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MASTER'S THESIS

COOPERATIVES AS A MODEL FOR OLIVE OIL EXPORT MARKETING; A CASE STUDY IN KARABURUN PENINSULA

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ABSTRACT

Master's Thesis

Cooperatives As A Model For Olive Oil Export Marketing; A Case Study In Karaburun Peninsula

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Recent developments of globalisation urge many small producers to come together and work collaboratively in order to achieve sustainable success at their working field. Small olive oil producers also face with tough competition conditions against to major players of the sector and this situation oblige them for innovative and effective challenges. At this point, although the long historical background of olive and olive oil production and specific type of olive fruit which is called "hurma" or "furma" in Karaburun Peninsula still there has not been an international olive oil brand. Wrong harvesting techniques; old population; irrigation problems due the land structure; insufficient knowledge of pruning, fertilizing and agricultural spraying; wrong storing conditions, long duration of the olive oil production process especially keeping olives in sacks till to milling facility; insufficient branding activities; unsatisfying performance of the cooperatives constitute obstacles in front of creating an export branding of olive oil in Karaburun District. Purpose of this study is to investigate the relationships between export marketing efforts and cooperative performance to create an export brand of olive oil in Karaburun Peninsula.

Keywords: Olive Oil, Karaburun, Cooperatives, Export Marketing, Branding.

ÖZET

Yüksek Lisans Tezi

Zeytinyağı İhracat Pazarlamasında Bir Model Olarak Kooperatifler;
Karaburun Yarımadasında Vaka Çalışması.

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Küreselleşmedeki son gelişmeler, birçok küçük üreticiyi çalışma alanında sürdürülebilir bir başarı elde etmek için bir araya gelmeye ve işbirliği içinde çalışmaya teşvik etmektedir. Küçük zeytinyağı üreticileri de, sektörün büyük oyuncularına karşı zorlu rekabet koşulları ile karşı karşıya kalmaktadır ve bu durum onları yenilikçi ve etkili çözümler aramaya yöneltmiştir. Bu noktada, Karaburun Yarımadası zeytin ve zeytinyağı üretimi konusundaki uzun tarihi geçmişi ve "hurma" ya da "furma" olarak adlandırılan Karaburun'a has özel zeytin türü olmasına rağmen hala uluslararası bir zeytinyağı markası yaratamamıştır. Yanlış hasat teknikleri; çoğunlukla nüfusun yaşlı olması; eğimli arazi yapısına bağlı sulama problemleri; budama, gübreleme ve tarımsal ilaçlama konusunda yetersiz bilgi; yanlış saklama koşulları, özellikle zeytinlerin sıkım tesisine gidesiye kadar uzun süre çuvallarda tutulması, yetersiz markalaşma faaliyetleri; mevcut kooperatiflerin tatmin edici olmayan performansı Karaburun İlçesinde zeytinyağı ihracatı markası yaratılmasının önünde engel teşkil etmektedir. Bu çalışmanın amacı Karaburun Yarımadasında bir zeytinyağı ihracatı markası oluşturmak için ihracat pazarlaması faaliyetleri ile kooperatif performansı arasındaki ilişkileri araştırmaktır.

Anahtar Kelimeler: Zeytinyağı, Karaburun, Kooperatifler, İhracat Pazarlaması, Markalaşma.

COOPERATIVES AS A COMPETITIVE STRATEGY OF OLIVE OIL EXPORTS; AN ANALYSIS IN ÇEŞME PENINSULA

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ABBREVIATIONS

ACCs	Agricultural Credit Cooperatives
ADCs	Agricultural Development Cooperatives
ASCs	Agricultural Sales Cooperatives
BADC	Bozköy Agricultural Development Cooperative
BoD	Board Of Directors
CAP	Common Agricultural Policy
CCIAA	Chamber of Commerce, Industry, Craft Trades and Agriculture
COGECA	General Confederation of Agricultural Cooperation in the European Union
COPA	Committee of Professional Agricultural Organisations
EACI	European Award for Cooperative Innovation
EADC	Eğlenhoca Agricultural Development Cooperative
EBSO	Aegean Region Chamber of Industry
EİB	Aegean Exporters' Associations
EU	European Union
EURICSE	European Research Institute on Cooperative and Social Enterprises
FCs	Fishery Cooperatives
GA	General Assembly
GDP	Gross Domestic Products
ICA	International Co-operative Alliance
ICs	Irrigation Cooperatives
IOC	International Olive Council
İZTO	İzmir Chamber of Commerce
KACC	Karaburun Agricultural Credit Cooperative
KWNADC	Karaburun West Neighborhood Agricultural Development Cooperative
MC	Member Council
MoAF	Turkish Republic Ministry of Agriculture and Forestry
MoEU	Turkish Republic Ministry of Environment and Urbanisation
MoT	Turkish Republic Ministry of Trade

MS	Market Situation
TÜİK	Turkish Statistical Institute
SB	Supervisory Board
SBGCs	Sugar Beet Growers' Cooperatives
VDCs	Village Development Cooperatives
UZZK	National Olive and Olive Oil Council

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INTRODUCTION

Olive Oil is one of the most precious goods of the agricultural oil industry. Turkey is one of the main olive oil producers of the world, and it has one of the largest olive tree plantation located in the Mediterranean region. The presence of olive trees increased by 71% in the period of 2002-2015 and rose from 101 million to 172 million (Turkish Republic Ministry of Economy, 2017). But, although large olive tree population as a country we could not benefit from this precious product economically as other mediterranean countries such as Spain, Italy, Tunisia. 93% of World olive oil exports were made by eight producing countries, Turkey included. Amount and value of olive oil subject to world trade are 1.8 million tons and 7 billion dollars respectively.

Table 1: World Olive Oil Exports (Thousand Tons)

Exporter	***2014/2015***
Spain	225
Italy	208
Tunusia	303
Portugal	53
Syria	-
Morocco	20
Turkey	14,9
World Total	894

Source:https://ticaret.gov.tr/data/5b8700a513b8761450e18d81/Zeytinyagi.pdf, 02.07.2019.

Turkey has a huge olive oil production potential, but the olive oil industry, which indeed has a long historical background and heritage, is still inefficient in export marketing practices. According to the International Olive Oil Council (UZZK) data, in 2012/2013 Turkish oil production reached 195 thousand tons but in 2015/2016 season, it is seen to decrease to 143 thousand tons. In 2017/2018 Turkey produced 263 thousand tons of olive oil which is the highest amount of it's last five years production

and ranked third biggest country among the Non-EU countries. In 2018-2019 production year, 193 thousand tons of olive oil production is expected (UZZK, 2018).

Turkish olive oil mostly exported as bulk or as private label which are generally known as low value added forms. Looking at the period of 2002-2015, in general, our country's olive oil export unit price is generally stands below the world average; but in 2015 $ 4.68 / kg unit price realized in our country, which is above the world average export price is ($ 4.04 / kg) and the average export prices of competing countries; and Spain ($ 3.88 / kg) and Tunisia ($ 3.43 / kg). This trend shows the positive dynamism in the industry (https://ticaret.gov.tr/data/ 5b8700a513b8761450e18d81/Zeytinyagi. pdf, 02.07.2019).

Promoting activities are carried out by the Olive and Olive Oil Promotion Committee under the coordination of the Ministry of Economy in order to increase the recognition and consumption of Turkish olive oil in the world. Ministry of Economy promote branding in exports, and packaged products for the end consumer for higher added value in exported olive oil. In order to increase Turkish exports, with the phrase "Made in Turkey; export refund assistance amounting to TL 386 / ton for olive oils exported in packages of 2-5 kg, TL 725 / ton for olive oils exported in packages of 1-2 kg, and TL 1,400 / ton for olive oils exported in packages up to 1 kg is made (https://ticaret.gov.tr/data/5b8700a513b8761450e18d81/Zeytinyagi.pdf, 02.07.2019).

Export marketing plan is a specialized piece of work which must be created for each and every market or location in international markets. Export marketing efforts consists all kind of detailed and specific research, plans and strategies related to the targeted country or consumer. These efforts covers a well organized marketing research, SWOT and PESTLE, analysis, industry and competition analysis, strategic marketing plan, especially branding and communication of exports by fairs and exhibitions.

The main purpose of this research is to find the inefficiencies in the olive oil production and marketing industry and to discuss details about the cooperatives as a model for improving high quality brands of olive oil for exporting. The world leaders, Spain and Italy olive oil industry has a success story in olive oil cooperatives in their domestic exports.

Sustainable Development Goals sets the main agenda of current economic issues in world trade. Total of 17 goals shows the efficient and effective ways of doing business and trade globally (https://sustainabledevelopment.un.org/, 02.07.2019). Cooperatives are by nature a sustainable and powerful competitive business models in today's economic world, can easily be positioned as one of the major actors of sustainable development. They play a key role in promoting public awareness of a sustainable and viable future especially in agricultural production and rural development.

From this point of view in this master thesis, at the scale of Karaburun/İzmir Peninsula, olive oil production and export activities has been investigated via case study. Basic problems of olive oil production, branding, and export marketing functions has been identified. Solutions for problems have been figured out related to the viewpoints of the producers/farmers/marketers of the region. Current cooperative system of the area is evaluated in order to find the possible solutions and explanations to the low olive oil export marketing performance of the region.

CHAPTER ONE
COOPERATIVES

1.1. COOPERATIVES

Industrial revolution triggered reconstruction of world's economic and business structure. In relation with industrial revolution; collapse of feodal system, unemployment after the world economic crisis in 1930's, unequal revenue distribution, migration from rural areas to urban areas caused to economical and social problems. At this stage cooperatives have been seen as a solution model for inequalities between the people. Many people define cooperatives as the third sector beside the private and public sectors. (Durmaz, 1998: 29)

According to the description of ICA (International Co-operative Alliance) "Cooperatives are people-centred enterprises owned, controlled and run by and for their members to realise their common economic, social, and cultural needs and aspirations"(https://www.ica.coop/en/cooperatives/what-is-a-cooperative).
Cooperatives; are effective entrepreneurship models at using idle resources, spreading capital to grassroots, including disadvantaged parts of the community into economic and social security and turning small attempts into major players by gathering their workforce (Turkish Republic Ministry of Trade, 2017,i).

Cooperatives are communities sharing common interest and benefits (Köroğlu, 2003: 4). These organizations provide labor and capital accumulation, fair income distribution, long and short term commodity and cash credit with low interest rates, produce high quality products at accessible prices, decrease or remove the income of intermediaries, market products, prevent unfair competition, enhance the cultural level of members, make the members gaining self-governance skills and etc (Serinikli, 2009: 20)

Cooperatives differ from companies at many aspects; such as cooperatives are members' aspiration oriented while companies are profit oriented. Cooperatives are member owned institutions while companies are capital owned. Cooperatives concern development of the communities at various fields such as education, health, and etc by

adopting sustainability issues while companies do not take the development of community as a duty.

Self-help, self-responsibility, democracy, equality, equity, and solidarity are the main values of cooperatives. Achievement of these main values are the cornerstones of the success of cooperatives. When we evaluate the successful cooperatives we will see collaboration and reliability as the driving factors (https://www.ica.coop/en/cooperatives/ cooperative-identity, 12.05.2019).

1.2. COMMON PRINCIPLES OF COOPERATIVES

Basis of the common principles of cooperatives depends on the movement of 28 workers who are known as Rochdale Pioneers and founders of Rochdale Consumer Cooperative in Rochdale, England in 1844 against to bad market conditions. Although policy makers often refers, these principles do not have legal binding (Sangen, 2012: 11). These principles are updated and defined by ICA under seven headings (ICA, https://www.ica.coop/en/cooperatives/cooperative-identity, 12.05.2019):

a) Voluntary and Open Membership

Cooperatives are voluntary organizations open to all people able to carry out the responsibilities of membership and attend to activities of cooperatives without the discrimination of gender, race, religion, political and social approach.

b) Democratic Member Control

Management of the cooperatives based on democracy. Every member has one voting right independently of their shares. Decisions are agreed by consensus. Board of management is the decision center and it is elected by democratic voting system.

c) Member Economic Participation

Members put share of capital according to their financial power and pay subscription fees defined by the board of management of the cooperative in order to carry out and finance the activities of their cooperative. Although cooperatives are not profit oriented, sometimes at the end of efficient management there can be surpluses. This surplus is utilized at contingency reserve, interest payments of the capital, paying shares of the cooperative unions and sending dividends to shareholders (MEB, 2014:8).

ç) Autonomy and Independence

Cooperatives are controlled by their members without the interfere of other institutions such as state. They are autonomous organizations and decisions are taken independently. If they enter into agreements with other organisations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their cooperative autonomy (https://www.ica.coop/en/cooperatives/what-is-a-cooperative, 12.05.2019).

d) Education, Training and Information

According to this principle cooperatives should organize trainings and give information about their activities to their shareholders (members, elected representatives, managers, and employees). Trainings are given about the business activity area of the cooperatives. For example; if it is an agricultural development cooperative it must give trainings or seminars to its members about pruning, harvesting, storing, irrigation and etc. Working principles and structure of the cooperatives also must be explained in detail to the members. So, all members can contribute to the development of their cooperative. For an effective and good management members should be aware of the activities of their cooperatives. Supervision of cooperatives is usually maintained by the Supervisory Board which is

selected by the members. Mission of education, training even includes the community in whereabouts the cooperative is.

e) Cooperation Among Cooperatives

In order to achieve their aims cooperatives should collaborate with other cooperations, unions through locally, nationally, regionally and internationally. Cooperatives can be competitive against to global firms by working in cooperation with other local, national, international structures. Working together contributes to socio-economic and socio-cultural development of the cooperative members.

f) Concern for Community

Cooperatives should work to improve their communities conditions through adopting sustainable policies. If we look over the historical view cooperative idea has already borned in poor and weak conditions for the improvement of social, economic and cultural situation. According to the spokesperson of the Italian Alliance for Sustainable Development; cooperative enterprises are by nature a sustainable and participatory form of business and they can play a key role in promoting public awareness of a sustainable and viable future (EURICSE, 2018: 45).

1.3. THE STRUCTURE OF COOPERATIVES

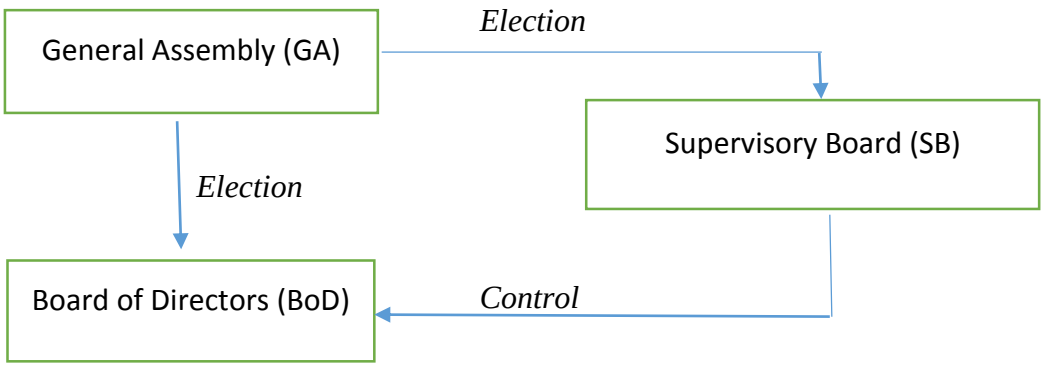
Structure and development process of the cooperatives differ from each other from country to country. Under this heading a general view of perspective about common structural aspects of the cooperatives and cooperative unions will be tried to given. Cooperatives have social content, but they are not a charity, foundation or association. They are economical organizations such as other business organizations which conduct their business via economic activities (Rehber, 2011: 66). Main purpose of cooperatives, unlike the capital businesses not making profit, is to provide good service for producers and consumers who are members of the cooperative.

First modern sense of cooperative meaning was born in Rochdale town of England in 1844 as a consumption cooperative. Then it was followed by the establishment of savings and credit cooperative which was founded by Friedrich Wilhelm Raiffesisen in Germany in 1864. In Germany cooperative system was appeared as credit cooperatives, in England as consumption cooperatives while in France it came up with production cooperatives (Ortmann and King, 2007: 44; Bilgin and Tanıyıcı, 2008: 139)

Organizations, gathering the labor and capital of individuals in order to meet their needs which they can not supply on their own are called "primary cooperative" (Kara, 2003: 56). Primary cooperatives generally have three bodies: first one is General Assembly (GA) which consist from all members, second one is Board of Directors (BoD) which is elected by the cooperative members, third one is Supervisory Board (SB) (Henrij, 2005; EURICSE, 2010; Van Der Sangen, 2012). General Assembly convenes at least once a year and takes the major decisions like terminating the cooperative, merging with other cooperatives, changing the by-laws, (dis)approving the annual financial report (Bijman, Hanisch, & Sangen, 2014: 648) while Board of Directors is in charge of initiation and implementation of the decisions (Fama and Jensen, 1983: 301-326). In traditional model BoD works as a management board which consist from chairman, secretary and financial officer.

According to Henrij (2005) most cooperatives have Supervisory Board, although it is not mandated by the cooperative legislation. The members of SB are usually chosen from GA and elected by the GA" (Bijman, Hanisch, & Sangen, 2014: 649). But, in some circumstances cooperatives in the name of professionalization can invite and employ outside experts at SB especially for fiscal and accounting issues. SB controls and monitors the activities of the BoD on behalf of GA and has right to propose candidates for the BoD just like the GA appoints the members of BoD.

Figure 1: The Traditional Model of Internal Governance of Cooperatives.

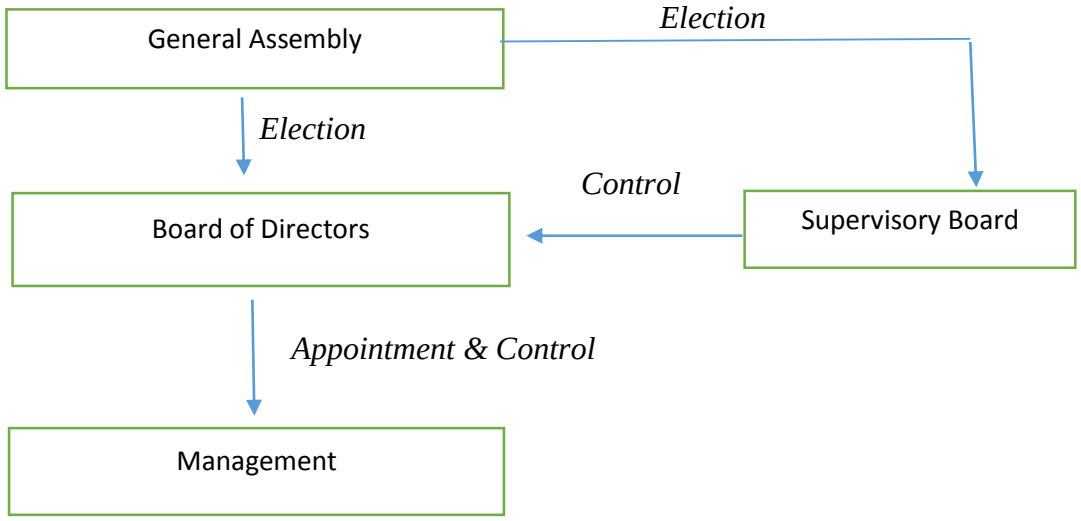


Source: (Bijman, Hanisch, & Sangen, 2014: 649).

GA at small cooperatives has the decision control function, while cooperatives with professional management have delegated the control function to the BoD (Bijman, Hanisch, & Sangen, 2014: 649). Governance structure can be changed according to the by-laws and national legislation. In recent years innovations are brought out at the governance structure of cooperatives. These innovations can be listed as the following;

- Professional managers are assigned to take over the executive tasks of BoD. This situation is actually applied when the size and complexity of the cooperative grows.

Figure 2: The Extended Traditional Model of Internal Governance of Cooperatives.

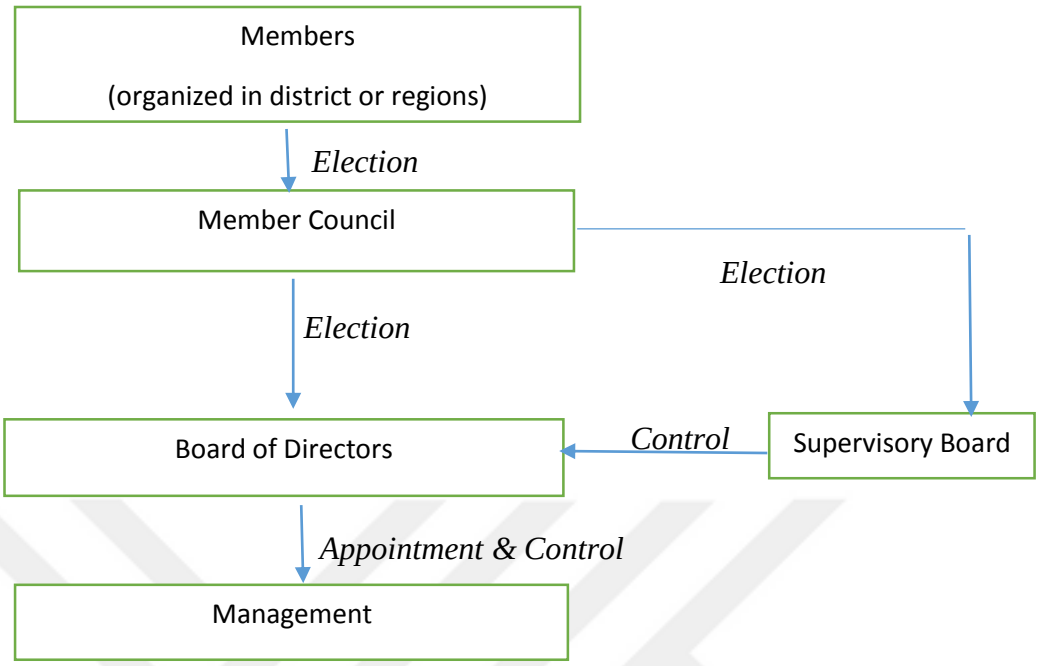


Source: Bijman, Hanisch, & Sangen, 2014: 650

- Another innovation is the proportional voting. At proportional voting system members' voting rights can change according to the value of transaction between the member and cooperative. Although as a basic principle cooperatives have one member-one vote rule, this can be change in some countries. For Example, "Italian cooperative law allows a member to have a maximum of 5 votes when the member is a legal entity, and allows members to have a maximum of 10% of all votes in the general assembly in the specific case of a cooperative of entrepreneurs" (Fici, 2010). Some European countries such as; Bulgaria, Cyprus, Estonia, Hungary, Ireland, Malta, Poland (only for primary cooperatives, not for second-tier cooperatives), Portugal, and Romania do not allow proportional voting (Bijman, Hanisch, & Sangen, 2014: 651). Another group of countries such as; Luxembourg, The Netherlands, Spain, Sweden and the United Kingdom accepts and applies proportional voting without any restrictions.
- In some cases outside experts can be members of BoD. "In 19 Member States of EU, cooperative legislation allows that the BoD includes non members. Only in Bulgaria, Cyprus, the Czech Republic, Greece, Malta, Portugal and Slovakia, the BoD has to consist entirely of members of the cooperative" (Bijman, Hanisch, & Sangen, 2014: 652).
- Non-members can be appointed at SB of the cooperatives. 16 EU states have the possibility of non-member appointment (Bijman, Hanisch, & Sangen, 2014: 652).
- In order to reduce the liabilities of cooperative and give more autonomy to the professional managers some cooperatives introduce legal separation between the cooperative association and the cooperative firm (Van der Sangen, 2001).

