



TURKEY-DENMARK BUSINESS COUNCIL

**DEiK EU TALKS:
FOOD SECURITY & SUSTAINABILITY
IN THE POST-CORONA ERA:
TURKEY & DENMARK**

15 June 2020 | Zoom Online Conference System





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Moderator

- **EMRAH İNCE**

Chairperson, DEİK/Turkey-Denmark Business Council

Participants

- **ANETTE S. GALSKJØT**

Consul General, Consulate General of Denmark in Istanbul

- **AYŞE AYŞİN IŞIKGECE**

*Chairperson & Director General, General Directorate of
Agricultural Enterprises (TİGEM)*

- **AYÇA AKAT ÖZYILDIRIM**

Country Manager, Chr. Hansen Turkey

- **DR. UMUT KÖROĞLU**

*Commercial Director for MEA & Country Manager
for Turkey, Novozymes*

Registered Attendees: 228

MEETING NOTES

The webinar on food security and sustainability during and post-Corona era was organised by the DEİK/Turkey-Denmark Business Council, moderated by Emrah İnce, Chairperson of the Business Council, with participations of Anette S. Galskj t, Consul General of Denmark to Istanbul; Ay e Ay ın I ıkgece, Chairperson and Director General of the General Directorate of Agricultural Enterprises (TİGEM); Ay a Akat  zyıldırım, Country Manager of Chr. Hansen Turkey; and Dr. Umut K ro lu, Commercial Director of Novozymes MEA & Country Manager for Turkey.



EMRAH İNCE

Chairperson, DEİK/Turkey-Denmark
Business Council

We are currently facing the Covid-19 pandemic and the post-pandemic era to a certain extent will be much more different than what we have been facing up to now. So, food security and sustainability is the topic we will be having experiences and correspondences from mutual parts and explaining projections for the post-pandemic era.

As we all know, due to the Covid-19 pandemic, border closures, quarantines, and market, supply chain and trade disruptions are restricting people's access to sufficient/diverse and nutritious sources of food, especially in countries hit hard by the virus or already affected by high levels of food insecurity. Both lives and livelihoods are at risk by this pandemic. Although, in some countries the spread of the pandemic has been slowing down and the cases have been decreasing, in some others Covid-19 is resurging and continuing to spread quickly. There is still a problem for a global response to pandemic. In any scenario the most affected ones will be the poorest and vulnerable segments of the population, including migrants, displaced ones, those hit by conflicts. Some 850 million people around the world are experiencing hunger, consuming insufficient amount of calories for a normal active life for a long period. Hunger impacts everyone negatively but it is particularly damaging on children's growth and development. Its effects are irreversible and carrying long-term implications for our future and sustainable development.

All we know that the pandemic will eventually retreat, but we still don't know how fast this will happen. We also know that this shop is a somewhat unusual as it affects significant elements of both food supply and demand. The significant

slowdown of all economies of the world, and especially of the most vulnerable ones as unemployment rates have risen and Covid-19's economic impacts will be felt more, will make countries, especially food import dependent countries, struggle to have the needed resources to buy food. In return, demand for food will decrease over the next months. Prices should be going down in 2020 and thus, this will have a negative impact on farmers and agricultural sector for sustainable development. As of now the structures have been minimal as food supply has been adequate and markets have been stable so far. However, we have already seen challenges in terms of logistics bottlenecks, not being able to move, put from A to B, which have been largely resolved by mid-May and likely there's less full of high value commodities, including fruits and vegetables being brought to market.

As of June, we still expect disruptions in the food supply chains, especially in the high-value commodities, meat, fish, milk, fruits, and vegetables, and the restrictions on movements as well as the basic the version be able to buy workers may impede farmers from farming and food processors who handle the vast majority of agricultural products from processing. Also, shortage of fertilizers, veterinary, medicines and other input could affect agriculture production. Closures of restaurants and less frequent grocery shipping diminished demand for fresh producing and fisheries products, affecting producers and suppliers. Sectors in agriculture, fisheries and aquaculture are particularly also affected by the restrictions on tourism, closure of restaurants and coffee and school meals suspension. What is also worrying, is that as the end of 2019, a further of 183 million people in 55 countries and territories were found to be exposed acute food insecurity, not yet at a crisis level, but putting them at the risk of slipping into crisis levels, if faced with a shock or stressors such as the Covid-19 pandemic. Indeed, if Covid-19 cases proliferate in countries home to 40 million people experiencing acute food insecurity, many of those public health and social protection systems, face capacity constraints, and the consequences could be drastic.



