

## Country fact sheet – Turkey

Official name	The Republic of Turkey	
Geographical location	Southeastern Europe and Southwestern Asia (39 00 N, 35 00 E)	
Area	783,562 km <sup>2</sup>	
Population	76.7 million	
Capital	Ankara	
Principal cities	Istanbul, Izmir, Bursa, Adana	
Neighbouring countries	Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Iran, Iraq, Syria	
Ethnic groups	Turkish, Kurdish	
Climate	Temperate climate with hot, dry summers and mild, wet winters. Moderate in coastal areas and harsher in interior. The average temperatures for the hottest (August) are 15°C-31°C while the coldest (January) are -4°C and 4°C.	
Official language	Turkish	
Major religions	Muslim	
Time zone	GMT + 2 (behind Hong Kong by 6 hours) GMT + 3 (behind Hong Kong by 5 hours in summer)	
International dialling code	+90	
Currency	Turkish new lira (TRY); US\$1= app. TRY 2.44 (30 Jan 2015)	
Visa requirement	Visa-free access for HKSAR passport holders	
Business hours	Private and government offices	8:30 am to 5:30 pm, Monday to Friday
	Banks	8:30 am to 5:00 pm, Monday to Friday
	Shops	9:30 am to 7:00 pm, Monday to Saturday

# 1. An overview of the Turkish economy

## Major macroeconomic indicators

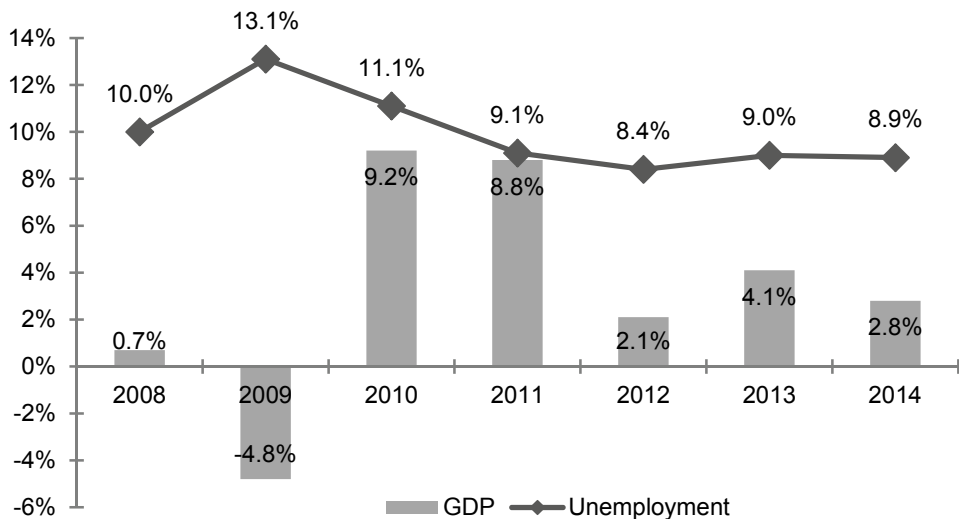
	2011	2012	2013	2014*
Population (millions of inhabitants)	74.7	75.6	76.7	77.3
Gross domestic product (US\$ billion)	775	789	820	795
Real GDP growth (%)	8.8	2.1	4.1	3.0
Consumer prices (year-on-year % change)	6.5	8.9	7.5	8.9
Exports of goods (US\$ billion)	135	153	152	158
Imports of goods (US\$ billion)	241	237	252	242
Average exchange rate (Turkish new lira per US dollar)	1.2	1.5	1.5	2.2

\* *estimates*

On the back of such a strong economic foundation, Turkey, unlike many of its counterparts in the emerging world, has been in a better position to face the economic headwinds battering the global financial markets in 2009 and the subsequent sovereign debt crisis across Europe. Despite a GDP contraction of 4.8% during the recession year 2009, the Turkish economy rebounded strongly with GDP growing by 9.2% in 2010 and 8.8% in 2011.

While stabilisation of the EU economy helped prop up Turkish exports, high inflation and increased volatility of the lira served to rein in the pace of growth, leading to a sharp deterioration of growth in 2012 and 2013. Looking ahead, despite the Turkish Central Bank's move to end the low-interest-rate environment by raising key short-term interest rates massively in a bid to support the sliding lira and calm inflation, Turkey is expected to maintain sustained growth thanks to the expected improvement in employment prospects and export performance.

## GDP growth and unemployment in Turkey



Source: TurkStat

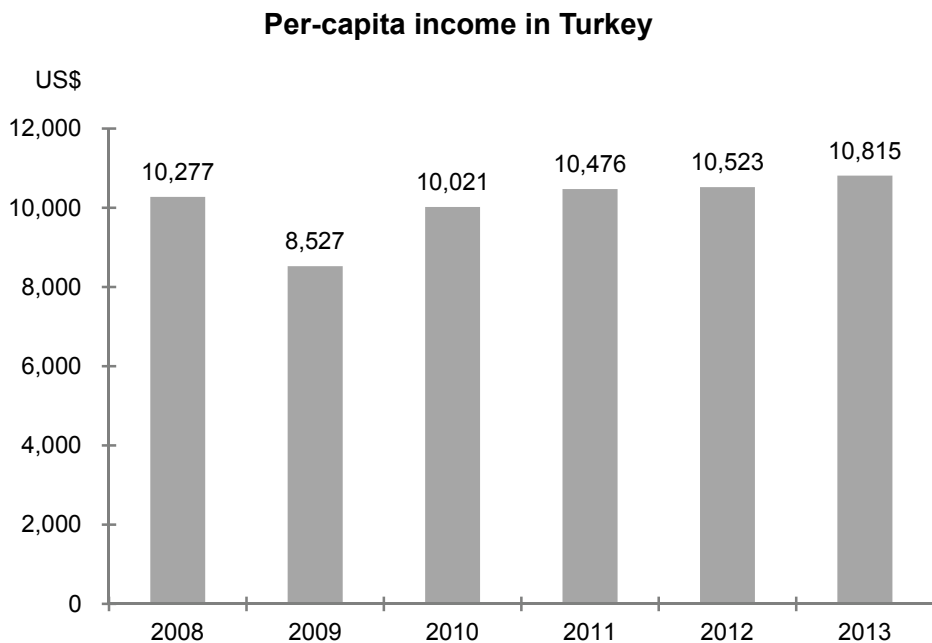
On the other hand, given its favourable demographic profile (i.e., large and young) and mature industrial base, Turkey's economy has been forecast to be the fastest growing among the OECD members during 2012-2017, consistently outperforming that of the EU28.

Notwithstanding the prevailing aftermath of the European debt crisis and geopolitical uncertainty, Turkey thus presents unabated opportunities for Hong Kong over the medium to long term. Turkey's track record of fast economic growth, expanding higher-income class and unrivalled geographical advantage as a natural bridge between both East-West and North-South axes raises the odds of a growing regional role in East Europe and the Middle East, creating efficient and cost-effective access to 1.5 billion consumers in Europe, Eurasia, the Middle East and North Africa.

## 2. The Turkish consumer profile

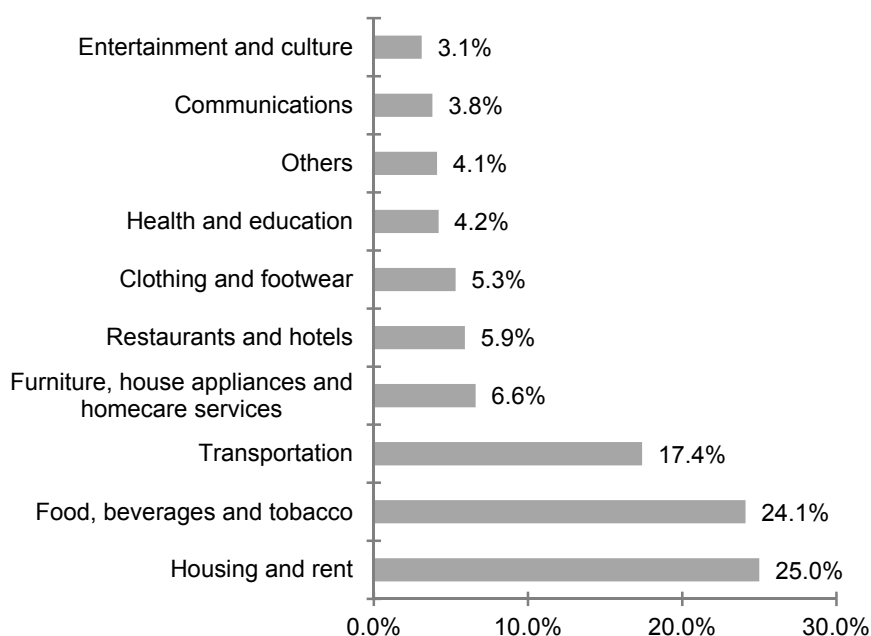
### Expanding higher-income class

The higher-income class has expanded along with the country's improving economy in recent years, boding well for the purchasing power of the Turkish market. This is exemplified by the fact that the proportion of households with annual incomes of US\$50,000 or more is forecast to reach 23% by 2016, up from 17% in 2011. To cash in on the rising purchasing power in Turkey, many foreign chains such as Carrefour, Metro and Tesco (grocery), Zara and Nine West (fashion), Media Markt and Saturn (consumer electronics) and B&Q and IKEA (DIY and home furnishings) have an increasing presence in major Turkish cities. Hong Kong's A.S. Watson, a subsidiary of Hutchison Whampoa Limited, has also had a presence in Turkey since 2005, engaging in the retailing of health and beauty products in order to reap the emerging opportunities from rising incomes in the country.



Source: IMF

## Structure of household consumption expenditure, 2013

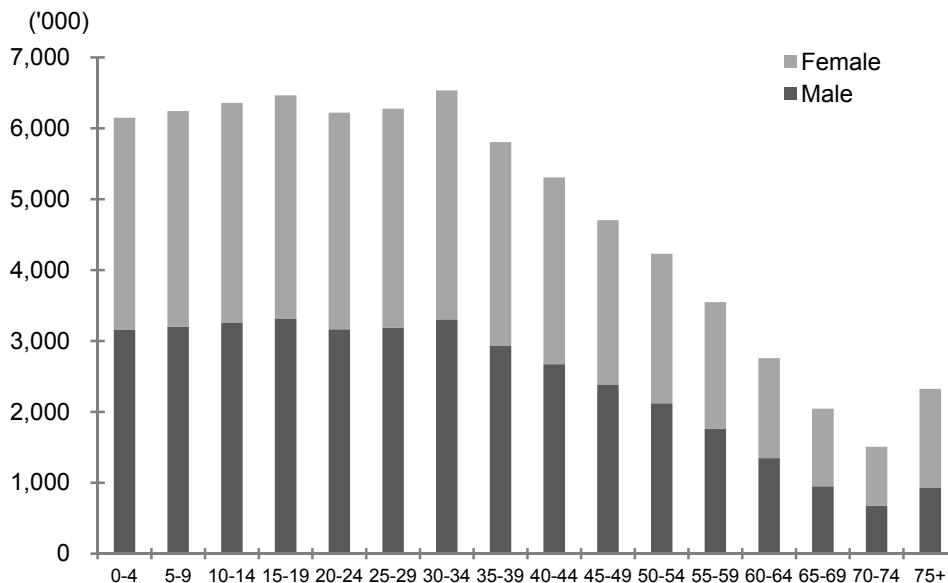


Source: TurkStat

## Young people are the major purchasers

While the median age of the Turkish population is 31.4, nearly one-quarter of the inhabitants in the country are aged 14 or below, leading to a higher demand for children's toys and child-care articles. Meanwhile, those aged 65 and above account for less than 8% of the population, and more than two-thirds of the population is aged between 15 and 64. While the pace of income growth of the working class, especially young professionals, has been somewhat hampered by the short-term economic pullback, youngsters' purchasing power will remain one of the main drivers of the country's domestic demand in the years ahead. This young consumer group, which has a strong preference for Western-style products and fashionable goods, has become a major purchaser in the market, and hence are the targeted customers of most consumer-goods companies.

