Based on Sub Union)

Sub Union of Seed Industrialists and Producers	637
Sub Union of Seed Dealers	4.804
Sub Union of Seed Growers	20.018
Sub Union of Plant Breeders	188
Sub Union of Seedling Producers	91
Sub Union of Sapling Producers	522
Sub Union of Ornamental Plants Producers	379

Advantages and disadvantages of Turkish Seed sector

Suitable and different ecologies to produce high quality seeds

Good substructure on Research and Development System at public and private sector

Public Regional Research Institutes (10)

Private Agricultural Research Firms authorized by the Ministry of agriculture (140)

Recent Improvements in legislative and technical infrastructure, harmonized with global seed rules, especially EU

(4 Law and more than twenty of Directives regulating the Seed issues)

A disciplined seed sector by public and private efforts and implementations throughout of country

Many of the companies are small scale and powerless

Breeding programs by the private sector is not yet sufficient







- Sub-Union of Seed Industrialists and Producers (TSÜAB) is a professional organization as a public entity, established in 2008, in accordance with the Seed Law
- TSÜAB has been representing the Turkish Seed Sector, due to its directly relation to the seed production, certification, registration and marketing
- According to Seed Law, all seed companies have to be a member of TSUAB

MEMBERS' PORTFILO

CATEGORIES	FIRM NUMBER	%
Cereals	439	42
Vegetable	164	16
Forage Crops	131	13
Maize	55	5
Potato	121	12
Sunflower	48	5
Paddy	31	3
Turf	22	2
Cotton	17	2
Sugar Beet	24	2

MAIN ACTIVITIES OF TSUAB MEMBERS

- Variety development and adaptation trial,
- Seed production, seed processing, packaging, marketing, distribution and import - export
- The major plant groupings which member companies work on are: *Cereals (winter and warm-season), Industrial crops, Forage crops, Vegetables, Grasses and ornamentals*

MAJOR FOCUS OF TSUAB

Policy Development

Engaging stakeholders for enabling Policy Environment

Collaborate and support in drafting regulatory Policies and their implementation across Country

Knowledge Dissemination

Seminars, workshops, conferences

Publications

Capacity Building

Training and supports for Members

Communication

Targeted Communications to various Stakeholders

Website , Daily / Weekly e- news mails

Trade Promotion

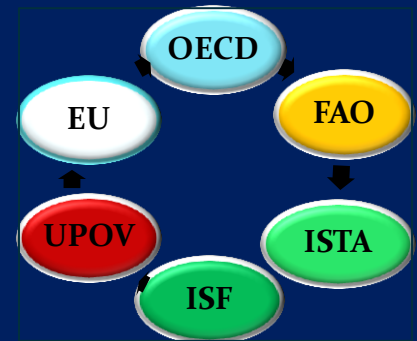
Trade Facilitation

Global Connect

MAIN ACTIVITIES



- Project- based activities, implemented by TSUAB
- Training for members and farmers
- Participation in Exhibitions, Fairs
- Information and consultation meetings with members
- Collaboration and Working with The Public Institutions
- Compliance with international rules
- Collaboration With International Organizations



TOGETHER WHAT CAN WE DO?



Cooperation among Seed Associations of the Eight Countries (exchange of knowledge, legal actions, standards, implementation of mutual scientific researches, exchange of information, development of joint projects etc.)



SEED TRADE BETWEEN TURKEY & D-8

Import from D-8 to Turkey (USD)

YIL	İRAN	PAKİSTAN	MISIR	ENDONEZYA	MALEZYA	NİJERYA	BANGLADEŞ
2010	-	-	19.741	10.728	-	-	-
2011	8.666	-	4.823	890	-	-	-
2012	260	31.473	19.221	23.762	-	-	-
2013	119.081	203.477	65.016	35.749	-	-	-
2014 (1-9)	3.225	11.737	12.199	38.423	-	-	-

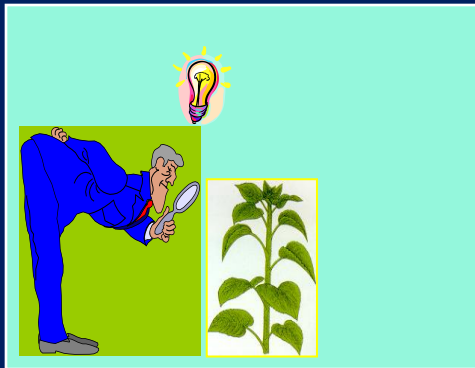
Export from Turkey to D-8 (USD)