- Another innovation is the introduction of Member Council (MC). MC consist of different group members and bears obligation and rights of GA. Thus if MC exists GA does not hold the functions of traditional model. See figure 3.

Figure 3: The Extended Traditional Model with Member Council.

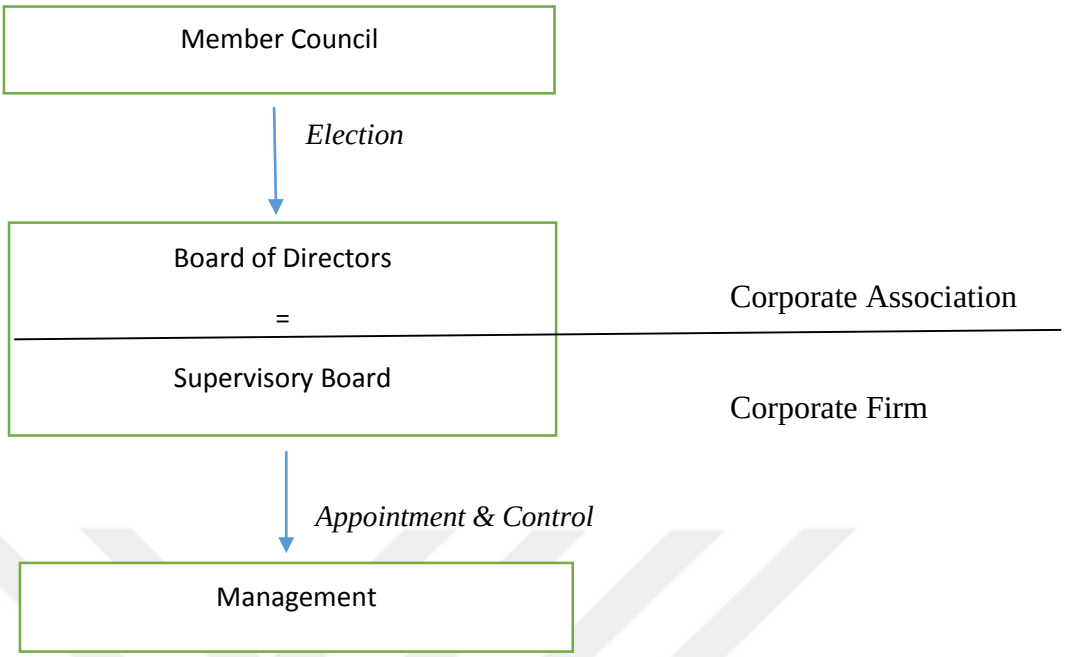


Source: Bijman, Hanisch, & Sangen, 2014: 653

Over the last two decades large cooperatives introduced hybrid ownership structure, which means diversifying ownership of the cooperatives by including non-members and giving limited votes to them (Nilsson, 1999; Chaddad and Cook, 2004). In order to increase capital, cooperatives have started to attract additional equity capital both from members and non members, for example in the form of dividend-earning participation (Hanisch and Müller, 2012: 17). Even some cooperatives have been listed in stock exchange market, examples are German cooperatives BayWa (free float of 40%) and Südzucker (34%), Finnish cooperatives Atria (45%) and HKScan (53%) and etc (Bijman, Hanisch, & Sangen, 2014: 654).

Beside to the extended traditional model, agricultural cooperatives in The Netherlands have been shaped as "Corporation Model" and the "Management Model". At Management Model, professional managers make up the BoD who can be non-member. At Corporation Model members of BoD are also the members of SB. In this case SB of the cooperative firm does not supervise the BoD of the cooperative association (Bijman, Hanisch, & Sangen, 2014: 654). See figure 4.

Figure 4: The Corporation Model



Source: Bijman, Hanisch, & Sangen, 2014: 655

Primary cooperatives can protect their members/shareholders towards to local intermediaries and pawnbrokers. But at global basis they will need to merge for competing against to multinational and global companies (Mülayim, 2013:164). For this reason primary cooperatives join horizontally and form "cooperative unions", then cooperative unions at same activity areas come together and constitute "central unions" and finally cooperative unions and central unions merge together and set "national cooperative unions" (Mülayim, 2013: 162). This structure enhances the solidarity and strength of the organization. Organizational structure usually begin locally then evolves nationally and afterwards results internationally.

The top institution of the cooperatives around the world is International Cooperative Alliance (ICA), it represents approximately 3 million worldwide cooperatives. It was founded in 1895 and it is one of the oldest non-governmental organisations and one of the largest ones measured by the number of people represented: more than one billion cooperative members on the planet. The ICA's members are cooperatives from all sectors namely agriculture, banking, consumer, fisheries, health, housing, insurance, and industry & services. Main office is in Brussels and has four Regional Offices (Africa, Americas, Asia-Pacific, and Europe). Each regional office implements it's activities within a partnership of European

Commission. In March 2016 European Commission and ICA brought into action of "International Cooperative Development Program" for five years period. Aim of this program is increasing visibility, enhancing advocacy, sharing capacity building, strengthening cooperative networking and conducting exhaustive research for supporting these activities (https://www.ica.coop/en/about-us/international-cooperative-alliance, 14.05.2019). Another structural parts of the ICA are Eight Global Sectoral Organisations (agriculture, banking, retail, fisheries, health, housing, insurance, and industry & services), and five Committees and Networks (gender, research, law, youth, and development). Each sectoral body supports their members by providing resources, conducting surveys and researches in order to improve the cooperative model. Today European region of the ICA represents 90 member organisations, 160.000 cooperative enterprises from all sectors of the economy, 123 million members and 5,4 million employees (https://coopseurope.coop/, 14.05.2019).

Beside the ICA, many country has their own specific national cooperative organizations. For example Zen Noh is the National Federation of Agricultural Cooperative Associations in Japan which was established on March 30, 1972. It includes 36.000 cooperatives, 80 million members and 640.000 employees and has 40 Billion USD trade volume annually. Zen-Noh consists of farmer's cooperatives whose main aim is to protect and enhance the agriculture together with the livelihood of Japanese farmers. It connects producers and consumers under fair conditions and revitalize production (https://www.zennoh.or.jp/english/about_zen-noh/index.html, 06.05.2019).

Some data of cooperatives around the world are as following:

- ✓ In Canada every third citizen is a cooperative member.
- ✓ In France, cooperatives provide 700.000 jobs.
- ✓ In Japan, 91 percent of farmers are organized in cooperatives.
- ✓ In Kuwait, 80 percent of the retail trade is made up of consumer cooperatives,
- ✓ In Bolivia, cooperatives manage a quarter of all national savings.

(https://www.deutschland.de/en/topic/business/cooperatives-examples-from-germany-and-around-the-world, 06.05.2019).

For Turkey we can assume that the roots of cooperative movement is belonging to 12th century under the name of Ahi movement (Okan N. D., & Okan C., 2013: 8). Ahi which means brotherhood, as the modern cooperatives based on solidarity, trust, equity, democracy and fairness. Indeed it was an occupation organization but undertook many missions such as organizing the community life, teaching people how to live virtuously and morally and etc (Zorlu et al., 2012: 77). Common characteristics of Ahi organization and today's cooperatives are as following:

1) Service oriented instead of profit oriented,
2) Entry to and resign from the organization is voluntary,
3) Management is handled through democratically elected committees,
4) Using and allocating the resources for on-the job and theoretical trainings,
5) Providing inputs at favourable and economical conditions to its members,
6) Paying dividends to the members,
7) Establishing alliances at regional and national levels,
8) Setting a common coffer for mutual liabilities such as taxes, social security, operation, maintenance costs, salaries of the employees, etc and welfare activities of the organization (Okan N. D., & Okan C., 2013: 8; Yüksel, 2005: 193).

Ahi organization maintained their activities till to 18th century. At the collapse period of Ottoman Empire, Ahi organization together with other social, cultural and economic institutions began to corrupt (Can & Sakarya, 2012: 29). After the Ahi organization to fill the gap another attempt similar to cooperative was "Country Chest" which was founded in 1863 by Mithat Pasha, the Governor of Ottoman Empire of Southeastern Serbia. Main purpose of the Country Chest was meeting financial needs of the farmers who were suffering from the burdens of heavy debts to wealthy individuals (Okan N. D., & Okan C., 2013: 9). In order to achieve this; production and credit cooperative system was combined, vacant lands of the state was planted by the peasants, crops grown at this vacant lands sold and formed a working capital for the farmers and members who need credit and loan (Can & Sakarya, 2012: 30). But, Country Chests could not be operated properly due to the lack of collecting capital and debts. So, they replaced with Agricultural Bank in 1888. In 1900 village groceries were founded as consumption cooperatives in İzmir. Then under the pioneering of Ahmet Cevat in İstanbul 11 consumption cooperatives was established and lasted till to 1919.

In order to struggle against to monopoly in fig market and meet the demands of fig producers in 1913 fig producers established the "Aydın Fig Producers Cooperative" which is the first Agricultural Sales Cooperative of Turkey (Çıkın & Karacan, 1994: 45-46; Okan N. D., & Okan C., 2013:10).

The first concerted cooperative movement as state policy came into force during Turkish Republic Period by the leadership of Mustafa Kemal Atatürk who paid special attention to cooperatives and took into consideration of them as one of the development model especially for the rural areas of Turkey. Even before the republic was founded 97 statues about "Production, Procurement, Buying and Selling Partnership Cooperatives" was passed in Parliament. Izmir Economic Congress in 1923, was also another major point where the decisions regarding to cooperatives were taken. At the İzmir Economic Congress it is decided that farmers were going to be membership of the Agricultural Cooperatives and Agricultural Bank was to going finance the cooperatives (Kocabaş, 2003: 20). Between 1924 and 1935 many laws were enacted for preparing the economical, social and cultural infrastructure of cooperatives. "By the time of Ataturk's death in 1938, the movement had been well established" (Okan C. & Okan N. D., 2013: 11). "The Law on Cooperatives (No. 1163) that became effective in 1969 accelerated the establishment of cooperatives" (Okan N. D., & Okan C., 2013: 12). Although the number of cooperatives increased, effectiveness could not be at desired level. Main reasons of that were many cooperatives were established in order to gain financial incentives from the state and it wasn't a movement coming from grassroots. Another reason was cooperatives could not act freely at their decisions and were not independent. According to Alkan (1998) in the first years of the State's support for cooperatives was crucial, but later on this situation turned them to a state-controlled organizations instead of democratically member owned and governed organizations.

Today, Turkish Cooperatives are ruled by Cooperatives Law (No. 1163), Agricultural Sales Cooperatives and Unions Law (No. 4572) and Agricultural Credit Cooperatives and Unions Law (No.1581) (Ministry of Trade, 2017: 7). Organization structure, functions, activities and all other related operational details of the cooperatives are identified in main contracts which are combined with these laws. Main contracts can be found under the related web sites of the ministries. In Turkey

cooperatives are grouped under three ministries but regarding to issues of cooperatives there is a coordination problem between these ministries (O. M. Koçtürk, personal communication, April 3,2019).

1) Ministry of Agriculture and Forestry is charge of;
- Agricultural Development Cooperatives (ADCs),
- Irrigation Cooperatives (ICs),
- Fishery Cooperatives (FCs),
- Sugar Beet Growers' Cooperatives (SBGCs),
- Agricultural Credit Cooperatives (ACCs).

2) Ministry of Trade is responsible for;
- Agricultural Sales Cooperatives (ASCs),
- Fresh Fruit and Vegetables Cooperatives,
- Consumption Cooperatives,
- Production and Marketing Cooperatives,
- Credit Guarantee Cooperatives,
- Transportation Cooperatives ,
- Tourism Development Cooperatives,
- Craft Cooperatives,
- Business Administration Cooperatives,
- Insurance Cooperatives and etc.

3) Ministry of Environment and Urbanisation is responsible for;
- Housing Cooperatives,
- Small Industrial Area Cooperatives,
- Collective Construction Cooperatives.

According to the data of Ministry of Trade (MoT), Ministry of Agriculture and Forestry (MoAF), Ministry of Environment and Urbanisation (MoEU) dated on 31.12.2016, in Turkey there are 53.259 cooperatives and 7.422.994 cooperative members at 35 different sectors (Ministry of Trade, 2017: 12). By the law 1163, setting

a union, center union and national union has been available. Number of cooperative unions in Turkey are shown at below table.

Table 2: Number of Cooperative Unions

Turnout Rate of Cooperatives Member of Unions	
Number of Cooperatives	53.259
Cooperatives Member of Union	16.008
Turnout Rate	% 30.1
Turnout Rate of Unions Member of Central Unions	
Number of Total Union	462
Number of Unions Member of Central Union	265
Turnout Rate	% 57.3
Turnout Rate of Central Unions Member of TURKEY COOP.	
Number of Central Union	14
Number of Central Unions Member of TURKEY COOP.	11
Turnout Rate	% 78.6

Source: Turkish Republic Ministry of Trade, Turkey Cooperation Report, 2017.

As it is observed from the above table in Turkey %30.1 of the cooperatives are member of an union which means membership of unions is not at required level while %57.3 of the unions member of central unions. As in the example of cooperatives in Italy and Spain, collaboration under the unions is crucial (O. M. Koçtürk, personal communication, April 3, 2019). In total there are 14 central unions of cooperatives and 11 of them are member of Turkey Coop. which is the top institution of cooperatives in Turkey.

1.4. AGRICULTURAL COOPERATIVES IN TURKEY

The scope of this research covers all kinds of cooperatives as a model but mainly agricultural cooperatives will be discussed in detail. The main purpose is to assess the importance of agricultural cooperatives on value added, quality agricultural goods exports, olive oil exports in particular. Agricultural Development and Agricultural Credit Cooperatives are represented under the General Directorate of

Agricultural Reform at Ministry of Agriculture and Forestry while Agricultural Sales Cooperatives are represented under the General Directorate of Cooperation at Ministry of Trade. By the date of 30.04.2019 there are 6.793 Agricultural Development Cooperatives and 4.702 of them are member of regional unions and 5.632 of them are member of central unions. Number of regional unions of ADCs are 85 and number of regional unions member of central unions are 95. Difference comes from that, various regional unions can be member of more than one central union. For example, under the Forestry Central Union there are 18 Forestry Regional Unions, 8 Köy-Koop. Regional Unions, 1 Livestock Regional Union and 1 Agriculture Regional Union. So, in total there are 28 Regional Unions member of Forestry Central Union. As from the side of Agricultural Credit Cooperatives number of ACC is 1.625 and all of them are member of both regional and central unions while 322 Agricultural Sales Cooperative (ASC) of 399 ASC are member of regional unions. This figure shows us, most of the ADCs and ACCs have joined to unions while ASCs have not set a central union (Republic of Turkey Ministry of Agriculture and Forestry, 2019).

Table 3: Number of Agricultural Cooperatives and Unions in Turkey

Agricultural Cooperatives (till to 30.04.2019)										
Primary Coop.			Regional Unions of Coop.				Central Unions of Coop.			
Type	Number	Number of Mem.	Type	Number	Number of Coop.	Number of Mem.	Number	Number of Union	Number of Coop.	Number of Mem.
			KÖY-KOOP	14	1.424	167.138	1	12	1.105	129.038
			Agriculture	13	547	62.545	1	15	955	109.755
			Livestock	35	1.738	179.156	1	35	1.800	193.283
			Forestry	18	952	112.708	1	28	1.731	211.682
ADC	6.793	747.168	Tea	5	41	66.516	1	5	41	66.516
Total of ADC				85	4702	588.063	5	95	5632	710.274
ACC	1625	907.233	ACC	17	1625	907.233	1	17	1.625	907.233
ASC	399	533.456	ACC	17	322	524.587	0	0	0	0

Source: Republic of Turkey Ministry of Agriculture and Forestry (06.05.2019), https://www.tarimorman.gov.tr/TRGM/Link/33/Tarimsal-Orgutlenme-Tablosu, (18.05.2019).

Although the amount of the Agricultural Cooperatives in Turkey (8817 agri-food cooperatives) are more than Italy as it will be indicated on following sections performance of the cooperatives are not at required level. According to the data of COGECA (General Confederation of Agricultural Cooperation in the European Union), there are more than 8100 agri-food cooperatives in Italy in 2014 and current market share of cooperatives is 55% in agriculture industry of Italy (https://ec.europa.eu/growth/sectors/ social-economy /cooperatives_en, 01.06.2019). Again the dominance of agricultural cooperatives reaches up to ninety percent in the milk market of Scandinavian countries while rate of agricultural cooperatives in Turkey is 13 percent (https://www.tiresutkoop.org/galeri/gazete-haberleri/s/1, 31.07.2019).

But there are also good examples such as Tire Dairy Agricultural Development Cooperative (in İzmir) which was selected as the best rural development model in the world by the United Nations in 2012 (Alp, 2015). Tire Dairy Cooperative collects the milk produced by their partners in cold chains by checking them in place at the milk purchasing centers which are established in 60 villages. In order to decrease production costs; fuel oil (one of the most important input) is provided 40 cents below the market price. Also; all needs of members such as seed, fertilizer are provided economically by purchasing in bulk. Sowing, mowing, packaging and leveling field are handled by machines of the cooperative. So, members hires necessary equipments and machines from the cooperative at cheaper prices and decrease costs. For example, in 2017 price of working hour of a machine in market was 140 TL while Tire Dairy Cooperative provide machine at 70 TL for one working hour (Eskiyörük, 2017). Members are able to purchase many products up to their household needs from the cooperative market at a discount. At the end of each month when purchasing members' products, Tire Dairy Cooperative settles accounts with members against to spending of them. By this way members of the cooperative do not pay any money for their production inputs such as fertilizer, seed, fuel oil and even for their household needs (https://www.tiresutkoop.org/galeri/gazete-haberleri/s/1, 31.07.2019). In İzmir as a result of municipality and cooperative cooperation, rate of agricultural cooperatives are above the mean of Turkey which is 28 percent (Eskiyörük, 2017). By purchasing their needs from cooperatives, İzmir Metropolitan Municipality not just provided

money to cooperatives but also branded the cooperatives. Buying milk from the cooperative created Tire Dairy Cooperative brand. By buying saplings from the Bademler Agricultural Development Cooperative (ADC), now Bademler ADC is exporting saplings (Eskiyörük, 2017). So, cooperation between the local authorities and cooperatives enhanced branding of the cooperatives. According to Mahmut Eskiyörük who is the head of Tire Dairy Cooperative there are two ways for developing cooperative culture in Turkey: first way is cooperative must be studied as a lesson in primary schools; second way is state policies, the government can create such as Tire Dairy Cooperative in every district of Turkey in European standards within two to three years. Currently Tire Süt Dairy Cooperative is planning to export it's products.

Another successful example for a cooperative branding is TORKU. Konya Sugar Factory which is a production cooperative created TORKU brand in 2007. Today it includes 900 thousand farmers as a member and process it's products in it's own factories and deliver with it's own brand to 74 countries (http://www.torku.com.tr/tr/icerik/ihracat-urunleri/2023, 05.08.2019). Product range differs from bakery products, chocolate coated products, confectionery, frozen potatoes, milk and meat products, bulgur to fruit juice, vinegar and turnip. Konya Sugar increased it's sales to TL 3,460,111,732 in 2018 and it ranked as 44th of Turkey's top 500 industrial giants (http://torku.com.tr/tr/haber/liste/507/haberler, 05.08.2019). As farmer cooperative brand, TORKU has two main objectives: first is to ensure that their producer partners produce more, and the second is to ensure that their producer partners earn more than they do. This can be by turning their product into a finished/processed product and put it in a branded packaging. By this way intermediaries between the producer and consumer is eliminated and producers gain more profit (Konuk, 2016).

1.4.1. Agricultural Development Cooperatives (ADCs)

Roots of "Agricultural Development Cooperatives" depends on "Village Development Cooperatives" (VDC) which were established 1965. In 1989 name of the "Village Development Cooperatives" changed as "Agricultural Development

Cooperatives". Main purpose of the VDCs were to meet the needs of rural areas especially villages and encourage the development. Providing inputs at accessible conditions, arranging trainings and teaching peasants, utilizing the resources in an efficient way and marketing crops of the rural areas, increasing the revenue, providing employment opportunities and decreasing the migration from rural to urban were the main activities of VDCs (Okan N. D., & Okan C., 2013: 19-20).

But, at the beginning of 1980's neoliberal policies negatively affected the agriculture sector. Agriculture share of Gross Domestic Product (GDP) began to decrease. For example, while %47 of labour was working in agriculture sector in 1990, this rate fell to %25.5 in 2005 and in the middle of 2018 fell to %19.4 (approximately 5.6 million people) (Şahin, 2018: 61). Share of agriculture in GDP was %26 in 1980, this rate decreased to %17 in 1990 and decreased to %6.3 in 2017 (TUIK, 2018; OECD, 2008: 5; Ministry of Agriculture and Forestry, 2018). Those quick look of figures clearly shows the urgent reorganization and efficiency improvements in agricultural sector. International examples and some successful domestic cooperatives shows how the cooperatives can be the key players of efficiency in agricultural production.

