



Botschaft
der Bundesrepublik Deutschland
Ankara



Organization of German Agricultural Sector and Agricultural Policy

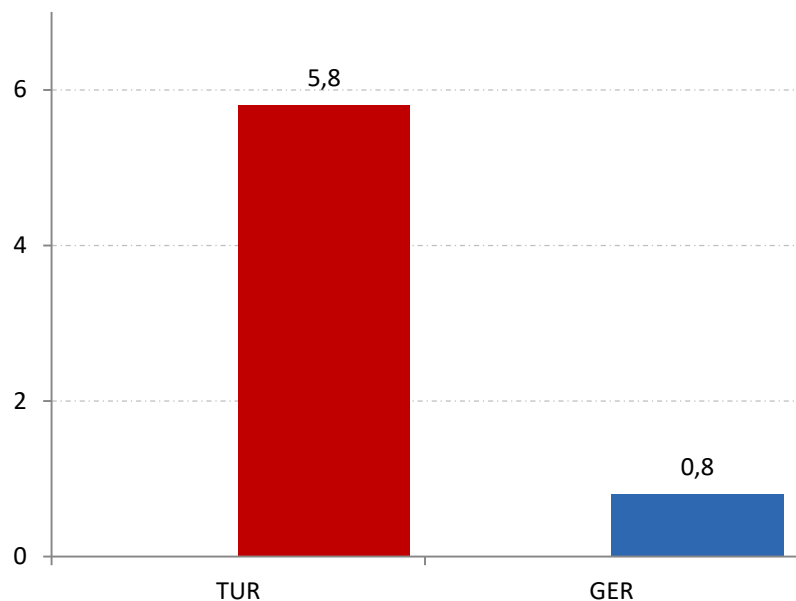
3. International Food Conference, Adana, November 5th 2019

Dr. Peter Bohlen, Agricultural Counsellor

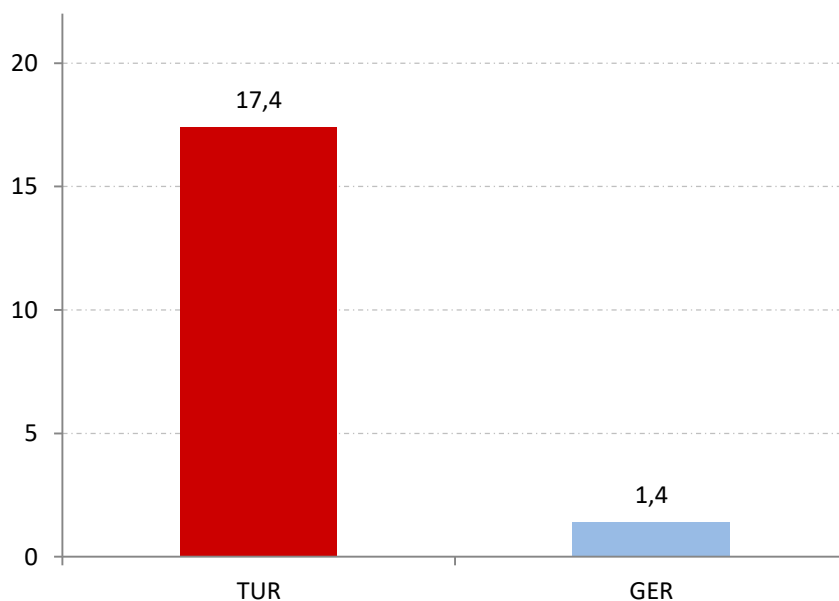


Importance of Turkish Agriculture in comparison with Germany (2018)

Share of Agriculture in GDP (%)



Share of Agricultural Employment (%)

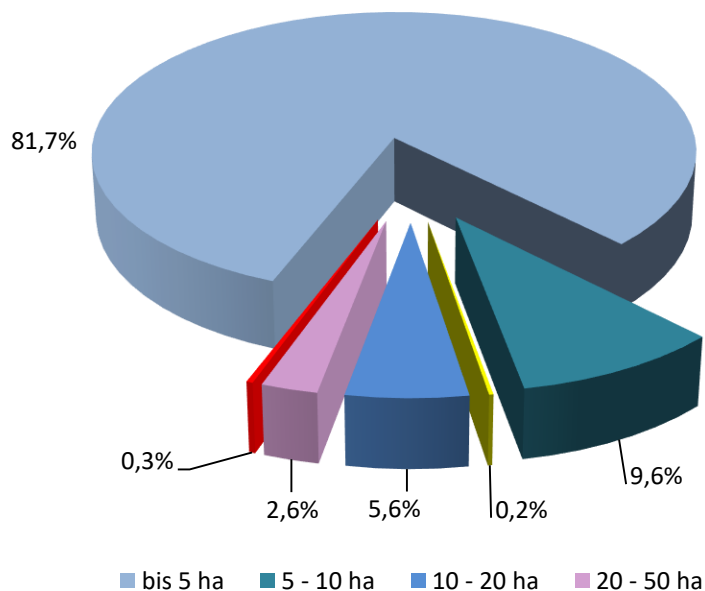


Conclusion: Turkish Agricultural Sector is **much more significant** for Economy than in Germany.