2010	1.557.765	676.152	128.552	-	-	-	-
2011	1.999.102	1.548.685	513.893	-	-	-	-
2012	3.141.580	1.052.232	573.253	-	-	-	-
2013	2.104.333	1.730.547	349.110	-	-	-	-
2014 (1-9)	1.023.888	1.107.615	494.210	-	-	-	-

Kaynak: TÜİK

SEED REGISTRATION AND CERTIFICATION

Breeding



Registration

Morphological Properties
+
Physiological and Biological
Properties
+
Technological Properties
+
Pathological characteristics
(Diseases and Pests)

Certification

Field Inspection
+
Laboratory Control

Certification and
marketing

SEED REGISTRATION AND CERTIFICATION

The “Variety Registration and Seed Certification Center” (VRSCC) was originally established as "Seed Control and Certification Institute" in 1959.

This Institute was merged with the "Regional Variety Testing Directorate" in 1986. Then, the new joint institution was named as (VRSCC) in 1987.

The VRSCC has been officially functioning within the Ministry of Food, Agriculture and Livestock

The VRSCC has been an ISTA member since 1963.

The VRSCC became a member of UPOV in 1987 in addition to the membership of ISTA, OECD and other international organizations

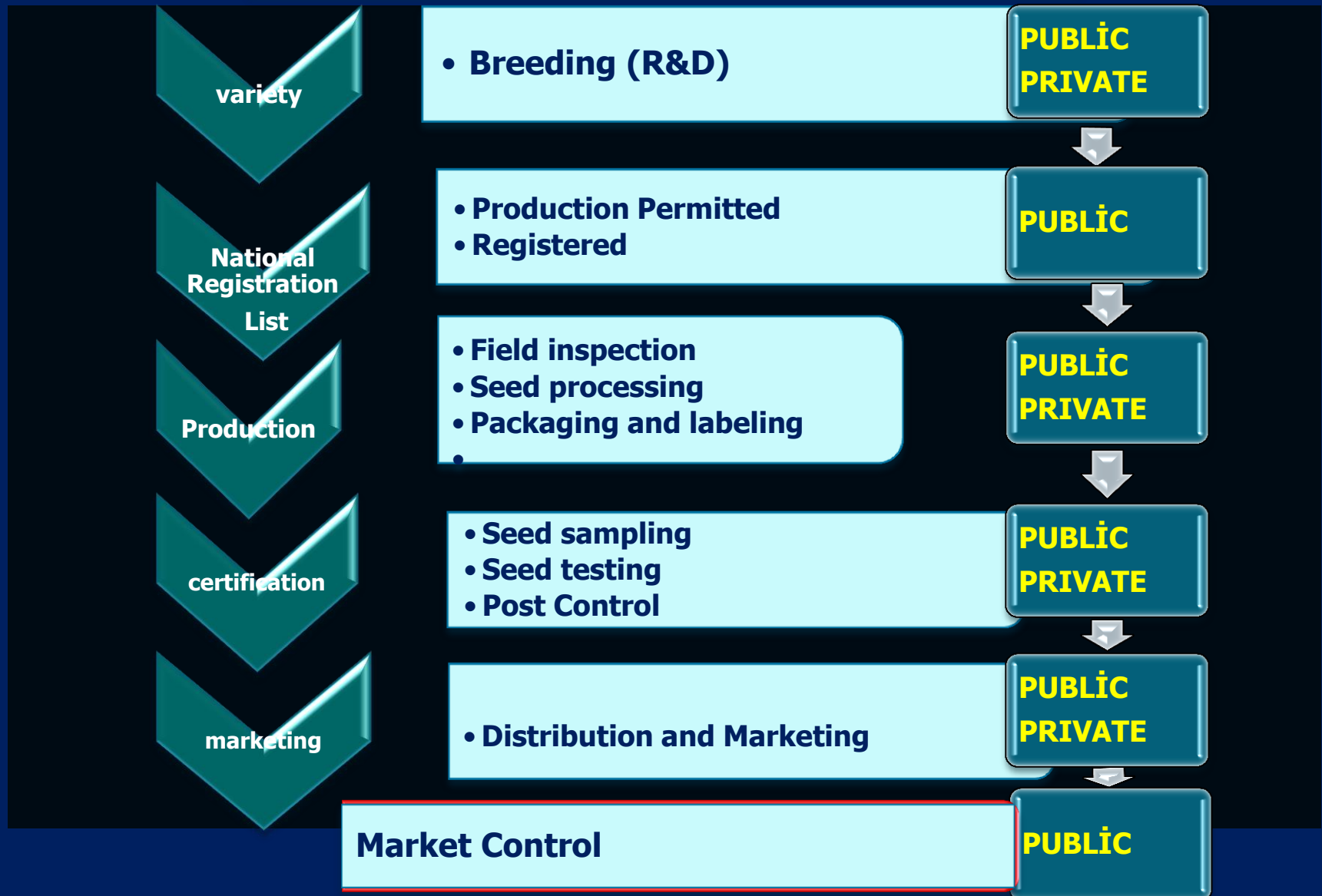
SEED REGISTRATION

	FIELD CROPS	VEGETABLE
PERMITTED VARIETIES	597	1397
REGISTERED VARIETIES	2044	1033

<http://www.tarim.gov.tr/BUGEM/TTSM/Menu/30/Kayit-Listeleri>

SEED BUSSINES SYSTEM

(Relation Between Seed Sector and Ministry)