ADCs must consist of at least 7 members. Members must be located at the same working area, must have similar or same production and means of livelihood. According to the main contract of ADCs scope of activities are as following:

a) Taking necessary precautions to improve the efficiency of agriculture.

b) Conducting technical activities of planting, fishery, livestock raising, forestry, apiculture, fruit growing, vegetable growing, viticulture, flowering and growing other crops.

c) Taking measures for improving the quality of products/crops of the member such as struggling with disease and pest control.

d) Supplying production equipments, tools and other inputs related to agriculture by purchasing and leasing.

e) Conducting activities for the utilization of the vegetable and animal products by processing, storing and marketing functions.

f) Helping members at production, transportation, storage, stacking and utilization of forest products; providing employment opportunities, giving credits, doing forestation in accordance with the forestry law.

g) Working in cooperation with related institutions for increasing the efficiency of tea production.

h) Utilization of the natural resources, miscellaneous workings on handicraft activities and marketing them.

ı) Meeting the financial needs of members by giving advances proportionally to their product submission and cooperative's financial situation.

j) Transferring technical and financial aids from ministries, institutions and bankings to members.

k) Using donations, aids, loans, grants provided from private corporations and public enterprises in compliance with common goals.

l) Mortgaging, movable and immovable properties of the cooperatives and pledging them as collateral against the debt of members.

m) Owning movable and immovable properties and selling them when needed or taking over businesses, making facility investments for cooperative.

n) Making the export and import transactions of the cooperative.

o) Using the building, land and all other equipments belonging to cooperative for agricultural activities, providing the maintenance and repairing of them.

p) Purchasing, selling and franchising the living and non-living belongings, fuel and foodstuff needs, household goods of the members.

r) Mediating and intervening for providing insurance services for the members.

s) Conducting leasing for cooperative works.

t) Conducting rural tourism activities.

u) Providing social, cultural and transportation needs of the members.

v) Doing activities at environmental issues.

y) Establishing company and joining to companies related to their working areas.

z) Publishing journals, books, news papers and in need organizing meetings, seminars, symposiums, panels and conferences according to the purposes and working areas of the cooperatives (Tarım Orman Bakanlığı, 2019).

1.4.2. Agricultural Credit Cooperatives (ACCs)

In order to advance rapidly in the development process, enterprises need to reach the economic scale limit, engage in intensive production, develop their technological structures, and implement long-term infrastructure investments (Koçtürk, Artukoğlu, Güneş, Gençler ve Şen, 2012: 8). This development significantly depends on the accessibility of financial resources. Although in recent years resources of private sector also have become active and been used for crediting agricultural businesses, Turkish Republic of Agriculture Bank and Agriculture Credit Cooperatives are the main actors of financing the agriculture sector in Turkey, (Koçtürk et al., 2012). Most of the farming activities in rural areas of our country are small scale. Provision of necessary inputs, marketing of the crops and meeting financial needs can be difficult by the small scale farmers. Because of that agricultural credits are crucial factors for sustainable agricultural production (Koçtürk et al., 2012: 2).

First ACC was established in 1935 based on Law No. 2836 and until 1972 maintained its activities as government-sponsored entity under the auspices of Agricultural Bank. (Okan N. D., & Okan C., 2013: 26). During this period ACCs acted as an intermediary financial institution between the state and farmers. In 1972, need for a new comprehensive legislation became apparent and Law No 2836 was replaced with Law No.1581. Next regulation came into force in 1985 under the Law number 3223 and placed ACCs under the responsibility of Ministry of Agriculture and Rural Affairs. Due to the increase at scope and needs of the ACCs, Law No. 5330 enacted in 1995. Afterwards, in order to enhance the functionality of ACCs Government Decree was issued in 2000 which allow the Agricultural Bank to observe and scrutinize financial situations of ACCs before lending them credits and not supporting financially weak ones. This caused for seeking new financial resources. So, the Law No. 5330 was amended in 2005 and provide an opportunity of utilizing national and international credit sources such as banks, finance and credit agencies (Okan N. D., & Okan C., 2013: 27). Another important point is by the law of producer unions ACCs gained producer union status (Bayaner, 2012: 71).

According to the main contract of ACCs, working areas are as following (Türkiye Tarım Kredi Kooperatifi, 2016):

1) Meeting all kinds of agricultural inputs of the members with short and medium term loans,

2) Utilizing and marketing crops of the members,

3) Providing all kinds of machinery, equipment and facilities that members can benefit from jointly,

4) Providing; production and compulsory consumption needs of the members and other producers as needed by purchasing in bulk and for this aim participating in the organizations with the permission of the Central Union Board of Directors.

5) Acting as an intermediary for the support payments to be made by the state if the government assigns a duty,

6) Developing handicrafts and make good use of them,

7) Improving technical and occupational knowledge of the members, carrying out social and cultural activities, organizing trainings and courses,

8) Keeping deposit accounts, giving banking services and working as an insurance agent,

9) Establishing bank and insurance company or join this kind of institutions in order to meet credit needs of the members,

10) Fulfilling duties given by the regional cooperative union.

"Turkey applies interest subsidies in agricultural lending practices. This application is carried out by credit institutions. The Undersecretariat of Treasury meets the subsidy amount and ACCs provide subvention credits" (Bayaner, 2012: 72). While, in 2004 %35 of the total credits of ACCs consisted of subvention credits, in 2010 share of the subvention credits rised to %85. Reason behind this increase arised from the credits with reduced interest rates and zero interest rates of the public institutions (Bayaner, 2012: 72). Distribution of the credits given to members of ACCs, according to the years are indicated at Table 4.

Table 4: Distributions of Credits (in TL)

	2013	2014	2015	2016	2017	∆%
Total given credit	5.220.853.823	5.947.587.441	6.405.798.867	6.765.228.505	7.619.314.092	12,62
Subvention credits	1.255.156.579	1.836.419.628	4.394.977.704	5.099.632.172	4.994.289.607	-2,07
Number of Member	409.496	421.286	426.092	422.156	422.526	0,09

Source: Tarım Kredi Kooperatifleri, 2017: 29.
http://www.tarimkredi.org.tr/files/faaliyetRaporlari/2017YiliFaaliyet.pdf, (28.05.2019)

As illustrated in above table amount of the subvention credits continue to increase till to 2016. But, in 2017 approximately 2 percent of decrease has been occurred and share of the subvention credits among the total credits decreased to 65.5 percent. Another option of credits given by ACCs are commodity credits. This approach prevents out of purpose usage of the agricultural credits (Bayaner, 2012: 73). Distribution of commodity and cash credits are shown at the following table:

Table 5: Types of Credits Given (in TL)

	2014	2015	2016	2017
Total given credit	5.947.587.441	6.405.798.867	6.765.228.505	7.619.314.092
Cash Credits	1.557.936.984	1.668.146.457	1.866.247.799	2.228.753.968
Commodity Credits	4.389.650.457	4.737.652.410	4.898.980.706	5.390.560.124

Source: Tarım Kredi Kooperatifleri, 2017: 30.
http://www.tarimkredi.org.tr/files/faaliyetRaporlari/2017YiliFaaliyet.pdf, (28.05.2019)

As obviously seen from the Table 5, both cash credits and commodity credits increased in parallel with each other between the years 2014 and 2017. But, share of the commodity credits always have a bigger share in total given credits. Credits of ACCs are grouped under two headings: first one is “business loans” which are short term credits second one is “investment loans” which are medium term credits. Short-term business loans are the loans granted to the cooperative members with a maturity of one year and for the purpose of supplying cash needs and inputs such as seedling, saplings, chemical fertilizers, pesticides, mixed feeds, fuel oil. Medium term

investment loans are the commodity loans with a maximum maturity of 5 years and provide all kind of agricultural equipment, fruit sapling, livestock to cooperative members (Bayaner, 2012: 73). At Table 6 statistics of business and investment loan are given between the years of 2015 and 2017.

Table 6: Distribution of Business Loans and Investment Loans (in thousand TL)

BUSINESS LOAN	2015	2016	2017	△%
General Need	2.064.669	2.522.397	2.899.349	14,94
Seedling, Sapling	348.669	366.501	382.167	4,27
Fertilizer	1.453.146	1.225.391	1.394.681	13,82
Pesticide	62.782	75.886	86.659	14,20
Livestock	486.736	563.627	762.373	35,26
Petroleum Products	500.481	490.945	587.571	19,68
Fisheries	7.702	5.563	5.255	-5,54
Consumption	139.521	146.941	206.221	40,34
Insurance Premium	63.563	64.201	43.571	-32,13
Other Business Loans	433.439	442.947	548.705	23,88
INVESTMENT LOAN	**2015**	**2016**	**2017**	**△%**
Equipment	479.371	482.770	375.790	-22,16
Irrigation Systems	125.432	121.343	79.934	-34,13
Construction & Facility	44.846	40.515	48.195	18,96
Purchasing Livestock	189.132	207.752	185.323	-10,80
Sapling	652	834	109	-86,90
Other Investment	5.655	7.616	13.411	76,09
TOTAL	**6.405.799**	**6.765.229**	**7.619.314**	**12,62**

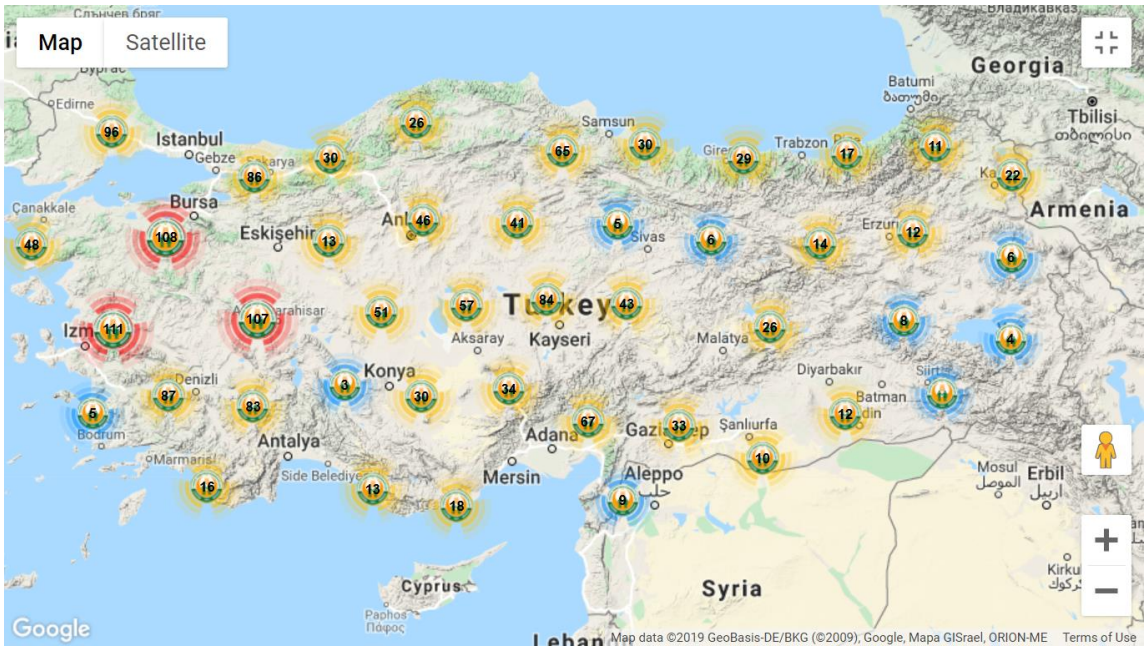
Source: Tarım Kredi Kooperatifleri, 2017: 30.
http://www.tarimkredi.org.tr/files/faaliyetRaporlari/2017YiliFaaliyet.pdf, (28.05.2019)

According to the Table 6, major amount of the business loan consist of general need loan, with the amount of 2.899.349.000 TL given to members in 2017. After general need loan, fertilizer loan ranks as the second biggest loan with the amount of 1.394.681.000 TL among the business loan. Generally; except fertilizer, petroleum products, fisheries and insurance premium, remaining loans increased year by year. Major difference between the three years among the business loans occurred in

consumption loan with 40.34 percent. From the side of investment loan, although decrease from 2015 to 2017, equipment loan keeps the highest portion with the amount of 375.790.000 TL among the investment loans. Except the construction & facility and other investment, remaining investment loans show a decrease from 2015 to 2017. Comparing business loan to investment loan, in total, business loan compose the significant share of total given credits.

Distribution of the ACCs in Turkey is shown at below figure.

Figure 5: Distribution of ACCs in Turkey



Source: Turkish Agricultural Credit Cooperatives.
http://www.tarimkredi.org.tr/index.php/kurumsal/kooperatiflerimiz, (28.05.2019)

ACCs can establish corporations. One of the good examples of success among the ACCs is Tarım Kredi Yem A.Ş. with 1.268.776.125 TL production sales in 2018. Agricultural Credit Cooperatives merged with 12 forage factories in 2012 and founded "Tarım Kredi Yem A.Ş" (Agricultural Credit Forage Corp.) which ranked as the 141st company in 2018 according to the list of ISO 500 (ISO, 2019).

1.4.3. Agricultural Sales Cooperatives (ASCs)

One of the main problems of the small farmers is, not selling their goods at fair prices. Selling process usually encounters them with brokers and intermediaries and causes increase at the selling price while farmers or producers could not even meet their costs and on the other side consumers can not purchase at affordable prices. At this point Agricultural Sales Cooperatives (ASCs) plays a crucial role by eliminating the intermediaries or reducing profits of the intermediaries. So, main purpose of ASCs is; utilizing farmers' products, selling their products in local and foreign markets at fair prices and building a direct relationship between farmers and consumers (Köroğlu, 2003: 82).

Small farmers become more powerful when they act in collaboration with each other by aggregating under ASCs. In this way they can achieve economies of scale and protect themselves against to market speculations. ASCs also give technical assistance to members and enhance the brand and quality of their products by giving guarantee. "An independent ASC can compete with local agents, eliminate some intermediaries and provide some technical advantages to its partners; however, they cannot do a wide range of work, and compete with major traders and industrialists who are holding manufacture or export of certain products. In order to achieve this, agricultural sales co-operatives should form regional and nationwide unions" (Köroğlu, 2003: 82).

Members of the Unions of ASCs are primary cooperatives and general assembly of the unions consist of representatives of the primary cooperatives. These unions are members of a Central Union of Agricultural Sales Cooperatives. Central unions and regional unions handles the relations between the state and primary cooperatives. They provide juridical, technical assistance but do not deal with the sales of the products. Except, in some cases unions export agriculture products. (Köroğlu, 2003: 83). As of 2019 number of primary ASCs is 399 and they have 533.456 members. 322 of these primary cooperatives are member of 17 regional unions with 524.587 members (see Table 3).

ASCs are affiliated to the General Directorate of Cooperatives Unit under the Turkish Ministry of Trade. Currently they are governed by the Law No. 4572 (Okan N. D., & Okan C., 2013: 31). Roots of Turkish ASCs based on "Aydın Fig Producers

Company" which was established in 1913 by the fig producers in order to break the monopoly in fig marketing. In 1935, the Law No. 2834 was enacted and prepared the foundation of today's ASCs. At the beginning they were active in grape, olive, cotton, fig but in time they began to operate at various fields such as nut, peanut, citrus, oil seeds, rose, silk cocoon and etc (Okan N. D., & Okan C., 2013: 31-32). Till to 1969 ASCs formed unions at regional base but in 1969 by the Law No. 1163 they began to form central union (Köroğlu, 2003: 83). Same year 23 regional union of ASCs come together and established Central Union of Agricultural Sales Cooperatives (TARKO) (Köroğlu, 2003: 84). But, in 1980 TARKO is closed and since then a new central union has not been established (Mülayim, 2003: 314).

One of the well known Union of ASCs is TARİŞ. Origin of TARİŞ dates back to Aydın Fig Producers company which is later on renamed as TARİŞ Agriculture Sales Cooperatives Union. Tariş ASCs Union includes four main commodity cooperatives: fig, grape, cotton and olive. In 1949, four main commodities were separated from each other and since then they have operated under different legal entities: Union of Tariş Olive and Olive Oil ASCs (S.S. Tariş Zeytin ve Zeytinyağı Tarım Satış Kooperatifleri Birliği), Union of Tariş Fig ASCs (S.S. Tariş İncir Tarım Satış Kooperatifleri Birliği), Union of Tariş Grape ASCs (S.S. Tariş Üzüm Tarım Satış Kooperatifleri Birliği), Union of Tariş Cotton and Oily Seeds ASCs (S.S. Tariş Pamuk ve Yağlı Tohum Satış Kooperatifleri Birliği) (http://www.tariszeytinyagi.com /www.tariszeytinyagi.com/taris-hakkinda.html, 29.05.2019) .

Today, Union of Tariş Olive and Olive Oil ASCs consist of 31 primary cooperatives which are located in Aydın, Balıkesir, Çanakkale, İzmir, Manisa and Muğla. It is the biggest entity in the sector from cultivation to utilisation of the products; with 28.000 producer-partners, 30 modern continuous-system olive milling facilities, 14 brining plants, R&D department, International Olive Oil Council-accredited laboratories, ISO9000 and ISO9002 Certifications (https://g.ta-ze.com.tr/DefaultEn.aspx, 30.05.2019). Union of Tariş Olive and Olive Oil ASCs is the first at receiving geographical sign of branding among the union of ASCs (Ger, A., Personal communication, April 11, 2019) . They have two main geographical sign brands: one is North Aegean Olive Oils which was registered in 2018 but first has been received in 2007 under the name of Edremit Bay Region Olive Oils, another brand of

geographic sign is South Aegean Olive Oils which is registered in 2006 (M.Zengin, personal communication, May 31, 2019). In 2007 Tariş Olive and Olive Oil ASCs achieved the highest olive oil export in the sector (https://www.haberler.com/taris-zeytinyagi-ihracat-sampiyonu-haberi/, 09.08.2019). Due to the high quality and reliability of the product, TARİŞ Olive and Olive Oil ASCs currently exporting to 49 countries. In 2018 export target of TARİŞ Olive and Olive Oil ASCs was 3000 tonnes (Geçer, 2018).

According to the production sales in 2018, two Union of ASCs placed in first 500 largest businesses in Turkey. These are "S.S. Trakya Yağlı Tohumlar Tarım Satış Kooperatifleri Birliği" and "S.S. Marmara Zeytin Tarım Satış Kooperatifleri Birliği". S.S. Trakya Yağlı Tohumlar Tarım Satış Kooperatifleri Birliği, ranked as 164th in terms of the net amount of the production sales which is 1.159.169.248 TL and S.S. Marmara Zeytin Tarım Satış Kooperatifleri Birliği (Marmara Olive Agricultural Sales Cooperatives Union) ranked as 417th in terms of the net amount of the production sales which is 497.522.712 TL (http://www.iso500.org.tr/500-buyuksanayikurulusu/2018/?ara=KOOPERAT%C4% B0F, 29.05.2019). Marmara Olive Agricultural Sales Cooperatives Union (Marmarabirlik), one of the world's largest table olive producers, provides approximately $ 23 million foreign currency by exporting olives and olive oil to 54 countries (Yüksel, 2018). It purchases "Gemlik" type olive through it's 8 production cooperative members in Marmara region. As a result of Research and Development activities which has been begun in 2010, Marmarabirlik decreased the salt ratio and increased the packaged product range. These developments enhanced export marketing of the Marmarabirlik. So, as indicated in above examples if cooperatives are well managed, branding and export marketing can be achieved.

1.5. AGRICULTURAL COOPERATIVES IN EUROPE IN OLIVE OIL SECTOR

Origin of Agricultural Cooperatives in Europe dates back to early 19th century. They are represented by COGECA (General Confederation of Agricultural Cooperation in the European Union), which also includes fisheries cooperatives

(https://www.copa-cogeca.eu/CogecaHistory.aspx, 01.06.2019). COGECA was established on 24 September 1959. Currently it has 35 full members, 36 partner members and 4 affiliated members from the EU (https://www.copa-cogeca.eu/CogecaHistory.aspx, 01.06.2019).

Roots of COGECA depends on COPA (Committee of Professional Agricultural Organisations) which was established on 6 September 1958, just one year before COGECA, in order to deal with the matters related to development of the Common Agricultural Policy (CAP), protect the interests of the agricultural sector as whole, seek solutions for the problems of common agricultural issues and maintain and develop relations with the community authorities, social partners of EU. Today, COGECA is accepted as the main representative body and spokesman for the entire agricultural and fisheries cooperative sector of EU by representing the interests of 40,000 farmers' cooperatives and through these cooperatives employing 660,000 people with a global annual turnover exceeding 300 billion euros (https://www.copa-cogeca.eu/CogecaHistory.aspx, 01.06.2019). Basic tasks and objectives of COGECA can be listed as following:

- Dealing with general and specific interests of European agri-cooperatives,
- Enabling cooperation between agri-cooperatives in EU countries,
- Undertaking legal, economic, financial, social or other issues of concern to agricultural and fisheries cooperatives,
- Seeking solutions for the common agricultural interests,
- Maintaining and developing relations with other organisations working in the agricultural, economic or social fields both at European and global level.

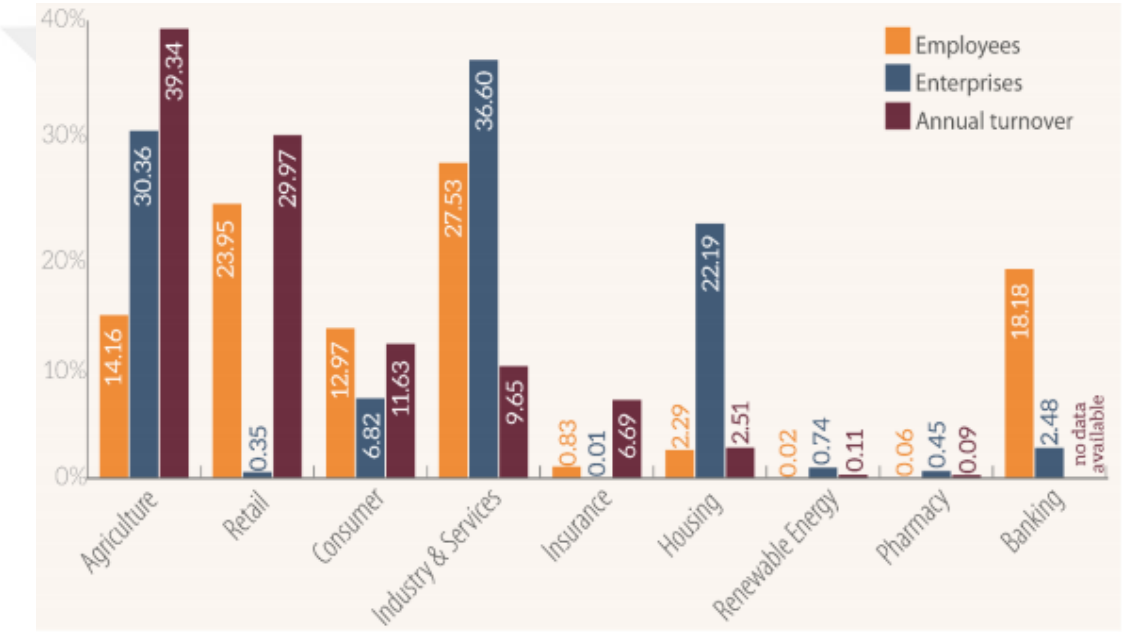
In order to achieve these objectives and enhance the competitiveness of agri-food cooperatives, COGECA promotes innovation as the key strategy. Implementation of this strategy has been launched in 2009 under the name of "European Award for Cooperative Innovation" (EACI) (COGECA, 2015: 17).

