

**TURKISH ORNAMENTAL PLANTS INDUSTRY  
REPORT 2016**



December, 2016

Ornamental Plants and Products Exporters Association

**I. PRODUCTION**

Turkey is a country that is optimally situated for ornamental plant production. It has many advantages for a prospering horticultural sector, like having a favorable climate for production of cut flowers, geographical proximity to the main markets, production in modern greenhouses and cheap and skilled labor.

Recent figures estimate ornamental plant production area in Turkey to be about 46.197 da. In 2015. Outdoor and indoor plants are produced on 73 % of this total production area. The share of cut flowers is 26%, and flower bulbs is 1%.

**Table: Ornamental Plants Production In Turkey**

	2015 VOLUME (UNIT)	2015 AREA (da)	SHARE (%)
<b>CUT FLOWERS</b>	1.036.147.373	11.826	26
<b>INDOOR PLANTS</b>	40.810.719	1.465	3
<b>OUTDOOR PLANTS</b>	451.142.538	32.293	70
<b>FLOWER BULBS</b>	27.200.330	613	1
<b>TOTAL</b>	1.555.300.960	46.197	100

Source: \*\*TUIK

Major production cities in Turkey are İzmir, Sakarya, Antalya, Yalova, Bursa and İstanbul. Outdoor plants are produced in Sakarya, Yalova and İstanbul region. Cut flowers are produced in different provinces like Antalya, İzmir and Isparta.

**Ornamental Plants Production Areas in Turkey (In da.)**

CITY	2015
<b>İZMİR</b>	14.347
<b>SAKARYA</b>	10.512
<b>ANTALYA</b>	5.539
<b>YALOVA</b>	2.875
<b>BURSA</b>	2.839
<b>İSTANBUL</b>	340
<b>OTHER</b>	9.746
<b>TOTAL</b>	<b>46.198</b>

**II. DOMESTIC MARKET**

The cut flower industry in Turkey has mainly grown through the increase of the number of small growers. Land, labor and other inputs are relatively cheaper in Turkey than in other countries.

In Turkey, there are two cooperatives for the marketing of cut flowers in the domestic market. They are S.S. Flora Flower Production and Marketing Cooperative and S.S. Çiçek Production and Marketing Cooperative. Both cooperatives are mainly located in İstanbul and have branch offices in different cities in İzmir, Antalya and etc. Producers are members of the cooperatives and market their products through them.

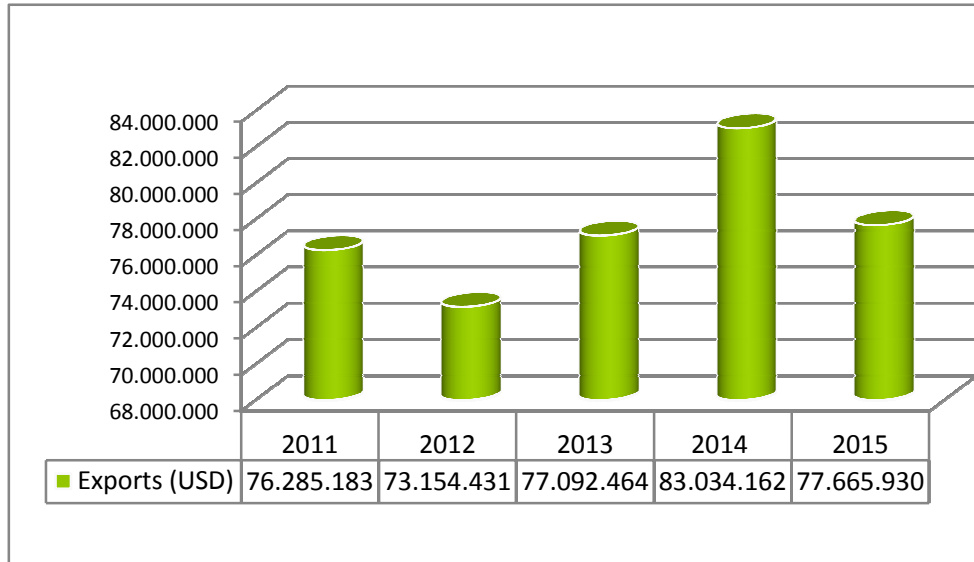
The estimated value of per capita consumption for cut flowers in Turkey is 5 Euros. Cut flower industry in Turkey has an important role by supplying high added value and employment. In Turkey, approximately 25,000 people are directly employed in cut-flower export. Including domestic market, more than 300.000 people are indirectly employed in the industry.