ANETTE S. GALSKJØT

Consul General, Consulate General of
Denmark in Istanbul

On Denmark and the Corona crisis, we were hit pretty hard in the beginning. Like Turkey, Denmark was closed down for a couple of months very effectively, which means that now, actually it's very parallel to the way it's developed in Turkey, because now Denmark is also opening all shops, cafes and restaurants and companies are opened. And this, today actually the civil servants from the east part of Denmark are also allowed back in the office, which means my colleagues are back in the Foreign Ministry in Copenhagen, and now also are allowed to go to work in the office in a controlled manner where not everybody will be working at the same time, but recognising that things are moving in the right direction in Denmark, we are seeing less and less infected and we have a very effective test strategy where you with your Danish ID card can go and book an online time. I did that myself when I landed in Denmark last week. And within two days you have the results. So a lot of people are being tested and, the borders open today between Denmark, Germany, Norway and Iceland. Denmark is still a little bit reluctant to open internally in the EU not to speak of any a third world, third countries outside the EU. So we're following this very closely because, of course it's interesting also in respect of Turkey and our Turkish-Danish relationship. But, I think we need probably to wait until the end of August when we can see a full opening of the Danish borders.

There are a lot of exemptions to be able to enter Denmark and business purposes are one of them. So, if you can document you have a meeting in Denmark, you can enter Denmark of course with the kind of visa that you like. The government has been very good at introducing a lot of serious measures in the beginning. Now they're being criticised lastly for being too slow at opening again and I think

this is one of the situations where it's so difficult to have an opinion, because it is very difficult to know whom to trust and if even the experts themselves know exactly what is going on. The medical experts in Denmark have been wrong so many times during this Corona where they predicted that it would be mass immunity, and then there wasn't, then they predicted that much more people would have been infected. So, that would be a pressure on the hospitals that didn't have either.

A lot of incidents where they have tried their best to find out what is happening, but it just proves to me that this is completely new territory and nobody knows how to maneuver, how to navigate. And I think we just have to compliment both the Danish and Turkish governments for being just in time and actually taking all the relevant measures that should be taken to combat this pandemic. So, we have a good chance of getting back on track and continuing with business in both of our countries. Denmark has introduced to mitigate some of the economic risks here. Denmark has introduced a large export and investment package to Danish companies directed primarily at Danish SMEs but also at larger Danish companies. We have informed all of our Danish companies in Turkey about this, and there's actually a total of 225 million, which is about 30 million Euros in aid to exporting companies, primarily giving them a discount on the services of the Danish Trade Council to promote their services abroad and we are in dialogue with so many Danish companies that were not really interested in Turkey before, because they found it maybe too risky, or our prices were too high where with these new incentives, we actually see a renewed interest in the Turkish market, which I find very positive and because of course I'm a huge believer in the Turkish market and I'm absolutely sure that the Turkish economy will bounce back as it has done time after time. Now therefore it's a fantastic opportunity for people to invest in Turkey and to invest in building a business in Turkey and building partnerships with Turkish companies. So, we are spending a lot of our time, advising Danish companies on how to do this within various sectors and of course sustainability is in the forefront of everything we do.

I'm sure you all know that Denmark was the first country to announce that we would be 70% neutron-CO2 by 2030 as a sort of a pioneer in autumn last year and the Corona crisis to some extent has made it easier, because we haven't consumed so much. So, for a while it went really well with the emissions, but

now of course when everything comes back on track, the dialogue becomes even more important on how do we together ensure that we continue the good signs from these two months where we haven't consumed so much and how can we introduce much more sustainable technologies, it will be food security of course, but also within energy, energy consumption, water consumption which are also parts of the food production sector. So, in my mind, all those sectors can benefit from sustainability and are becoming more sustainable. They are sort of interconnected in any way. If you don't look at the way you consume energy in your food production, you're not sustainable, even though you may be organic or you may be using less fertiliser or we're looking at other elements of sustainability, you still have to look at your water and energy usage and how to combine the best technologies from Turkey and Denmark in achieving the most optimal solutions. And I think that is our task for the coming years to identify the needs in Turkey and find out where the Danish innovative solutions that we can help introduce are and with this new package, also that's a huge discount on trade delegation. So, we are expecting at trade delegation to Turkey next year which will be on energy as a sort of sustainability. I'm looking very much forward to that, because this is the first real delegation to Turkey for a while. Due to the political turbulence in Turkey, we haven't been able to really get any high level Danish officials to dare to go to Turkey, even though we are telling them that it's perfectly safe. There is absolutely a new willingness now from the Danish companies and the Danish industry to visit Turkey. We have also a new incoming ambassador on 1st September. We will welcome Mr. Danny Annan who's our current ambassador in Iran and he has a huge appetite for trade.

