



**Value Chain Analysis for Four Wheat Landraces
(Karakılçık, Sarı Bursa, Sarı Buğday, Üveyik) in Turkey
Nurcan Atalan-Helicke, Ph.D.
October 2019**

Acknowledgements: The author served as a consultant on the International Treaty on Plant Genetic Resources Project (W2B-PR-41-TURKEY) for CIMMYT, the International Maize and Wheat Improvement Center. Qualitative data for this project was collected from May to October 2019 in Turkey. This document has been produced with the financial assistance of the European Union within the framework of the Benefit-sharing Fund project (“W2B-PR-41-TURKEY”) of the Food and Agricultural Organization (FAO)’s International Treaty on Plant Genetic Resources for Food and Agriculture. The views expressed in this document are those of the author and do not necessarily reflect the views or policies of the European Union, FAO or CIMMYT. The author would like to thank to all the research participants in the project: Alexey Morgounov, Süheyla Sarıtaş, Gülsemin Akay, Nurten Çevik, Murat Demirtaş, Eppek and Ekrem Atalan for their help during field work.

Executive Summary

The report examines four of the top ten wheat landraces still cultivated in Turkey. The fieldwork for the study was carried out in May and July 2019, and involved participant observation at local farmers and grains markets, semi-structured and informal interviews with farmers, mayors, municipality staff, bakers, nonprofit organization representatives, online food and consumer groups, traders, farmer-traders, millers, business owners and local consumers. The fieldwork are carried out in Adapazarı, Amasya (Suluova), Ankara, Balıkesir, Çanakkale (Bayramiç, Biga), Çankırı (Yapraklı), Istanbul, Kastamonu (Tosya), Malatya (Arguvan) and Tokat (center, Turhal, Zile).

Growing interest in wheat landraces for health reasons coincides with a quest for better grains, as well as nostalgia and patriotism associated with the revival and conservation of ancestor wheat and Anatolian seeds. Various actors reflect these narratives in terms of their involvement for revival and cultivation of these wheat landraces. There are local markets previously established for *karakılçık*, *sarı bursa*, *sarı buğday* and *üveyik*. However, there are also regional differences in the landraces and how they are used (e.g. *üveyik*, *karakılçık*). There is a growing national recognition of wheat landraces due to the fame and national distribution chains of *siyez*, which has also created a financial incentive for bringing other wheat landraces to national markets (e.g. *Karakılçık* is now sold in the Migros supermarket chain). However, the financial incentive has also created the rise of unauthentic or “fake” wheat landraces and the difficulty of distinguishing what is real (e.g., *Sarı buğday* bread is now sold in a national supermarket chain in Ankara due to major flour companies’ interest in *sarı buğday*. However, two flour companies interviewed for this study mentioned that they are using any durum wheat variety and selling it as *sarı buğday* since 2014).

There are various actors involved in the value chain of these four wheat landraces: Local traders and farmer-traders continue to sell wheat landraces in local farmers markets (e.g. A farmer-trader from Çorum and trader from Amasya, Suluova, can be found at the local farmer markets in Suluova selling *üveyik* wheat as bulgur and flour). Municipalities are involved in “reviving” wheat landraces for rural and local development (e.g. Arguvan Municipality, Malatya, has been investing in and growing *sarı bursa* since 2017 on municipality-owned land for local market consumption. Seferihisar Municipality, Izmir, has been growing *karakılçık* since 2011 on both municipality land and as contract farming in collaboration with farmers in one village. Seferihisar Municipality sells *karakılçık* both at local and national markets). Artisan bakers are expanding sourdough bread baking and sales in Istanbul by using wheat landraces (e.g., Eppek bakery has been making sourdough bread with six different wheat landraces including *karakılçık*, *sarı buğday* and *üveyik* since 2016 and has been selling it to Istanbul consumers in its shop and through consumer cooperatives). Celebrity chefs embracing New Anatolian Cuisine principles incorporate wheat landraces in new creations to Istanbul consumers (e.g. Chef Maksut Aşkar has incorporated *üveyik* wheat landrace in the dishes he serves at the Neolokal restaurant since 2014. Chef Aşkar also highlights dishes made from *üveyik* bulgur at national and international cooking demonstrations). Consumer cooperatives and organizations buy directly from producers or grow wheat landraces (on rented land or on land they engaged in different use relationships with the owner, e.g. Balıkesir Center for Life-friendly Products, Solidarity and Sharing sources six



different wheat varieties, four of which are landraces, karakılçık, kırmızı, köse, sarı buğday, and makes bread to sell in its shop. It buys these wheat landraces directly from farmers and grows whatever they need for the season in lands they commonly use with a farmer).

While the increase and diversity of actors is a sign of hope for the cultivation of wheat landraces, the price differentiation between local and national markets for the same wheat landrace and among different sellers can be a concern for consumers and business that would like to use wheat landraces. Because there is a growing “fake” wheat landrace market (including siyez), there is also a need to protect both the small producers and consumers via regulation and labeling of wheat landraces. There are multiple actors in Istanbul bringing wheat landraces to national markets. However, their information is limited (e.g. The Wheat Landrace Survey completed in 2014 has not been published in Turkish. The only available information from this survey is in English). The artisan bakers and the newly established Bakers Collective in Istanbul established by artisan and home bakers are interested in reaching out to small producers in different parts of Turkey, alone or in collaboration with Consumer Groups and food cooperatives in Istanbul. Although it seems an unlikely partner, because they reach out a sizable number of consumers with disposable income in Istanbul, these collective initiatives in Istanbul can be potential partners in connecting small producers and wheat landraces to national markets.