



The inclusion of small producers in modern marketing channels: module 3 Turkey, results from the microdata

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Module 3: Turkey



Meso-Study

May-July 2007

Regoverning markets workshop: micro results

2007/09/24-28 ; Morelia (MEX)

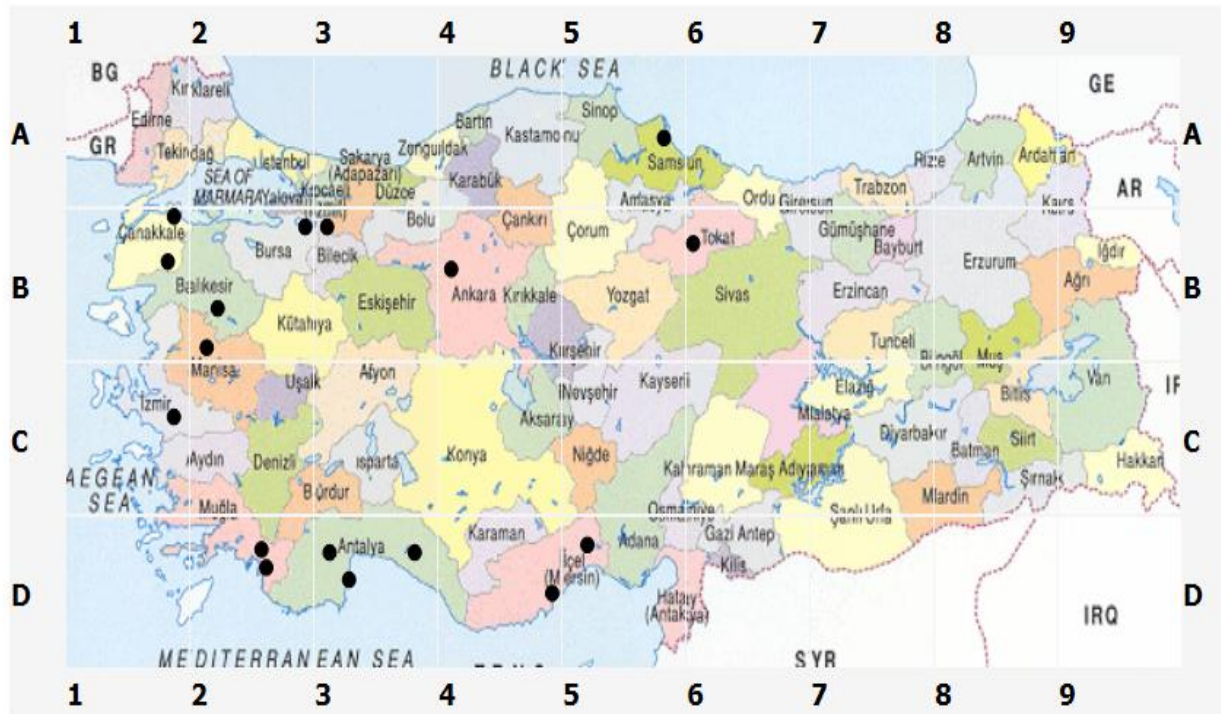
Agenda

- ▣ Selection of study sites, and methodology
- ▣ Results

Selection of study sites

- ❑ Turkey is composed of 81 provinces
- ❑ among which 78 are producing tomatoes
- ❑ But the first 12 provinces account for 73,1% of total tomato production (volumes)
- ❑ In these 12 provinces, 17 villages were selected (part randomly, part on purpose)
- ❑ Map

Map - Turkey



| | | | | | | | |
|----------|------|---------|-----|------------|----|------------|----|
| Antalya: | D3 | Bursa: | B2 | İzmir: | C1 | Balıkesir: | B2 |
| Mersin: | D4-5 | Manisa: | BC2 | Çanakkale: | B1 | Samsun: | A5 |
| Tokat: | B6 | Muğla: | CD2 | Ankara: | B4 | Bilecik: | B3 |

The rationale of the selection

□ Diversity:

- Climate
- Specialization in tomato
- Orientation
 - Industry,
 - Tourism
 - Exports