Agricultural cooperatives in the EU have a major role in socio-economic structure of the community by handling over the 50% share of agricultural input supply and over 60% share of collection, processing and *marketing of agricultural products* (https://www.copa-cogeca.eu/CogecaHistory.aspx, 01.06.2019). According to the report of COGECA entitled "Development of Agricultural Cooperatives in the EU"

(2014); in 2013 total turnover of all the agricultural cooperatives in EU is €347 billion and the total output of the agricultural industry is approximately €408.8 billion. From the evolution side the top 100 EU Agri-cooperatives show a significant growth about %18.9 between the years of 2011 and 2013.

As indicated at Figure 6, biggest share of annual turnover among the cooperative sectors in Europe is belonging to agricultural sector with %39.34. But, from the perspective of number of enterprises industry and services sector of cooperatives ranks first in EU.

Figure 6: European Cooperatives by sector/number of employees/ turnover, 2015 (%)



Source: Cooperatives Europe, The power of cooperation- Cooperatives Europe key figures 2015.

At Table 7, top 8 olive and olive oil cooperatives are listed. Dcoop which is a Spanish cooperative, ranks first with about €564 million turnover in 2013. Dcoop is the biggest olive oil producer in the world and it is owned by 75.000 farmers and stock breeders (https://www.dcoop.es/company-information/dcoop-group, 01.06.2019)

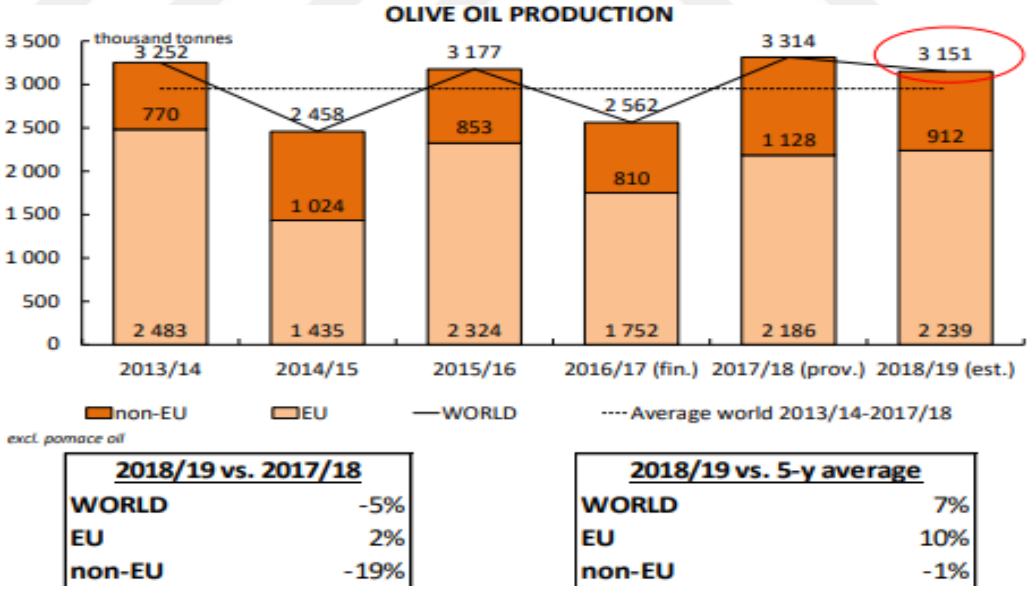
Table 7: EU Top 8 Olive Oil & Olive Cooperatives (By turnover in million €)

N°	Cooperative	Country	2013
1	Dcoop (Hojiblanca)	ES	564
2	Agro Sevilla Aceitunas	ES	96
3	Jaencoop	ES	72
4	Oleoestepa	ES	71
5	Oleicola El Tejar	ES	55
6	Granada Oil "Tierras Altas" (Highlands)	ES	40
7	Almazara de la Subbética	ES	40
8	Ntra. Sra. Del Pilar	ES	32
7	Agropecuaria de Anteque	ES	31
8	Olivar del Segura	ES	29

Source: COGECA, 2015: 36

According to the latest update datas of International Olive Oil Council and MS (Market Situation) Declarations, estimated olive oil production of world in 2018/2019 is above the average of last 5 years. As obviously seen from the Figure 7, EU has the biggest share at world olive oil production. Estimated olive oil production of EU in 2018/2019 is 2.239 thousand tons which is 71% of the whole production.

Figure 7: Olive Oil Production In World (1000 tons)

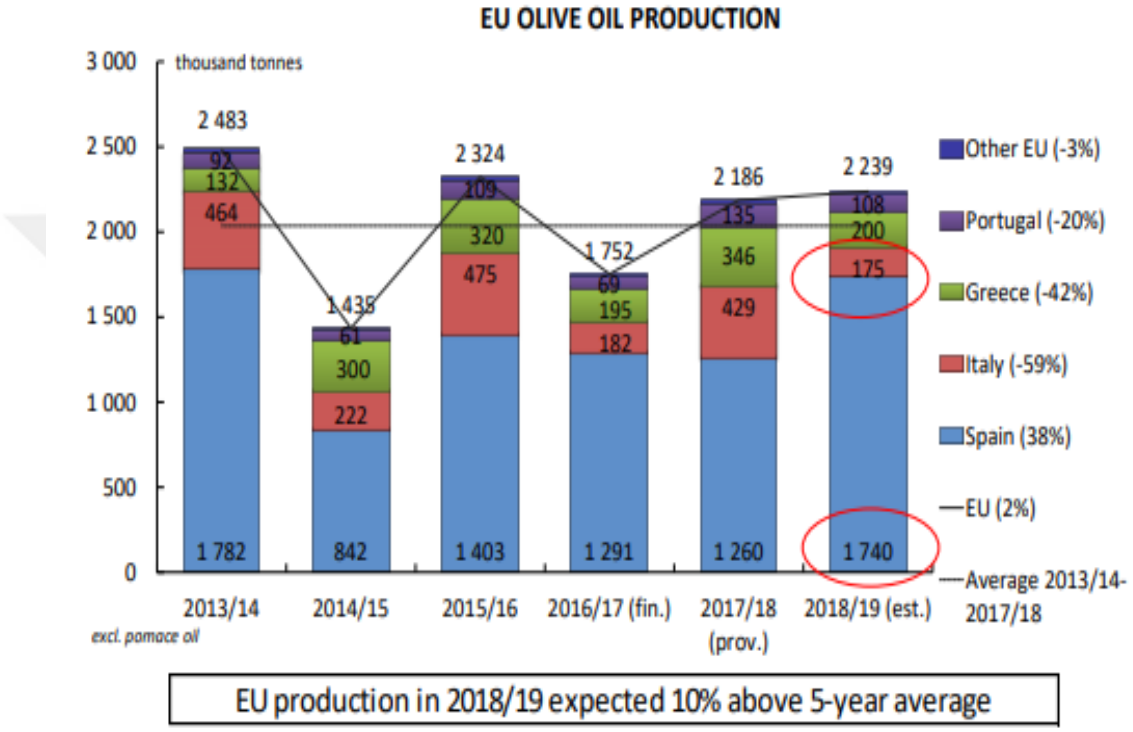


Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019.

Olive oil production of EU is shown at Figure 8. Spain always ranked first among the EU countries regarding to olive oil production. For Example in 2018/2019,

77.7% of the entire production of EU is expected to be provided by Spain. After Spain, Italy or Greece ranks as second biggest olive oil producer in EU. Last five years average of the olive oil production of EU is nearly 2 million tons. In 2018/2019 EU olive oil production is expected 10% above the 5-year average.

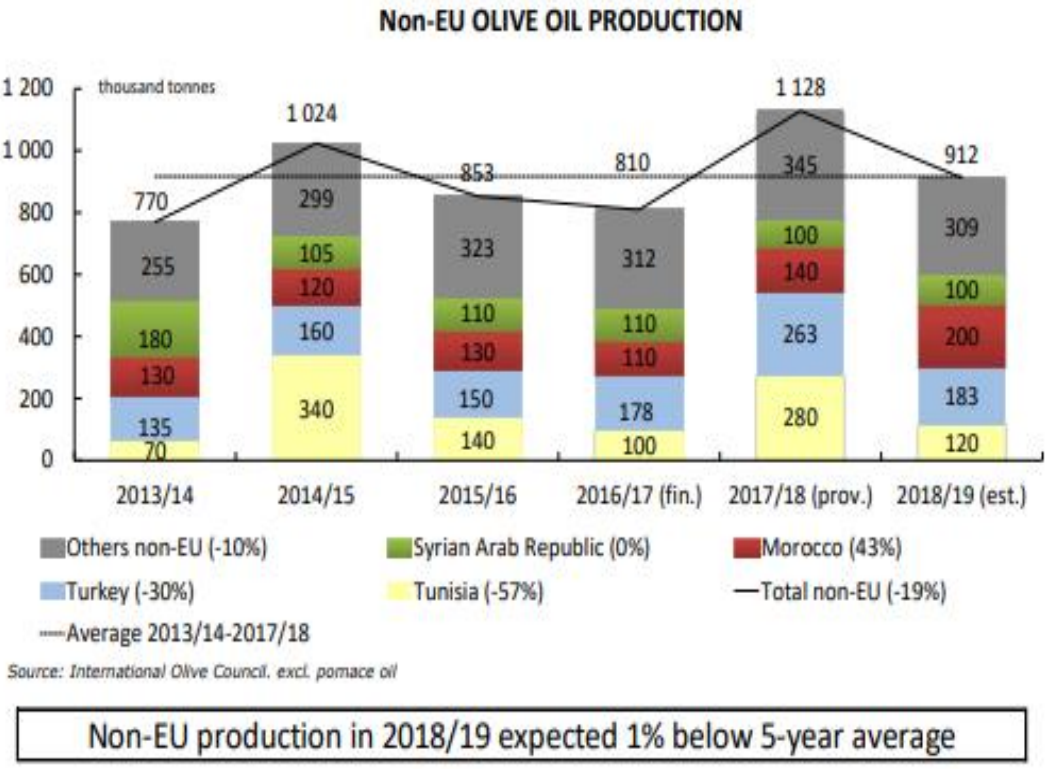
Figure 8: Olive Oil Production In EU (1000 tons)



Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019.

Last five years average of Non-EU countries is approximately 900 thousand tons due to the recent data of IOC. Olive oil production of Non-EU countries is expected to decrease about 1% below 5-year average. In 2017/2018 Turkey produced 263 thousand tons of olive oil which is the highest amount of it's last five years production and ranked third biggest country among the Non-EU countries .

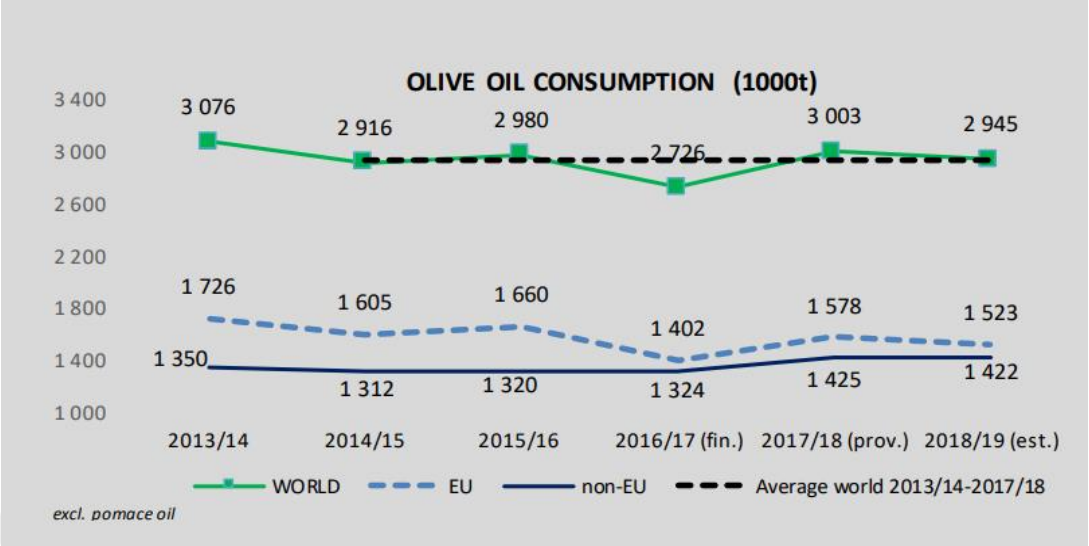
Figure 9: Olive Oil Production of Non-EU Countries (1000 tons)



Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019.

As same as with the production, EU always has the biggest share of world's olive oil consumption. Average of last five years olive oil consumption of EU countries is 1.594.200 tons while last five year average of non-EU countries is 1.346.200 tons.

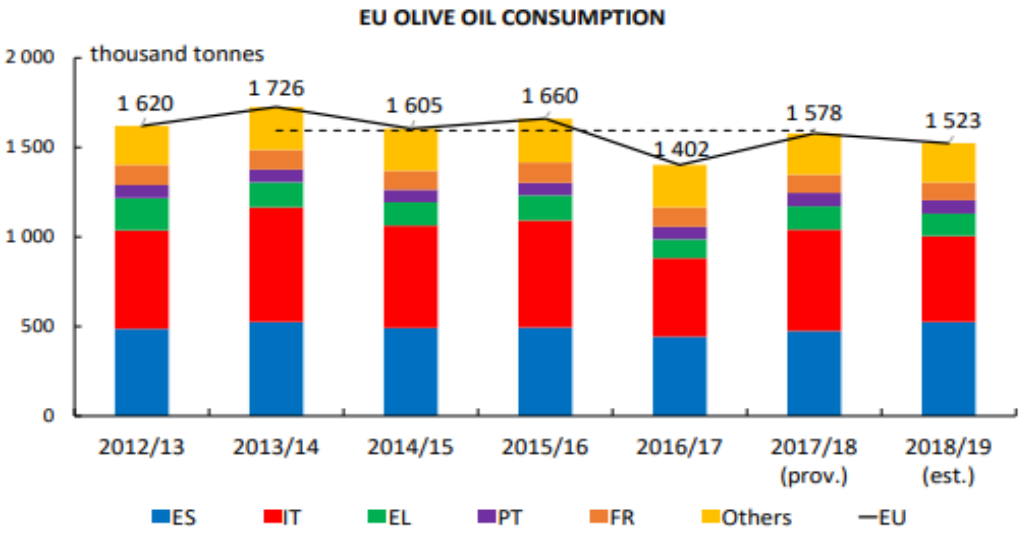
Figure 10: Olive Oil Consumption In World (1000 tons)



Source:https://ec.europa.eu/agriculture/sites/agriculture/files/dashboards/olive-oil-dashboard_en.pdf, 01.06.2019.

EU consumption is expected to decrease about 3% in 2018/2019. At below figure olive oil consumption of EU is indicated in a country basis. Italy and Spain have the biggest share at olive oil consumption among the EU countries.

Figure 11: Olive Oil Consumption In EU (1000 tons)



Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019

As indicated at Table 8, EU imports 75% of olive oil from Tunisia. Turkey's share of EU olive oil import is changing between 3% and 7%.

Table 8: EU Imports of Olive Oil from Third Countries (October-January**)**

Imports of olive oil from third countries (October - January)									
Trade partner	2013/18 (5-year average		2016/17		2017/18		2018/19		
	volume (t)	share (%)	volume (t)	share (%)	volume (t)	share (%)	volume (t)	share (%)	vs. 2017/18 (%)
Tunisia	27 250	68	28 693	77	33 050	64	34 779	75	5.2
Argentina	3 066	8	1 018	3	5 113	10	1 999	4	-60.9
Syria	2 746	7	3 310	9	7 200	14	3 112	7	-56.8
Turkey	2 362	6	1 237	3	3 612	7	1 807	4	-50.0
Morocco	1 942	5	1 522	4	1 280	2	3 626	8	183.4
Australia	1 059	3	918	2	202	0	0	0	-100.0
Chile	910	2	10	0	590	1	166	0	-71.9
Others	799	2	644	2	858	2	730	2	-14.9
Extra EU	**40 135**		**37 352**		**51 905**		**46 219**		-11.0

Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019

36% of the EU's olive oil exports are made to USA. Brazil comes in second rank with 11%.

Table 9: EU Exports of Olive Oil to Third Countries (October-January)

EU exports of olive oil to third countries (October - January)									
Trade partner	2013/18 (5-year average		2016/17		2017/18		2018/19		
	volume (t)	share (%)	volume (t)	share (%)	volume (t)	share (%)	volume (t)	share (%)	vs. 2017/18 (%)
United States	65 302	37	74 048	40	60 319	33	71 451	36	18.5
Brazil	18 829	11	14 841	8	25 584	14	22 845	11	-10.7
Japan	14 991	8	15 262	8	15 377	9	19 039	9	23.8
China	11 572	7	12 043	7	14 830	8	16 328	8	10.1
Canada	8 558	5	9 611	5	8 706	5	9 156	5	5.2
Australia	8 175	5	10 339	6	7 138	4	8 024	4	12.4
Russia	4 694	3	3 655	2	4 097	2	5 006	2	22.2
Others	44 744	25	45 402	25	44 305	25	49 006	24	10.6
Extra EU	**176 865**		**185 200**		**180 357**		**200 855**		11.4

Source:https://ec.europa.eu/agriculture/sites/agriculture/files/olive-oil/prices/market-situation.pdf, 01.06.2019

United States, Brazil, Japan and China are the most important export markets for olive oil. Besides to the efforts to export high quality products to EU markets, this

table shows the way to Turkish exporting companies and cooperatives for the direction of their export marketing efforts.

1.5.1. Agricultural Cooperatives In Italy And Olive Oil Sector.

According to the data of COGECA, there are more than 8100 agri-food cooperatives in Italy in 2014 and current market share of cooperatives is 55% in agriculture industry of Italy (https://ec.europa.eu/growth/sectors/ social-economy /cooperatives_en, 01.06.2019). Today number of the cooperatives in Italy is close to 70.000 and they have approximately 13 million members (LaSalle, 2012).

"Olive growing is an important agricultural activity in Italy, generating 3151 million euros in the olive oil sector, and accounting for 2.4% of the value of agrifood production" (IOC, 2017). In Italy the Bologna region is well-known place because of its cooperative Sector (Bodnar, 2017:16). "It is located in the heart of the Emilia-Romagna region, which is an agricultural center of Italy. Agriculture in this region makes up 4% of the region's employment, while the overall agrifood system (including agriculture, food science, distribution, retail, and restaurants) makes up 16.7% of the region's employment. Co-operatives are integral to the overall economy of the region. While only 1.3% of businesses in the region are cooperatives, they generate approximately 15% of the region's employment and 20% of the region's GDP. Co-ops play an even larger role in agriculture and agrifood systems. 95% of the region's wine is produced by co-operatives. Co-operatives pack and distribute much of the fresh produce, meat, and dairy. Over 60% of the region's groceries are purchased through consumer cooperatives" (Bodnar, 2017:16).

As the other farmers around the world, Italian farmers are facing the same challenges (Bodnar, 2017:16). "The production of agricultural land is decreasing, the age of farmers is increasing, and many rural areas are depopulating. Global trade has made it more difficult for individual operators to access markets. By working together in cooperatives, the farmers of Emilia-Romagna have been able to respond to the global pressures on agriculture. Cooperatives have allowed farms to specialize, produce high-quality, value-added products, and sell into an international market.

The specialty products of Emilia-Romagna farmers are known around the world. At each step of the food system Italian cooperatives add value to the products being produced, increasing the economic return to their farmer members. For example, farmers don't just produce milk; they make Parmesan cheese. Farmers don't just grow grapes; they make high-end wines and balsamic vinegar" (Bodnar, 2017:16).

In Italy cooperative can be founded by three members and rules of limited liability companies are applied (COGECA, 2014: 186). "Cooperative companies are open-ended investment companies and must be registered, as any other company, in the Register of Undertakings at the Chamber of Commerce, Industry, Craft Trades and Agriculture (CCIAA). Each member holds a number of share, the nominal value of which can not be below 25 Euros or above 500 Euros" (COGECA, 2014: 186).

Table 10: National Legislative Framework for Cooperatives

National Cooperative Law	National Sectoral Law On Agri-Cooperatives	Legal Basis Affecting Cooperatives Civil Law: Commercial Law	Min. No. Of Farmer-Members	Minimum Capital (€)
Civil Code	None		A cooperative can be founded by three members, if they are natural persons.	Not required by law.