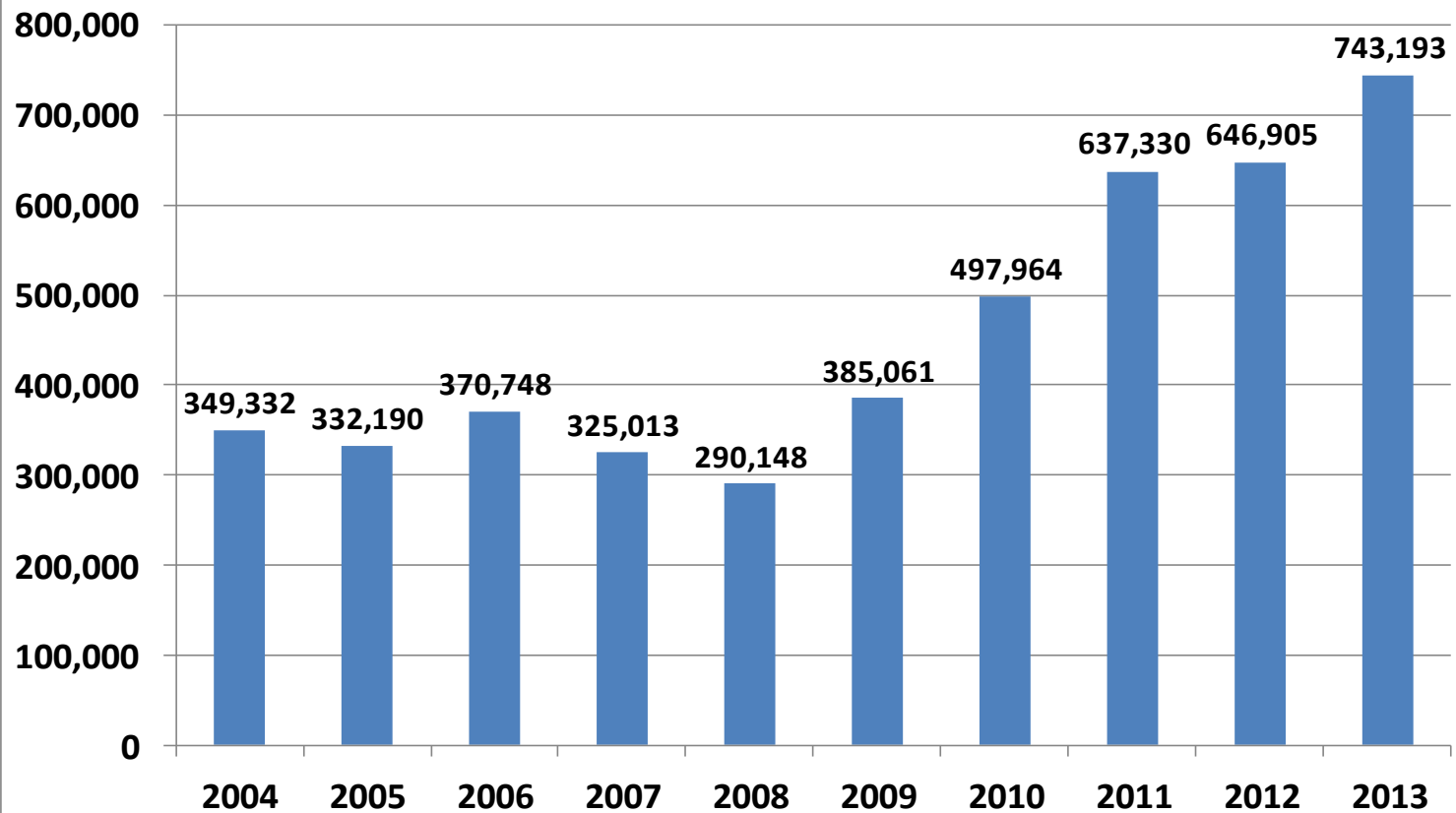
SOME SEED FIGURES