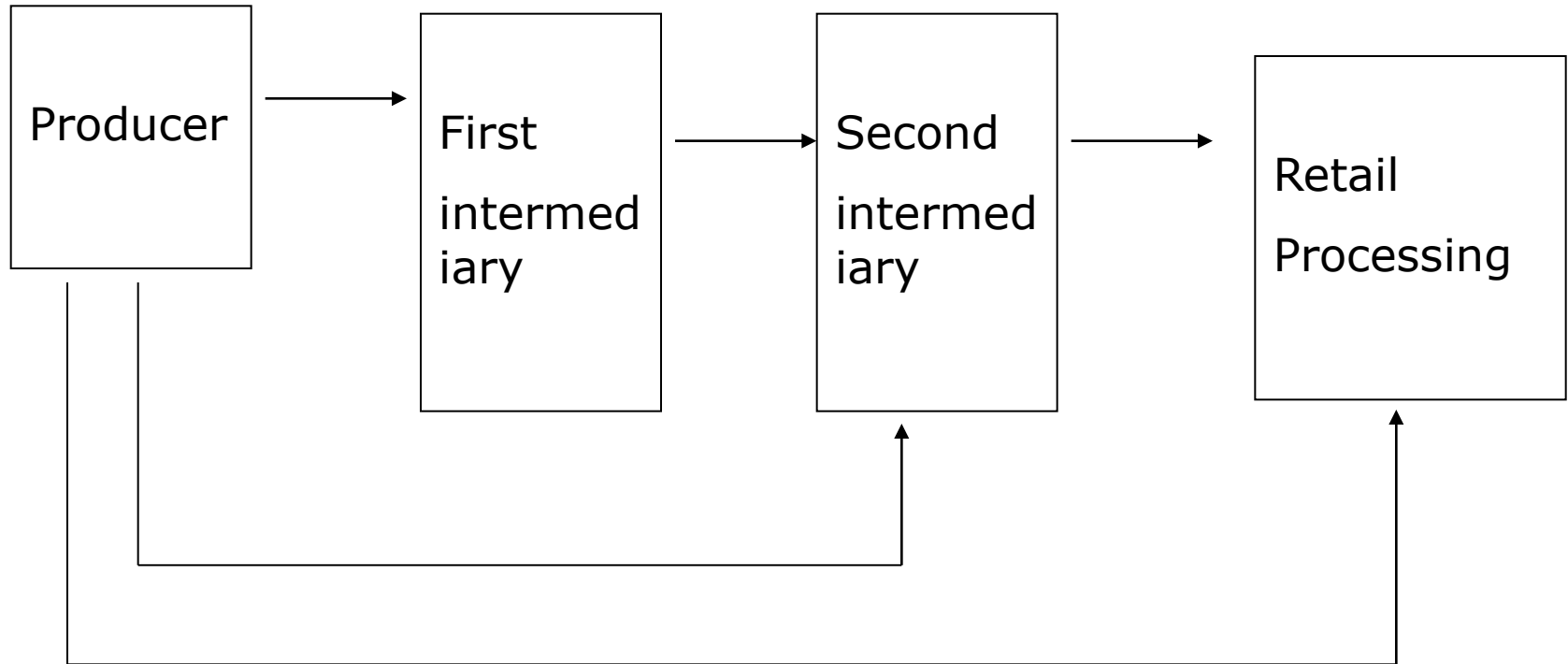
Methodology

- ❑ Local directorate of the Ministry of Agricultural & Rural Affairs
- ❑ Farmers and other important actors (director of the coop, head of the village)
- ❑ Collective interviews, 10 to 30 participants, 1 to 4 hours.

Results

- Main production constraints:
 - Input procurement (high costs -pesticides problems for low-costs inputs, scarcity of information- land price) – 1 -
 - Scarcity in qualified labour – 3 -
 - Difficulties in marketing – 2 -

Marketing channels - domestic



Marketing channels - domestic

- ❑ Intermediaries:
 - Commissionners on the wholesale markets (local or national level)
 - Cooperatives

- ❑ Sub-intermediaries:
 - Local agents
 - Merchants

- ❑ Direct sales:
 - Supermarkets
 - Open markets
 - Exporters
 - Processing firms