Source: COGECA, 2014: 186

Following table shows the most important cooperatives, in terms of the turnover, for top olive oil producing countries in EU. Italian cooperatives rank second after Spanish cooperatives (Iliopoulos, C., Theodorakopoulou, I., Tzouramani, I., 2012: 18)

Table 11: Most Important Cooperatives in Olive and Olive Oil Sector

Country	Names of Cooperative	Primary (P) or Secondary (S) cooperative	Turnover 2010* (million Euro)
Spain	1. Coop. Hojiblanca	S	451.07
	2. Coop. Agro Sevilla Aceitunas	S	146.23
	3. Coop. Jaencoop	S	77.51
	4. Coop. Oleoestepa	S	70.216
	5. Olivar del Segura	S	41.5
Italy	1. Oleificio Montalbano	S	60.341
	2. OL.MA. Collegio Toscano degli Olivicoltori	S	8.471
	3. Cooperativa C.A.S.O.	S	5.331
	4. Oliveti Terra di Bari	n/a	2.85
	5. Oleificio Cooperativo Cima di Bitonto	P	2.382
Greece	1. U.A.C. of Heraclion	S	52.32
	2. U.A.C. of Peza	S	26.12
	3. U.A.C. of Sitia	S	27.872
	4. U.A.C. of Messinia	S	13.982
	5. U.A.C. of Lakonia	S	12.173

Source: European Commission, 2012: 18

"The European Commission provides financial support to the cooperatives in the member states at intervals. The decision on granting to the agricultural cooperatives in the Liguria region (Italy) in 1998 can be an example of this support (31999DO298). Within the framework of this Decision, the Law provides for capital grants up to 55% of the total permissible expenditure on investments such as construction, storage, processing and marketing of agricultural products, the purchase of plant and equipment" (Turkish Republic Ministry of Trade, 2012: 17).

1.5.2. Agricultural Cooperatives In Spain And Olive Oil Sector In Spain

According to Govantes (As cited in Yıldırım, 2007) who is the general manager of Oleoestapa, olive oil producers gives all of their crops to cooperatives which they are member of. Then cooperatives sell table olive and olive oil which they produced from their members' olives. After reducing costs, cooperatives make payments by 15 days periods to the member producers whenever their products are sold. Member producers can not receive any payment from the cooperative before the products are sold. Just in emergency cases, 75% of their product value is given as bank loan via banks. Annual interest rate of the bank loan is approximately 4%.

Olive and olive production has a very old history in Spain. Olive fruit which the motherland is Anatolia and Mesopotamia, has been come to Spain by Greeks and Phoenicians. Today, Spain is the world leader at olive oil production and export (approximately 300.000 tonnes annually). Due to the cyclical nature of the harvest average annual production of olive oil varies between 800.000 and 1.800.000 metric tons and only 20% of it is exported (Europa, 2019; Prosodol, 2019). It has the highest number of olive trees (more than 300 million) and dedicates 2.4 million hectares of land to olive (Prosodol, 2019; Padilla, 2019). Nearly 96% of the olive production is used for olive oil production and remaining 4% is consumed as table olive (Yazıcı, 2008). About 80% of the crop is concentrated in Andalusia which is the biggest olive growing area in the world (Prosodol, 2019). In Andalusia class "A"oils have a maximum acidity of 0.4% and class "B" oils have maximum 1% acidity (Prosodol, 2019). Approximately 40% of the olive oil producers of Spain are located in the province of Jaen which is in Andalusia. Main olive type in this area is Picual, but there are also other various types. Catalonia region also has a significant share of olive oil production where the Arbequina variety is the specific type of this area.

Yazıcı (2008) specified that there were 1814 olive oil producers, 1776 milling facilities, 61 oil extractors, 26 refineries, 580 laboratories and 1595 packaging facilities all over the Spain in 2008. He also indicated that most of the producers (%72) were using 2 phase centrifugal continuous facility, while 14% were using traditional type, 9% were using 3 phase centrifugal continuous system facility and remaining 5% were using more than one methods. So, 90% of the olive oil production of Spain were made at two phase facilities according to the datas of 2008. According to the investigations of Küçükçakır (2008) around 70% of the milling facilities in Spain works with 1000 tons of capacity daily.

Most of the Spanish extra virgin olive oil is protected by Geographical Registration in order to increase the quality of olive oil. Geographical Registration arranges; production area, product types, production techniques and plant characteristics that makes all special features of the product. Only olive oil which has been registered geographically can carry logos related to this registration in such a way that they are separated from other olive oils (Yazıcı, 2008).

For many years, in Spain olive oil producers received support premiums as €1,3 per kilo, but between the years 2007 and 2013 under the agriculture support reform, they received €550 per hectare (Yazıcı, 2008). While this support premium in Turkey is around €0,12 per kilo and given with one year delay. So, beside the low premium, delay is also another problem of Turkish olive oil producers. According to the datas of Olive Oil Council on November 2018 recent export statistics of Spain are indicated at following table.

Table 12: Olive Oil Export Figure of Spain Among the Top 5 Olive Oil Exporters (1000 Tons).

	2014/15	2015/16	2016/17	2017/18	2018/19
SPAIN	236.8	297.2	291.2	292.0	320.0
ITALY	199.6	208.1	199.5	186.4	185.8
TUNUSIA	304.0	102.5	89.5	200.0	130.0
PORTUGAL	47.6	40.5	39.5	58.3	50.2
TURKEY	30.0	15.0	45.0	70.0	45.0
EU	508.1	573.5	558.0	563.4	573.0
WORLD	929.0	788.5	782.5	945.5	844.5

Source: IOC, 2018

As shown at above table between 2015- 2018 Spain is the top olive oil exporter among the world wide countries. More than half of the EU olive oil export is handled by Spain. Just in 2014 Tunisia was the top exporter with 304.000 Tons.

Table 13: Olive Oil Import Figure of Spain Comparing with Other Main Importers (1000 Tons).

	2014/15	2015/16	2016/17	2017/18	2018/19
WORLD	920.5	790.5	781.5	936.0	874.5
EU	224.5	97.5	90.5	180.0	121.6
USA	294.5	314.0	305.0	310.5	310.0
BRASIL	66.5	50.0	59.5	76.5	78.0
ITALY	96,0	40.6	35.9	64.1	85.4
SPAIN	104.7	47.3	41.0	99.4	25.0
JAPAN	59.0	53.5	54.5	55.5	55.0

Source: IOC, 2018

From the imports side ; USA is the top olive oil importer country, after USA Brasil rank as second with in total 330.500 Tons of olive oil import in last five years. Italy rank as third biggest olive oil importer country with in total 322.000 Tons of olive oil import in last five years while Spain rank as fourth biggest olive oil importer country with in total 317.400 Tons of olive oil import in last five years. Except 2018-2019 harvest year Spain is the major olive oil importer country among the EU. Just in 2018-2019 Italy hold the biggest share of olive oil import among the EU with 85.400 Tons.

In the following chapter, the case of Turkish cooperatives related to olive oil production and marketing will be examined for a high potential region Karaburun, İzmir. Utilizing various qualitative data related to cooperatives and olive oil production & marketing in the region, the current situation, problems and possible solutions will be discussed from Turkish market perspective.

CHAPTER TWO
COOPERATIVES AND EXPORT MARKETING

Aegean region is the major olive oil producer of Turkey as a region, which is divided to two main parts as northern and southern production regions. Karaburun being located in İzmir stands in the southern region with an olive tree stock of almost 727.000 (İzmir Provincial Directorate of Agricultural: 2018). Even there is not a consensus about the number of olive trees between the various actors of the sector in the region - e.g. one of the forecasts increases the amount to 1 million- , the current stock makes Karaburun as one of the most " high potential" areas for production. Not only the quantity of the trees is an indicator but also the environmental quality of the Peninsula improves the potential of the region for organic and high quality olive oil production. Karaburun has been announced by President's decree as special environmental protection zone in May 14th, 2019. Karaburun is one of the smallest district of İzmir with 10.600 population and 330 farmers recorded to MoA's farmer registration system. Total field of the olive groves in Karaburun district is 9911,522 decare and 9689,645 decare of this area is used for olive oil production (T. Ergin, personal communication, April 3, 2019).

On Table 14 number of the olive tree and amount of the both olive and olive oil production of Karaburun district is indicated.

Table 14: Number of Olive Trees and Olive Production of Karaburun District (in 2018)

DISTRICT	**TABLE OLIVE**				**OLIVE FOR OIL PRODUCTION**				
	Number of trees giving fruit	Number of trees not giving fruit	Productivity (kg/ tree)	Production (ton)	Number of trees giving fruit	Number of trees not giving fruit	Productivity (kg/ tree)	Production (ton)	Amount of the Olive Oil Produced (ton)
KARABURUN	1400	10.400	10	14	605.000	110.111	15	9.075	2.269

Source: İzmir Provincial Directorate of Agriculture and Forestry, 2019

According to the recent datas of İzmir Provincial Directorate of Agriculture and Forestry, in 2018 number of olive trees for olive oil production (in total 715.111) were more than the number of olive trees (in total 11.800) for producing table olive. In 2018 annual production of table olive was 14 tons while annual production of olive oil was 2269 tons in Karaburun. The MoAF and MoT aim to be second as a country in the olive sector of the world. For this target, new plantation was carried out and operational infrastructure is renewed (H. Çetin, personal communication, April 11, 2019). In next years amount of the harvested crop is expected to double (H. Çetin, personal communication, April 11, 2019).

Activities of Karaburun Branch of Tariş Olive and Olive Oil ASCs which was closed few years ago, can be given as an example of export marketing activity of a cooperative. When Tariş was active in Karaburun, olive oils under the brand of TA-ZE were being exported. TA-ZE brand of Tariş was founded in 2001 and Tariş is still continuing and developing its branding activities through the penetration strategy of marketing (H. Çetin, personal communication, April 11, 2019). It is benefitting from online sales over website, getting into contact with customers via social media and investigating behaviours of customers and estimating customers consuming habits. There are two main reasons behind the closure of TARİŞ ASC in Karaburun. First, according to the survey, participants who were previously member of Tariş Olive and Olive Oil Cooperative in Karaburun stated that logistic service of the vendor was not good enough and purchase price of the Tariş was not satisfying. Second reason, farmers preferred private wholesalers instead of preferring cooperative and sold their products who gave more price. This situation led closure of the Tariş. After the closure, private mills increased the commission of pressing from %8 to %16. When Tariş was active pressing commission was around %8 (https://www.haberler.com/taris-baskani-cahit-cetin-uretici-birligine-sahip-9564888-haberi/, 03.07.2019). So, not collaborating with cooperative increased the costs of olive oil production.

Currently there are four Agricultural cooperatives in Karaburun Peninsula.

- Karaburun Agricultural Credit Cooperative
- Eğlenhoca Agricultural Development Cooperative
- Bozköy Agricultural Development Cooperative
- Karaburun West Neighborhood Agricultural Development Cooperative

Karaburun Agricultural Credit Cooperative (KACC) was established on 01.01.1930 in Karaburun and has 150 members, but just 130 of them are active members (U.Büyük, personal communication, May 6, 2019). KACC provides both commodity credit and cash credit to it's members. As commodity credit it supplies diesel oil, fertilizer, machinery, tool equipment and etc. They do not have any activity regarding to olive and olive oil production.

Eğlenhoca Agricultural Development Cooperative (EADC) was established on 10.03.1976 in Eğlenhoca Village of Karaburun and has 218 members (M.Döngeloğlu, personal communication, April 3, 2019). Main activity of Eğlenhoca Agricultural Development Cooperative is providing market needs of the local people. But, it also supplies inputs such as fertilizer, diesel fuel, tractor, forage and etc. for farming and breeding activities of the local people.

Actually founding purpose of the cooperative was supporting agricultural development activities of the district such as creating an olive oil brand and selling olive oil. For this purpose olive oil production continuous centrifugal press system facility set. But in 2012 according to the Law No 6360, assets and properties of the villages transferred to the municipalities. So, possession of the Eğlenhoca olive oil facility transferred to Karaburun Municipality in 2012. By this transfer operation right of the facility went out to tender. Since then cooperative did not have any operation right on the facility. EADC has tendered for the facility. But, could not provide the enough money and a private company called Sahil Yağ won the tender.

Both peasants and cooperative members trying to get the possession of the facility from the municipality and they are emphasizing the importance of receiving the operation rights. Headman of the village who is also the president of the EADC states that it is difficult to create an olive oil brand without getting the operation rights of the facility. Because, administration of the facility is not satisfying. They believe that if the EADC could run the facility, quality of the olive oil production will be much better. As a EADC they do not want to sell the olive oil which they do not produce by themselves. Because of that there isn't any olive oil selling activities at the EADC.

Bozköy Agricultural Development Cooperative (BADC) was established on 25.02.2014 in Bozköy Village of Karaburun and has 17 members (M.Döngeloğlu, personal communication, April 3, 2019). Currently Bozköy Agricultural Development

Cooperative is not dealing with olive oil production. Main activity is growing narcissus flower (H.Baba, personal communication, May 5, 2019). But, they applied for the brand registration and planning to produce olive oil under the name of Bozköy Agricultural Development Cooperative.

Karaburun West Neighborhood Agricultural Development Cooperative (KWNADC) is established on 28.03.2018 in Küçükbahçe Village of Karaburun and has 33 members (M.Döngeloğlu, personal communication, April 3, 2019). Although recent establishment, KWNADC is the most active agricultural cooperative in Karaburun. On 21.11.2018 first symposium on "Olive production in Karaburun Peninsula: Problems and Solutions" is pioneered by KWNADC. Hurma / Furma type of olive was the main subject. Problems and solutions of furma olive production was discussed. Second symposium on "Olive and olive oil production in Karaburun Peninsula" is also handled by KWNADC on 17.04.2019. Attendees were from various areas such as from Olive School (in İnecik Village), Olive Research Institute (in Bornova İzmir), Gödence Agricultural Development Cooperative (in Seferihisar İzmir), Bademler Village Agricultural Development Cooperative, members of design project with name "Pomace: Learning Circularity from Olive" (in Netherlands), chairwoman of İzmir Köy Koop (Association of İzmir Agricultural Development and Other Agricultural Cooperatives), farmers, olive and olive oil producers, headmans of the districts, academicians, collectives and etc. Main results from the second symposium can be summarized as following (KWNADC, 2019):

- Karaburun should be food producing area not just a touristic location.
- Producer cooperatives and consumption cooperatives should work together in a spirit of collaboration to increase olive oil consumption.
- Over irrigation, over agricultural spraying, over fertilization is giving harm to olive trees.
- Reliable, scientific data related to the olive trees must be published.
- Rejuvenation of old trees must be done.
- Farmers do not know pruning of the olive trees.
- Olive fruit fly giving substantial damages to olive trees.
- Disposal of the olive pomace is one of the biggest problems.

- Harvesting problem: in Karaburun farmers are harvesting/picking up olive from ground not from the branches. One of the main reason of that habit is to wait for the precious "Hurma"- a self-maturation, tree-top fruit- olives, which are limited in quantity. This picking method decreases the quality of olive and olive oil. Because, olive fruit is mouldering when it gets into contact with soil and waits for a long time.
- Time span between the harvest and processing is too long. Olive fruit is waiting too much before going to mill and usually waiting 2-3 days at mill too. Stocking harvested olives for long time causes fermentation and development of mould.
- Storage conditions must be improved. Many producers/farmers keeping their olive oil in plastic containers/barrels which causes absorption of PVC from the plastic. Best way for storage of olive oil is using glass, ceramic, porcelain, non-reactive metals such as stainless steel containers. Storage degree should be between 16-18 degrees centigrade.
- Minister of Forestry is not allowing grafting of the "Delice" olive. Delice Olive is the wild type of olive in Karaburun Peninsula. Oil of Delice is very valuable and healthy. But, 1 kg Delice olive oil can be acquired approximately from 10 kg Delice olive.
- One of the main problems of cooperatives in Karaburun is undercapitalization.
- Cooperatives must be transparent and faithful.
- In world market olive oil consumption and demand is increasing day by day. There is not production surplus in world market.
- Increase in world demand causes increase in olive oil prices. But, olive oil producers of Karaburun Peninsula can not benefit from this price increase effectively.
- Olive oil extraction must be under 28 centigrade degrees and process must be maximum 30 minutes (Unpublished symposium notes of KWNADC, 2019).
- Furma/Hurma which is a specific olive type unique to Karaburun area must be branded.
- Phenolic compound which increases the quality of olive oil will be high if olive is harvested and extracted properly.

- Olive oil festivals during the harvest time can be organized in order to introduce olive oil of the Karaburun Peninsula.
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2.1. COOPERATIVES AND MARKETING

In Karaburun between the dates of 5-9 September 2018, 13th Science Congress under the topic of "Cooperatives" has been organized by leadership of Consumption Cooperative of Anatolia Life, Cooperative Initiative of Beşiktaş, Cooperative of Kadıköy, Cooperative Initiative of Koşuyolu. Many cooperatives, initiatives, collectives, organizations, producers attended from various locations of Turkey in order to discuss the problems of cooperatives and their marketing activities. Discussions were made over 3 headings:

1) Food and Cooperatives (Session 1),

2) Organization Types (Session 2),

3) What should we do (Session 3)?

At these three sessions attendees introduced themselves and shared their experience and knowledge under the frame of topics which is summarized below (13th Karaburun Science Congress: 2018) :

2.1.1. Food and Cooperatives

Session 1 of "Food and Cooperatives" was handled on 7 September 2018. Discussions concentrated on accessibility of cheap, healthy and qualified foods. Collaboration and organization are emphasized for reducing the costs and decreasing the intermediaries. Main results of this session are listed below.

- Building networks between consumers and producers;
- Transferring goods and foods via these networks; providing common depots;
- Decreasing transportation costs by gathering small producers and individual consumers;
- Frequently organising workshops between the cooperatives, collectives and other initiatives for enhancing the solidarity;
- Strengthening relations with cooperative unions by merging;

- Turning cooperatives into much more democratic structures;
- Avoiding from monopol structures of the unions by providing equal and fair opportunities for members;
- Regaining and providing the reliability between the cooperative members;
- Consumption habits must be changed via using consumption cooperatives;
- Farming without using pesticides, harmful chemicals for nature can just be achieved and disseminated under the support of consumption cooperatives, food communities and initiatives.
- High prices of ecological and organic agriculture is also discussed.

2.1.2. Organization Types

The session 2 started on 8 September 2018 with the participants presenting their own forms of organization and models. Problems and solutions of different organization types and models were handled. Depending on the difference of organization models of consumption cooperatives, collectives and producer cooperatives, collectives problems faced are also differ from each other.

It is stated that there is no responsibility mechanism to connect the non-members in the implementation of the decisions taken in the cases where the non-members have the equal right to decision making and therefore there are problems. Beside this, some cooperative models run their operations by working bodies and applying rotation between the bodies. Some groups adapted consensus and majority rules as decision making model. Application of the consensus model is easy when the number of participants are low, but it is difficult when the number of participants increase.

Another issue is general assembly meetings where some cooperatives organize meetings as a camp for discussing previous year activities and identifying next years activities, while some cooperatives organize general assembly meetings just for the formality and not taking actions into force.

At not officialised cooperative initiatives and food organizations, opening shop has some advantages together with disadvantages. In the case of hiring shops officialising is compulsory. High rent fees of shops and the bureaucracy of opening

shop are the disadvantages. But, for reaching much more people opening shop is an efficient model. At the absence of shops, organizing workshops also can be a model for accessing people. Currently officialising process of some consumption cooperatives are continuing by establishing branches, stabilising sale prices. But, people with low income can not afford prices of the organic products. It was also emphasized that the cooperatives should go beyond the groups of consumers coming together, the consumption issue should be seen as an organization area, and the consumption cooperatives should be increased to change the current food system.

Food organizations works in local districts as small communities and there are horizontal relationship among them. Works are handled by few people and few volunteers and meetings are done when it is needed.

From the side of producer cooperatives, low attendance of new partners/members is one of the main problems. Most of the members do not want to take responsibility so managers or administration do not change. They are consisting of Supervisory Board and Board of Directors. Meetings are handled when there is an important issue or situation. Decisions are taken at these meetings. Other problems specified as; setting unions and gathering with other producer cooperatives could not be achieved. Opening shops as partnership even could not meet the costs. Sale rates are low.

At horizontal organizations, rights of the individual members must be protected, sometimes equal conditions are not provided and there can be hierarchy among the founding authorities, old members and new members. Gender equation is also not provided in some organizations. Even sometimes women workforce is exploited.

2.1.3. What Should The Cooperatives Do Mutually?

Common actions can be taken together with local authorities, for making changes at food policies. Accession to healthy, cheap food must be included in election declarations. Database of consumers and producers must be established so all parts can directly get into contact with each other. Ecoharita (Ecomap) can be an example for this database and this network can be established under the roof of cooperatives.

Collaboration against to monopol structures for the achievement of common targets is necessary. This collaboration must also include syndicates, work organizations, associations.

Although some participants suggested establishing organizations other than cooperatives and setting a commune system, most of the participants agreed on cooperative system as the solution for accessibility of healthy and cheap food. Opening cooperative branches or setting central cooperative union or establishing primary cooperatives in every district is also discussed.

Consensus must be provided; labour, producer must be at the decision process. Vertical organization should be, but decisions must be taken in cooperative assembly. Ecologic agriculture must be supported. Under the partnership of producers and consumers, certification system must be developed against to industrial certification.

Transportation and warehousing problems can be solved by collaboration. Invitation of the experts and informative activities should be organized for changing the consumer habits of public. Common training programs of cooperative models, food and agriculture policies and organization processes must be implemented. Public awareness of sustainability and ecological agriculture must be increased via written and visual documents and campaigns.

2.2. PROBLEMS OF OLIVE OIL PRODUCTION AND MARKETING IN COOPERATIVES

Olive Oil production industry faces with many problems today in Turkey, which lowers Turkish Export performance nationally. The main problematic areas will be discussed under marketing mix elements as Product, Place, Price, Promotion and target market.

2.2.1. Product/Production

Human resource and farmer potential is one of the significant problem of the olive oil production. Young generations have not been included in the workforce almost for the last 40 years of urbanization trends of Turkey. Farmers are getting older

as a general problem of Turkish agriculture industry. As many rural areas of Turkey there is not enough young population for agricultural activities in Karaburun. Most of the young population are living in cities although they have the farming heritage from the families. So, there is a substantial workforce loss in villages and rural areas of Karaburun Peninsula. Age of the peasants are generally above 60 years old. Seasonal labour is also not enough and common for the farmer families. Sometimes families coming from the east side of Turkey during the olive harvest. But, labour costs are high when we compare with the revenue obtained from olive and olive oil production. High harvesting costs and lack of young farmer causes not picking olives on time. Mostly; olives are picked up, after ripen and they fall to soil. Olives left on the ground will rot and can foster disease and olive fruit flies (Grant, 2018). Beside not being healthy, picking from ground decreases the quality of olive oil and increases the acidity levels of the oil. Not harvesting olives on time from branches also causes crops to be eaten by pigs. Many peasants specified that when they go to the groves they see that especially the good ones are eaten by pigs.