## Turkey's population distribution, 2013



Source: Turkstat

## Larger household size

Turks have a larger family than their European counterparts, boasting the highest proportion of households with three or more children across the EU and OECD economies (i.e., 20%, according to OECD Family Database). The larger household size has also resulted in consumers preferring economy- or family-size items when buying household items. Also, demand for child-care products is potentially larger than that in Western Europe. But the higher number of children has prompted them to purchase cheaper, more long-lasting toy sets, educational products and clothes for their children.

## Mature brand culture

Unlike many other emerging markets, there is a mature brand culture among Turkish consumers. Turks, especially those residing in major cities, generally have a good knowledge of both local and reputable foreign brands. Although this does not necessarily mean that Turkish consumers always buy branded

products, they largely acknowledge that a good brand, rather than a mere trademark, represents quality, offers a warranty and has after-sales services. Therefore, branded products usually enjoy a premium in the market. Even for goods originating from the Chinese mainland, branded goods are better received by consumers.

As for non-branded products, however, consumers will focus on the country of origin. Unfortunately, non-branded products originating from China usually have a poor reputation among Turkish consumers in terms of quality and reliability, and such products are usually meant for the low-end market only.

## **3. Distribution and import channels**

### **General pattern**

For delivery from China to Turkey, cargo is usually shipped directly to the Istanbul port (or transited to Istanbul via Mediterranean ports). Transshipment via Western European ports is rare, given the longer transportation distance and higher costs. In practice, Turkish importers usually distribute goods to small wholesalers and certain large retailing groups in the market, including supermarket and DIY chains. Small- and medium-sized importers deal with a large amount of suitcase traders, which come from smaller cities in Turkey, as well as from cities in neighbouring countries. Dealings with such suitcase traders are mainly on cash-on-delivery payment terms at the importers' premises or warehouses.

So-called "fairgrounds" for small importers exist in the country. In Istanbul, for instance, Tahtakale consists of a few streets in the old town and accommodates about 5,000 small importers of a variety of light consumer goods such as toys, stationery, kitchenware, watches, consumer electronics and a wide variety of small industrial items. These importers usually have a small warehouse next to their shops and offices, importing goods from China, Asia and other East European countries. They mainly sell goods to wholesalers (who in turn sell to smaller retailers) and retailing groups. Given their scale and the nature of their businesses, they could be among potential buyers for Hong Kong's small- and medium-sized exporters.

### **Regional distribution via Turkey**

Apart from distribution within Turkey, an increasing number of Turkish companies have developed distribution networks in nearby regions, particularly in East European countries like Romania and Bulgaria, some CIS countries such as Ukraine and Georgia, Balkan markets like Macedonia, Bosnia, Serbia-Montenegro and Kosovo, as well as certain Middle Eastern markets like Iraq and Iran. Therefore, Turkish companies can be partners with Hong Kong companies for regional distribution in these markets, in addition to West Europe.



Turkey, especially Istanbul which handles the majority of Turkey's external trade, is a logistics centre in the region. Indeed, Turkey is the logistics hub for the CIS, Balkan, Middle East and the Mediterranean region, and is the bridge between the US/EU and CIS/Middle East. Certain logistics companies, such as Turkish Barsan Global Logistics (which has offices in Hong Kong and the Chinese mainland), are making use of Istanbul as a base for offering freight-forwarding services in the region, including land, air, railway and sea transport. They render logistics services for multinationals that require door-to-door service for their cross-continental operations. Hong Kong's container line OOCL also has a presence in Istanbul.

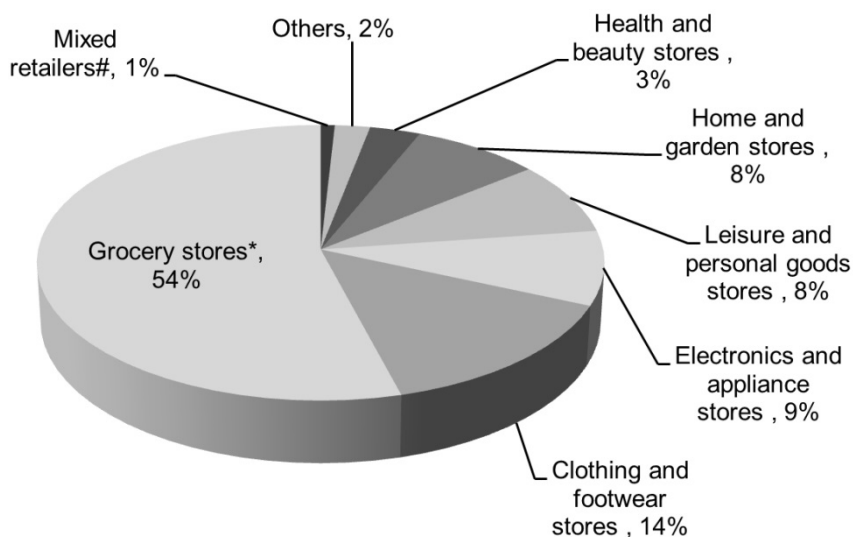
As previously mentioned, Hong Kong companies may consider Turkey to be a production or sourcing base for marketing in West Europe, CIS and the Middle East, reaping the benefits of quick response and just-in-time delivery to the market, especially for fast fashion items. As many Turks speak English, the language issue is not expected to pose a barrier in setting up a facility there. Indeed, Hong Kong-based global consumer-goods exporter Li & Fung Limited ("Li & Fung") already has offices in Istanbul (which became a regional hub on 13 January 2010), Izmir and Denizli to oversee its sourcing and associated logistics activities in Europe, the Mediterranean, Middle East, Northern Africa and the former Soviet Union republics.

## **An SME-dominating retail landscape**

Despite the rising popularity of organised retail such as hypermarkets/supermarkets and retail chains, independent stores still account for the lion's share of retail sales in Turkey. It is estimated that more than half of the total retail sales in Turkey was attributed to independent retailers (small, family-run shops such as bakkals) in 2013. Nevertheless, the share of large-scale retailers, i.e., hypermarkets/supermarkets, discounters and chain stores has been rising fast in recent years. In fact, the recession year 2009 and the lingering European debt crisis have both prompted Turkish consumers to search for better value for money, boosting the sales and popularity of these retail channels. In addition, many of these small and medium-sized retailers are active in the informal retail sector. Targeting

mainly low-income consumer segments, informal retailers are estimated to account for nearly one-third of the total retail sales in Turkey.

### Retail sales in Turkey, 2013



\* Grocery stores segment includes hypermarkets, supermarkets, discounters, convenience stores, independent small grocery shops, food/drink/tobacco stores, etc.

# Mixed retailers segment includes department stores, warehouse clubs, etc.

Remark: Percentages shown above are calculated according to retail sales.

Source: Euromonitor

### Top 10 retailers by sales (2013) in Turkey

	Retailer	Chains/Brands	Website
1.	BIM	Bim	<a href="http://www.bim.com.tr">www.bim.com.tr</a>
2.	Migros	HP Migros, M Migros, MM Migros, MMM Migros, Sok, Tansas, Macrocenter	<a href="http://www.migros.com.tr">www.migros.com.tr</a>
3.	Arcelik	Arcelik, Beko	<a href="http://www.arcelik.com.tr">www.arcelik.com.tr</a>
4.	LC Waikiki	LC Waikiki	<a href="http://www.lcwaikiki.com">www.lcwaikiki.com</a>
5.	A101	A101	<a href="http://www.a101.com.tr">www.a101.com.tr</a>
6.	Teknosa	Teknosa	<a href="http://www.teknosa.com">www.teknosa.com</a>

	<b>Retailer</b>	<b>Chains/Brands</b>	<b>Website</b>
7.	Yildiz	Sok, Onurex	<a href="http://www.yildizholding.com.tr">www.yildizholding.com.tr</a>
8.	Vatan	Vatan	<a href="http://www.vatanbilgisayar.com">www.vatanbilgisayar.com</a>
9.	Carrefour	Carrefour, Carrefour Express, Dia, Endi	<a href="http://www.kurumsal.carrefour.com.tr">www.kurumsal.carrefour.com.tr</a>
10.	Tesco	Kipa, Kipa Bütçe, Tesco	<a href="http://www.tesco.kipa.com.tr">www.tesco.kipa.com.tr</a>

**Selected examples of national importers/  
distributors and retailers in Turkey**

<b>Consumer electronics</b>	Gold Bilgisayar	<a href="http://www.gold.com.tr">www.gold.com.tr</a>
	Vatan Bilgisayar	<a href="http://www.vatanbilgisayar.com">www.vatanbilgisayar.com</a>
	Teknosa	<a href="http://www.teknosa.com">www.teknosa.com</a>
<b>Fashion (i.e., clothing and footwear)</b>	Yargici	<a href="http://www.yargici.com.tr">www.yargici.com.tr</a>
	Beymen	<a href="http://www.beymen.com.tr">www.beymen.com.tr</a>
	Vakko	<a href="http://www.vakko.com.tr">www.vakko.com.tr</a>
	Shoes Center	<a href="http://www.shoescenter.com.tr">www.shoescenter.com.tr</a>
	Mudo	<a href="http://www.mudo.com.tr">www.mudo.com.tr</a>
	Boyner	<a href="http://www.boyner.com.tr">www.boyner.com.tr</a>
	YKM	<a href="http://www.ykm.com.tr">www.ykm.com.tr</a>
<b>Timepieces</b>	Flo Shoes	<a href="http://www.flo.com.tr">www.flo.com.tr</a>
	Konyali Saat	<a href="http://www.konyalisaat.com.tr">www.konyalisaat.com.tr</a>
<b>Toys and games</b>	Saat & Saat	<a href="http://www.saatvesaat.com">www.saatvesaat.com</a>
	Joker	<a href="http://www.joker.com.tr">www.joker.com.tr</a>
<b>Home furnishings and building materials</b>	Toyz Shop	<a href="http://www.toyzzshop.com">www.toyzzshop.com</a>
	Tepe Home	<a href="http://www.tepehome.com.tr">www.tepehome.com.tr</a>
	Mudo	<a href="http://www.mudo.com.tr">www.mudo.com.tr</a>
	Paşabahçe	<a href="http://www.pasabahce.com.tr">www.pasabahce.com.tr</a>
<b>Gifts and premiums</b>	Koçtaş	<a href="http://www.koctas.com.tr">www.koctas.com.tr</a>
	Mudo	<a href="http://www.mudo.com.tr">www.mudo.com.tr</a>
<b>Perfumes &amp; cosmetics</b>	Sevil Parfümeri	<a href="http://www.sevil.com.tr">www.sevil.com.tr</a>

There were more than 330 shopping malls in Turkey in 2013, of which nearly one-third were based in Istanbul. Thanks to the fierce competition among foreign and domestic retailers to open shops and attract customers in new and modern shopping centres, many (young) Turks now prefer shopping malls to bazaars. Apart from providing a wide assortment, these shopping centres offer leisure and entertainment, with amusement parks, theatres and cinemas, along with various food-service chains, cultivating a different kind of shopping experience.