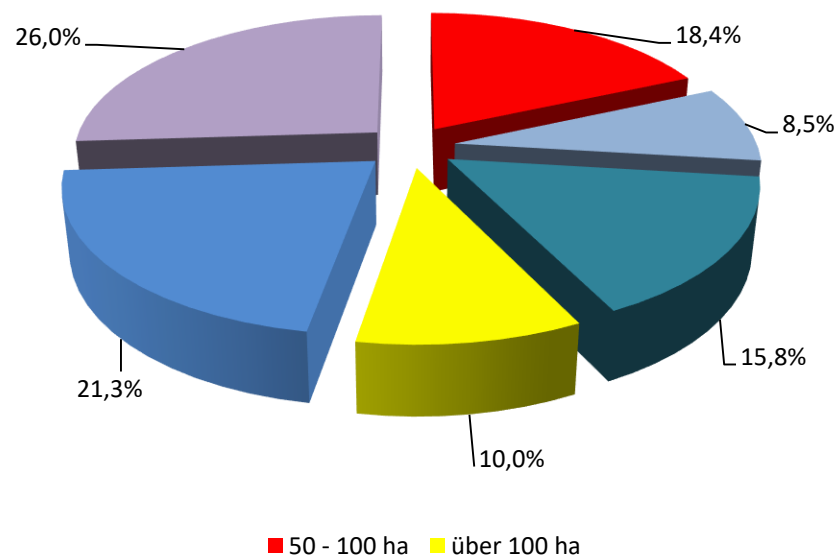


Number of farms by area size

Turkey (2001)
5.808.316 farms



Germany (2017)
260.000 farms



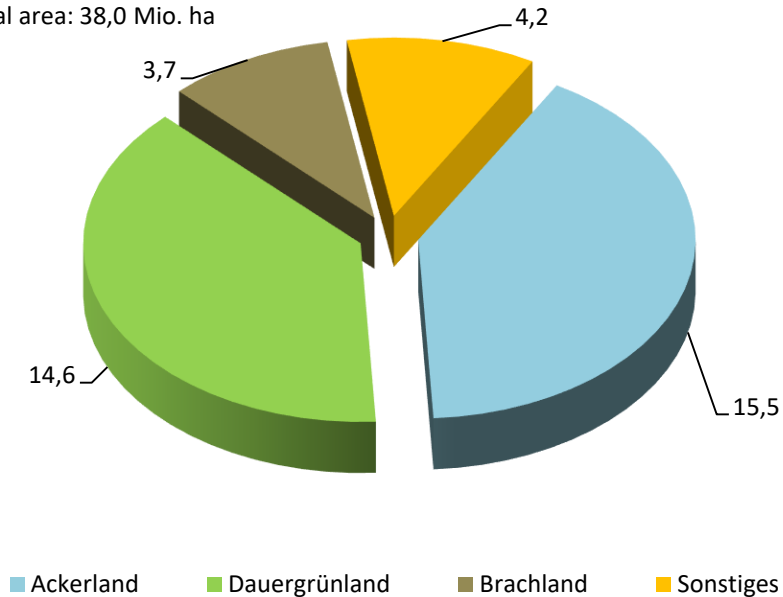
Conclusion: Average size of farms in GER about **10 times as large** as in TUR.

Agricultural Land (2017)

(Mio. ha)

