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**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

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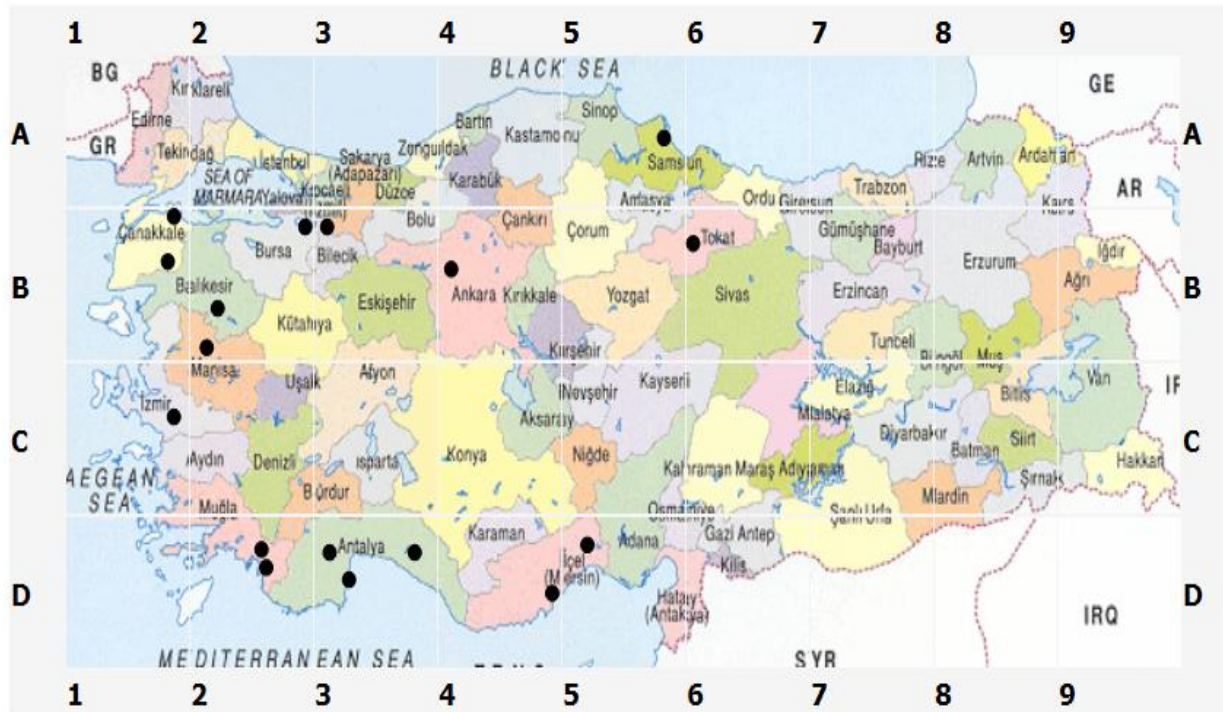
- Selection of study sites, and methodology
- Results

# Selection of study sites

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- 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	Izmir:	C1	Balikesir:	B2
Mersin:	D4-5	Manisa:	BC2	Çanakkale:	B1	Samsun:	A5
Tokat:	B6	Muğla:	CD2	Ankara:	B4	Bilecik:	B3

# The rationale of the selection

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

# Methodology

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- 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