### Selected major shopping centres in Istanbul

Name	Website
Cevahir	<a href="http://www.istanbulcevahir.com">www.istanbulcevahir.com</a>
212 İstanbul Power Outlet	<a href="http://www.212istanbul.com">www.212istanbul.com</a>
Akmerkez	<a href="http://www.akmerkez.com.tr">www.akmerkez.com.tr</a>
Astoria Shopping Mall	<a href="http://www.astoria.com.tr">www.astoria.com.tr</a>
Capitol Shopping and Entertainment Center	<a href="http://www.capitol.com.tr">www.capitol.com.tr</a>
Carousel	<a href="http://www.carousel.com.tr">www.carousel.com.tr</a>
City's	<a href="http://www.citysnisantasi.com">www.citysnisantasi.com</a>
Galleria	<a href="http://www.galleria-atakoy.com.tr">www.galleria-atakoy.com.tr</a>
Grand Bazaar	<a href="http://www.grandbazaaristanbul.org">www.grandbazaaristanbul.org</a>
Kanyon	<a href="http://www.kanyon.com.tr">www.kanyon.com.tr</a>
Neomarin	<a href="http://www.neomarin.com.tr">www.neomarin.com.tr</a>

### E-commerce plays an integral role

E-commerce has become so strong in Turkey that some research organisations such as German yStats.com recently named the country one of the world's leaders in B2C e-commerce growth. According to the "Europe B2C Ecommerce Report 2013", there were more than 50,000 active e-commerce platforms offering online shopping and virtual payment methods in Turkey in 2013, thanks to rising internet penetration and increasing popularity among Turkish consumers, who want to shop and pay online using their smartphones or mobile gadgets. With more than half of the country's

consumers being active internet users, the country has seen online spending through virtual point-of-sales (POS) networks grow at an average annual rate of 40% since 2009, reaching US\$18 billion in 2013.

### Popular e-tailers in Turkey

Name	Website
D-Market	<a href="http://www.hepsiburada.com">www.hepsiburada.com</a>
eBay	<a href="http://www.gittigidiyor.com">www.gittigidiyor.com</a>
Vipindirim	<a href="http://www.markafoni.com">www.markafoni.com</a>
DSM	<a href="http://www.trendyol.com">www.trendyol.com</a>
Trend Magazacilik	<a href="http://www.hizli1.com">www.hizli1.com</a>
Amazon.com	<a href="http://www.amazon.com">www.amazon.com</a>
Migros	<a href="http://www.migros.com.tr">www.migros.com.tr</a>
Istanbul Bilisim	<a href="http://www.istanbulbilisim.com.tr">www.istanbulbilisim.com.tr</a>
Vatar Bilgisayar	<a href="http://www.vatanbilgisayar.com">www.vatanbilgisayar.com</a>
Cicek Sepeti	<a href="http://www.ciceksepeti.com">www.ciceksepeti.com</a>
Boyner	<a href="http://www.morhipo.com">www.morhipo.com</a>
Klik	<a href="http://www.kliksa.com">www.kliksa.com</a>

Source: Euromonitor International

## **4. Trade regulations**

### **EU-Turkey Customs Union**

Turkey has significantly liberalised its import regime; any individual or enterprise can freely register to engage in the import business. It is a member of the World Trade Organization (WTO), and the EU-Turkey Customs Union also came into force in January 1996, under which Turkey and the EU have abolished all customs duties, other surcharges and import quotas levied on most manufactured products from each other. Turkey has also adopted the EU's Common External Tariffs imposed on imports from third countries and economies, except for agricultural and coal and steel products. Products imported from sources other than the EU and Turkey can therefore move freely within the EU and Turkey, as long as all import formalities have been complied with and custom duties, or charges having an equivalent effect, have been levied in the importing country.

Nonetheless, traditional agricultural products are not covered by the arrangements, and will be included in the Customs Union only after Turkey has completed the alignment of its agricultural sector with the EU's common agricultural policy. On the other hand, some industrial products from the least developed and developing countries (including the Chinese mainland) benefit from the EU's Generalised System of Preferences (GSP). With the creation of the Customs Union between the EU and Turkey, such products are also covered under Turkey's GSP regime.

Import taxes aside, a value-added tax (VAT) of 18% applies to most imports as well as domestic products, while lower VAT rates of 8% and 1% are charged for certain goods and services.

### General import tariff rates of Turkey\*

HS Code	Description	Turkey MFN (%) as of 2015
01	Live animals	0-135
02	Meat and edible meat offal	23.4-225
03	Fish and crustaceans, molluscs and other aquatic invertebrates	0-50
04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	0-180
05	Products of animal origin, not elsewhere specified or included	0-20
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	3.9-46.8
07	Edible vegetables and certain roots and tubers	0-49.5
08	Edible fruit and nuts; peel of citrus fruit or melons	13-145.8
09	Coffee, tea, mate and spices	0-145
10	Cereals	0-130
11	Products of the milling industry; malt; starches; inulin; wheat gluten	4-102.6
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruits; industrial or medicinal plants; straw and fodder	0-35
13	Lac; gums, resins and other vegetable saps and extracts	0-25
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	0
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes	0-46.8
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	54-121.5
17	Sugars and sugar confectionery	0-135
18	Cocoa and cocoa preparations	0-20
19	Preparations of cereals, flour, starch or milk; bakers' wares	3.8-37
20	Preparations of vegetables, fruit, nuts or other parts of plants	0-135.9
21	Miscellaneous edible preparations	0-58.5
22	Beverages, spirits and vinegar	0-70

<b>HS Code</b>	<b>Description</b>	<b>Turkey MFN (%) as of 2015</b>
23	Residues and waste from the food industries; prepared animal feed	0-13.5
24	Tobacco and manufactured tobacco substitutes	10-74.9
25	Salt; sulphur; earths and stone; plastering materials, lime and cement	0-1.7
26	Ores, slag and ash	0-12.5
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	0-8
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare earth metals, of radioactive elements or of isotopes	0-5.5
29	Organic chemicals	0-6.5
30	Pharmaceutical products	0-6.5
31	Fertilisers	0-6.5
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring matter; paints and varnishes; putty and other mastics; inks	0-6.5
33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	0-12.8
34	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes, polishing or scouring preparations, candles and similar articles, modelling pastes, 'dental waxes' and dental preparations with a basis of plaster	0-6.5
35	Albuminoidal substances; modified starches; glues; enzymes	0-15.6
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	5.7-6.5
37	Photographic or cinematographic goods	0-6.5
38	Miscellaneous chemical products	0-6.5
39	Plastics and articles thereof	0-6.5
40	Rubber and articles thereof	0-6.5
41	Raw hides and skins (other than furskins) and leather	0-6.5
42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silkworm gut)	1.7-9.7
43	Furskins and artificial fur; manufactures thereof	0-3.7
44	Wood and articles of wood; wood charcoal	0-10



<b>HS Code</b>	<b>Description</b>	<b>Turkey MFN (%) as of 2015</b>
45	Cork and articles of cork	0-4.7
46	Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	0-4.7
47	Pulp of wood or of other fibrous cellulosic material; waste and scrap of paper or paperboard	0
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	0
49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans	0
50	Silk	0-7.5
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	0-8
52	Cotton	0-8
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	0-8
54	Man-made filaments; strip and the like of man-made textile materials	3.8-8
55	Man-made staple fibres	4-8
56	Wadding, felt and nonwovens; special yarns, twine, cordage, ropes and cables and articles thereof	3.8-12
57	Carpets and other textile floor coverings	3-8
58	Special woven fabrics; tufted textile fabrics; lace, tapestries; trimmings; embroidery	5-8
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	4-8
60	Knitted or crocheted fabrics	6.5-8
61	Articles of apparel and clothing accessories, knitted or crocheted	8-12
62	Articles of apparel and clothing accessories, not knitted or crocheted	6.3-12
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	0-12
64	Footwear, gaiters and the like; parts of such articles	3-17
65	Headgear and parts thereof	0-5.7
66	Umbrellas, sun umbrellas, walking sticks, seatsticks, whips, riding-crops and parts thereof	2.7-5.2

<b>HS Code</b>	<b>Description</b>	<b>Turkey MFN (%) as of 2015</b>
67	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles of human hair	1.7-4.7
68	Articles of stone, plaster, cement, asbestos, mica or similar materials	0-3.7
69	Ceramic products	0-12
70	Glass and glassware	0-11
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal and articles thereof; imitation jewellery; coin	0-4
72	Iron and steel	0-40
73	Articles of iron or steel	0-15
74	Copper and articles thereof	0-5.2
75	Nickel and articles thereof	0-3.3
76	Aluminium and articles thereof	0-10
78	Lead and articles thereof	0-5
79	Zinc and articles thereof	0-5
80	Tin and articles thereof	0
81	Other base metals; cements; articles thereof	0-9
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	1.7-8.5
83	Miscellaneous articles of base metal	0-3.7
84	Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	0-9.7
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	0-14
86	Railway or tramway locomotives, rolling-stock and parts thereof; railway or tramway track fixtures and fittings and parts thereof; mechanical (including electro-mechanical) traffic signalling equipment of all kinds	0-3.7
87	Vehicles other than railway or tramway rolling stock, and parts and accessories thereof	0-22
88	Aircraft, spacecraft, and parts thereof	1.7-7.7
89	Ships, boats and floating structures	0-2.7

HS Code	Description	Turkey MFN (%) as of 2015
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof	0-6.7
91	Clocks and watches and parts thereof	2.7-6
92	Instruments; parts and accessories of such articles	1.7-4
93	Arms and ammunition; parts and accessories thereof	0-3.2
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated sign illuminated nameplates and the like; prefabricated buildings	0-5.7
95	Toys, games and sports requisites; parts and accessories thereof	0-4.7
96	Miscellaneous manufactured articles	0-7.7
97	Works of art, collectors' pieces and antiques	0

\* For more detailed tariff information, please refer to [www.resmigazete.gov.tr](http://www.resmigazete.gov.tr).

Source: Undersecretariat of Customs, Republic of Turkey

## Measures not covered by the Customs Union

### Anti-dumping measures

Trade-protection measures such as anti-dumping (AD), however, have not been eliminated between the EU and Turkey. Such protective measures have, likewise, not been eliminated with respect to dumped and subsidised products from third countries. In other words, Turkey has its own anti-dumping actions, which are separate from those of the EU. The legislative base for implementing anti-dumping and countervailing measures in Turkey is the *Law on the Prevention of Unfair Competition in Imports and the Act on the Prevention of Unfair Competition in Imports*.

As of end-2014, Turkey applied 51 AD measures on imports from the Chinese mainland. Meanwhile, Turkey applied one AD measure on imports of tempered glass lids from Hong Kong (i.e., US\$0.91 per kg; imposed on 23 May 2010 for five years).