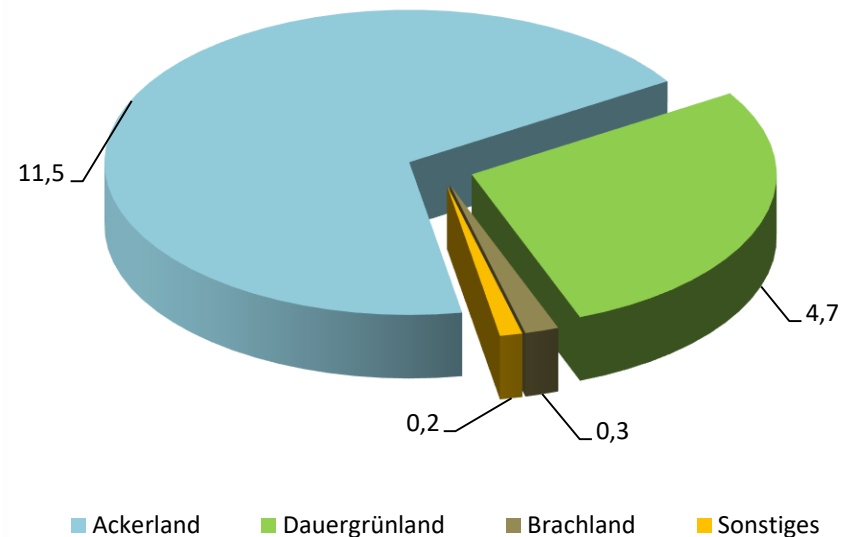
Turkey

Total area: 38,0 Mio. ha



Germany

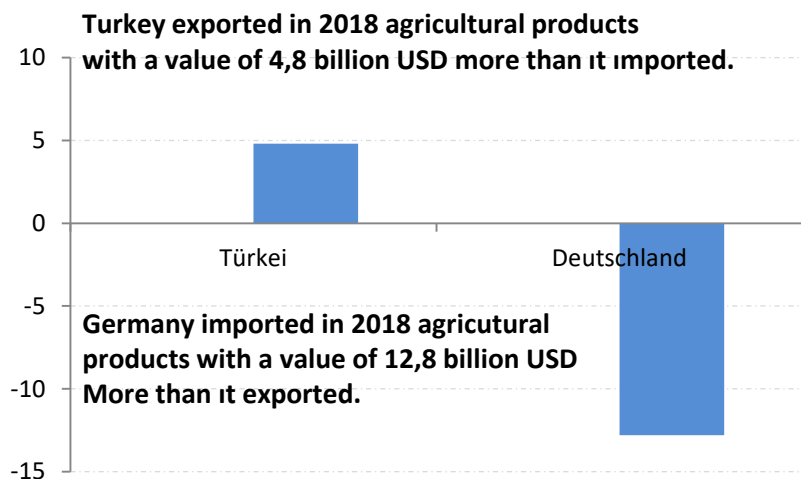
Total area: 16,7 Mio. ha



Conclusion: Mainly due to climate differences more intensive use of areas in DEU (higher share of arable land, smaller fallow land); however in TUR fruit and horticulture more significant.



Agricultural Trade



Main export products

Turkey

- Fruits and nuts
- Preparations of vegetables
- Preparations of cereals

Germany

- Milk products
- Meat
- Processed agric. products

Main import products

- Cereals
- Live animals
- Oilseeds

- Fruits and vegetables
- Fish
- Oilseeds

Bilateral agricultural exports from Turkey to Germany amounted to approx. EUR 1.3 billion and those from Germany to Turkey about 0.4 billion EUR in 2018.

Conclusion: **Positive trade balance** in agriculture for TUR.

Agricultural Administration

▶ Federal Ministry

- Federal Research Institutes (see later)
- Federal Office of Consumer Protection and Food Safety
- **Federal Office for Agriculture and Food (Implementing authority, e. g. Federal Program Rural Development; Competence Center Rural Development)**
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▶ State Ministries

- State Authorities
- Chambers of Agriculture

Agricultural Policy in Germany

- ▶ Strategies and Programs
- ▶ Strategies (e. g.)
 - Agricultural Strategy
 - Livestock Strategy
 - National Sustainability Strategy
- ▶ Programs (e. g.)
 - Innovation Promotion Program
 - Program organic farming
 - Program renewable resources
 - Program improvement of energy efficiency
 - Program cultivation protein crops
 - Program Digitization
 - Federal Program Rural Development

Agricultural Statistics

- ▶ Special Harvesting Determination
- ▶ Supply Balance Sheets for all relevant products
- ▶ Income Calculations
 - Turnover (Yield, Quality, Price)
 - Costs (variable and fix; all inputs: quantity and price)
 - Testfarms
- ▶ Committee for Engineering and Construction in Agriculture (Economic key figures for Agriculture, Technology Transfer)
- ▶ **Conclusion: Comprehensive agricultural statistics a prerequisite for in-depth analysis!**

Agricultural Research in Germany

- ▶ German Agricultural Research Alliance
 - 6 Federal Institutes
 - 16 State Institutes
 - 15 Universities
 - 7 Colleges
 - 18 Other Research Institutes
- ▶ **Cooperation: All Institutes are interlinked, share their research, have meetings together, where they exchange their knowledge. Also exchange of information with industry.**

Agricultural Research in Germany

- ▶ Research Disciplines:

- Nutrition and food
 - Agriculture
 - Horticulture
 - Viniculture
 - Forestry and wood industry
 - Fishing
 - Veterinary Medicine
 - Parts of the environmental and geosciences

- ▶ They cover **all aspects of Agricultural Research**

Agricultural Research in Germany

- ▶ Federal Research Institutes:
 - Federal Institute for Risk assessment (healthy food)
 - Julius Kühn-Institute (Crops)
 - Friedrich-Loeffler-Institute (Animal Health)
 - Thünen-Institute (i. a. Markets, Business Management, Food)
 - Max Rubner-Institute (Rural Areas, Forest, Fishery)
 - German Weather Service, Center for Agrometeorological Research
- ▶ **Steering research by allocating funds to specific research areas, e. g. Innovation Promotion Program**

Consulting and training in Germany

Consulting/Extension/Advice

- ▶ State advice
 - Chambers of Agriculture
 - Agricultural offices
- ▶ Private Extension
 - consulting rings
 - cooperatives
 - Private dealers
- ▶ agribusiness
 - Freelance consultants (have to be paid by farmers)
- ▶ **Conclusion: Extensive consulting services essential for efficient agriculture!**

Agricultural Training

- ▶ Agricultural Chambers and Offices have
 - **Agricultural schools**
 - Dual system, apprenticeship training in a recognized farm (Farmer with special exams for trainers)
- ▶ **DEULA**, training in practical courses, for apprentices and farmers
- ▶ Project in Konya (“Train the Trainer”)
- ▶ **Good education and training are also essential for efficient agriculture!**

Cooperatives

- ▶ Cooperative idea developed inter alia in DEU.
- ▶ Merger of many farmers to bundle offer.
- ▶ Better prices, lower costs, access to intermediate goods and additional services.
- ▶ 50% of total agricultural turnover is generated in cooperatives.
- ▶ **Through their diverse services, the private agricultural trade can not help but offer these services as well. Cooperatives thus determine German agriculture.**
- ▶ **“Together we are strong”, but without the state!**