Cut flower industry is playing an important role in providing more cohesion to the social structure in the country, through employment of unskilled workers, and by providing them with accomodation and education opportunities.

**III. EXPORTS**

Flower exports from Turkey began 25 years ago, and the sector has grown steadily since then. Ornamental plant exports increased to \$ 78 million in 2015.

**Figure: Ornamental Plant Export of Turkey**

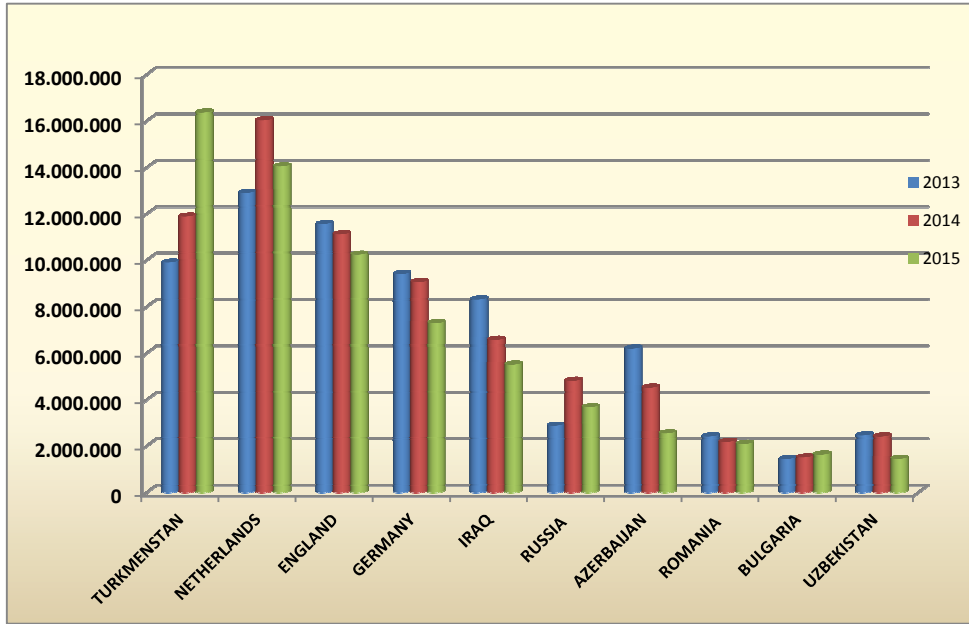


Turkish exporters are taking good advantage of the geographical location of Turkey and of the proximity to the large consumption markets in Europe and elsewhere. Turkish flowers are exported to nearly 65 countries. The most important export markets are the Turkmenistan, Netherlands, United Kingdom, Germany and Iraq.

**Table: Ornamental Plant Exports From Turkey (2015)**

COUNTRY	2014		2015		CHANGE (%)	
	Volume (units)	Value (USD)	Volume (units)	Value (USD)	Volume	Value
TURKMENSTAN	2.252.565	11.880.653	3.378.709	16.363.130	50	38
HOLLAND	146.524.590	16.027.404	147.339.955	14.047.300	1	-12
UNITED KINGDOM	85.951.079	11.116.551	88.052.826	10.237.387	2	-8
GERMANY	60.148.715	9.054.054	60.315.946	7.291.459	0	-19
IRAQ	2.704.603	6.575.720	2.308.430	5.513.383	-15	-16
RUSSIA	34.605.268	4.814.170	42.049.780	3.677.617	22	-24
AZERBAIJAN	15.366.762	4.519.779	4.835.287	2.540.897	-69	-44
ROMANIA	37.738.323	2.172.879	30.287.435	2.084.679	-20	-4
BULGARIA	44.208.564	1.508.178	41.245.553	1.631.897	-7	8
UZBEKISTAN	2.204.370	2.407.541	1.959.041	1.444.923	-11	-40
UKRAINE	38.532.070	3.957.973	23.636.455	1.353.395	-39	-66
USA	3.630.953	821.991	3.299.765	1.349.957	-9	64
GEORGIA	1.625.173	604.238	2.764.847	1.231.150	70	104
İTALYA	226.458	334.956	282.495	1.217.310	25	263
CYPRUS	3.278.540	963.903	2.985.662	1.146.956	-9	19
HUNGARY	5.812.172	615.903	9.268.097	610.651	59	-1
GREECE	8.172.100	499.683	7.050.965	601.971	-14	20
AUSTURIA	5.782.599	615.536	4.638.163	585.769	-20	-5
POLAND	773.133	180.302	5.778.661	561.788	647	212
KAZAKHSTAN	826.400	735.583	940.940	550.187	14	-25
OTHERS	12.936.129	3.627.167	13.053.342	3.624.124	1	0
<b>TOTAL</b>	<b>513.300.566</b>	<b>83.034.162</b>	<b>495.472.353</b>	<b>77.665.930</b>	<b>-3</b>	<b>-6</b>