## Anti-dumping measures against Chinese products in Turkey

Product	CN Code	Anti-dumping duty	Imposition date	Expiry date
Yarn of man-made or synthetic or artificial staple fibres	55.08; 55.09 (except for 5509.52; 5509.61; 5509.91); 55.10 (except for 5510.20); 55.11	US\$0.49-0.8/kg	12.01.2009	Pending expiry review
Certain finished or semi-finished artificial leather	5603.14	US\$1.9/kg	18.04.2009	Pending expiry review
Knives for electromechanical domestic kitchen appliances	8208.30.00.00.00	US\$20.85/kg	18.06.2009	Pending expiry review
Stud-link of Iron or steel & welded link chain of iron or steel	7315.81; 7315.82	US\$1,069/ton	25.07.2009	Pending expiry review
Cylindrical door locks (excluding electromechanicals) & other door locks (excluding electromechanicals) & only cylinder and case for door locks	8301.40.11.00.00; 8301.40.19.00.11; 8301.40.19.00.19; 8301.60.00.00.00	US\$0.74-1.77/unit	30.07.2009	Pending expiry review
Motorcycle tyres & Motorcycle tubes	4011.40; 4013.90.00.00.11	37-100%	05.08.2009	Pending expiry review
Bicycle tyres & bicycle tubes	4011.50.00.00.00; 4013.20.00.00.00	33-50%	05.08.2009	Pending expiry review
Ball-point pens	9608.10.10.10.00; 9608.50.00.10.00	US\$0.066/unit	12.11.2009	Pending expiry review
Certain tube or pipe fittings of iron or steel	7307.91.00.00.00; 7307.93.11.00.11; 7307.93.11.00.12; 7307.93.19.00.00	US\$663/ton	22.01.2010	Pending expiry review
Certain made-up textile articles and fabrics made of artificial or synthetic fibres	5407; 6005.31.10.00.00; 6005.32.10.00.00; 6005.33.10.00.00; 6005.34.10.00.00; 6006.31.10.00.00; 6006.32.10.00.00; 6006.33.10.00.00; 6006.34.10.00.00; 5810.92.10.00.00; 5810.92.90.00.00; 6303.12; 6303.92	70.44% (US\$5/kg at most)	11.04.2010	11.04.2015

Product	CN Code	Anti-dumping duty	Imposition date	Expiry date
Baby carriages, parts (chassis only)	8715.00.10.00.00; 8715.00.90.00.00	US\$8-12/unit	23.05.2010	23.05.2015
Articulated link chain and parts thereof	7315.11.90.00.11; 7315.11.90.00.19; 7315.12.00.00.11; 7315.12.00.00.19; 7315.19.00.00.00	US\$1,200/ton	23.05.2010	23.05.2015
Glass lid/cover (also applicable to products originating in Hong Kong)	7010.20.00.00.00	US\$0.91/kg	23.05.2010	23.05.2015
Fan coil	8415.83.00.90.00	34.27%	31.05.2010	31.05.2015
Hinges of base metal & hat-racks, hat-pegs, brackets and similar fixtures of base metal & base metal mountings, fittings and similar articles suitable for furniture	8302.10.00.00.11; 8302.10.00.00.19; 8302.50.00.00.00; 8302.42.00.00.00	US\$0.75-1.64/kg	20.07.2010	20.07.2015
Ropes and cables (including locked coil ropes)	7312.10.81.00.00; 7312.10.83.00.00; 7312.10.85.00.00; 7312.10.89.00.00; 7312.10.98.00.00	US\$1/kg	21.07.2010	21.07.2015
Metallised yarn, whether or not gimped, being textile yarn, or strip or the like of heading 5404 or 5405, combined with metal in the form of thread, strip or powder or covered with metal	5605.00	US\$2.2/kg	21.07.2010	21.07.2015
Slide fasteners	9607.11; 9607.19	US\$3/kg	30.10.2010	30.10.2015
Textile fabrics impregnated with polyurethane (leather substitutes & others) & textile fabrics coated, covered or laminated with polyurethane (leather substitutes & others)	5903.20.10.10.00; 5903.20.10.90.00; 5903.20.90.10.00; 5903.20.90.90.00	US\$1-2.2/kg	31.10.2010	31.10.2015
Refillable pocket flint lighters	9613.20.00.00.19	US\$0.05/unit	31.10.2010	31.10.2015
Interchangeable tools for drilling metals with working parts of high-speed steel	8207.50.60.00.00; 8207.70.31.00.19	US\$6-10/kg	31.12.2010	31.12.2015

Product	CN Code	Anti-dumping duty	Imposition date	Expiry date
Glass-fibre reinforcement materials	7019.11.00.00.00; 7019.12.00.00.00; 7019.19.10.00.00; 7019.19.90.00.00; 7019.31; 7019.90.00.10.00; 7019.90.00.30.00	20.2-23.75%	31.12.2010	31.12.2015
Skid chain for motor vehicles, of iron or steel	7315.20.00.00.00;	US\$1,500/ton	03.05.2011	03.05.2016
Pentaerythritol	2905.42.00.00.00;	US\$270/ton	03.05.2011	03.05.2016
Certain types of new pneumatic tires, of rubber	4011.20; 4011.62.00.00.00; 4011.63.00.00.00; 4011.69.00.00.00; 4011.93.00.00.00; 4011.94.00.00.00; 4011.99.00.00.00; 4011.61.00.00.00; 4011.92.00.00.00	60%	21.06.2011	21.06.2016
Cored wire of base metal	8311.20.00.00.00	21.12-28.87%	28.07.2011	28.07.2016
Pre-finished engineered laminated flooring (floating or not)	4418.72.00.00.00	35%	31.01.2012	31.01.2017
Only wall-type split air-conditioners & only outdoor unit of wall-type split air-conditioners (except for outdoor unit of VRF systems) & only indoor unit of wall-type split air-conditioners	8415.10.90.00.00; 8415.90.00.90.11; 8415.90.00.90.12	25%	21.03.2012	21.03.2017
Fittings	7307.19	US\$800/ton	22.05.2012	22.05.2017
Plywood consisting solely of sheets of wood, each ply not exceeding 6 mm in thickness	4412.10; 4412.31; 4412.32; 4412.39	US\$240/m <sup>3</sup>	10.07.2012	10.07.2017
Granites	6802.23; 6802.93	US\$174/ton	10.07.2012	10.07.2017
Welded stainless steel tubes, pipes & profiles	7306.40.20.90.00; 7306.40.80.90.00; 7306.61.10.00.00	13.82-25.27%	15.03.2013	15.03.2018
Refractory bricks of chromite, magnesite or chrome magnesite; other articles containing magnesite, dolomite or chromite	6902.10.00.10.11; 6902.10.00.10.12; 6902.10.00.10.13; 6815.91	US\$145/ton	15.03.2013	15.03.2018

Product	CN Code	Anti-dumping duty	Imposition date	Expiry date
Endless transmission belts of trapezoidal cross-section (V-belts), other than V-ribbed	4010.32.00.00.00; 4010.34.00.00.00; 4010.39.00.00.00	US\$5.04/kg	15.03.2013	15.03.2018
Woven fabrics of synthetic and artificial staple fibres	55.13; 55.14; 55.15; 55.16	87%	05.05.2013	05.05.2018
Polyester synthetic staple	5503.20.00.00.00	US\$0.21/kg	16.07.2013	16.07.2018
Electric storage water heaters	8516.10.80.00.19	22-49%	19.09.2013	19.09.2018
Wall clocks (battery accumulator or main powered)	9105.21	US\$2.1/unit	05.10.2013	05.10.2018
Diesel engines	8408.90.41.90.00	152.48-165.18%	21.11.2013	21.11.2018
Blankets & long pile fabrics of synthetic fibres and others of man-made fibres for blankets	6301.40; 6301.90; 6001.10.00.00.11; 6001.92	US\$4/kg	23.01.2014	23.01.2019
Textured yarn of nylon or other polyamides, measuring per single yarn more than 50 tex	5402.31	37.40%	27.03.2014	27.03.2019
Pocket lighters, gas fuelled, non-refillable & pocket lighters, gas fuelled, refillable with electrical ignition system & parts of lighters	9613.10.00.00.00; 9613.20.00.00.11; 9613.90.00.00.11	US\$0.01-0.05/unit	26.04.2014	26.04.2019
Laminated flooring	4411.13.90; 4411.14.90; 4411.92.90; 4411.93.90	US\$1.6-2.4/m <sup>2</sup>	03.05.2014	03.05.2019
Instantaneous gas water heaters	8419.11.00.00.00	20.12-59.65%	11.07.2014	11.07.2019
Aluminium foil of a thickness not exceeding 0.2 mm, not backed	7607.11; 7607.19	22%	26.07.2014	26.07.2019
Pencils with leads of graphite and pencils with leads of crayons encased in a rigid sheath	9609.10	US\$3.16/144 units	09.08.2014	09.08.2019
Fully drawn yarn (FDY)	5402.47	US\$0.15-0.17/kg	16.10.2014	16.10.2019

Product	CN Code	Anti-dumping duty	Imposition date	Expiry date
Tarpaulin made of polyethylene / polypropilen	3921.90.60.00.11; 3921.90.60.00.13; 3926.90.92.00.00; 3926.90.97.90.18; 5407.20.11.90.00; 5407.20.19.90.00; 5903.90.91.90.00; 6306.12.00.00.00	US\$1.06/kg	11.11.2014	11.11.2019
Hook & loop	5806.32.90.00.11; 5806.32.90.00.19	US\$3.86/kg	13.11.2014	13.11.2019
Polyester textured yarn	5402.33	US\$268-351/ton	17.12.2014	17.12.2019
Woven fabrics of synthetic filament yarn	5407	70.44% for >110gr/m2 21.13% for ≤110gr/m2	21.01.2015	21.01.2020

*Remark: Anti-dumping measures in force as of January 2015*

*Source: Undersecretariat of the Prime Ministry for Foreign Trade*

## Safeguard measures

The legislative base for implementing safeguard measures is *the Decree on Safeguard Measures Against Imports and the Implementing Regulations on Safeguard Measures Against Imports*. Under Turkish law, safeguard measures may be applied (following an investigation) where a product is imported in such increased quantities and under such conditions as to cause, or threaten to cause, serious injury to the domestic producers producing like, or directly competitive, products. Safeguard measures can take the form of customs duties, additional financial charges, restrictions on quantity/value of imports, tariff quota or a combination of these forms. In cases in which the safeguard measures take the form of quantity and/or value restriction (establishment of the quota), the average level of imports in the last three representative years for which statistics are available shall be taken into account unless a different level is necessary to prevent or remedy serious injury.

The duration of safeguard measures shall not exceed four years, including the duration of any provisional measure unless it is extended. The duration of the measure may be extended in accordance with the results of a new



investigation to be initiated provided it is determined that the safeguard measure continues to be necessary to prevent or remedy serious injury and there is evidence that the domestic producers are adjusting to the conditions of the internal market. An extended measure shall not be more restrictive than it was at the end of the initial period, and shall continue to be liberalised. The total period of application of a safeguard measure shall not exceed 10 years.