Network of Food Safety

Assesment

Legislation

Management

**EU
Level**



FVO

**Directorate of GD
Sante**

Health and Food Audits
and Analysis

**Federal
Level**



Federal Institute
for Risk Assesment

**State Inspection
Offices**



Federal Ministry
of Food
and Agriculture



Federal Office of
Consumer Protection
and Food Safety

**State
Level**

**State Inspection
Offices**

State Ministries

**Federal State
Working Groups**

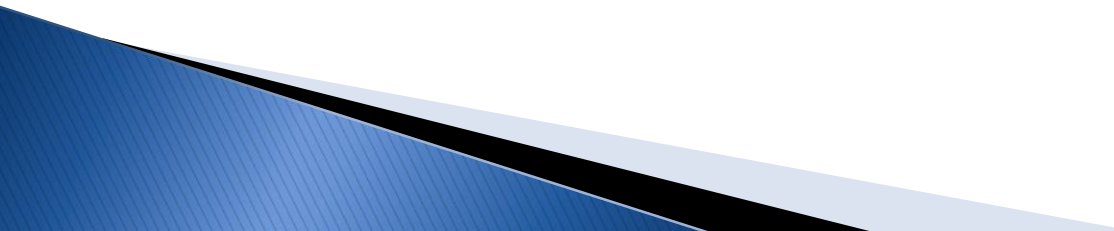
**Official Monitoring of the 16 Federal States in 402 Regions
and independent cities**

**Company
Level**

Self control of the Food Industry and the Food Retail Sector

Food Safety

- ▶ Review / Legislation / Management
- ▶ Levels: EU, Federal, States, Companies
- ▶ Essential: Food inspectors can inspect all grocery stores and restaurants without notice (sampling)
- ▶ A previous complaint / notification / notice is not necessary
- ▶ Important is self-control of food chains. They are strongly observed by NGOs in DEU, which creates pressure
- ▶ **Conclusion: To achieve food safety only through independent state control. Self controls by food chains also important!**

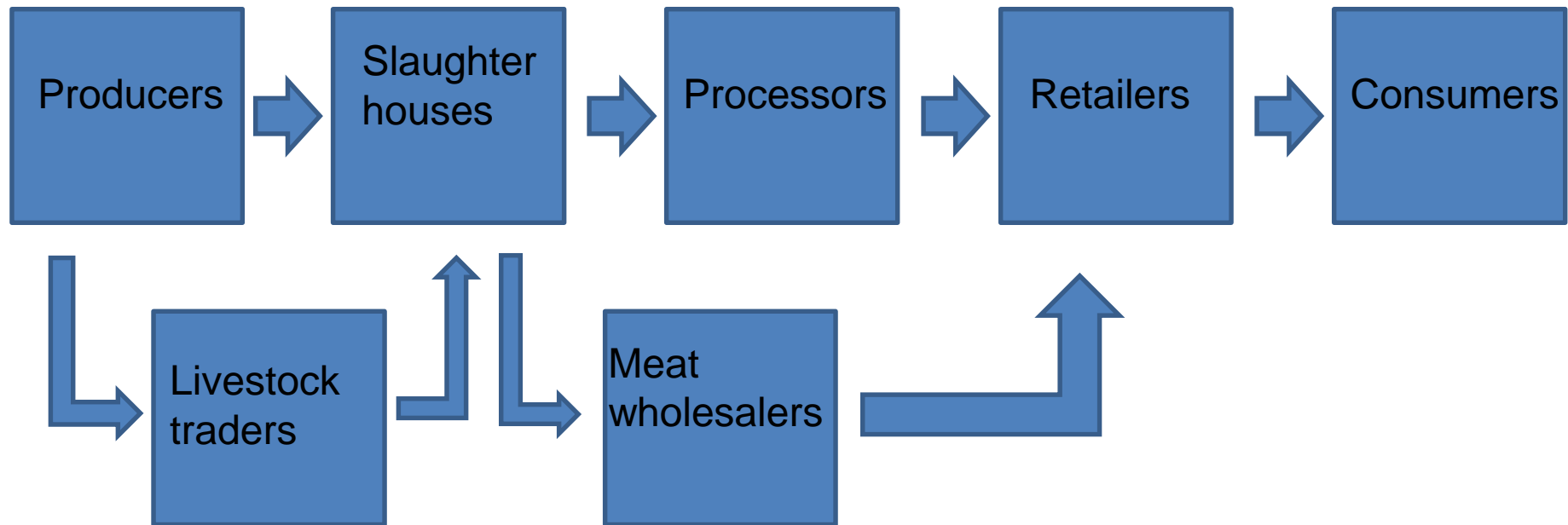
- ▶ Thank you very much for your attention
 - ▶ Questions now?
 - ▶ Or under: La-1@anka.diplo.de
- 