Goats are also giving so much harm to olive trees. They are eating the olives and breaking the branches of trees. Another major problem is olive fly and olive moth which causes nearly 40% loss of the crop (Unpublished symposium notes of KWNADC, 2019). Few years ago Olive School (in İnecik Village) conducted workshops and gave trainings to farmers about how to mitigate the olive fly. Volunteers of the olive school and peasants set tracks for flies and indeed they received positive results.

Using harvesting machinery is much more economic than picking olives by hand. But, land structure of Karaburun Peninsula especially the east side is not suitable for machinery harvesting. Because land is rough, steep and many olive growers have small groves. Another negative effect of steep land is irrigation problem. Most of the farmers have irrigation difficulties. They usually do not water their olive trees and uncaring of the hard-to reach trees causes decrease on productivity. Olive growers in the area also do not have enough knowledge of proper pruning. Trainings and seminars to farmers regarding to pruning, fertilizing and agricultural spraying are not common in the region. Lack of common agriculture policy leads, farmers irregular crop

growing. If they can not meet their costs from olive growing they are growing citrus and not paying attention to olive trees.

Most of the olive oil producers and olive growers stated that they do not receive enough support from Karaburun District Directorate of Agriculture and Chamber of Agriculture. As it can obviously be seen at findings section on Table 33, rate of receiving support from Karaburun District Directorate of Agriculture is 1.14 and rate of receiving support from Chamber of Agriculture is 1.05 which are very low.

Current cooperatives are not working on branding activities of olive oil, they even do not market the olive oils of the producers. Cooperatives do not have branding activities at all. Producers mostly sell their olive oil in plastic reused water bottles without labeling and branding. Thus revenue of the olive oil per/kg is low. When the revenue is low, willingness of production also decreases.

Independent laboratory is not available in Karaburun. Farmers/producers are analyzing their olive oil at the olive oil mills where they are pressing their olives. So, it can not be said that there is a fair and independent laboratory analysis. Just "Mill of Malia" a private company sending olive oils to Bornova Olive Research Institute and İzmir Directorate of Provincial Agriculture and Forestry for analysis which are authorized formal institutions.

2.2.2. Place

In Karaburun farmers mostly sell their olive oil products in bulk (5-10 kg plastic bottles) in bazaar. There are not organized retailers or groceries that sell these products. The olive oil is mainly sold from home storages directly to the local user.

Storage conditions is also another major problem. Although in some mills, chrome tanks are used, due to the high costs of chrome and stainless steel tanks most of the olive oil producers use plastic barrels or tanks at home for storing.

Currently there are 6 active olive mills in Karaburun and all of them are using centrifugal continuous system. But, just one mill which is belonging to Malia has 2 phase centrifugal continuous system, remaining mills have 3 phase centrifugal continuous system. 2 Phase system is the most modern type of milling system where the phenolic value of the olive oil is higher. According to presentation of Didar Sevim

from Bornova Olive Research Institute, phenolic value is approximately 197 (mg/L, as gallic acid) at 3 phase mills while it is 292 (mg/L, as gallic acid) at 2 phase mills. As the phenolic value increases quality and healthy features of the olive oil will increase. Although the amount of olive oil produced, decreases at 2 phase systems in order to obtain healthier and qualified olive oil it will be better to prefer 2 phases mills. After 2010 Turkish government began to give support and incentives for 2 phase mills. Name of the mills in Karaburun Peninsula are as following:

1) Eğlenhoca olive oil mill (belonging to Karaburun Municipality),
2) Eğlenhoca olive oil mill (private mill facility)
3) Ambarseki olive oil mill,
4) Yayla olive oil mill,
5) Parlak olive oil mill (belonging to Malia company),
6) Çatalkaya olive oil mill,
7) Kösedere olive oil mill (not active, it is closed),

2.2.3. Price

The average retailing price of Karaburun olive oil marketed from local producer is between 16-20 TL/kg, which is mainly filled in reused plastic water bottles. Insufficiency of branding activities and wrong production causes low selling price and low revenue of the producer.

Olive oil import from Syria also decreases prices of the olive oil in the local market. Already local olive growers and olive oil producers can not meet their production costs, adding on low market prices, affects the production process in a negative way.

Small amount of farmers receive premium incentive, fuel and fertilizer incentives. Main reason of this low rate is, they think incentives are not enough and not worth for applying. For example fuel and fertilizer incentive is 14 TL per decare and premium incentive of olive oil is 0.80 TL per kilogram (https://www.tarimorman.gov.tr/Konular/Tarimsal-Destekler/Fark-Odemesi-Destekleri, 04.06.2019). Amount given is very low when we compare with the incentives of EU countries.

2.2.4. Promotion

From modern marketing perspective there is almost no promotion activities done for Local Karaburun olive oil producers. There is just one newly established company Malia, which will be examined below in detail, making marketing investment to website, social media, label design, fair visits etc. related to local Karaburun products. There is no geographical sign registration yet for any kind of trees, olives, or olive oil in Karaburun Peninsula.

2.2.5. Target Market

There are some basic criterias which must be taken into consideration while selecting the target market. These are:

- Identifiying the major importer countries of the product,
- Specifying countries that increased the import in recent years,
- Identifying countries that have low export and high import of the product,
- Geographical distance and climate conditions,
- Age distribution and cultural values,
- Comparative advantages of the trade with mentioned country,
- Demand similarity with local market,
- Meeting consumer needs,
- Bilateral trade agreements,
- Customs tariffs and limitations,
- Certifications, standards, import legislations,
- Economic development, trade structure,
- Foreign trade policies of the country,
- Currency stability,
- Competitiveness with rival companies,
- Logistic opportunities (Yılmazer and Pesen, 2015:87).

The main target markets for Turkish olive oil industry is EU, USA, Japan, China and Brazil. In order to increase our market share of these countries as a country we need to pay special attention to consumption habits of their populations. While

creating an olive oil brand expectations of the customers must be taken into consideration. For example Japan consumers prefer fruity sweet taste, strong flavor, maximum 0,8 acidity level and green colour at olive oil (Sabuncu, 2016: 139). Colour of early harvested olives are green, so if the green colour is demanded harvesting must be before the ripeness of olives. Mete (2015) has shown, olive oil export to USA is much more profitable and entry to the market is much more easy than EU. But, currently in Karaburun, there is not any specific target market investigations and distribution channels. Olive oil producers sell their products usually to local consumers who are either their relatives, friends or tourists coming to visit Karaburun area. In general except Malia brand, olive oil produced in Karaburun is not being sold neither at grocery stores nor in foreign markets. So, there is not any target market activities for olive oil in Karaburun Peninsula.

2.3. CREATING AN OLIVE OIL BRAND

Kay (2006), defined "branding" as creating customer awareness by differentiating the product or service from similar ones within an established category. The general problems of Turkish Exported goods structure are known as low-value, no-brand, bulk or private label goods. Branding is the golden key for value added export goods, not just for industrial products but also for agricultural products. According to the Gemunden (1991), there are more than 700 factors influencing performance on export success. Especially; buyer-seller relationship, market, product, brand and distribution related issues are the basic factors. For building brand awareness and brand loyalty; innovation, creation, prestige, labor are the major factors (Albaum & Duerr, 2008: 430; Tanyeri, 2015: 70).

Successful branding process starts from the production stage of the product and continues with bottling, labelling and promotion activities. Without solving the production problems of olive oil in Karaburun, successful branding can not be achieved. As the acidity level (expressed as oleic acid) decreases quality of the olive oil increases. But, due to the wrong harvesting and other above mentioned production problems, currently acidity level of olive oils produced in Karaburun is usually between 3 and 4 grams per 100 grams which can be classified between "ordinary virgin

olive oil" and "virgin olive oil not fit for consumption". Although in the region, the farmers all agree to the quality of their olive oil and it is mainly stated that their olive oil is qualified, tasty and even can be consumed in high acidity level; in fact many consumers prefer low acidity.

According to the face to face interview with the owner of Malia Agricultural Product Corporation, they are aiming to amend and improve wrong applications of olive oil production in Karaburun while creating Malia Olive Oil brand. He emphasized that if the producer deals with the olive grove correctly; waters on time, does the pruning, fertilizing and spraying properly, ventilates soil, carries olives in crates instead of sacks, picks olives from the branches instead of picking from the ground or uses harvesting machine together with laying nets and tarps under the trees, not waits too long for pressing and sends to mill as quickly as possible then the quality of olive will be increased and they will buy from the farmers in high prices. When the farmers and producers receive high revenue they will pay much more attention to their olive groves and this will provide the sustainability of their brands.

But, branding activity does not end at this point. Storage temperature is also fundamental for the quality of olive oil; during the grinding, stirring and pressing, olive paste temperature does not go above 24-25 C and harvested olives are pressed in same day. In this way nutritional value and vitamins are preserved. Acidity level of their extra virgin olive oil is 0.3 grams per 100 grams. They created two different series of extra virgin olive oil in special designed 500 cl glass bottles. First one is with 0.4 oleic acidity called "Karaburun Amber Serial" and production is limited to 2000 bottles which has fruity taste and soft bitter at tongue, burning feeling at throat. Price of this serial is 25 TL in 500 cl bottle. Another one is Oliva Malia Domat Serial with 0.3 oleic acidity, 449 Phenolic value and strong fruity smell, burning feeling at throat. Price of this second serial is 50 TL in 500 cl bottle. Both brands are sold both in local and foreign market.

Mill of Malia has an organic certification building and machinery park, production areas are without windows, and also has light, heat, oxygen and dust fighting factory design. Photographs of Mill of Malia are shown below.

Figure 12: Mill Of Malia

Source: Malia Agricultural Product Corporation

Figure 13: Cleaning and Crushing Machine of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Cleaning and crushing machine has double fan for removing dust, branch and decontamination. It also has constantly renewed 3-ton olive washing pool, full automatic crushing hammer, silence working property.

Figure 14: Malaxation of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Malaxation means mixing of the olive paste. Mill of Malia has 6 malaxers with 750 kg capacity which are computer controlled, and programmable according to the product and harvest type. Every malaxer can work separately and independently from each other. Without mixing the remnant of previous product each malaxer are capable of self- cleaning with pressurized hot water.

Figure 15: 2 Phase Decanter of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Daily processing capacity of the decanter is 70 Tonnes and has two engines with slowing down spinning rate.

Figure 16: Separator of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Separator with computer controlled fully automatic blasting, precision digital scales.

Figure 17: Storage of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Malia Mill has 267 m2 stock area which is built underground. All tanks and materials are AISI 304 stainless steel. Olive oil is stored at oxygen-free and under nitrogen. Storage area is odorless, 4 seasons 18 degrees, air-conditioned environment. Total storage capacity is 77 tons and there are 17 different tanks at 5 tons, 2 tons and 1 tons dimensions. Custom tank rental services are also provided. Production of olive oil with special conical sedimentation tanks with 45 degree angles.

Figure 18: Product Development Unit of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

Paper (polishing) filter before packaging, 10 tons capacity blended tank for different products, Kieselguhr (Soil) Filter.

Figure 19: Bottling and Canning of Malia Olive Oil Mill

Source: Malia Agricultural Product Corporation

All kinds of glass bottles, cans and pet filling ability between the range of 250 ml - 30 lt, cover printing, cover plastering, hooding, automatic label printing, IR, SKT, inkjet printer can print Party No, palletizing and shrinkage.

CHAPTER THREE
A CASE STUDY OF KARABURUN PENINSULA

3.1. THE PURPOSE OF THE STUDY

Recent developments of globalisation urge many small producers to come together and work collaboratively in order to achieve sustainable success at their working field. Small olive oil producers also face with tough competition conditions against to major players of the sector and this situation oblige them for searching innovative and effective challenges. At this point, although the long history of olive and olive oil production and specific type of olive fruit which is called “hurma” or “furma” in Karaburun Peninsula still there has not been a global brand. So, in this research we tried to find out answers of the following questions:

- Although historical background of olive oil in Karaburun Peninsula why there is not an international olive oil brand in Karaburun?
- Does performance of the cooperatives effect branding strategies of olive oil export?
- Can cooperatives be a competitive model for creating an olive oil export brand?

Cooperatives and export marketing research area is an empty place of scientific work. In Turkey cooperatives from the modern and sustainable marketing perspective has not been studied in every aspects yet. Also there has not been any research at Karaburun Peninsula regarding to olive oil export branding activities and cooperatives in the region. Because of that purpose of this study is to investigate the relationships between export marketing efforts and cooperative performance to create an export brand of olive oil in Karaburun Peninsula.

3.2. METHODOLOGY

During the research it has been both benefited from the primary data and secondary data. Reports and web sites of ICA (International Cooperative Alliance), IOC (International Olive Council), UZZK (National Olive and Olive Oil Council), İZTO (İzmir Chamber of Commerce), TÜİK (Turkish Statistical Institute), Republic

of Turkey Ministry of Trade, Republic of Turkey Ministry of Agriculture and Forestry, Republic of Turkey Ministry of Treasury and Finance , İzmir Provincial Directorate of Agriculture and Forestry, EU (European Union), EİB (Aegean Exporters' Associations) , EBSO (Aegean Region Chamber of Industry), EURICSE (European Research Institute on Cooperative and Social Enterprises), COGECA (General Confederation of Agricultural Cooperation in the European Union), TARİŞ (Tariş Olive and Olive Oil ASCs) and journals, articles and academic dissertations and news papers were the main secondary data sources of this thesis.

Primary data has been collected both by qualitative and quantitative methods. As a qualitative methods we benefited from: 1) Interviews, 2) Symposium notes and outputs, 3) Report of the 13th Karaburun Science Congress. As a quantitative method questionnaire is conducted.

3.2.1. Data Collection Methods

3.2.1.1. Qualitative Method

Semi structured interviews are conducted with 7 people who are expert on olive oil, cooperatives and branding. Open ended questions are used at interviews and they lasted approximately between 45-60 minutes. Interviewees were Prof. Dr. Osman Murat Koçtürk who is lecturer at Manisa Celal Bayar University and has specific studies on cooperatives, Dr. Hakkı Çetin who is Deputy General Manager at Tariş Olive and Olive Oil Association, Aslı Ger who is Assistant Coordinator at Tariş, Dr. Erkan Susamcı who is Food Engineer at Olive Research Institute, Murat Döngeloğlu from İzmir Rural Development Organization Branch Office of İzmir Provincial Directorate of Agriculture, Turhan Ergin from Farmer Registration Branch Office of İzmir Provincial Directorate of Agriculture and Forestry, Ümmühan Tibet who is the head of National Olive and Olive Oil Council (UZZK). Key findings of the interviews can be summarized as following:

According to Prof. Dr. Osman Murat Koçtürk,

"In Turkey cooperatives dealing with olive oil are especially organized on the coastline such as in İzmir, Balıkesir and Muğla. The market share of our cooperatives

in foreign countries are not at the level we desire. Although the cooperatives have corporations active in foreign countries most of them dominate the domestic market more. Tariş is not a public enterprise but it is still perceived as a public institution. Cooperatives must be independent, but the state still intervenes from time to time. Almost every district of the Western region has Agricultural Development Cooperatives (ADCs). Like other private enterprises, these ADCs press olives for a certain percentage and sell olives and olive oil. Unfortunately, there is not an organized movement. I have not yet witnessed such activities as brand creation and international marketing. But, they are searching for branding just as Tire Milk Cooperative created. There is such a desire in olive oil, but because of some personal and administrative problems cooperatives and olive oil producers can not collaborate effectively. I wish Tariş and all other olive oil cooperatives could unite. Tariş has done its best in branding, but it has no complete dominance in the local market. In some years it dominated the olive oil market 10% and in some years around 25%. As in recent days there should not be municipality sales in order to regulate the prices of the products. Both from the producer side and consumer side cooperatives should regulate market prices. From the perspective of registered warehousing I do not think it will be successful without state support. Who will meet the storage costs? What will be the financial model? Because of these questions neither private companies nor cooperatives want to handle and deal with registered warehousing system ".

According to the interview with Dr. Hakkı Çetin,

"Considering the support received from EU producers, it is seen that Turkish farmers suffer from a disadvantage in terms of competition. As a strategic product, olive oil should be continued to be supported under the premium system or another name. The premium amount should be given both for olive oil and table olives as it is in the EU. In our country, the premium system is used in a compensatory sense. However, it should be remembered that it's main function should be planner and production enhancer. The amount of premiums must be known in advance by the manufacturer and producer and must be continuous. The premium that creates it's own source provides transition to the registered economy, should not be seen as an additional burden to the treasury, it must be sufficient and paid on time. Turkey also must benefit from quotas granted to other countries such as Tunisia and Morocco for duty free

export to EU. Mechanical harvest must be widespread in order to prevent loss and increase fast picking. In the years when the supply of goods is high, the producer suffers from the decrease in price and cannot take the value of the product. However, in such cases, the European Union tries to prevent damage of the producer by making stocking aid. So, we should develop a system for supply-demand balance and enhance the storage conditions. Policies must be developed for management of the olive groves and trainings for farmers. Solutions for loss of pomace revenue during the transition process from 3 phase milling to 2 phase milling system must be found".

Key notes from the interview with Ümmühan Tibet are as following:

"International Olive Council (IOC) is a subsidiary institution of United Nations and has 17 members. Although EU meets approximately 70% of world olive oil production as other members it has only one voting right. Turkey withdrawn from the membership of IOC in 1998 and be member again in 2010 by the efforts of UZZK. But, during this process I voluntarily attended both to Chemical Committee and Sensory Committee of IOC and transferred my experience and knowledge to the sector. Then in 2007 UZZK was established. Till to 2007 olive and olive oil sector of Turkey was foreign-dependent. We had approximately 95 million olive trees at those years. If first year olive oil production was around 125.000 tonnes then the second year production was around 60.000 tonnes due to the periodicity. Consumption was around 500 ml-600 ml per year per person. Italian and Spanish merchants were coming and receiving our olive oil production in bulk. At those conditions we also did not have national and independent laboratories, export samplings were being sent to European laboratories and results were arriving in 15 days without ensuring the reliability. I established Turkey's first private olive oil analysis laboratory together with a private company which sells laboratory equipments. This laboratory was very successful and accredited by the IOC. Till to 2009 I was the general manager of this laboratory. Currently there are 13 private olive oil analysis laboratories and 5 Sensory laboratories and we are trying to increase the number of these laboratories. I have 40 years of experience in olive oil sector. In Turkey Food Councils are usually under the domination of Chambers and stock market. But UZZK, is an independent institution and established as a civil society organization. Nearly all shareholders of the olive oil sector in Turkey are member to UZZK. Currently UZZK has 95 members which includes, MoAF, MoT,

TÜİK, Chamber of Agriculture, Chamber of Industry, Chamber of Commerce, Universities, businessman, EİB, producers, exporters and etc. UZZK carries significant mission in olive and olive oil sector of Turkey. It organizes trainings, competitions, build relationships between the state and sector, works as a consultancy and research institute".

From the remaining interviewees in general, statistical data is received. Symposium notes are indicated in Chapter Two under the heading of "Cooperatives And Export Marketing And Branding". Between 5-9 September 2018, 13th Science Congress under the topic of "Cooperatives" has been organized in Karaburun. Outputs of the 13th Karaburun Science Congress is indicated under the heading "2.1. Cooperatives And Marketing".

3.2.1.2. Quantitative Method

As a quantitative method questionnaire survey is applied to farmers, olive and olive oil producers, businessman and local authorities. The data obtained from the study were analyzed with SPSS (Statistical Program for Social Sciences) program. The data is analyzed on the basis of descriptive and statistics. For this reason, frequency distributions of demographic questions have been considered and meaningful data have been evaluated from two perspectives. Firstly, the reliability of the data (Cronbach alpha) was tested then to determine the effect of independent variable on dependent variable Regression analysis was performed.

3.2.1.2.1 Sampling Design

According to the information from İzmir Provincial Directorate of Agriculture there are 330 farmers (registered to Farmer Register System) who are dealing with olive and olive oil production in Karaburun area. Because of the personal data protection rule, it was not possible to get the contact details of the olive farmers from the Farmer Register System. To find the proper respondents, the researcher contacted with the 6 local authorities (headmen) of Karaburun province and has determined the olive and olive oil producers in their region. 14 villages/neighborhoods have been

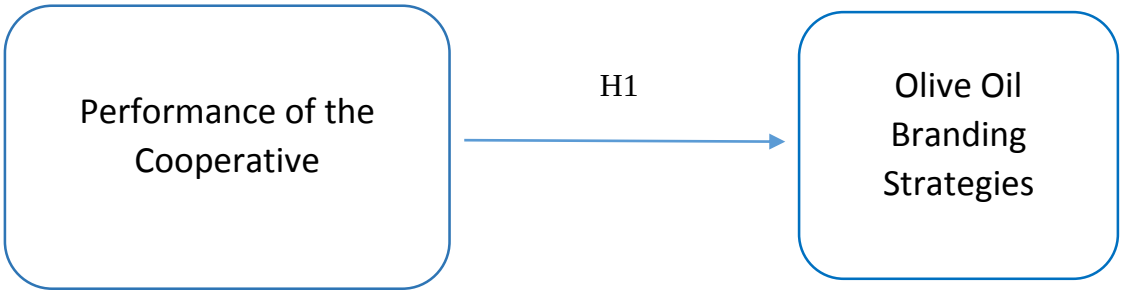
visited in Karaburun and one of the judgment sampling method, snowball sampling method has been utilized.

According to Sekaran and Bougie (2014: 252) snowball and judgment sampling in other words purposive sampling means obtaining information from specific target groups, instead of obtaining information from those who are most readily or conveniently available. The sampling here is confined specific types of people who can provide the desired information, either because they are the only ones who have it, or they conform to some criteria set by the researcher. The selection criteria was "dealing with olive and olive oil production in Karaburun region". So, questionnaires were applied to the sampling of related counterparts and shareholders such as olive growers, cooperative members and managers who are producing and selling olive oils, pressing mills, refiners, blenders, companies involved in olive oil marketing, olive school managers in Karaburun, District Directorate of Agriculture, Local Authorities and District Mayor. Sampling size of the research was 95 persons from the whole population of 330 farmers.

3.4. RESEARCH MODEL

With the data received from the participants via questionnaires, performance of the current cooperatives and olive oil branding/marketing strategies in Karaburun region has been analysed by using the research model below.