### Current definitive safeguard measures against mainland products

Product	CN Code	Measures	Details		
			1st year	2nd year	3rd year
Certain electrical appliances	8509.40.00.00.11 8509.40.00.00.12 8509.40.00.00.13 8509.40.00.00.15 8509.40.00.00.19 8509.80.00.00.11 8516.60.90.00.11 8516.31.00.00.19 8508.11.00.00.19	Specific duty	US\$5.0-8.0 / piece  1/11/2013 - 31/10/2014	US\$2.5-4.5 / piece  1/11/2014 - 31/10/2015	-
Matches	3605	The difference between the threshold level (listed on the right) and the actual price of the import product will be collected as duty, subject to a specified maximum level.	US\$3.1 / kg* ; (Max level of duty:US\$1.0 / kg)  6/6/2012 - 5/6/2013	US\$3.05 / kg* ; (Max level of duty: US\$0.95 per / kg)  6/6/2013 - 5/6/2014	US\$3.0 / kg* ; (Max level of duty: US\$0.90 per / kg)  6/6/2014 - 5/6/2015

Product	CN Code	Measures	Details		
			1st year	2nd year	3rd year
Motorcycles	8711.10.00.00.11 8711.10.00.00.19 8711.20.10.00.00 8711.20.91.00.00 8711.20.93.00.00 8711.20.98.00.00 8711.30.10.00.00	Specific duty	US\$155-240 / piece  15/8/2012 - 14/8/2013	US\$150-235 / piece  15/8/2013 - 14/8/2014	US\$145-230 / piece  15/8/2014 - 14/8/2015
Spectacle frames	9003.11 9003.19	Specific duty	US\$1.75 / piece US\$2.00 / piece  5/3/2014 - 4/3/2015	US\$1.50 / piece US\$1.75 / piece  5/3/2015 - 4/3/2016	-
Travel bags, handbags and similar containers	42.02	Specific duty	US\$2.4 / kg (max) or US\$3.5 / piece  8/4/2014 - 7/4/2015	US\$2.30 / kg (max) or US\$3.25 / piece  8/4/2015 - 7/4/2016	-
Polyethylene terephthalate (PET)	3907.60.20.00.00	Specific duty	6.75%  8/11/2014 - 7/11/2015	6.65%  8/11/2015 - 7/11/2016	6.50%  8/11/2016 - 7/11/2017
Terephthalic acid (TPA)	2917.36.00.00.11	Specific duty	4.00%  14/8/2014 - 13/8/2015	3.75%  14/8/2015 - 13/8/2016	-

\* *Threshold level*

*Remark: Safeguard measures in force as of January 2015*

*Source: WTO, Undersecretariat of the Prime Ministry for Foreign Trade*

## **Registration for textiles, clothing and footwear imports**

The new regulations require importers to make registrations for the imported textile and apparel products before importation. The registration should contain an Export Registration Form (valid for one year) with a consular certification issued by the Consular Section of the Turkish Embassy in Beijing or the Turkish Consulate Offices in Shanghai or Hong Kong (for companies registered in Hong Kong or Macau only). Prior to this process, a notarial certificate concerning foreign affairs and a consular certification should be issued by the local branch of the China Council for the Promotion of International Trade (CCPIT) and the local Foreign Affairs Office, authorised by the Ministry of Foreign Affairs of China to issue the consular certification.

The items affected include silk, wool, cotton, rayon and short fibres, carpets, fabrics weaved by special shuttles and lace fabrics, knitted or crocheted fabrics, all clothing and apparel, blankets, bed sheets and tablecloths, curtains, textile bags and packaging bags, hair nets, and headwear that is knitted or made of fabric. The new regulations affect textile and clothing products of the following categories (HS number):

420310, 420321, 420329, 420330, 430310, 4304;

Category 50;

Category 51;

Category 52;

Category 53;

Category 54 (except 5407.20);

Category 55;

Category 56;

Category 57 (except 5701 and 5702);

Category 58 (except 5805);

Category 59;

Category 60;

Category 61;  
Category 62;  
Category 63 (except 6305.32 and 6305.33); and  
6505

On 26 July 2014, footwear products (HS 64) were added to the list of products subjected to import registration. As of 10 August 2014, an “Exporter Registry Form” is required of footwear suppliers shipping to Turkey.

When exporting the above products to Turkey, registration needs to be made at the Records Centre set up by Turkey’s Undersecretariat of the Prime Ministry for Foreign Trade (UFT) for this purpose. The Records Centre takes charge of issuing the registration certificate. The only thing that needs no registration is goods equal to or less than five kilograms for one time when they pass through customs. A registration certificate is valid for 90 days, and one certificate can only be used for one customs entry application. It cannot be postponed, nor transferred to a third party. Re-registration is required if the registered company would like to change its information.

## **Import restrictions**

Turkey implements import bans on products according to the environment, public safety, health, public morality or the relevant international conventions. The banned products include drugs, chemical weapons, fuel that is detrimental to health, weapons and ammunition, products that violate trademark rights or whose names violate the International Convention on Industrial Property, silkworm eggs, farm natural fertiliser, games and gambling machines.

## **Product standards**

The Turkish Standards Institution, or TSE, is the product standardisation body of Turkey, responsible for setting product standards and ensuring compliance. Taking electrical and electronic products as an example, while

there is a minimum two-year warranty requirement, it is also necessary to obtain technical approval by the TSE, and attain the European CE standard certification under the requirements set out by the TSE, before the products can be imported and placed onto the Turkish market. As for toys, the TSE also imposes a number of safety standards, which in large part follow those required by the EU. Therefore, the attainment of CE standard certification can serve as a good reference for fulfilling the TSE's requirements.

In sum, manufacturing products within the scope of mandatory standards are subject to inspection by the TSE. The inspections are carried out in respect of minimum health, safety and protection of the environment, aiming to provide adequate information to consumers. If the importer declares that the product is in conformity with the relevant international standards (e.g., ISO, CEN, IEC, CENELEC and ETSI), the inspection may be carried out, upon request, according to these international standards.

For products that are CE-marked according to related regulations of the EU and which are freely circulated in the EU, a Conformity Certificate shall be issued directly by relevant competent bodies in cases where the Declaration of Conformity is submitted to the TSE before imports. However, the TSE may still request the technical file and test the products for verification on whether they can meet the relevant EU requirements.

## **RoHS & WEEE**

To harmonise with the relevant EU directives, Turkey has adopted both the WEEE (Waste Electrical and Electronic Equipment) (2002/96/EC) and RoHS (Restriction of Use of Hazardous Substances) (2002/95/EC) Directives, the provisions of which have the effect of further aligning Turkish law with the EU's environmental policy. The Turkish law (Atık Elektrikli ve Elektronik Eşyaların (AEEE) Kontrolü Yönetmeliği" was published in the country's Official Journal, no: 28300, on 22 May 2012, and entered into force on the same day.

The Turkish law, integrating provisions from both the EU's RoHS and WEEE Directives, sets out, in Article 9, 16 sub-paragraphs outlining the

responsibilities that will be applicable to producers. These include the following:

- Documenting that new EEE meets the RoHS substance restrictions and keeping the documentation for a period of up to 10 years. The substance restrictions are the same as in the EU's RoHS Directive: EEE must not contain, inside homogenous materials, more than 0.1% of lead, mercury, hexavalent chromium, polybrominated biphenyls (PBB) and polybrominated diphenyl ethers (PBDE) and more than 0.01% of cadmium;
- Including a sentence within the product description that the product conforms with the WEEE Directive;
- Filling out and submitting the Compliance Declaration Form that is provided in Annex 3 of the law to the Ministry of Environment and Forestry, every year by the end of February;
- Using products and techniques that would facilitate the reuse, recycling, recovery, dismantling and decomposition of the products, as well as refraining from employing processes that would prevent reuse, unless they provide significant advantages as regards the protection of the environment and human health;
- Preparing a plan on WEEE management and sending it to the Ministry for approval (this provision will apply one year after the law's publication date);
- Meeting the collection targets as set out in Article 15 for domestic WEEE;
- Bearing the cost of the domestic WEEE which is collected by municipalities and distributors; making sure that the domestic WEEE is treated at the licensed firms or organisations which meet the technical requirements stated in Article 14; putting into place a system

for the disposal of domestic WEEE that cannot be reused and bearing the costs;

- Making sure that a system is put into place for the collection, treatment and disposal of non-domestic WEEE;
- Together with the municipalities or individually, arranging campaigns in order to raise awareness on the issue, and preparing all necessary documents for such campaigns;
- Either setting up a system or participating in a collective scheme in order to fulfil the duties arising from the Turkish WEEE law and providing a guarantee (this provision will apply one year after the law's publication date);
- Informing the Coordination Centre which is established according to Article 22 concerning all collected WEEE;
- Marking the EEE that is put onto the market after the law comes into force with the symbol of a crossed out wheelie bin and black bar, as provided in the law's Annex 3, in accordance with the applicable Turkish standards (numbered TSE EN 50419).
- Subscribing to the registration system whose principles are prepared by the Ministry, for the EEE that is going to be launched on the market.

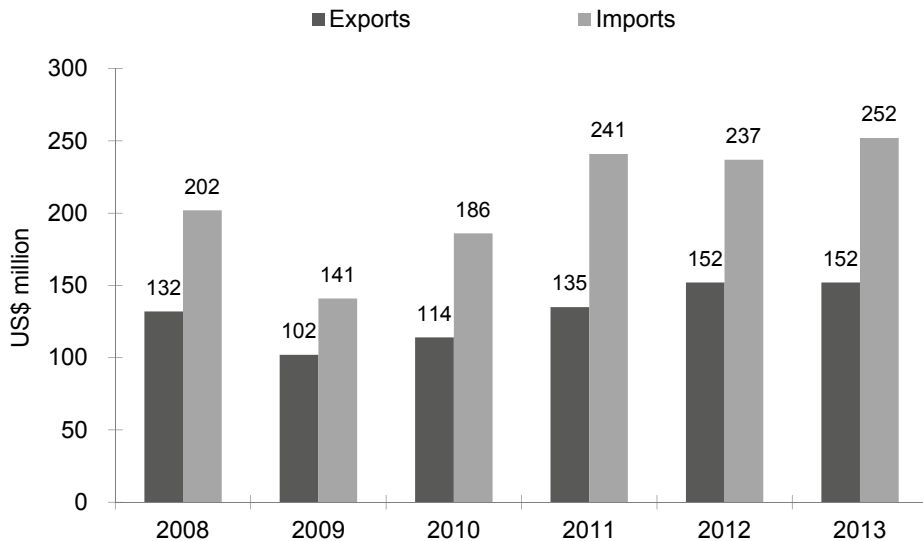
Hong Kong companies with interests in Turkey should ensure a careful examination of the law, including the list of EEE categories found in the law's Annex 1A, with detailed information on each category in Annex 1B. The Turkish WEEE and RoHS law can be found (only in Turkish) at <http://www.resmigazete.gov.tr/eskiler/2012/05/20120522-5.htm>

## 5. Potential trade opportunities

### Overview

Increasing globalisation has pushed Turkish traders to look for more competitive sources and destinations around the globe. More importantly, a more resilient banking sector after the severe banking crisis in 2000 and 2001, coupled with the expanding economy, has strengthened Turkey's economic fundamentals and therefore enhanced its import absorption capacities. As a result, an increasing number of Turkish companies are interested in buying products from Asia, while exploring new export markets outside Europe, the Middle East and the Mediterranean.

#### Foreign trade turnover in Turkey



Source: TurkStat

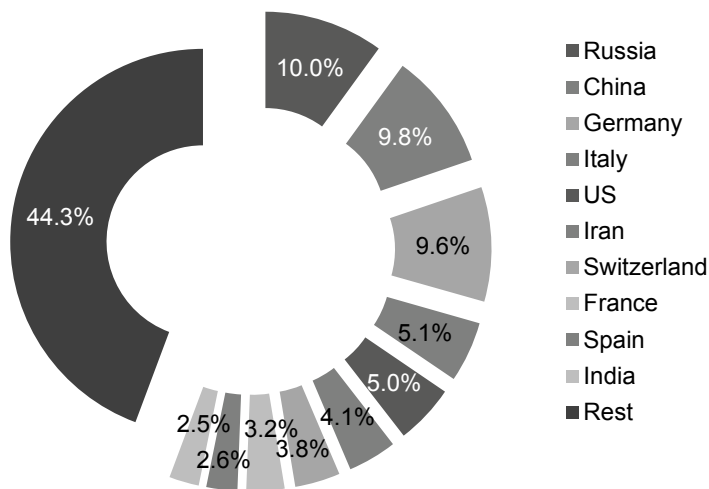
China has been the country's second-largest source of imports, accounting for 9.8% of the total in 2013, after only Russia's 10.0%. Imports from China nearly doubled from US\$12.7 billion in 2009 to US\$24.7 billion in 2013. While higher labour costs in Turkey are among the major reasons why companies are looking at China, the lack of economies of scale among Turkish



manufacturers also makes it more expensive to produce locally. Despite some relapse following the outbreak of the financial tsunami and the European debt crisis, the supply chain advantages generated from efficient industrial clustering in the Chinese mainland are expected to continue to prompt Turkish companies to source from the mainland. In fact, more and more Turkish companies have set up buying offices in China, especially when product quality has greatly improved over recent years.