Additional Information

Feedback on Turkey's agricultural Policy

- ▶ Production of **red meat** in TUR (example)
- ▶ Efficiency of production could be improved (import requirement)
- ▶ Analysis of the entire value chain in all details
 - ▶ = Breeding (herdbook, breed)
 - ▶ = Keeping
 - ▶ = Feeding
 - ▶ = Marketing
 - ▶ = Slaughterhouses
 - ▶ = Processors
 - ▶ = Marketing to Retail
 - ▶ = Retail sale
- ▶ Program / strategy to increase the efficiency of red meat production
- ▶ **Monitoring** of the program, if necessary, **adaptation** of the program in order to successively increase the production
- ▶ **Analysis of value chains!**

Meat chain in Germany



Source: ZMP



Efficiency of TUR Agriculture

	Cereals	Wheat	Corn	Rapeseed	Potatoes	Sugar	Meat per head of stock (kg)	Milk yield per cow (l)
TUR	3,25	2,8	9,23	3,63	33,59	6,23	61,0	3143,0
DEU	7,26	7,67	10,3	3,28	45,41	7,62	97,0	7660,0

Conclusion: TUR agriculture often **less intense**. However: Partly very efficient in fruit and vegetable production as well as irrigated areas; 31% of the areas irrigated in TUR, 7% in DEU.



Comparison between agricultural producer prices in 2018

	Turkey	Germany
<u>Plant products (€/t)</u>		
Soft Wheat for Breadmaking	168	171
Grain Maize	149	165
Potatoes	181	209
Rapeseed	335	345
<u>Animal Products (€/kg)</u>		
Cow milk	0,26	0,35
Beef	5,04	3,82
Lamb	5,58	5,30
Eggs	1,07	1,52

Cooperatives

A Co-operative is...

- an enterprise
- natural and/or legal persons join voluntarily, because they
 - share at least one common interest and
 - **to achieve their goals together better than alone.**



Entrepreneurial Activity for the Members

Not shareholder value maximization

but

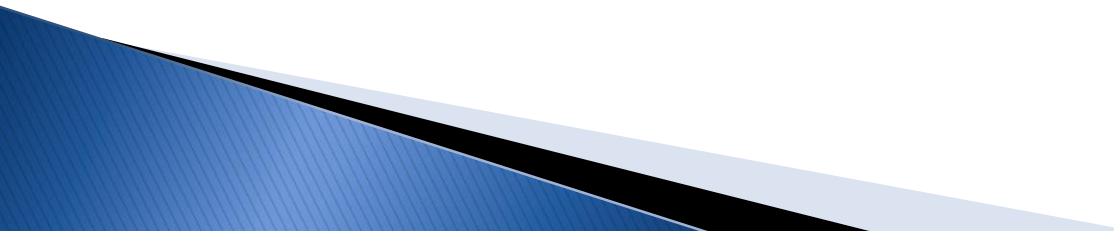
Membership value maximization through:

- ➔ better prices
- ➔ lower costs
- ➔ access to inputs
- ➔ (additional) services

„Together we are strong“.

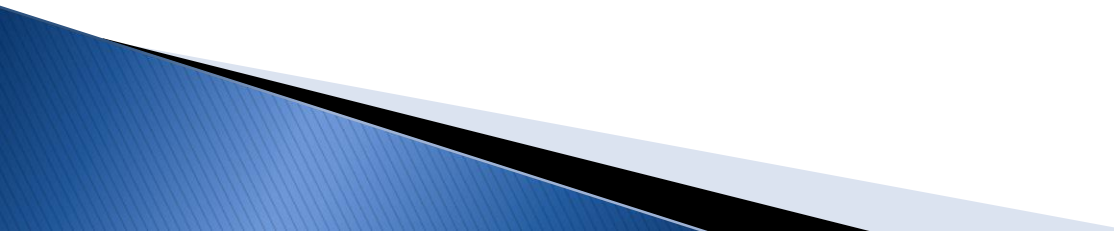


Agricultural Co-operatives in Germany (2017)

- Number of Co-operatives: 2.104
 - Members: 364.000 (without credit Co-operatives)
 - Turnover: 63 billion €
 - 50 % of total turnover in agriculture by Co-operatives.
- 

Services of Coops for a better Market Position

Examples:

- ▶ Better access to information (Extension for production methods, new products, plant protection advice, renewable resources)
 - ▶ Better access to machinery
 - ▶ Better access to inputs (fuel, fertilizer, plant protection).
- 


Structural Agricultural Changes in Germany

	No. Of farms	Average farm size	No. of coops
1950 Western-Germany	1,600,000	8 ha	23,750
2017 East & West Germany	268,000	62 ha	2,104

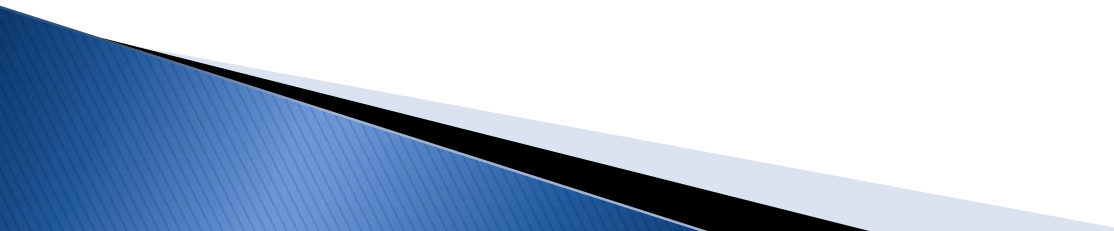
Agricultural co-operatives respond actively to structural changes:

- **Mergers**
- **Close-down of co-operatives combined with transfer of business to other co-operative enterprises.**


Agricultural social policy

- ▶ Agricultural health insurance (comprehensive protection for farmers)
 - ▶ Agricultural care insurance (for farmers, who need to be cared for)
 - ▶ Agricultural accident insurance
 - ▶ Old-age insurance for farmers (pension)
 - ▶ Social insurance institutions belong to the agricultural administration
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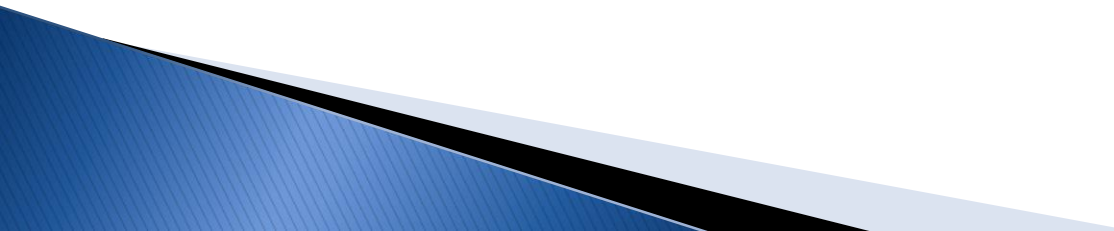
Grass and Pasture Management

- ▶ In DEU feed consumption about 80 million tons
 - ▶ 52% green and dried fodder (hay)
 - ▶ 25% compound feed
 - ▶ 23% farm-owned grain and bought-in feed materials
 - ▶ Silage (green fodder) predominantly as maize and grass silage.
- 

Land Consolidation

- ▶ Land consolidation = governmental instrument for the general improvement of the agricultural structure
 - ▶ Land Consolidation Act
 - ▶ Voluntary or ordered pooling of land and exchange of land
 - ▶ Aim: **Make a few big ones out of many small parcels to improve agricultural structure**
- 

Agri Tourism

- ▶ Income combinations for agriculture
 - ▶ Direct marketing to consumers
 - ▶ Vacation on the farms
 - ▶ Farm restaurants
 - ▶ Learnfarms
 - ▶ Several legs for the operation and thereby reducing risk
 - ▶ Use of income opportunities
 - ▶ In many cases leads to **better involvement of women** in the business
- 

Good Agricultural Practices

- ▶ Sustainable securing of soil fertility through low-emission production processes and the highest possible raw material efficiency
- ▶ Binding standards for areas in good agricultural and environmental condition
 - ▶ = Minimum soil cover
 - ▶ = Erosion control
 - ▶ = Preservation of the organic substance
 - ▶ == Prohibition of burning off stubble fields
 - ▶ == Obtaining permanent grassland
 - ▶ = Fertilizer legislation (reduction of nutrient input)
 - ▶ = Plant protection legislation (integrated pest management)
 - ▶ = Soil Survey
- ▶ **New indicator for the protection of the soil within the framework of the German Sustainability Strategy**

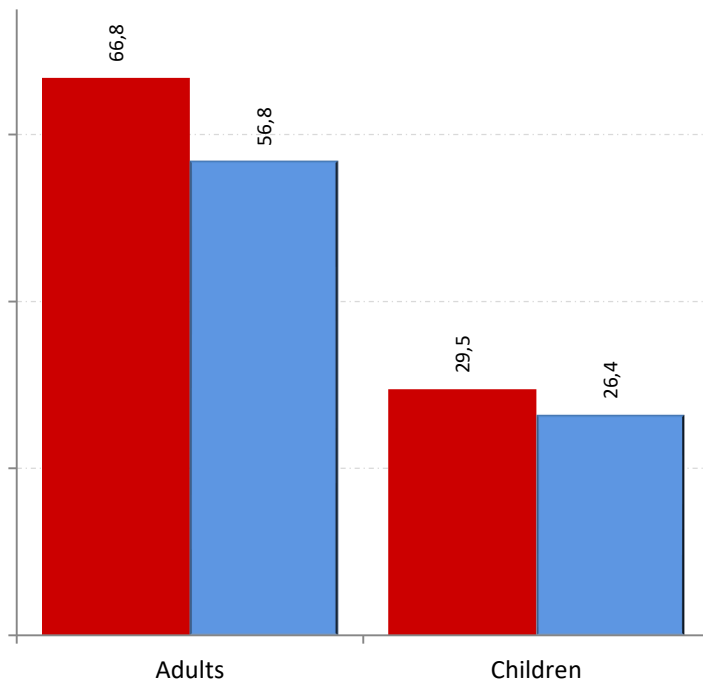
Federal Program Rural Development

- ▶ Objective: To ensure the future viability of rural areas
- ▶ Activities:
 - ▶ - Model and demonstration activities
 - ▶ - Model Regions
 - ▶ - Competitions (with awards)
 - ▶ - Dialogue formats to promote new ideas
 - ▶ - Knowledge transfer and promotion of research projects
- ▶ Since 2015, more than 1,000 projects funded
- ▶ **The promotion of rural areas should include not only agriculture, but also the rest of the economy and social services**