Results: marketing channels identification

| Channel | 1st | 2nd | 3rd | 4th |
|--------------|-----|-----|-----|-----|
| CWM | 7 | 2 | 0 | 0 |
| Firms | 2 | 1 | 3 | 0 |
| Local agents | 3 | 2 | 1 | 0 |
| Merchants | 2 | 6 | 2 | 0 |
| Exporters | 2 | 4 | 0 | 0 |
| Coops | 1 | 1 | 0 | 0 |
| Open Market | 0 | 2 | 3 | 1 |
| Supermarkets | 0 | 0 | 0 | 4 |
| Total | 17 | 18 | 9 | 5 |

Results: marketing channels identification

- ❑ City Wholesale Markets, major channel
- ❑ Importance of merchants (or local agents in the West)
- ❑ Absence of significative collective action
- ❑ Supermarkets as a minor marketing channel
- ❑ Low number of marketing channels (no alternatives?)
- ❑ Geographically differentiated (few wholesale markets in the N-W)

Results: Why? Marketing constraints

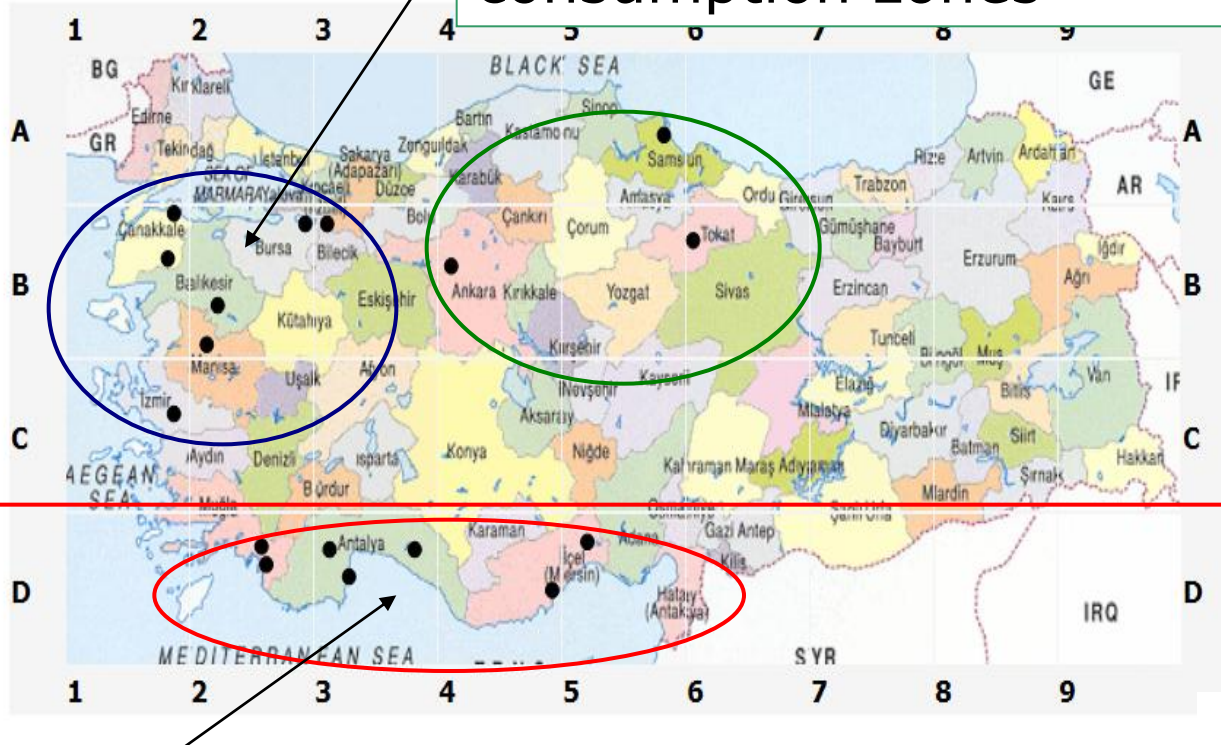
Lack of bargaining power:

- Dispersion: collecting activities
- Distance to wholesale markets
- Lack of own storing, grading, packaging facilities (credit shortage)
- No national or local production planning → price fluctuations
- No trust, one-sided contracts (except exporters and firms) → long term relationships
- Corruption

Conclusion

North:

Summer production, field, industry, local agent, few WM in consumption zones



South:

Winter production, greenhouses, exports, merchants, numerous local WM in production zones