Moreover, the increasing number of new start-ups in the market could also engender a new breed of potential customers for Hong Kong exporters. For example, there are cases of some small companies engaged in metal hardware and building materials which are currently sourcing Asian products via West European distributors, due mainly to their small order quantity and desire for better logistics arrangements rendered by distributors in Europe. But expanding business in Turkey and more sophisticated sourcing requirements are prompting them to consider buying directly from Asia, at lower cost.

**Turkish imports by country, 2013 (Total: US\$252 billion)**

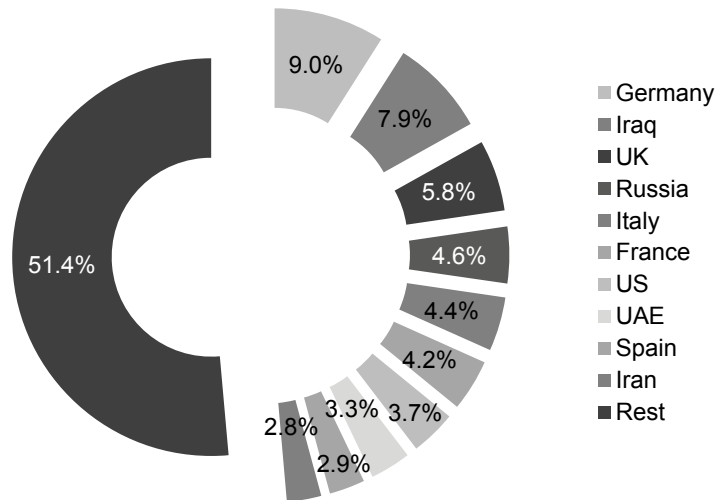


### Total imports by selected countries in 2013

		US\$ million	% Growth 12/13	% Share in 2013
1.	Russia	25,064	-5.9	10.0
2.	China	24,686	15.9	9.8
3.	Germany	24,182	13.0	9.6
4.	Italy	12,885	-3.4	5.1
5.	US	12,596	-10.9	5.0
6.	Iran	10,383	-13.2	4.1
7.	Switzerland	9,645	124.1	3.8
8.	France	8,080	-5.9	3.2
9.	Spain	6,418	6.5	2.6
10.	India	6,368	9.0	2.5

Source: TurkStat

### Turkish exports by country, 2013 (Total: US\$152 billion)



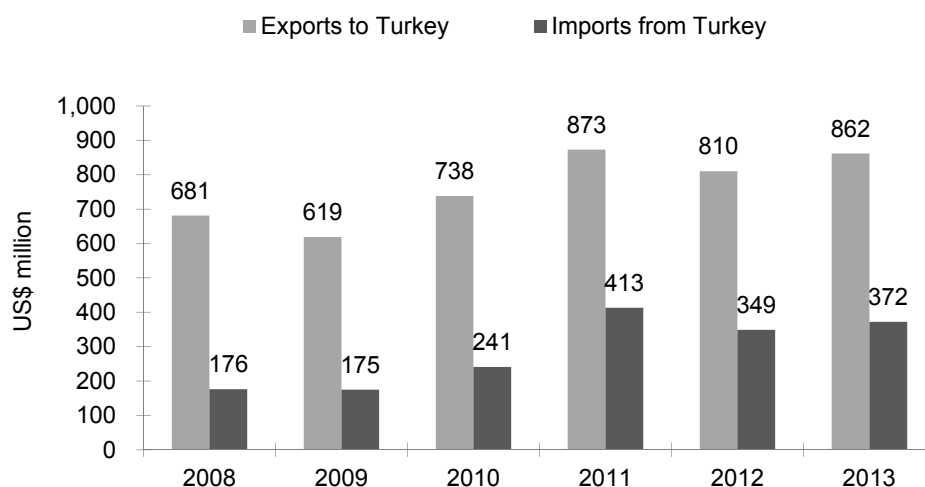
## Total exports by selected countries in 2013

	US\$ million	% Growth 12/13	% Share in 2013
1. Germany	13,703	4.4	9.0
2. Iraq	11,949	10.4	7.9
3. UK	8,785	1.1	5.8
4. Russia	6,964	4.2	4.6
5. Italy	6,718	5.4	4.4
6. France	6,377	2.9	4.2
7. US	5,640	0.6	3.7
8. UAE	4,966	-39.3	3.3
9. Spain	4,334	16.6	2.9
10. Iran	4,193	-57.7	2.8

Source: TurkStat

Following years of economic expansion and ever-growing demand for consumer goods in Turkey, Hong Kong's trade with Turkey has been gradually expanding in recent years. Hong Kong's total exports to Turkey recorded a compound annual growth of 9% between 2009 and 2013.

## Hong Kong's trade with Turkey



Source: Census & Statistics Department, HKSAR Government

Given the rising demand in Turkey and the potential industry complementarities with Hong Kong, consumer goods such as gifts and premiums, watches and toys, offer certain niches for Hong Kong exporters. In many cases, Turkish importers have been buying such consumer goods via their agents in Western Europe, as many of them are not familiar with sourcing in Asia, and are constrained by small order quantities. But spurred by the country's steadfast economic growth and business expansion in recent years, an increasing number have been exploring or carrying out direct sourcing in Asia. On the other hand, Turkey's growing importance as an alternative production base, especially for fast fashion and electronics manufacturers, for international companies can provide new opportunities to Hong Kong companies of related industrial supplies such as textiles and electronic parts and components.

### Hong Kong's total exports of selected products to Turkey

(US\$ million)	2010		2011		2012		2013	
	Value	% Growth	Value	% Growth	Value	% Growth	Value	% Growth
<b>Total exports</b>	<b>738</b>	<b>+19.1</b>	<b>873</b>	<b>+18.4</b>	<b>810</b>	<b>-7.2</b>	<b>862</b>	<b>+6.4</b>
Electronics <sup>^</sup>	390	+1.2	484	+24.2	470	-3.0	469	-0.2
<i>Telecom equipment</i>	111	-30.6	159	+43.0	177	+11.3	174	-1.8
<i>AV equipment</i>	110	+41.0	102	-7.1	80	-21.6	70	-13.2
<i>IT equipment</i>	60	+1.8	68	+12.7	81	+19.8	98	+21.1
Gifts and premiums*	130	+53.8	150	+15.7	131	-12.9	151	+15.9
Watches and clocks	74	+56.5	84	+13.8	78	-7.4	94	+20.9
Fashion products	63	+11.2	70	+10.7	60	-14.7	64	+7.1
<i>Clothing</i>	42	+11.4	45	+6.4	33	-27.3	33	+2.3
<i>Footwear</i>	14	+14.2	18	25.5	18	+5.3	22	+19.6
<i>Travel goods and handbags</i>	7	+4.2	7	+6.9	8	+14.5	8	-1.4
Toys and games	29	+73.9	33	+11.8	22	-32.8	24	+12.0

(US\$ million)	2010		2011		2012		2013	
	Value	% Growth	Value	% Growth	Value	% Growth	Value	% Growth
Household electrical appliances	14	+73.3	15	+6.7	11	-31.0	22	+109.2
Jewellery	12	+32.1	20	+69.5	17	-11.1	19	+7.1

<sup>^</sup> Includes finished electronic products and parts and components of electronic products

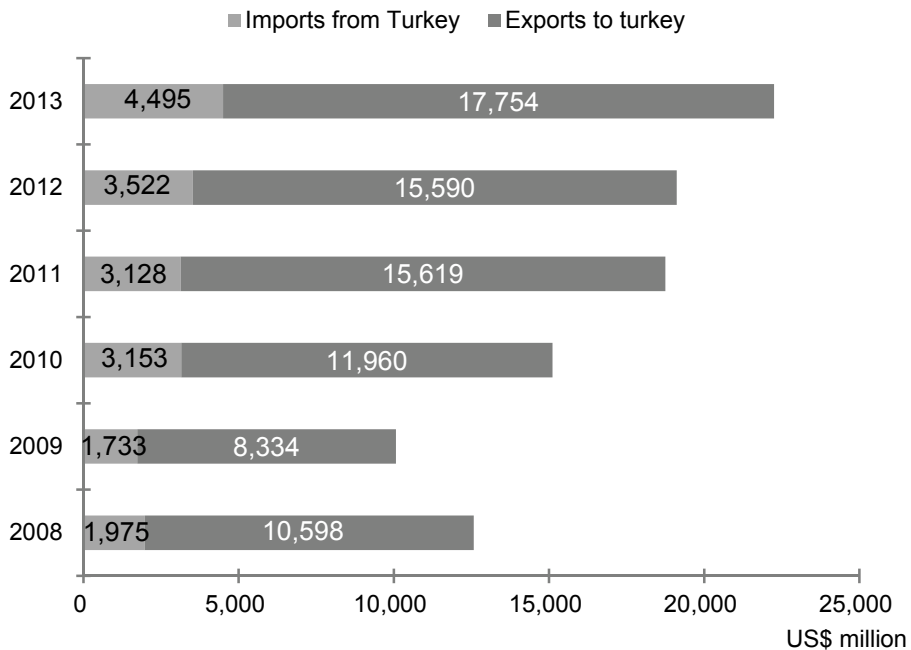
\* Includes items covered in other categories

Source: Census & Statistics Department, HKSAR Government

## Hong Kong as a platform for Sino-Turkish trade

Despite mounting protectionism and fierce competition in industries like textile and apparel, Sino-Turkish trade has been faring well in recent years, with total trade between the two countries surging by 221%, or a compound annual growth rate of 22%, between 2009 and 2013. Symbolised by the highest-level ever official visit of the Turkish president to China in 2009 and the more strategic move by Chinese companies such as Chery Auto and China Sunergy (solar cells and modules) to use the Turkish market as a gateway to other European markets, bilateral trade between the two countries is bound to flourish in years to come. Moreover, as trade leads in raw materials such as minerals, machinery and medical instruments, the fast development of industrial and infrastructural activities in both countries after the global recession will certainly give an extra shot in the arm for Sino-Turkish trade.

## Bilateral trade between Turkey and China



Source: China Customs

That said, although many Turkish companies acknowledge that China has become the world's leading production base for a wide range of consumer products, especially electrical/electronic items, they are still not familiar with sourcing from the Chinese mainland. This is due in part to the fact that Turkey has a sizable manufacturing sector of light consumer products. Traditionally, Turkey is a producer rather than importer of such items. Many Turkish companies therefore lack experience in sourcing from overseas suppliers.

The most problematic issues for Turkish companies, especially inexperienced small and medium-sized companies, in sourcing from China include quality assurance and communications. Among Turkish companies, quite a few suffer from the inconsistent quality problems stemming from imports from the Chinese mainland. This is especially a problem for smaller-sized companies, which find it difficult to cooperate with reputable suppliers on the mainland due to their small order sizes and therefore impaired bargaining power.

On the other hand, although many Turkish traders can speak English well, they find it difficult to communicate with local Chinese companies. This is because the smaller Turkish companies usually approach the smaller Chinese suppliers, which are usually not staffed with competent English-speaking personnel.