Figure 20: Research Model



3.5. HYPOTHESIS

Research Model of the study evaluates the effects of performance of cooperatives on olive oil branding strategies. According to the research model high performance of the cooperative will create a successful brand. Cooperatives working in collaboration with members and other cooperatives, unions and meeting needs of their members efficiently, providing reliability, organizing trainings and enhancing the activities under the management of professional administration can achieve branding in olive oil sector. The research hypothesis has been determined as follows:

H1: Performance of the cooperative influences the olive oil branding strategies.

3.6. FINDINGS

Main findings of survey are shown between Table 15 and Table 34 and discussed below.

3.6.1. Demographics

In Karaburun Peninsula there are 16 villages and 14 villages have been personally visited by the researcher. The following table (Table 15) shows the responses from the various villages in the peninsula.

Table 15: Villages of The Questionnaire Survey

Village		Frequency	Percent
	Ambarseki	6	6.3
	Bozköy	1	1.1
	Çatalkaya	1	1.1
	Eğlenhoca	26	27.4
	Hasseki	7	7.4
	İnecik	9	9.5
	İskele	2	2.1
	Karaburun	4	4.2
	Kösedere	15	15.8
	Küçükbahçe	8	8.4
	Mordoğan	2	2.1
	Parlak	2	2.1
	Salman	1	1.1
	Sarpıncık	10	10.5
	Tepeboz	1	1.1
	Total	95	100.0

Most of the participants of the questionnaire survey are from Eğlenhoca village with 26 person and percentage of the Eğlenhoca village is %27.4 over the 95 participants. Reason behind this high share is that olive oil production in this district is intensive when we compare with other regions and much more farmers were available in the village. At second rank Kösedere village appears with 15 participants and percentage of 15.8. Olive and olive oil production of Kösedere is also high and two villages are close to each other. In some villages such as Parlak village, it is hard to find any farmers in the village, the coffee shop is permanently closed.

The gender distribution of the respondents is as follows:

Table 16: Gender of The Participants

	Gender	Frequency	Percent
	Female	10	10.5
	Male	85	89.5

Number of female participants were 10 while number of male participants were 85. The reason of huge gap between the gender is that men are much more familiar to the production rates and accessibility to them is easier in village coffee shops. During the field work participants were met at village cafes where men are intensive. As entrepreneurs or farmers women are less active than men in the region. But, in Eğlenhoca village women are planning to establish a cooperative soon.

Age distribution of the respondents has been shown in Table 17 below:

Table 17: Age of Participants

Age	Frequency	Percent
29-38	9	9.5
40-50	11	11.6
51-60	23	24.2
61-70	30	31.5
71-82	22	23.2
Total	95	100.0

The average age of the participants is 60.56 which shows the population at villages of Karaburun peninsula who deals with farming and olive oil production is quite old. According to the above table we can explicitly observe that most of the participants are between the 61-70 age range with 30 person who consists 31.5 percent of the whole participants. At second rank age range between 51-60 comes with 23 person and 24.2 percent of the whole participants. Mode -which means most repeated age- of the sample is age 67, 7 participants were at age 67. Old age of the farmers is an advantage in terms of experience, but in terms of workforce it is a disadvantage. When the age gets older picking olives and delivering to mill takes too much time. Long duration of the harvest and picking olives from ground causes rot on olives and increases the acidity level of olive oil produced.

Education distribution of the respondents can be seen in Table 18.

Table 18: Education Level of The Participants

Education Level		Frequency	Percent
	Primary School	44	46.3
	Secondary School	12	12.6
	High School	19	20.0
	Vocational School	6	6.3
	Bachelor Degree	8	8.4
	Master Degree	4	4.2
	Doctoral Studies	2	2.1
	Total	95	100.0

Although 8 year primary/basic education is compulsory in our country, as of the ages, 44 participants have graduated from 5 year primary school education which compose 46.3 percent of the whole participants. This figure indicates that in general, education level of the olive oil producers in Karaburun are primary school average. Because of the low education, many participants can not follow up new technologies and recent developments in the sector. So, mechanization level is low. Most of them are not attending to trainings. For example just few farmers attended to second symposium of olive and olive oil production which was organized by KWNADC. If the education level were high most of them will be aware of the importance of trainings and there would be high level of participation.

In the next section; number of olive tree, list of mills, annual olive, olive oil and furma production of the participants were asked, answers are below. First of all, when the relations of farmers with olive and olive oil is asked, it is seen that almost all of their lives are related to olive farming. In general, we can state that olive oil is an important part of the life style of Karaburun. Table 19 shows the time of the participants' relations with olive and olive oil.

Table 19: Interest of The Olive and Olive Production

Years		Frequency	Percent
Valid	2-20	20	21.7
	21-40	28	30.5
	41-60	33	35.8
	61 and above	11	12
	Total	92	100

As it can be seen from the above table 35.8 percent of the participants are interested with olive and olive oil production between 41-60 years. Average of their interest in olive and olive oil production is 41.17 years.

Situation changes when we look at the production years. At Table 20, most of the participants, 31.8 percent, dealing with production of olive and olive oil between 21-40 years. Distribution of the production years are close to each other and average of the production year is 37.52 years.

Table 20: Producing Years of The Olive and Olive Oil Sector.

Producing years		Frequency	Percent
Valid	2-20	25	27.5
	21-40	29	31.8
	41-60	27	29.7
	61 and above	10	11
	Total	91	100

During the questionnaire it is inferred that some of the participants began to olive and olive oil production after their retirement. There are some disadvantages of beginning to production late such as low energy and having low capital.

At below table distribution of mills used are indicated. Tariş Mill was closed few years ago but one farmer used Tariş Mill. Although; Urla Özbek Mill, Germiyan Mill (in Çeşme) are not in Karaburun Peninsula some participants uses them. So, mills outside the Karaburun Peninsula also included at the mill table. Some producers uses more than one mill. For that reason three mill column is opened.

Table 21: List of Mills

		First Mill	Second Mill	Third Mill
Name of Mills		Frequency	Frequency	Frequency
Valid	Eğlenhoca Mill (Municipality)	65		
	Eğlenhoca Mill (Private)	4	8	
	Ambarseki Mill	14	9	
	Çatalkaya Mill	-		
	Yayla Mill	-		1
	Parlak Mill (Malia)	1		
	Tariş Mill	1		
	Urla Özbek Mill	-	1	1
	Kösedere Mill	2		
	Germiyan Mill	4		
	Total	91	18	2

According to the above table, 65 participants press their olives at Eğlenhoca Mill which ownership is belonging to Karaburun Municipality while operating right is belonging to a private company. At the same village there is also private (ownership) mill where the 12 participants of our survey are using. Second most used mill between the participants is Ambarseki Mill which is located in Ambarseki Village and 23 participants is pressing their olive in here. Although most of the farmers uses Eğlenhoca and Ambarseki Mills, recently opened (in 2018) mill called Malia which is in Parlak Village of Karaburun is the only mill that has 2 phase centrifugal continuous system in Karaburun. Remaining mills in Karaburun have 3 phase centrifugal continuous system.

In order to figure out the size of farmers/producers, how many olive trees they have is also asked to participants. Average number of olive trees possessed by the farmers is founded as 355.

Table 22: Number of Olive Trees

Number of olive trees		Frequency	Percent
Valid	1-200	53	60.2
	201-400	19	21.6
	401-600	11	12.5
	601 -800	2	2.3
	801 and above	3	3.4
	Total	88	100

According to the Table 22, 60 percent of the participants have below than 200 olive tree. This data shows that most of the olive and olive oil producers are small size farmers. Reason behind this data is that the survey has been done mostly in east Karaburun. In east side of the Karaburun olive groves are generally in small sizes and age of trees are older while in west side of the Karaburun olive trees are younger and recently have been begun to grown by the incentives received from the state and olive groves are expanded to wider area . Although the number of trees are low in Karaburun, efficiency is higher than the other areas. Approximately 1 kg olive oil is produced from 4 kgs olives at three phase centrifugal continuous system under the hot extrusion (above 25 centigrade degree). But, for more qualified and healthy olive oil two phased centrifugal continuous system under the 25 centigrade degree extrusion is recommended.

Annual olive oil production by the average of two years in kgs is listed at Table 9. Mean of annual olive oil production among the farmers is approximately 868 kgs. In fact, comparing to the olive tree asset 868 kgs of olive oil is low. Main reason of the low productivity is many farmers are not dealing with their olive groves due to the high costs and older age of the population.

Table 23: Annual Olive Oil Production (average of two years in kgs)

Amount of Olive Oil (kgs)		Frequency	Percent
Valid	50-250	17	19.8
	251-500	19	20.9
	501-750	8	8.8
	751-1000	24	26.3
	1001 -2000	19	20.9
	2001-4000	3	3.3
	Total	91	100

As indicated at above table 26.3 percent of the farmers are producing olive oil between 751 and 1000 kgs annually and approximately 21 percent of the participants producing between 251-500 kgs and between 1001-2000 kgs. This means approximately 97 percent of the farmers are producing under 2001 kgs which is quite low production.

Distribution of the olive production per year is shown at Table 24. Seven participants did not respondent this question. So, the percentage is calculated over 88 participants. Average olive production among the participants is approximately 3362 kgs.

Table 24: Annual Olive Production (average of two years in kgs)

Amount of Olive (kgs)		Frequency	Percent
Valid	150-750	14	15.9
	751- 1500	13	14.8
	1501-2300	10	11.3
	2301-3500	10	11.4
	3501-6000	31	35.2
	6001-8000	7	8
	8001 and above	3	3.4
	Total	88	100

As indicated at Table 24, annual olive production of 35.2 percent of the farmers is between 3501- 6000 kgs and 88.6 percent has under the 6001 kgs of olive production annually. Figure of olive production is in parallel with annual olive oil production.

Occupation of the participants is listed on Table 25. Some of the respondents signed second occupation which is indicated at second column of the Table 25. During the survey it is observed that most of the participants except permanent residents begin to live in Karaburun after their retirement. This situation also increases the age of farmers.

Table 25: Occupation of the Participants

Occupation		Frequency	Percent	Frequency	Percent
Valid	Farmer	49	51.6		
	Producer	2	2.1	2	6.7
	White collar employee	6	6.3	3	10.0
	Owner / manager	4	4.2	5	16.7
	Retired	32	33.7	16	53.3
	Housewife	1	1.1	4	13.3
	Unemployed	1	1.1		
	Total	95	100.0	30	100

Farmers constitute 51.6 percent and retired constitute 33.7 percent of the whole participants.

3.6.2. Cooperation

At the questionnaire form rate of membership of cooperatives also measured. Details of the membership rates can be seen at Table 26.

Table 26: Membership of Cooperative

		Frequency	Percent
Valid	Cooperative member	43	45.3
	None member	52	54.7
	Total	95	100.0

More than half of the participants do not have membership of cooperatives. But, during the survey many of the respondents were planning to be a member of

Karaburun West Neighborhood Agricultural Development Cooperative (KWNADC) which is recently established in 2018.

Some respondents have membership of up to three cooperatives. Each membership are referred at three different columns on Table 27.

Table 27: Name of the Cooperatives

	First Cooperative	Second Cooperative	Third cooperative
Name of the Cooperative	Frequency	Frequency	Frequency
Bozköy Agricultural Development Coop.	1		
Eğlenhoca Agricultural Credit Coop.	1		
Eğlenhoca Agricultural Development Coop.	17	1	
Eğlenhoca Irrigation Coop.	3	6	1
Karaburun Agricultural Credit Coop.	14	3	
Parlak Irrigation Coop.		1	
Karaburun West Neighborhood ADC.	5		1
Küçükbahçe/Salman Irrigation Coop.	1		
Mordoğan Multipurpose Production, Marketing and Business Coop.	2		
Total	44	11	2

44 People are member of one cooperative, 11 people are member of second cooperative and 2 people are member of three cooperatives. 18 Respondents are member of Eğlenhoca Agricultural Development Cooperative (EADC) while 17 Respondents are member of Karaburun Agricultural Credit Cooperative (KACC). Both cooperatives are the earliest cooperatives in the region. EADC was established in 1976 and KACC was established in 1930. Another reason of this distribution is that most of the respondents were from Eğlenhoca Village.

At questionnaire form reasons of not being a cooperative member is grouped under 15 headings. Respondents chose 8 reasons.

Table 28: Reasons of Not Being a Cooperative Member

Reasons of not being coop. member	Frequency	Percent
Not beneficial	8	14.3
Bureaucracy	1	1.8
Not transparent	1	1.8
Not reliable	1	1.8
Not interested & no idea	8	14.3
Closed & no coop. in my village	31	55.4
Thinking about membership or establishing a cooperative	4	7.1
Do not stay in Karaburun	2	3.6
Total	56	100

55.4 Percent of the respondents specified the reason of not being a cooperative member as no cooperative is existing in their village and many of them stated if there will be an effective cooperative in their region they will be member. Another major part of the respondents, especially respondents from the Sarpıncık village, with 14.3 percent do not have any idea of cooperatives while another 14.3 percent of the respondents do not find cooperatives beneficial. 7.1 Percent of the respondents are thinking about being a member of cooperative or establishing a new cooperative. Especially villagers in Kösedere are planning to establish a cooperative while the respondents close to Küçükbahçe Village are planning to be a member of KWNADC.

Membership period of being a cooperative member is listed in three columns at Table 29 according to the number of cooperatives. For the first cooperative average membership period is 24 years, for the second cooperative average membership period is 15 years, for the third cooperative average membership is 1 year.

Table 29: Time Period of Being a Cooperative Member

		First Cooperative		Second Cooperative		Third Cooperative	
		Frequency	Percent	Frequency	Percent	Frequency	Percent
Valid	1-10	12	29.3	2	22.2	1	1.1
	11-20	9	21.9	6	66.7		
	21-30	5	12.2				
	31-40	5	12.2				
	41 and above	10	24.4	1	11.1		
	Total	41	43.2	9	9.5	1	1.1

According to the above table 29 respondents are member of a first cooperative between 1-10 years and 10 respondents are member of a first cooperative above 41 years. Nearly 67 percent of the respondents are member of a second cooperative between 11-20 years. Period of membership is also related with the establishment dates of the cooperatives. Three of the participants were manager of the cooperatives and six of the participants were head of the villages. Current Mayor of Karaburun is also member of one of the cooperatives in Karaburun.

Under the section 2.5 at questionnaire form expectations from the cooperative are measured with 12 criteria. Five-point likert scale is used where 1 refers “strongly disagree”, 2 refers “disagree”, 3 refers “neither agree nor disagree”, 4 refers “agree” and 5 refers “strongly agree”. Table 30 shows the expectation items, average of the answers and standard deviation among the participants.

Table 30: Expectations from the Cooperative

2.5. Please mark how much you agree with the expectations from the cooperative.

Expectations from the cooperative	Mean	Std.
Nobody can be forced to be a cooperative member	4.48	0,84
Cooperatives collaborate with other cooperatives	4.31	0.88
Cooperative organizes trainings for members	4.55	0.74
Member's voting right does not changes according to membership share.	4.47	0.85
Cooperatives work on issues such as community's education, health and etc.	4.27	1.00
Members put capital to cooperative according to their economic power.	4	1.26
State is not empowered in cooperative decisions	4.18	1.14
Entry to cooperative must be easy	4.48	0.84
Cooperative management must be reliable and transparent	4.89	0.3
Members are obliged to provide quality products	4.84	0.37
Cooperatives solve farmer's main problems.	4.79	0.45
Cooperative maintains agricultural development.	4.85	0.35

Mean column refers average answer. As obviously seen from the above table average answer is between “agree” and “strongly agree”. Gap between the standard deviation is narrow. Reliability and transparency of the cooperative is the common expectation with the highest average degree by 4.89. Although “Putting capital according to the economic power of members” has 11 percent of “strongly disagree” in general we can assume that cooperative principles are known by most of the respondents and in general common expectations from the cooperative are agreed on.

At section 2.6 of the questionnaire form, performance of the cooperatives in Karaburun Peninsula is evaluated via 20 items which is shown at Table 31. Numbers in the scale indicate, 1 as the worst performance 10 as the best performance of the cooperative.

Table 31: Performance of the Cooperatives

Performance of the cooperative	Mean	Std.
Our cooperative provides cheap input.	4.35	3.08
Our cooperative provides consumption products at accessible prices.	4.46	2.87
Our cooperative sells our products in relevant prices.	3.12	3.11
Our cooperative makes investments to our village.	3.19	2.86
Our cooperative helps to our villagers/peasants.	3.08	2.57
Our cooperative solves the workforce problems at picking olive.	2.22	2.23
Our cooperative supports producers financially.	2.32	2.04
Our cooperative gives information to producers.	4.25	3.11
Our cooperative organizes regular trainings.	2.83	2.75
Our cooperative has an executive agricultural engineer.	2.24	2.23
Our cooperative stores products at good conditions.	3.28	3.16
Our cooperative provides loan to producers.	3.02	2.55
Our cooperative arranges relations with the state.	3.23	2.91
Our cooperative collaborates with other institutions.	3.53	2.9
Our cooperative increases employment in our village.	3.06	2.69
Our cooperative solves transportation problems.	2.79	2.64
Our cooperative makes insurance transactions.	2.33	2.3
Our cooperative processes our crops.	3.08	2.92
Our cooperative has a geographical sign.	2.03	2.19
Total performance of our cooperative is very good.	4.07	2.69

There are just 3 items over mean 4 which are providing cheap input (Mean 4.35), providing consumption products at accessible prices (Mean 4.46), and total performance of the cooperative (Mean 4.07). Even these 3 items are under 5 (which means “Adequate”). Most of the answers are grouped between 1 (very bad) and 2 (bad). 9 of the means are around 3 and 7 of the means are around 2. So, this data figures out that performance of the cooperatives in Karaburun Peninsula are not at required level, and overall performance of the cooperatives have been marked as 4.07. When we have an overall look, mean of 20 items is 3.124 which means performance of the cooperatives in Karaburun Peninsula are not good enough. It can be inferred from the questionnaire that current cooperatives in Karaburun Peninsula do not have any activities in terms of branding, training, insurance, transportation and financial support. Not having young and well trained people in villages is the main reason behind this. Although there is a specific type of olive in the region geographical

registration has not been received yet. But, respondents believe that if collaboration between the members can be achieved and professional managers take responsibility of the cooperatives and young persons take place both in cooperatives and farming there can be a successful olive oil brand in Karaburun. In fact many people hope that recently established KWNADC will meet their expectations otherwise they are planning to establish new cooperative.

3.6.3. Branding

Size of the olive oil sold is shown at below table. Some respondents signed more than one options and options are grouped under 13 sizes.

Table 32: Packaging of Olive Oil (frequencies)

250 cc	500 cc	1 lt	Between 1-2 lt	2 lt	Between 2-5 lt	5 lt
1	4	15	9	6	8	76

10 lt	20 lt	50 lt	100 lt	200 lt	250 lt and above
49	17	15	9	8	10

5 liter is the most preferable size, 76 respondents sell their olive oil in 5 litre bottles and 49 respondents sell their olive oil in 10 litre bottles. Just one respondent who is the owner of the Malia olive oil sells in 250 cc bottles. During the survey process it is observed that except Malia company none of the olive oil producers achieved branding. Most of the participants are selling olive oil in reused plastic water bottles and they do not have branding activities.

Within this part of the questionnaire the respondents answered some of the questions related to branding and marketing issues of local olive oil production on a five-point likert scale. On likert scale; 1 refers strongly disagree, 2 refers disagree, 3 refers neither agree nor disagree, 4 refers agree and 5 refers strongly agree. Evaluation of the olive oil branding is shown at below table.

Table 33: Olive Oil Branding

	Mean	Std.
I am following up the market research of olive oil	2.29	1.35
I am attending to olive oil fairs	2.12	1.22
Our olive oil is processed in good conditions at mill	3.68	0.97
Analysis of our olive oil is done regularly	3.07	1.03
Analysis of our olive oil is done at independent lab.	2.08	1.03
Our olive oil is stored at chrome containers	2.41	1.11
We received food certificate of our olive oil	1.49	0.92
We are selling our olive oil to retailers	1.60	1.08
We are selling our olive oil from our own reserve	4.60	0.89
We bottle our olive oil	1.51	0.95
We package our olive oil in retailing packages	1.62	1.12
We have olive oil brand	1.31	0.76
We sell our olive oil to local wholesaler	2.5	1.32
We have a web site of our olive oil	1.29	0.76
We use social media related to our olive oil	1.37	0.83
Our olive oil is high quality.	4.15	0.81
Our olive oil is sold in relevant price	2.33	1.02
We are exporting our olive oil	1.23	0.71
We receive support from District Directorate of Agriculture.	1.77	1.14
We receive support from Chamber of Agriculture	1.78	1.05

Items related to branding are generally grouped between “strongly disagree” and “disagree” options. Observing from the mean section just 2 items which are “quality of olive oil” and “selling from own reserve” agreed among the participants. But, in average respondents could not specify “agree” or “disagree” for “processing in good conditions” and “analysing regularly”. This means except few respondents remaining do not have branding activities. Following up the market research, attending to olive oil fairs, analysing olive oil in independent laboratories, storing at chrome tanks, receiving food certificate, selling to retailers, bottling and packaging, creation of brand, selling to wholesaler, using web site and social media for marketing, selling in relevant prices, exporting, receiving support both from District Directorate of Agriculture and Chamber of Commerce are not at required and acceptable level.

Incentives provided by the Ministry of Agriculture and Forestry are listed below. But, respondents stated that they receive "domestic certificated planting incentive" from the İzmir Metropolitan Municipality in collaboration with Olive Research Institute.

Table 34: Incentives (frequency)

Incentives	Yes	No	Incentives	Yes	No
Premium incentive	35		Fuel and fertilizer incentive	35	
Depot incentive			Organic agriculture incentive	4	
Analysis incentive	1		Good agricultural practices	2	
Transportation			Domestic certificated planting incentive	9	
			Rehabilitation in traditional olive groves.		

When, which incentive they benefited is asked to participants, 35 person specified that they receive premium incentive, fuel and fertilizer incentive. At second rank domestic certificated planting incentive comes with 9 person. Depot and transportation incentive are not received among the participants.

3.6.4. Reliability Analysis

Reliability analysis of the scales are evaluated under the three headings: first branding, second expectations and third performance. Although, expectation items take place in the questionnaire form they are not taken into consideration for further analysis.