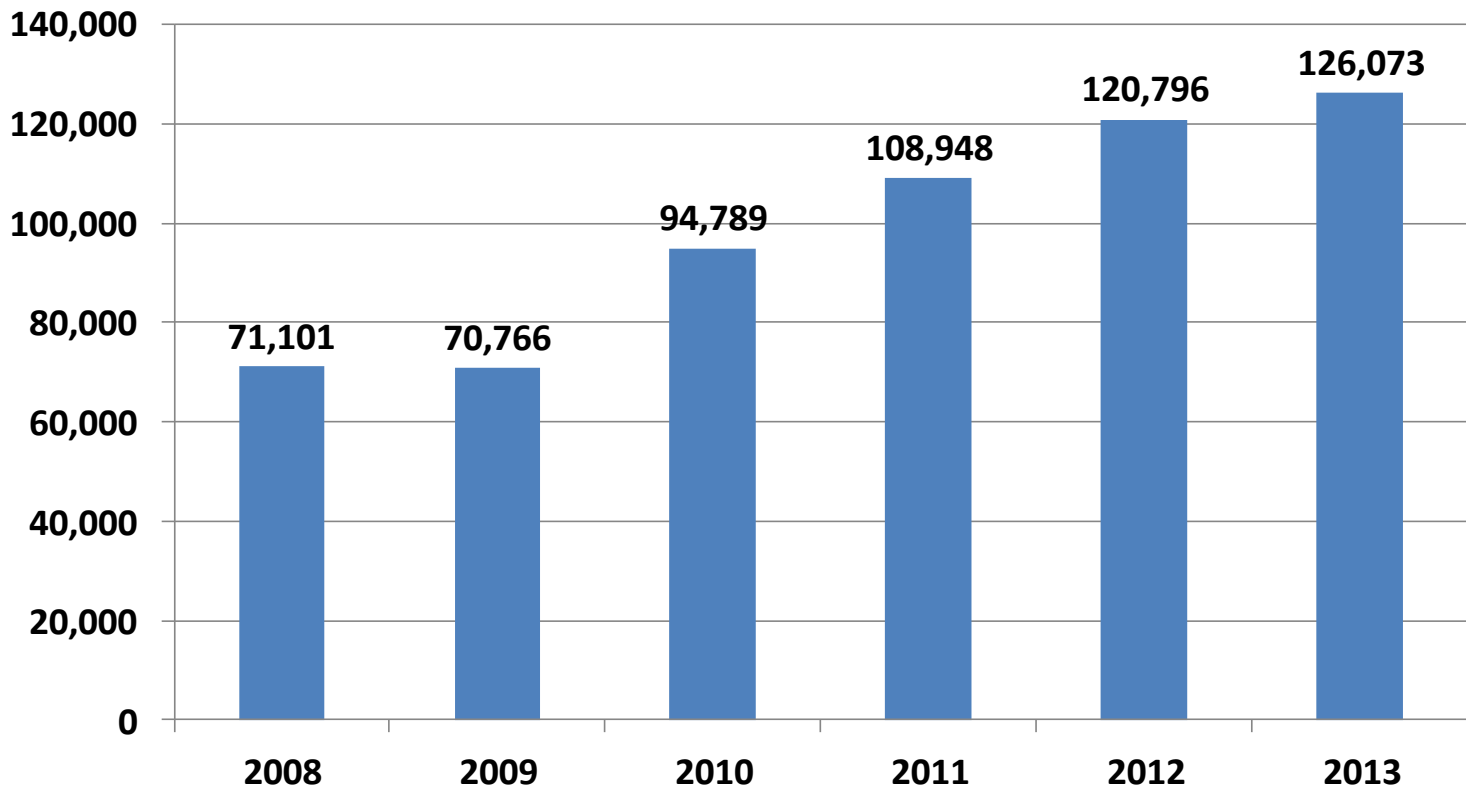
CERTIFICATED SEED PRODUCTION (TONE)