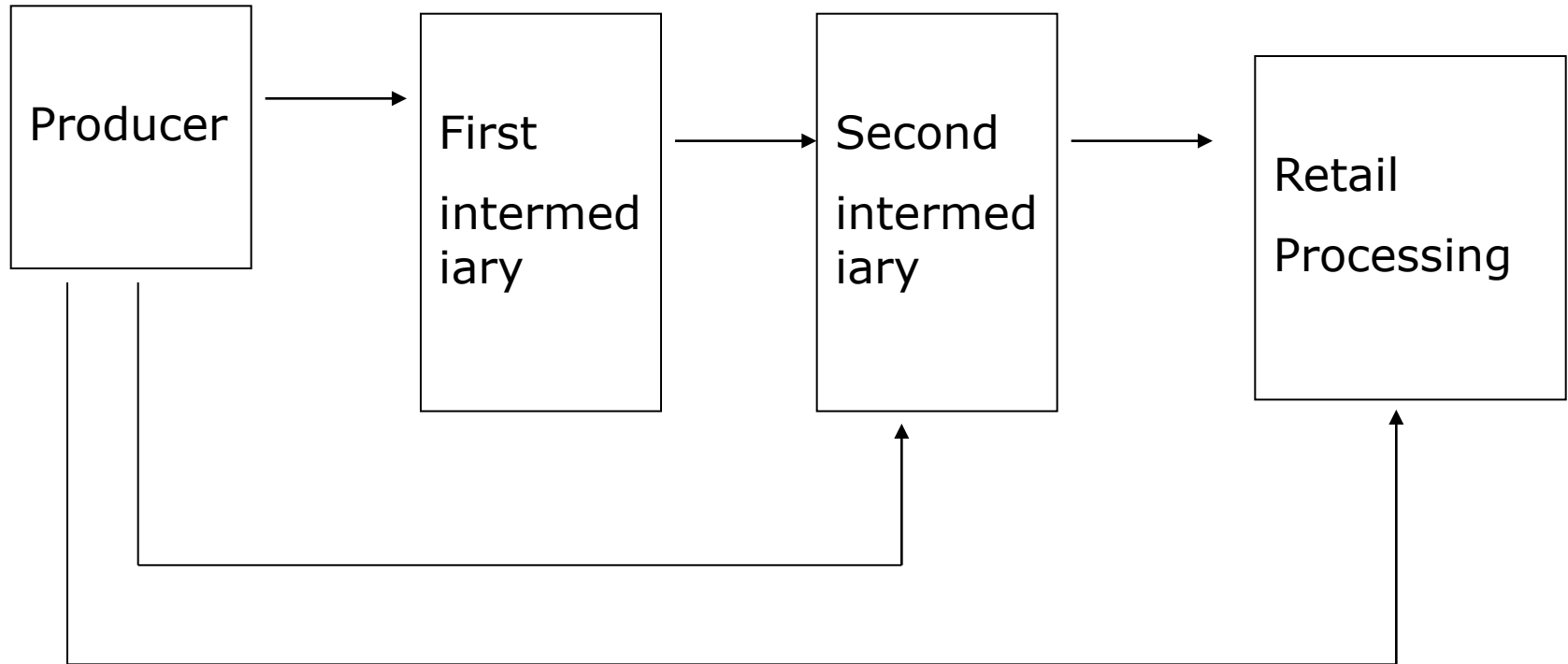
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- Main production constraints:
  - Input procurement (high costs -pesticides problems for low-costs inputs, scarcity of information- land price) – 1 -
  - Scarcity in qualified labour – 3 -
  - Difficulties in marketing – 2 -



# Marketing channels - domestic

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# Marketing channels - domestic

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- 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

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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

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- ❑ City Wholesale Markets, major channel
- ❑ Importance of merchants (or local agents in the West)
- ❑ Absence of significant 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

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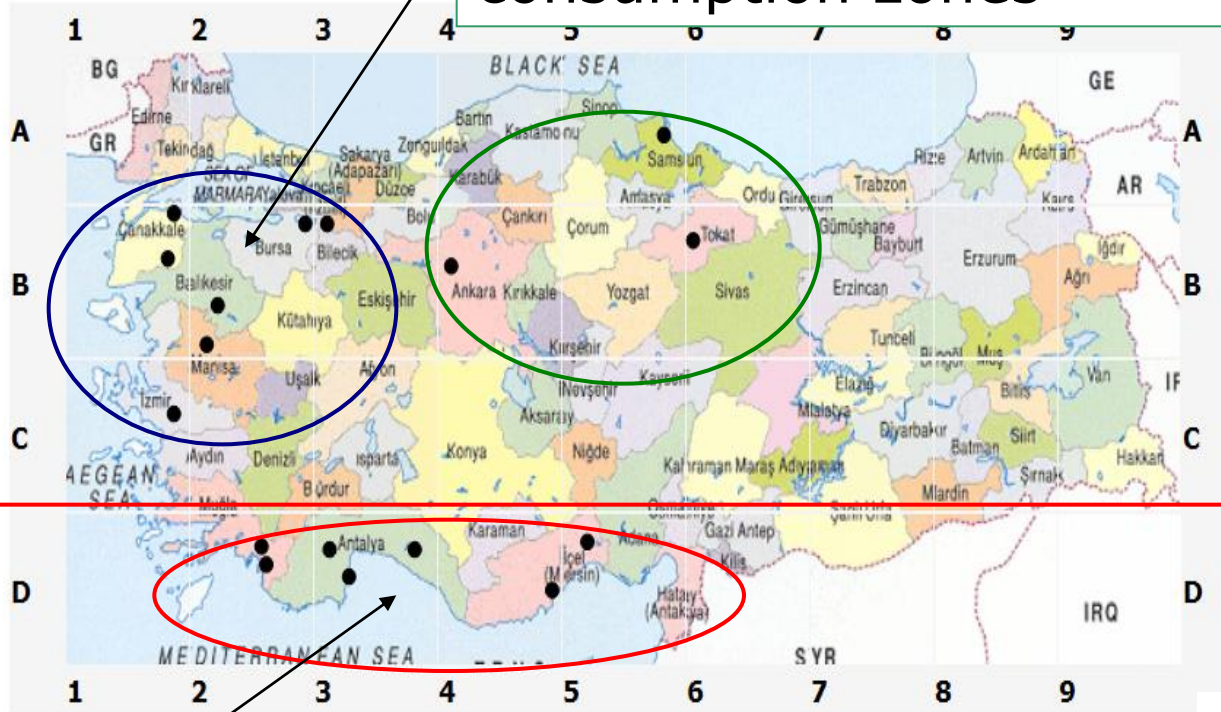
### Lack of bargaining power:

- 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