As a corollary, some Turkish companies are interested in buying Chinese products, especially consumer products, via Hong Kong traders. They generally recognise that Hong Kong companies can offer more reliable quality assurance and better services in terms of delivery, logistics and shipping arrangements, despite the fact that it can be more expensive than buying directly from indigenous Chinese companies.

## **6. Business practices**

### **Business hours**

In Turkey, government offices and banks are open Monday to Friday, and are closed on Saturday and Sunday. Government offices open from 8:30am to 5:30pm with an hour lunch break from 12:30pm to 1:30pm. Banks normally have shorter opening hours, from 8:30am to 5pm, with a lunch break from 12pm to 1:30pm. Business offices also follow the five-day working week, but most have business hours from 9am to 6pm.

During summer months, the government offices and many other establishments in the Aegean and Mediterranean regions are closed in the afternoon. These fixed summer hours are determined by the governing bodies of the provinces.

On the other hand, some government offices and business establishments may have certain temporary arrangements to advance their working hours by 15 or 30 minutes in order to fully utilise the daylight and save energy.

With regard to retailing, in general there are no special restrictions on business hours. Shops and bazaars are normally open Monday to Saturday, 9:30am to 7pm (some may have a lunch break), and closed on Sunday. But most stores in shopping malls and major shopping districts are open seven days a week, with a longer opening time that can run till the late evening.

### **Religion and holidays**

While Turkey's dominant religion is Muslim, it is a secular country with a long-standing tradition of tolerance and co-existence between peoples of different beliefs and creed. At the moment, about 99% of the Turkish population is Muslim. The remaining 1% consists mostly of Orthodox Christians, Gregorian Christians and Jews.



Notably, Hong Kong companies that intend to do business with Turkey need to observe the Turkish business calendar, as Turkish holidays do not exactly match those of the West. While the official holidays there include some national days, such as holidays for Republic Day and Victory Day, there are also two important religious holidays, namely Seker Bayrami or Ramazan Bayrami (three days) and Kurban Bayrami (four days), which are observed by most Turks and business people in the country. The dates of these religious holidays occur 10-11 days earlier for each Western calendar year, because they follow the Muslim lunar calendar, which is different from the West. As most Turks have their religious rituals and celebrations during these festivals, Hong Kong companies are advised to observe such periods when doing business with Turkey.

### Public holidays in Turkey

Date for 2015	Date for 2016	Event
1 January	1 January	New Year's Day
23 April	23 April	National Sovereignty and Children's Day
1 May	1 May	Labour Day
19 May	19 May	Commemoration of Atatürk, Youth and Sports Day
17-19 July	7-9 July	Seker Bayrami or Ramazan Bayrami (Three-day festival when sweets are eaten to celebrate the end of the fast of Ramadan.)*
30 August	30 August	Victory Day
23-26 September	11-14 September	Kurban Bayrami (Four-day festival when sacrificial sheep are slaughtered and their meat distributed to the poor.)*
29 October	29 October	Republic Day

\* The dates of these religious festivals change according to the Muslim lunar calendar.

### Business meetings

Although Turkey is a Muslim country, Turks are largely used to conducting

business in a Western style. As for business meetings, a handshake with exchange of business cards is common among businessmen during greetings.

The dress code in the business community is similar to that in Western Europe. For example, men normally wear a suit with a tie and shirt. For ladies, however, it is noteworthy that a skirt with conservative length is recommended. Moreover, ladies should refrain from using strong perfume, lipsticks of bright colours and luxury jewellery.

## **Meeting schedule**

One should try to avoid setting up business meetings with their Turkish counterparts around the times of national or religious holidays. This is because many staff and executives may be on leave during these periods. It is difficult to reach the Turks especially during the periods around the two major religious holidays Seker/Ramazan Bayrami and Kurban Bayrami (see above section for details of the holidays). This is because many Turks usually take a long break during such periods for the corresponding celebrations and family gatherings.

## **Usual business language**

In the business community, English is increasingly spoken by Turkish businesspeople, especially among the younger businessmen. English, in fact, is the most common language for liaison with foreign companies in Turkey. Despite this, not all the businesspeople can speak English well. Although some of them may indicate that they can understand English, it is still better to arrange an interpreter, which could help foreigners communicate with their Turkish counterparts in a more effective and accurate way.

## **Business gifts**

With regard to business gifts, items for office purposes such as quality pens (including those with your company logo), are acceptable items in the Turkish

business community. But alcoholic items may not be an appropriate option. For example, while whisky is welcome by many people, wine is not preferable as a gift in many circumstances.

## **Turkish cuisine**

As Turks are largely Muslim, pork is not consumed in general. But there are markets in the big cities where pork and bacon are for sale. There is also an age limit of 18 for the sale of tobacco-related products and alcoholic beverages. However, following the establishment of the Food Auditing and Certification Research Association (GİMDES) in 2005, Turkey has been cashing in on the concept that virtually all goods and services can be certified *Halal* (the Arabic for “permissible”), including – but not confined to – food and beverages.

## **Tipping**

Service charge normally is not included in restaurant bills nor on their listed prices. It is common to give tips at a rate of 10% to 15% of the total when paying the bill. However, tipping is not expected by taxi drivers. It is enough to pay the amount recorded by the meter in the vehicle.

## **7. Challenges facing exporters**

### **Unfavourable sentiment towards Chinese imports**

The Turkish economy is dependent on certain manufacturing sectors, such as ready-made clothing. But increasing imports from China, especially after the liberalisation of the textile trade including the expiry of textile quotas by the end of 2008, has resulted in intensified competition in the market, stirring up certain unfavourable sentiment among Turkish companies towards Chinese products.

In addition to textiles and clothing, there is also a strong similarity between certain Chinese and Turkish exports. These include a number of labour-intensive products such as footwear and leather goods. There is, therefore, keen competition between Turkish and Chinese products in some markets, particularly in West Europe, in addition to the local Turkish market. As a result, unfavourable sentiment towards Chinese products may continue to spread from textiles to these sectors, not to mention Turks' criticism from time to time over Chinese treatment of Uyghurs.

### **Protectionist measures**

Despite the expiry of safeguard quotas against various Chinese textile products by the end of 2008, new protectionist measures, such as the new registration requirements for imported footwear, have been erected in order to protect the interests of local footwear industries. Other protectionist measures include a bewildering array of anti-dumping duties and safeguard measures. Imposition of such measures has, in effect, discouraged Turkish companies from sourcing such items from the Chinese mainland.

On top of China-origin products, Hong Kong traders should keep an eye on the anti-dumping order concerning imports of tempered glass lids, imposed for five years with effect from 23 May, 2010, although there is no apparent trade implication for Hong Kong as has not had any export or re-export of the

subject merchandise to Turkey since 2004, except for a small consignment in 2008.

## **Currency and geopolitical risks**

Worries over spillover from the Russian fallout and the ending of the quantitative easing (QE) stimulus programme in the US have put Turkish assets and lira under pressure and are likely to remain drags in the near term, effectively hampering the payment ability of many Turkish importers. This, coupled with a widening current-account deficit, might make meeting Turkey's external financing requirements more difficult and become another source of concern for Hong Kong exporters. Apart from financial volatility, persistent geopolitical tension in the Middle East and anaemic growth in the EU also make business conditions more complicated and challenging.

## **8. Practical recommendations**

### **Get acquainted with Muslim and business calendars**

While most Turks are Muslim, many of them, especially those in the business, retail and tourism sectors, have Western-style business practices. Hong Kong companies that intend to do business with Turkey, however, need to observe the Turkish business calendar, as Turkish holidays do not exactly match those of the West. While its official holidays include some national days, such as holidays for the celebration of Republic and Victory, there are also two important religious holidays, namely Seker Bayrami or Ramazan Bayrami (three days) and Kurban Bayrami (four days), which are observed by most Turks and businesspeople in the country. The dates of these religious holidays occur 10-11 days earlier for each Western calendar year because they follow the Muslim lunar calendar. As most Turks have their religious rituals and celebrations during these festivals, Hong Kong companies are advised to observe such periods when doing business with Turkey.

### **Jump start with “Istanbul” rather than the “entire Turkey”**

Istanbul is by far the largest city in Turkey with 14 million people, or 18% of the total population. But as the country’s business and financial capital, Istanbul handles most of Turkey’s international and wholesale trade, as well as its service business, and so accounts for nearly a quarter of GDP and consumption expenditure. In view of the potential, an increasing number of Turkish and foreign retail operators are targeting Istanbul’s consumer market. Moreover, the targeted customers of most branded products are largely the high-income consumers living in Istanbul, instead of the entire country. Coupled with its status as the country’s economic capital and distribution centre, Istanbul, rather than Turkey as whole, seems to be the right market and possesses the appropriate purchasing power for Hong Kong products.

## **Avoid fierce competition by product and brand differentiation**

The influx of cheap Chinese imports has given Turkish consumers the perception that goods from Asia (perhaps with the exception of Japan and South Korea) are largely inexpensive items with compromised quality. Turkish consumers therefore make little distinction between goods from the Chinese mainland and those from Hong Kong. To avoid fierce (price) competition with indigenous mainland suppliers and to tap into the expanding higher-income group, Hong Kong companies should strengthen their offerings with additional features, functions and better design. More importantly, more time and effort could be required for Hong Kong companies to convince their Turkish counterparts of the value of paying for premium features of Hong Kong products.

## **Build a long-term relationship**

While Turkish businesspeople are friendly and accommodating, they are not used to hard-sell tactics and an over-passionate manner. Given the great importance attached to the place of family in the Muslim world, it is a courtesy to extend a friendly inquiry about the family of your Turkish business counterparts to kick off formal business negotiations. Although Turkish businesspeople are rather straightforward in negotiations, they do not like to feel rushed when conducting business and prefer to cultivate a long-term friendship along with business cooperation. In this context, e-mails and faxes are insufficient, but face-to-face meetings are essential. For new-to-the-market Hong Kong companies, visiting trade fairs, either in Hong Kong or Turkey, can be one of the most effective channels for meeting Turkish buyers.