**Table: Ornamental Plant Exports From Turkey (2015)**

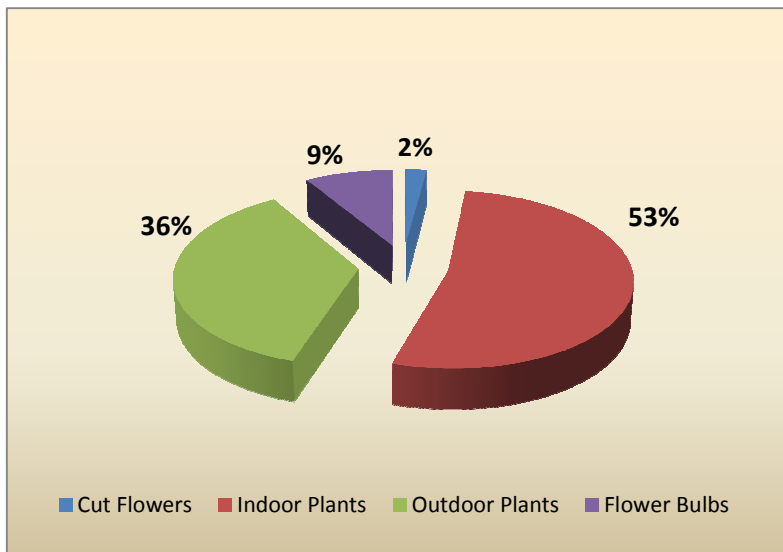


Live Plants, including outdoor and indoor Plants account for 53% of our exports, whereas cut flowers account 36%. The production in the highland area allows to export flowers year round to the markets.

**Table: Ornamental Plant Export From Turkey (2015)**

	Volume (units)	Value (USD)	SHARE (%)
BULBS	25.128.642	1.574.076	2
LIVE PLANTS	106.978.524	41.029.423	53
CUT FLOWERS	353.895.615	28.318.853	36
MOSSES AND TREE BRANCHES	9.469.573	6.743.579	9
<b>TOTAL</b>	<b>495.472.353</b>	<b>77.665.930</b>	<b>100</b>

**Table: Ornamental Plant Export From Turkey (2015)**



Turkey has logistical advantages in the sector. Air and road transport is commonly used in exports. Road transport is cheap and it takes a short time to main destinations in Europe like the Netherlands, UK and Germany.

**IV. IMPORTS**

Import of ornamental plants is \$92 million in 2014. 85% of imported ornamental plants is outdoor and indoor plants. Most important countries in import are Italy, Holland and Germany.

**Table: Ornamental Plant Imports of Turkey (VALUE :USD)**

VALUE	2014	2015	2016 (9 mth)
BULBS	7.381.235	9.994.618	4.233.897
LIVE PLANTS	78.447.489	65.803.719	55.196.914
CUT FLOWERS	6.342.302	4.883.293	3.396.583
MOSSES AND TREE BRANCHES	719.114	703.508	545.171
<b>TOTAL</b>	<b>92.890.140</b>	<b>81.385.138</b>	<b>63.372.565</b>

**Table: Ornamental Plant Imports of Turkey (VALUE :USD)**