In order to calculate the reliability of the scale questions Cronbach's Alpha reliability coefficient was used in the study. Cronbach's Alpha reliability coefficient is defined as scoring of the items by weighting or grading method. Accordingly grading $0.60 \leq \alpha < 0.90$ means relatively reliable, $0.90 \leq \alpha < 1.00$ means highly reliable (Nakip, 2013:205).

Table 35: Cronbach's Alpha

Reliability	
Branding	0,817
Expectation	0,714
Performance	0,933

As shown in Table 35, question items of Branding (0,817) and Expectation (0,714) are relatively reliable which are between 0,60 and 0,90.

The correlation value is shown in Table 36.

Table 36: Correlation

Construct	**Branding**
Performance	**0.503****

**. Correlation is significant at the 0.01 level (2-tailed).

The results indicate that performance and branding are correlated positively at $p<0.01$.

3.6.5. Hypothesis Testing

In order to test the hypothesis regression analysis is utilized. R Square value indicates explanation percentage of dependent variable by independent variable. Independent variable which is performance explained variance of branding with 0.253.

In the regression analysis, Beta coefficients of independent variable that regress the dependent variable and t values related to their significance are given in Table 37.

Table 37 : Coefficient Table

Coefficients[a]

Model		Unstandardized Coefficients		Standardized Coefficients		
		B	Std. Error	Beta	t	Sig.
1	(Constant)	1.647	.532		3.099	.003
	SMEAN(Perf)	.194	.035	.503	5.575	.000

a. Dependent Variable: SMEAN(Branding)

As indicated in Table 37, correlation (0.503) is significant at 0.01 level (2-tailed). Therefore, H1 is supported and performance of the cooperative influences the olive oil branding strategies.

3.7. LIMITATIONS & SUGGESTIONS FOR FUTURE RESEARCH

Within this research survey is limited to Karaburun Peninsula. So, for further researches, area of the case study can be widen, for example it can include Çeşme Peninsula. One of the main difficulties faced during the field study is finding and meeting farmers in the villages. Most of the villages have low population and average age of the residents is above 60. It is hard to get information from the local people which is spread around 16 villages. Finding regional statistical local data related to the current agricultural profile and production is also difficult. For example monitored data related to farmers, olive production, number of olive trees, measure of the olive groves are not certain for Karaburun sub-region.

Cooperatives and export marketing research area is an empty place of scientific work. In Turkey cooperatives from the modern and sustainable marketing perspective has not been studied in every aspects yet. There is a research gap on this area. This can be a suggestion for future researchers.

CONCLUSION

Although the long historical heritage and high olive and olive oil production potential of the Karaburun district; wrong harvesting techniques; old population of the farmers; irrigation problems due to the land structure; insufficient knowledge of pruning, fertilizing and agricultural spraying; wrong storing conditions, keeping olives in sacks for a long time; insufficient branding activities; unsatisfying performance of the cooperatives constitute obstacles in front of creating an export branding of olive oil in Karaburun District.

Within this study we have reached 14 Villages of Karaburun Peninsula which is 16 in total. The main problem in Turkish agricultural industry was faced in Karaburun as well; the old and inefficient farmers. It is found out that as many rural areas of Turkey there is not enough young population for agricultural activities in Karaburun. In the research %78.9 of the respondents' age were above 50 years old. Most repeated age in other words mode of the sample is age **67.7.** Most of the young population are living in urban areas mostly in İzmir. So, there is a substantial workforce loss in villages and rural areas of Karaburun Peninsula. Old population can not afford to harvest properly and on time which causes decrease on the quality of olive oil production and increase the acidity level of the product. Due to their old age they can not deal with transportation and delivery of the olive to mill takes too much time. The young generation of the farmer families are not included in farming activities, as there is less value added production from the farms. The revenue from the average farmer families is not enough to meet the financial needs of the larger family of elderly people and the young generation family. The social infrastructure of Karaburun does not support the young generations to be settled in Karaburun either. For example there is not enough primary and secondary level schools in Karaburun and there is no regional train service that will connect İzmir city to Karaburun. New social political applications of the government is needed to support the efficiency in farms by turning back the young generation to their family fields.

High harvesting costs and lack of young farmer causes not picking olives on time. Mostly; olives are picked up, after ripen and they fall to soil. Contact with soil causes decay of the fruit and decreases the quality of both olive and olive oil produced.

Beside the decrease on quality, pigs are eating olive fruits when olives are not picked from the trees. Goats are also giving so much harm to olive trees. They are eating the olives and breaking the branches of trees. Another major problem is olive fly and olive moth which causes loss of the crop. Steep structure of the land makes it difficult for watering/ irrigation and most of the farmers usually do not water their olive trees and uncaring of the hard-to reach trees causes decrease on productivity. Olive growers do not have enough knowledge of proper pruning. Trainings and seminars to farmers regarding to pruning, fertilizing and agricultural spraying are not common in the region. Lack of common agriculture policy leads, farmers irregular crop growing. If they can not meet their costs from olive growing they are growing citrus and not paying attention to olive trees. All above mentioned reasons causes low productivity. Mean of annual olive oil production among the farmers is approximately **868 kgs** and 97 percent of the farmers are producing under **2001 kgs** of olive oil which means quite low production according to the potential. Most of the farmers especially the ones located in east side of the peninsula have small size olive groves. According to the survey 60 percent of the participants have below than **200 olive trees**. Participants of the questionnaire survey specified the high costs of stainless steel or chrome tanks which they can not be afforded by the small farmer. Solution can be storage equipment provisions of the cooperatives. Capital of the cooperatives can be used at providing chrome or stainless steel tanks and these tanks can be used jointly by the members.

Turkish state and government should take precautions for decreasing costs of olive and olive oil production. Common Agricultural policies must come into force and lead farmers for regular productions. Young people must be attracted and participation level of agricultural labour force should be increased. Increasing the employment at agricultural areas can be solution for both unemployment problem and decreasing agricultural production.

For qualified olive oil production, olives must be harvested on time and contact with soil must be avoided. Contact with soil increases acidity level of the olive oil. Olive growers should be trained about harvesting, pruning, agricultural spraying, watering and awareness of correct production process should be raised. Technical supports must be handled more effectively by related authorities. Cooperatives in that need will fulfill a very important gap. In the last few years even newly established

cooperative has done very effective various seminars, gatherings and trainings about the problems of the farmers. Again a newly established olive school in the region has organized many actions and trainings with in the limited period of time, which offered some concrete positive results related to some problems. The current agricultural state offices do not support trainings in the region which cooperatives are the effective actors.

To obtain the sustainable development in the region, the farmers have to be supported by the well organized bodies as cooperatives, platforms, unions, institutions. Joint action and/or cooperative action is needed more to fill the gap of sustainable development in olive oil production in Karaburun Peninsula. Qualified, young, educated, preferablly local originated management staff deficit exist as a gap in the region. In order to increase the qualified olive oil production, revenue from the olive oil should be increased to attract the next generation to farms. Without planned and organized branding and marketing activities, revenues can not be increased. A cooperative can employ technical and marketing staff for the members, organize trainings and workshops, makes and manages regional policies and supports members financially during these investments. As in the example of Spain and Italy; farmers and producers in Karaburun, should take joint actions. Within this context olive growers and olive oil producers must collaborate, share their capital and benefit from the common investments. Although the membership rate of cooperatives are less than half in Karaburun, during the research it is found out that olive oil producers and other participants think positive about being a member of a cooperative. 31 Person stated **not having an effective working cooperative** as the main reason of not being a member. So, if there will be successful cooperative operations in their region they want to benefit from collaboration, solidarity, credit opportunity, competitive advantage of the cooperatives. But activities of the current cooperatives are not good enough to reach the sustainable development goals in the region. For example none of them have branding, labelling and marketing activities of olive oil. The current cooperatives should be reorganized to use modern marketing and management techniques. Cooperatives can be pioneer institutions at gaining competitive power on export marketing. As in the Tariş example, local olive oil products can be sold in international markets via cooperatives. At this point, different cooperative types can create synergy

on export marketing. Forexample, while ADCs increase the quality of the products, ASCs can organize export marketing efforts.

The main result of this qualitative and quantitative research is - which is the good news in many sense- even though they are old and tired, farmers believe in the importance of cooperatives and the efficiency on olive oil branding/marketing success. The farmer community of the researched region believes and feels the role of cooperatives in the agricultural performers. But, they are unaware of the potential power of the modern cooperative management. There is definitely a connection between creating olive oil brands for export marketing and cooperatives for sure. The main obstacles on this area in the region are; 1)qualified management staff, 2)young generation farmers involvement, 3)more specialized cooperatives, 4)unions connecting and supporting cooperatives, 5)collaboration between cooperatives, 6)low capitalization of current cooperatives. This thesis could be a guide to begin the reorganization and establishment of cooperatives in the olive oil production regions in Turkey.

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APPENDICES

Appendix 1: Questionnaire Form (English)

Dear Participant,

This survey is conducted for master thesis of Cooperative and Olive Oil Branding at Foreign Trade Program of DEU Institute of Social Sciences. Responses of the questionnaire will support awareness of the cooperative system in Karaburun Peninsula. Your response will be kept confidential and used only for this research. Results will be shared with you.

Thank you very much for your time and cooperation.

Prof. Dr. Canan Madran
Supervisor

Deniz Burcu Mıhladız
Master Student of Foreign Trade Program of DEU.

1st Section: Demografic Information

1.1.	Village	
1.2.	Gender	
1.3.	Age	
1.4.	Education	
1.5.	How long have you been interested with olive and olive oil production?	
1.6.	How long have you been producing olive and olive oil?	
1.7.	Name of the olive oil mill you are using?	
1.8.	How many olive tree do you have?	
1.9.	Your annual olive oil production (average of two years in kgs)	
1.10.	Your annual olive production (average of two years in kgs)	
1.11.	Your annual production of furma olive (average of two years in kgs)	
1.12.	Occupation	

Farmer	Producer	White Collar Employee	Blue Collar Employee	Owner / Manager	Student	Retired	Housewife	Unemployed

2nd Section: Cooperative System

2.1.	Are you a member of cooperative?	
2.2.	If yes name of the cooperative	1. 2. 3.
2.3.	If no please indicate the reason.	☐ Providing expensive input ☐ Not beneficial ☐ Bureaucracy ☐ Not transparent ☐ Not reliable ☐ Not giving information and education ☐ Not interested & no idea ☐ Closed & no cooperative in my village ☐ Thinking about membership or establishing a cooperative ☐ Do not stay in Karaburun ☐ Not selling our products in relevant prices ☐ Cooperative management is not knowledgeable ☐ Financial management is not good enough ☐ Management capacity is poor ☐ Not providing quality standards at buying products ☐ Looking for personal favours and interests ☐ Not solving farmers' problems ☐ Diğer
2.4.	How long have you been a member of a cooperative	

2.5. Please mark how much you agree with the expectations from the cooperatives.

Expectations from the cooperatives	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
	1	2	3	4	5
Nobody can be forced to be a cooperative member.					
Cooperatives collaborate with other cooperatives.					
Cooperative organizes trainings for members.					
Member's voting right does not changes according to membership share.					
Cooperatives work on issues such as community's education, health and etc.					
Members put capital to cooperative according to their economic power.					

State is not empowered in cooperative decisions						
Entry to cooperative must be easy						
Cooperative management must be reliable and transparent						
Members are obliged to provide quality products						
Cooperatives solve farmer's main problems						
Cooperative maintains agricultural development						

2.6. Please mark the following cooperative performance options in terms of the cooperative that is related with you in the Karaburun Peninsula. Rate the performance on the scale of 1 (very bad) to 10 (excellent).

Performance of the Cooperative	1	2	3	4	5	6	7	8	9	10
Our cooperative provides cheap input.										
Our cooperative provides consumption products at accessible prices.										
Our cooperative sells our products in relevant prices.										
Our cooperative makes investments to our village.										
Our cooperative helps to our villagers/peasants.										
Our cooperative solves the workforce problems at picking olive.										
Our cooperative supports producers financially.										
Our cooperative gives information to producers.										
Our cooperative organizes regular trainings.										
Our cooperative has an executive agricultural engineer.										
Our cooperative stores products at good conditions.										
Our cooperative provides loan to producers.										
Our cooperative arranges relations with the state.										
Our cooperative collaborates with other institutions.										
Our cooperative increases employment in our village.										
Our cooperative solves tranportation problems.										
Our cooperative makes insurance transactions.										
Our cooperative processes our crops.										
Our cooperative has a geographical sign.										
Total performance of our cooperative is										

3rd Section: Branding of Olive Oil

3.1. In which size are you selling your olive oil?

250 cc	500 cc	1 lt	Between 1-2 lt	2 lt	Between 2-5 lt	5 lt

10 lt	20 lt	50 lt	100 lt	200 lt	250 lt and above

3.2. Please evaluate branding of the olive oil.

	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
	1	2	3	4	5
I am following up the market research of olive oil.					
I am attending to olive oil fairs.					
Our olive oil is processed in good conditions at mill.					
Analysis of our olive oil is done regularly.					
Analysis of our olive oil is done at independent laboratory.					
Our olive oil is stored at chrome containers.					
We received food certificate of our olive oil.					
We are selling our olive oil to retailers					
We are selling our olive oil from our own reserve.					
We bottle our olive oil.					
We package our olive oil in retailing packages.					
We have an olive oil brand.					
We sell our olive oil to local wholesaler.					
We have a web site of our olive oil.					
We use social media related to our olive oil.					
Our olive oil is high quality.					
Our olive oil is sold in relevant price.					
We are exporting our olive oil.					
We receive support from District Directorate of Agriculture.					
We receive support from Chamber of Agriculture.					

3.3. Which state incentives are you benefiting from?

Incentives	**Yes**	**No**	**Incentives**	**Yes**	**No**
Premium			Fuel and Fertilizer		
Depot			Organic Agriculture		
Analysis			Good Agricultural Practices		
Transportation			Domestic Certificated Planting		
			Rehabilitation In Traditional Olive Orchards		

Appendix 2: Questionnaire Form (Turkish)

Sayın Katılımcı,

Bu anket çalışması DEÜ Sosyal Bilimler Enstitüsü Dış Ticaret Programında ***Kooperatifçilik ve Zeytinyağı Markalaması*** konusunda yürütülen yüksek lisans tezi için yapılmaktadır. Vereceğiniz bilgiler Karaburun'da kooperatifçilik konusunda bilinçlenmeye destek olacaktır. Cevaplarınız gizli tutulacak ve sadece bu tez çalışması kapsamında kullanılacaktır. Sonuçlar kitap halinde sizlerle paylaşılacaktır.

Zaman ayırdığınız ve işbirliğiniz için çok teşekkür ederiz.

Prof. Dr. Canan Madran
Tez Danışmanı

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DEÜ İngilizce Dış Ticaret Bölümü
Yüksek Lisans Öğrencisi

1. Bölüm: Demografik Bilgiler

1.1.	Köy	
1.2.	Cinsiyetiniz	
1.3.	Yaşınız	
1.4.	Eğitim durumunuz	
1.5.	Kaç yıldır zeytin ve zeytinyağı konusu ile ilgileniyorsunuz?	
1.6.	Kaç yıldır zeytin ve zeytinyağı üretiminde aktif olarak çalışıyorsunuz?	
1.7.	Sıkım yaptığınız fabrikanın/tesisin adı nedir?	
1.8.	Zeytin ağacı sayınız kaçtır?	
1.9.	Yıllık ürettiğiniz zeytinyağı miktarı (iki yıllık ortalama, lt olarak) ne kadar?	
1.10.	Yıllık ürettiğiniz zeytin miktarı (iki yıllık ortalama, kg olarak) ne kadardır?	
1.11.	Yıllık ürettiğiniz hurma zeytin miktarı ne kadardır (iki yıllık ortalama, kg olarak)?	
1.12.	Mesleğiniz	

Çiftçi	Üretici	Beyaz yakalı çalışan (memur)	Mavi yakalı çalışan (işçi)	İşletmeci	Öğrenci	Emekli	Ev Kadını	İşsiz

2. Bölüm: Kooperatifçilik

2.1.	Kooperatife üye misiniz ?	
2.2.	Evet ise kooperatifinizin adı nedir?	1. 2. 3.
2.3.	Hayır ise nedenini belirtiniz.	☐ Pahalı girdi sağlıyor ☐ Faydalı olamıyor ☐ Bürokrasi ☐ Şeffaf değil ☐ Güven vermiyor ☐ Eğitim ve bilgi vermiyor ☐ İlgim ve bilgim yok ☐ Kapandı & Köyümde kooperatif yok ☐ Üye olmayı / yeni bir kooperatif kurmayı düşünüyorum ☐ Karaburun'da ikamet etmiyorum ☐ Ürünlerimizi yüksek fiyattan satamıyor ☐ Koop. yönetimi yeterince bilgili değil ☐ Finansal yönetimi iyi değil ☐ Yönetim kapasitesi zayıf ☐ Ürün alımında kalite standardını sağlayamıyor.
2.4.	Kaç yıldır kooperatife üyesiniz?	

2.5. Aşağıdaki kooperatiften beklentilere ne derecede katıldığınızı işaretleyiniz lütfen.

Kooperatiften Beklentiler	Kesinlikle katılmıyorum	Katılmıyorum	Ne katılıyorum ne katılmıyorum	Katılıyorum	Kesinlikle katılıyorum
	1	2	3	4	5
Kimse bir kooperatife üye olmaya zorlanamaz.					
Kooperatifler diğer kooperatifler ile işbirliği yapar.					
Kooperatif ortaklarına eğitim düzenler.					
Ortağın kooperatifteki söz hakkı ortaklık payına göre değişmez.					

Kooperatifler toplumun eğitimi, sağlığı vb. konularda çalışmalar yapar.					
Ortak, kooperatif sermayesine kendi ekonomik gücüne göre ortaklık payı öder.					
Kooperatiflerle ilgili kararlarda devlet etkili olmaz.					
Kooperatife giriş kolay olmalıdır.					
Kooperatif yönetimi güvenilir ve şeffaf olmalıdır.					
Ortaklar kooperatife kaliteli ürün sağlamakla yükümlüdür.					
Kooperatif çiftçinin temel sorunlarını çözer.					
Kooperatif tarımsal kalkınmayı sağlar.					

2.6. Aşağıdaki kooperatif performansı ile ilgili seçenekleri Karaburun Yarımadasında aktif olan ve sizinle ilgisi olan kooperatif bakımından (Bozköy, Eğlenhoca, Batı Mahalleri) işaretleyiniz. En kötü 1, en iyi 10 olmak üzere performansını değerlendiriniz.

Kooperatif Performansı	1	2	3	4	5	6	7	8	9	10
Kooperatifimiz ucuz girdi sağlar.										
Kooperatifimiz ucuz tüketim mamülleri sağlar.										
Kooperatifimiz ürünlerimizi yüksek fiyattan satar.										
Kooperatifimiz köyümüze yatırım yapar.										
Kooperatifimiz köylümüze yardım eder.										
Kooperatifimiz zeytin toplamadaki işgücü sorunlarını çözer.										
Kooperatifimiz üreticiye finansman desteği sağlar.										
Kooperatifimiz üreticiye bilgi sağlar.										
Kooperatifimiz, üreticiye düzenli eğitimler verir.										
Kooperatifimizde yetkili ziraat mühendisi vardır.										
Kooperatifimiz, ürünleri uygun şartlarda depolar.										
Kooperatifimiz üreticiye kredi sağlar.										
Kooperatifimiz devlet ile ilişkileri düzenler.										
Kooperatifimiz diğer kurumlarla işbirliği yapar.										
Kooperatifimiz köyümüzde istihdamı arttırır.										
Kooperatifimiz nakliye sorunlarımızı çözer.										
Kooperatifimiz sigorta işlemlerimizi yapar.										
Kooperatifimiz tarım ürünlerimizi işler.										
Kooperatifimizin coğrafi işareti vardır.										
Kooperatifimizin toplam performansı										

3. Bölüm: Zeytinyağında Markalaşma

3.1. Zeytinyağınızı hangi ebatlarda satıyorsunuz?

250 cc	500 cc	1 lt	1-2 lt arası	2 lt	2-5 lt arası	5 lt

10 lt	20 lt	50 lt	100 lt	200 lt	250 lt ve üzeri

3.2. Zeytinyağında Markalaşma ile ilgili değerlendirmeleri yapınız.

	Kesinlikle katılmıyorum	Katılmıyorum	Ne katılıyorum ne katılmıyorum	Katılıyorum	Kesinlikle katılıyorum
	1	2	3	4	5
Zeytinyağı ile ilgili pazar araştırmalarını takip ediyorum.					
Zeytinyağı ile ilgili fuarlara katılıyorum.					
Zeytinyağımız fabrikada uygun şartlarda işlenir.					
Zeytinyağımızın analizleri düzenli yapılır.					
Zeytinyağımızın analizleri bağımsız laboratuarda yapılır.					
Zeytinyağımız uygun krom kaplarda depolanır.					
Zeytinyağımızın gıda sertifikaları alınmıştır.					
Zeytinyağımız yurtiçi prekandeciye ulaştırılmaktadır.					
Zeytinyağımızı elden şahıslara satıyoruz.					
Zeytinyağımız şişelenmektedir.					
Zeytinyağımızı perakende ambalajında paketliyoruz.					
Zeytinyağı markamız vardır.					
Zeytinyağımız yurtiçi toptancıya ulaştırılıyor.					
Zeytinyağımız ile ilgili web sitemiz vardır.					
Zeytinyağımız ile ilgili sosyal medya kullanıyoruz.					
Zeytinyağımız kalite bakımından üstündür.					
Zeytinyağımız yüksek fiyattan satılmaktadır.					
Zeytinyağımız ihraç edilmektedir.					
İlçe Tarım Müdürlüğünden destek alıyoruz.					
Ziraat Odasından destek alıyoruz.					

3.3. Aşağıdaki devlet desteklerinin hangisinden ya da hangilerinden yararlanıyorsunuz?

Destekler	**Evet**	**Hayır**	**Destekler**	**Evet**	**Hayır**
Prim			Mazot ve Gübre		
Depo			Organik Tarım		
Analiz			Sebze ve Meyvede İyi Tarım Uygulamaları		
Nakliye			Yurt İçi Sertifikalı Fidan Desteği		
			Geleneksel Zeytin Bahçelerinde Rehabilitasyon		