# Appendix 1

Map of Turkey





## Appendix 2

### Population of major cities in Turkey

City	'000 people
Istanbul	14,108
Ankara (capital)	5,056
Izmir	4,048
Bursa	2,727
Adana	2,144
Antalya	2,142
Konya	2,066
Gaziantep	1,840
Şanlıurfa	1,807
Mersin	1,697
Kocaeli	1,667

Source: TurkStat, 2013

## Appendix 3

### Useful contacts and resources

#### Hong Kong

##### **Consulate General of Turkey**

Room 301, Sino Plaza, 255-257 Gloucester Road, Causeway Bay, Hong Kong

Tel: +852 2572 1331

Fax: +852 2572 0275

E-mail: [consulate.hongkong@mfa.gov.tr](mailto:consulate.hongkong@mfa.gov.tr)

Website: <http://hongkong.cg.mfa.gov.tr>

##### **(Office of the Commercial Attaché)**

Tel: +852 2893 6609

Fax: +852 2893 6620

E-mail: [hongkong@ekonomi.gov.tr](mailto:hongkong@ekonomi.gov.tr)

Website: [www.musavirlikler.gov.tr](http://www.musavirlikler.gov.tr)

#### Turkey

##### **Hong Kong Trade Development Council, Istanbul Office**

Teyyareci Suphi Sok. No 17/1, D5 Arnavutkoy 34345, Istanbul

Tel: +90 (212) 287 46 78

Fax: +90 (212) 287 01 20

E-mail: [istanbul.consultant@hktcdc.org](mailto:istanbul.consultant@hktcdc.org)

##### **Embassy of the People's Republic of China in the Republic of Turkey**

Golgeli Sokak No.34, 06700 Gaziosmanpaşa - Ankara

Tel: +90 (312) 446 24 94

E-mail: [chinaemb\\_tr@mfa.gov.cn](mailto:chinaemb_tr@mfa.gov.cn)

Website: [www.chinaembassy.org.tr](http://www.chinaembassy.org.tr)

**(Economic and Commercial Counsellor's Office)**

Tel: +90 (312) 437 71 07

Fax: +90 (312) 446 67 62

E-mail: [tr@mofcom.gov.cn](mailto:tr@mofcom.gov.cn)

Website: <http://tr2.mofcom.gov.cn>

**Selected government departments and agencies**

**Central Bank of the Republic of Turkey**

Istiklal Cad. 10 Ulus, 06100 Ankara

Tel: +90 (312) 507 50 00

E-mail: [iletisimbilgi@tcmb.gov.tr](mailto:iletisimbilgi@tcmb.gov.tr)

Website: [www.tcmb.gov.tr](http://www.tcmb.gov.tr)

**Turkish Statistical Institute (TurkStat)**

Yücepete Mah.Necatibey Cad. No:114 06100 Çankaya – Ankara

Tel: +90 (312) 410 04 10

E-mail: [bilgi@tuik.gov.tr](mailto:bilgi@tuik.gov.tr)

Website: [www.turkstat.gov.tr](http://www.turkstat.gov.tr)

**Undersecretariat of Customs**

T.C. Başbakanlık Gümrük Müsteşarlığı Hükümet Meydanı 06100 Ulus -  
Ankara

Tel: +90 (312) 306 80 00

E-mail: [bilgiedinme@gumruk.gov.tr](mailto:bilgiedinme@gumruk.gov.tr)

Website: [www.gumruk.gov.tr](http://www.gumruk.gov.tr)

**Undersecretariat of the Prime Ministry for Foreign Trade**

T.C Başbakanlık Dış Ticaret Müsteşarlığı İnönü Bulvarı, 36 Emek 06510 -  
Ankara

Tel: +90 (312) 204 75 00

E-mail: [ead@dtm.gov.tr](mailto:ead@dtm.gov.tr)

Website: [www.dtm.gov.tr](http://www.dtm.gov.tr)

## **Undersecretariat of the Prime Ministry for Treasury**

İnönü Bulvarı No:36 06510 Emek - Ankara

Tel: +90 (312) 204 60 00

E-mail: [bilgiedinme@hazine.gov.tr](mailto:bilgiedinme@hazine.gov.tr)

Website: [www.treasury.gov.tr](http://www.treasury.gov.tr)

## **Other useful contacts in Turkey**

### **Association of Automotive Parts and Components Manufacturers (TAYSAD)**

Ataşehir Boulevard, 42 A-C Islands, Gardenia Plaza, 7/1 Block,  
D.38 Kat.6 Ataşehir, Kadikoy, Istanbul

Tel: +90 (262) 658 98 18

Fax: +90 (262) 658 98 39

E-mail: [info@taysad.org.tr](mailto:info@taysad.org.tr)

Website: [www.taysad.org.tr](http://www.taysad.org.tr)

### **Association of Corrugated Cardboard Manufacturers (OMUD)**

Talatpaşa Bulv. No: 58 Kat: 6 No:11, Alsancak-35220, Izmir

Tel: +90 (216) 456 36 31

Fax: +90 (216) 456 36 33

E-mail: [omud@omud.org.tr](mailto:omud@omud.org.tr)

Website: [www.omud.org.tr](http://www.omud.org.tr)

### **Association of Machine Manufacturers**

Sokak No: 8/10 06680, Çankaya - Ankara

Tel: +90 (312) 468 37 49

Fax: +90 (312) 468 42 91

E-mail: [mib@mib.org.tr](mailto:mib@mib.org.tr)

Website: [www.mib.org.tr](http://www.mib.org.tr)

### **Automotive Manufacturers Association (OSD)**

Atilla Sokak No:10, Altunizade 34676, Istanbul

Tel: +90 (216) 318 29 94

Fax: +90 (216) 321 94 97

E-mail: [osd@osd.org.tr](mailto:osd@osd.org.tr)

Website: [www.osd.org.tr](http://www.osd.org.tr)

### **Banks Association of Turkey**

Nispetiye Cad. Akmerkez B3 Blok Kat: 13 34340 Etiler, Istanbul

Tel: +90 (212) 282 09 73

Fax: +90 (212) 282 09 46

Website: [www.tbb.org.tr](http://www.tbb.org.tr)

### **Electromechanical Industrialist Association (EMSAD)**

Ziyabey Cad. Dostlar Sitesi B Blok Kat:8 D:83, Balgat - Ankara

Tel: +90 (312) 284 40 32

Fax : +90 (312) 287 37 65

E-mail: [emsad@emsad.org.tr](mailto:emsad@emsad.org.tr)

Website: [www.emsad.org.tr](http://www.emsad.org.tr)

### **Export Promotion Centre (IGEME)**

Mithatpaşa Cad. No:60, 06420 Ankara

Tel: +90 (312) 417 22 23

Fax: +90 (312) 417 22 33

E-mail: [igeme@igeme.gov.tr](mailto:igeme@igeme.gov.tr)

Website: [www.igeme.gov.tr](http://www.igeme.gov.tr)

### **Footwear Industry Suppliers Association (AYSAD)**

Aymakoop Industrial Estate Aymakoop Trade Center Floor: 5

D:3 Ikitelli-Istanbul

Tel: +90 (212) 549 36 12

Fax: +90 (212) 549 36 22

E-mail: [info@aysad.org](mailto:info@aysad.org)

Website: [www.aysad.org](http://www.aysad.org)

**Foreign Economic Relations Board (DEIK)**

TOBB Plaza Talatpařa Cad. No:3 Kat:5, 34394 Gltepe, Levent İstanbul

Tel: +90 (212) 339 50 00

Fax: +90 (212) 270 30 92

E-mail: [info@deik.org.tr](mailto:info@deik.org.tr)

Website: [www.deik.org.tr](http://www.deik.org.tr)

**Foreign Trade Association of Turkey (TURKTRADE)**

Kore Őehitleri Cad., Arçıl Apt. No: 37/4 D.4, 34394 Zincirlikuyu, İstanbul

Tel: +90 (212) 272 69 81

Fax: +90 (212) 275 51 36

E-mail: [infoturk@turktrade.org.tr](mailto:infoturk@turktrade.org.tr)

Website: [www.turktrade.org.tr](http://www.turktrade.org.tr)

**İstanbul Chamber of Commerce**

Resadiye Cad., 34112, Eminon, İstanbul

Tel: +90 (212) 444 04 86

E-mail: [info@us-istanbul.com](mailto:info@us-istanbul.com)

Website: [www.us-istanbul.com/](http://www.us-istanbul.com/)

**İstanbul Chamber of Jewellery**

Piyerloti Cad. Saka İř hanı No: 11-13 Kat:3 Çemberlitař - İstanbul

Tel: +90 (212) 516 27 57

Fax: +90 (212) 516 12 78

E-mail: [info@iko.org.tr](mailto:info@iko.org.tr)

Website: [www.iko.org.tr](http://www.iko.org.tr)

**General Secretariat of İstanbul Textile and Apparel Exporter Associations (ITKIB)**

Cobancesme Mevkii, Sanayi Cad. Dis Tic. Kompleksi B-Blok

Yenibosna, Bahçelievler, İstanbul

Tel: +90 (212) 454 02 00

Fax: +90 (212) 454 02 01

E-mail: [info@itkib.org.tr](mailto:info@itkib.org.tr)

Website: [www.itkib.org.tr](http://www.itkib.org.tr)

**Lighting Luminaires Manufacturers Association (AGID)**

Okcumusa Cad. Tezgul Ishani No: 2 Kat:7, Karakoy - Istanbul

Tel: +90 (212) 238 65 12

Fax: +90 (212) 238 65 13

E-mail: [agid@agid.org.tr](mailto:agid@agid.org.tr)

Website: [www.agid.org.tr](http://www.agid.org.tr)

**Machine Tool Businessmen's Association (TIAD)**

Abdi İpekçi Cad.Özel İdare İş Mrk.No:150 Kat: 3 B.No: 340-341,

Kat: 4 B.No: 442 Bayrampaşa - Istanbul

Tel: +90 (212) 565 53 54

Fax: +90 (212) 501 77 31

E-mail: [info@tiad.org](mailto:info@tiad.org)

Website: [www.tiad.org](http://www.tiad.org)

**Packaging Manufacturers Association (ASD)**

Kosuyolu Katip Salih Sokak No. 13, Kadıkoy - Istanbul

Tel: +90 (216) 545 49 48

Fax: +90 (216) 545 49 47

E-mail: [asd@ambalaj.org.tr](mailto:asd@ambalaj.org.tr)

Website: [www.ambalaj.org.tr/](http://www.ambalaj.org.tr/)

**Turkish Ceramic Federation**

Büyükdere Cad. No: 85, Stad Han, K: 4, Mecidiyeköy - Istanbul

Tel: +90 (212) 266 52 54

Fax: +90 (212) 266 51 23

E-mail: [info@turkishceramics.com](mailto:info@turkishceramics.com)

Website: [www.turkishceramics.com](http://www.turkishceramics.com)

### **Turkish Clothing Manufacturers Association (TGSD)**

Mehmet Akif Cad. 1. Sok., Haydar Akın İş Mrk.-2,  
No:23 K:5 D:19, Şirinevler – Bahçelievler, İstanbul  
Tel: +90 (212) 639 76 56  
Fax: +90 (212) 451 61 13  
E-mail: [tgsd@tgsd.org.tr](mailto:tgsd@tgsd.org.tr)  
Website: [www.tgsd.org.tr](http://www.tgsd.org.tr)

### **Turkish Association of Electronics and Information Industries (TESID)**

Bagdat Cad. No: 439/4, 34740 Suadiye İstanbul  
Tel: +90 (216) 463 27 00  
Fax: +90 (216) 463 38 36  
E-mail: [info@tesid.org.tr](mailto:info@tesid.org.tr)  
Website: [www.tesid.org.tr](http://www.tesid.org.tr)

### **Turkish Plastics Industry Association (PAGEV)**

Halkalı Cad. No: 132/1 Tez-İş İş Merkezi Kat:4, Sefaköy - İstanbul  
Tel: +90 (212) 425 13 13  
Fax: +90 (212) 624 49 26  
E-mail: [pagev@pagev.org.tr](mailto:pagev@pagev.org.tr)  
Website: [www.pagev.org.tr](http://www.pagev.org.tr)

### **Turkish Small and Medium Information Network (KOBİNET )**

Yardım Masası, Abdülhakhamit Cad. No: 866, Mamak - Ankara  
Tel: +90 (312) 595 27 62  
Fax: +90 (312) 368 07 15  
E-mail: [bilgi@kobinet.org.tr](mailto:bilgi@kobinet.org.tr)  
Website: [www.kobinet.org.tr](http://www.kobinet.org.tr)

### **Turkish Standards Institution (TSE)**

Tel: +90 (312) 416 62 00 (TSE Ankara Headquarter)  
+90 (262) 653 07 51 (TSE Quality Campus)  
E-mail: [iovut@tse.org.tr](mailto:iovut@tse.org.tr)  
Website: [www.tse.org.tr](http://www.tse.org.tr)