Natural Nutrition and Healthy Life; German Perspective and Measures in Germany

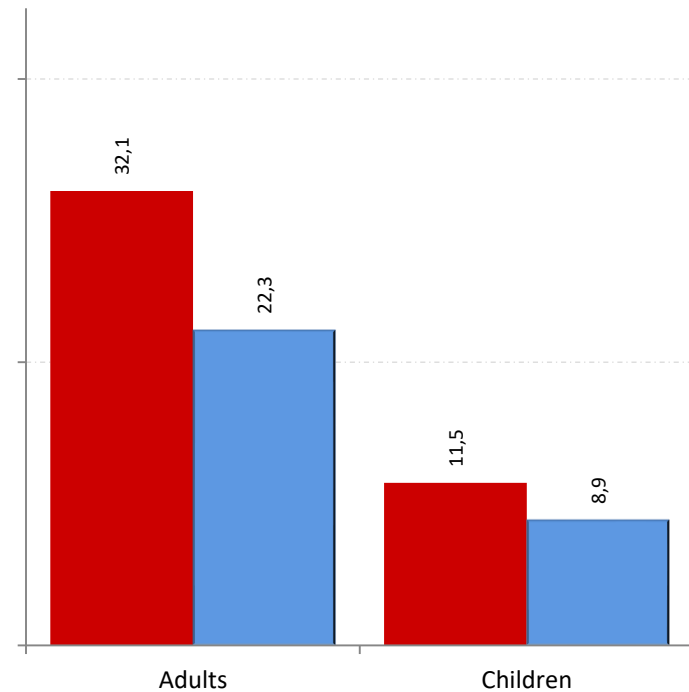
Prevalence of overweight and obesity in Turkey and Germany 2016 (%)

Overweight (BMI >25)



■ TUR ■ GER

Obesity (BMI >30)



■ TUR ■ DEU

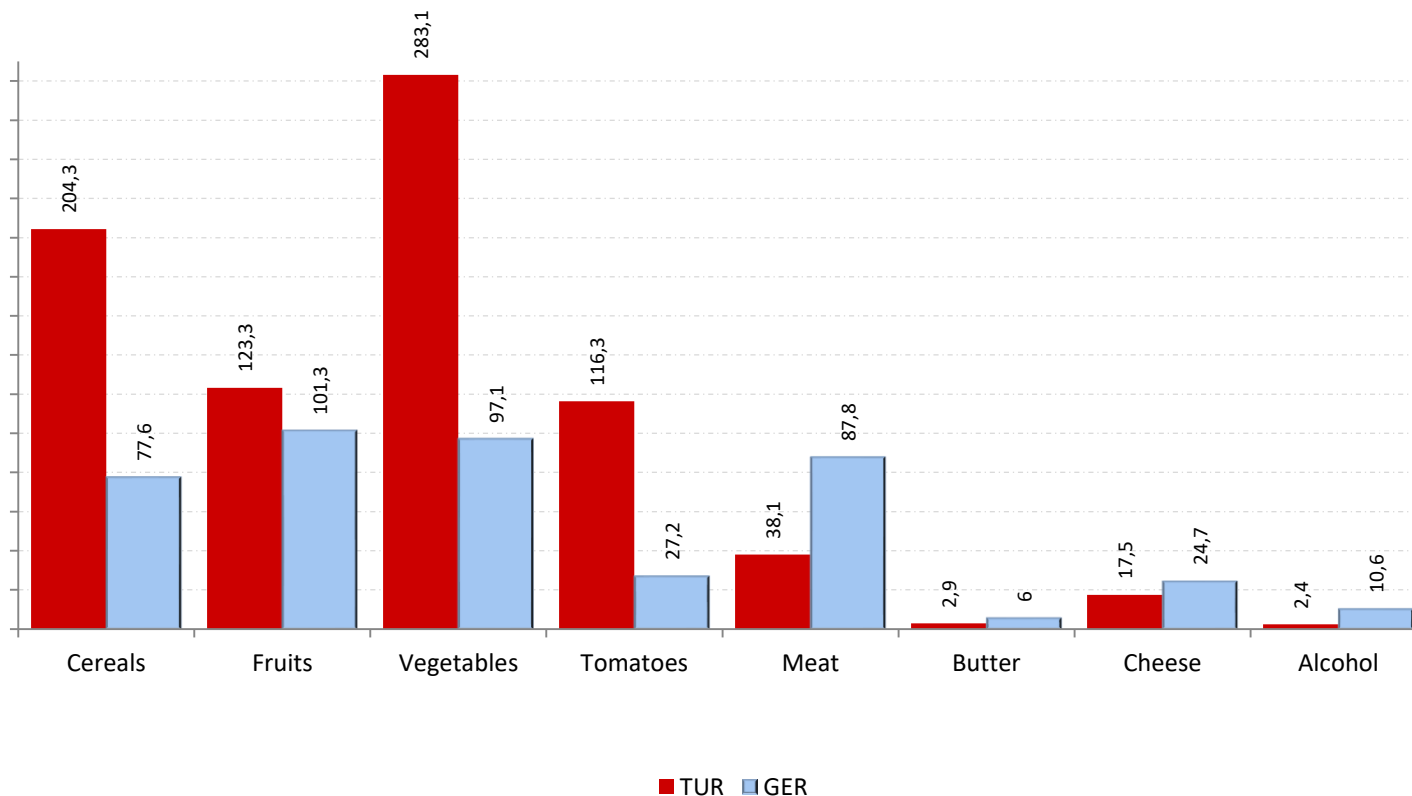
10 Guidelines of the German Nutrition Society for a wholesome diet