	2008	2009	2010	2011	2012	2013
WHEAT	158.452	227.164	315.676	410.766	327.924	421.588
BARLEY	20.180	35.844	34.416	48.401	43.162	79.189
MAIZE (Hybrid)	34.097	14.715	35.234	31.338	32.796	38.576
PADDY	3.410	5.015	5.521	8.649	8.627	7.629
SUNFLOWER(Hybrid)	8.727	2.902	11.854	14.137	14.732	18.786
POTATOES	45.651	53.800	70.654	96.295	185.485	150.908
COTTON	10.948	12.000	15.679	16.911	23.074	10.260
VEGETABLE	2.087	2.758	2.500	2.213	2.115	1.576
CLOVER(Alfalfa)	517	864	349	473	670	630
Lentil	380	37	107	589	894	2.078

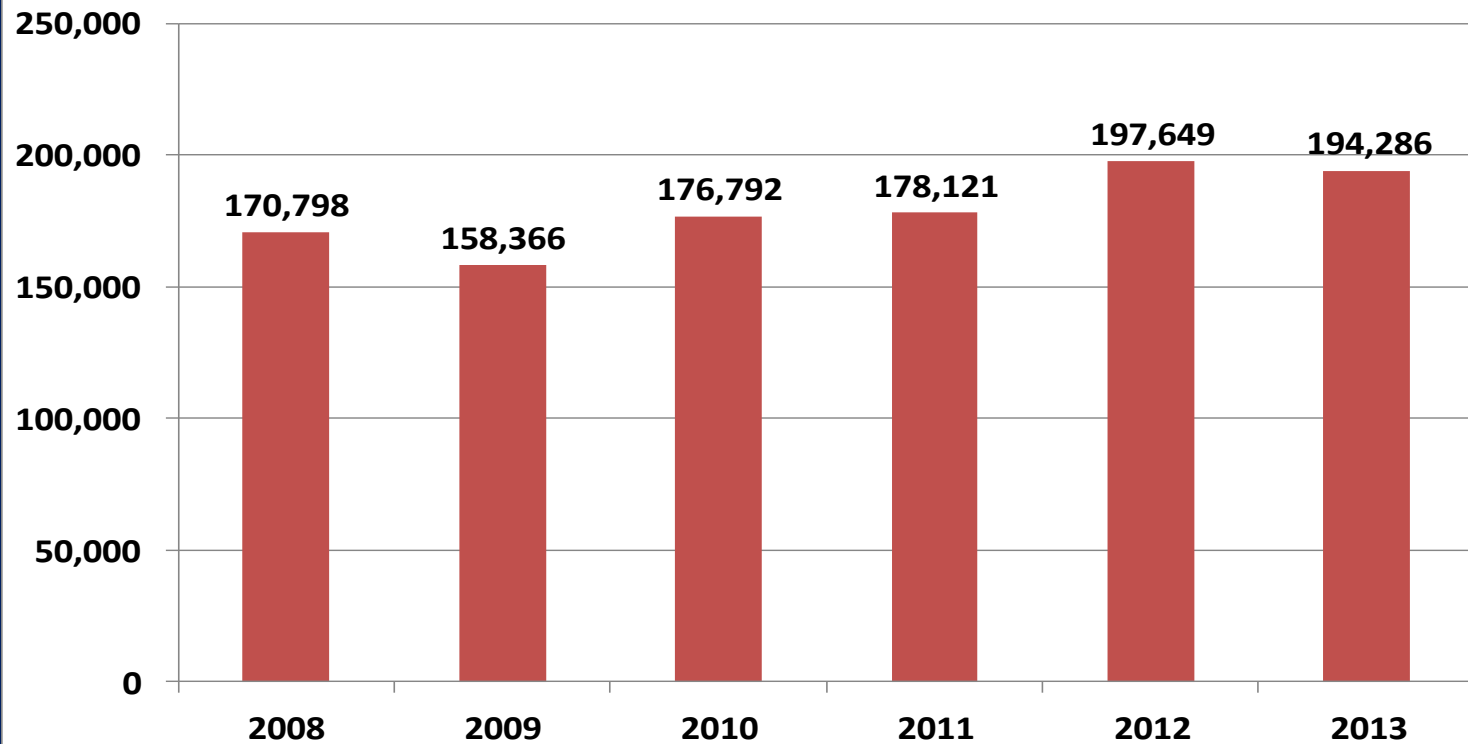
Annual Seed Production of TURKEY (Tonnes)



Annual Seed Export Values of TURKEY (000 US Dollar)



Annual Seed Import Values of TURKEY (000 US Dollar)



THANK YOU FOR
YOUR ATTENTION