- ▶ 1. Enjoy food diversity
- ▶ 2. Vegetables and fruit – take „5 a day“
- ▶ 3. Favor whole-grain foods
- ▶ 4. Complete the choice with animal-based foods
- ▶ 5. Choose health-promoting fats
- ▶ 6. Reduce sugar and salt intake
- ▶ 7. Water is the best choice
- ▶ 8. Prepare carefully cooked dishes
- ▶ 9. Mindful eating and enjoying
- ▶ 10. Watch your weight and stay active



Consumption of agricultural products/food 2017/2018

Kg / Person



German Sustainable Development Strategy

- ▶ Sustainable in the sense of Environmental, Resources and Climate Protection

- ▶ Measures concerning Sustainable Nutrition and Healthy Life are integrated into the German Sustainable Development Strategy
 - National Action Plan: „In Form“ – Germany’s initiative for healthy diet and more exercise.
 - Federal Programme for ecological and other forms of sustainable farming.
 - Regional diets (short ways from the producer to the consumer).
 - Initiative to reduce sugar, fats and salt in ready-to-eat meals.

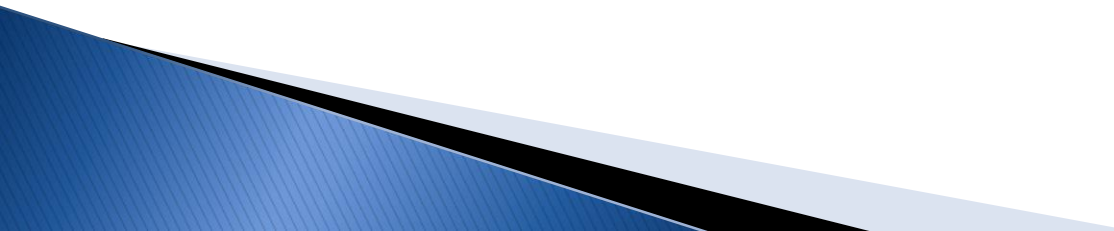
More German Initiatives, 1

- ▶ Animal welfare
 - ▶ - New ways for more animal welfare (program)
 - ▶ - Livestock strategy
- ▶ Development of an indicator of soil quality
- ▶ Fertilizer Act and Fertilizer Directive
- ▶ National Action Plan for the sustainable use of plant protection products
- ▶ Food waste
 - ▶ - Initiative "Too good for the dustbin"
 - ▶ - Avoid post-harvest losses (Action Plan for Supply Protection)
- ▶ Prevent antibiotic resistance
 - ▶ - German antibiotic resistance strategy
 - ▶ - Antibiotics minimization concept for agricultural animal husbandry

More German Initiatives, 2

- ▶ Expand the contribution of bioenergy as a renewable energy source
- ▶ - Law for the development of renewable energies
- ▶ - German biomass research center
- ▶ - Funding Program Renewable Resources
- ▶ Reduction of land use outside agriculture
- ▶ National Sustainable Consumption Program
- ▶ - Promotion of sustainable production and consumption of agricultural commodities
- ▶ - Forum Sustainable Palm Oil
- ▶ - Forum Sustainable Cocoa

Three examples for national measures

- IN FORM - Germany's initiative for healthy nutrition and more exercise
 - „Regional Window“
 - Initiatives to reduce sugar, fats and salt in ready-to-eat meals
- 

IN FORM - Germany's initiative for healthy nutrition and more exercise

- Goal: Sustainable improvement of nutrition and physical activity in Germany by 2020
- National steering group
- Promotion of around 100 projects, for example in the areas of school catering, workplace health promotion, public relations, quality standards for out-of-home meals
- Five fields of action:
 1. Federation, Länder and municipalities as a model
 2. Information about diet, exercise and health
 - 3 exercise in everyday life
 4. Quality improvement in out-of-home catering
 5. Impulses for research
- Dialogue function around issues of a healthy lifestyle, for politics, economy, science and society

„Regional Window“

- ▶ Declaration
- ▶ Voluntary
- ▶ Criteria: The region must be named clearly and verifiably for the purchase of the raw material:
 - Administrative boundaries (e.g. district, state) or
 - specifying a radius in kilometers,
 - smaller than the Federal Republic of Germany,
 - it may cross state or national borders (for example cereals from the Eifel or 100 kilometers around Aachen).
 - Designation by the applicant.

Initiatives to reduce sugar, fats and salt in ready-to-eat meals

- Part of a comprehensive and diet-related approach to aim at a sustainable and health-promoting lifestyle
- Aim: to draw up a concept with relevant stakeholders
 - Scientifically based
 - Commitment to goals and timeframe
- Special focus on feasibility for small sized companies (craft working companies)