Sustainability is of course in the forefront of everything and if there's something we have learned from the last couple of months, it's that we all need to contribute, but also that is possible, you know, from one day to the other people didn't drive, consume and use so much waste anymore. These kinds of lessons that we learned because we were forced to, I think we can very easily implement some of these things in our daily lives going forward to make sure that we continue the good trend of consuming more wisely and most sustainably. We are here to advise all of the Turkish and Danish companies that are interested in doing business with Denmark and I'm really looking forward to turning 2020 into a sustainable business year and putting the Corona behind us and focusing on the future and all the opportunities that we will definitely have together.



AYŞE AYŞİN İŞIKGECE

Chairperson & Director General,
General Directorate of Agricultural
Enterprises (TİGEM)

The Covid-19 is a big trouble around the world. I will give information about our activities first of all. First, TİGEM is the biggest farmer in Turkey. It has a history of 700 years. We are under the authority of the Ministry of Agriculture and Forestry. We have 17 farms in different locations. We are producing certificated seeds and livestock. We breed cattle and sheep and provide them to the farmers. We are trying to increase the quality of agriculture in Turkey. We also have Arabian racing horses and we have gazelles, goats and dogs. We are protecting their genetics; this is one of our important tasks under TİGEM. TİGEM is an example for Turkish farmers; there are huge investments and technologies in our farms. We are a market leader; our share is 37% which was 30% in 2018.

We increased our share; we are the best on the market about quality. Each year we sell 170.000 tons of cereals. This year we started new projects. The first one is the local vegetable products project. We started planting six different national seeds in our farms; it can be a good possibility to do it together with Denmark. We can make a trade. We are open to make trade about our all articles; it can be a really good possibility for the both countries. We also started a great campaign, which is called native seed project. We have collected the forgotten seeds from the villages and planted them, trying to protect these seeds. And lastly, we started producing cannabis. Cannabis is also a really important topic nowadays in the world. This is the new trend and cannabis has a great industrial value. So, we are working about this article to produce industrial cannabis seeds in our farms.

Talking about the pandemic, in the first weeks there was a great chaos. The countries stopped exports and there was a panic buying in everywhere. It was something new for everyone. The three organisations, namely; FAO, WHO and WTO made a joint call for supporting small farmers, expanding aid programs, focusing on bottlenecks, keeping on global trade and not allowing food inflation. In order to be ready for the pandemic, we made an action plan. We took necessary measures in the farms. Our ministry started new policies. We held campaigns for the benefit of the people. We never lost contact with the pharmacy and the sector and made meetings in order to understand what's happening on the market.

Keeping contact, we understood the stock of the articles and which type of difficulties we have. After checking the market, of course we made meetings with other ministries in order to take prompt decisions. We formed a science committee within our Ministry and we established products desk to follow the harvests at yield figures. We took our actions according to these figures. For example, when we checked the figures of lemon because new harvest was in September, we noticed that the stock would not be enough. Therefore, we limited export. It was a really important topic and also important decision which we had. We always checked what's happening on the market, because retails from other countries increased and everybody rushed into do retail groups and they bought articles. Stock was really important topic. We applied all possible measures to prevent from the spread of virus and also we published booklets and distributed them to all producers to inform them what is happening on the market. We also started joint efforts with TÜBİTAK to develop a vaccine. We provided lands to the producers free of charge to increase production and now these lands are an additive source of production. This is very valuable because the quantity of the articles is really important and we don't know what will happen in coming days, as it is blur.

Our Ministry donated to 75% of the seed price in 21 cities. TİGEM also sent 4.000 tons of seeds to 5 cities. Travel permits were given to seasonal workers, the government supported farmers with subventions. We made a 20% increase in our purchase price of wheat and barley. There was a surplus in seabass and seabream due to stop of exports. As you know, for seabass and seabream, we are sending the articles to the European countries mainly and in the beginning

of the pandemic, the borders were closed and we had a lot of stocks. We put a fixed price for them in all markets. We worked together with market in order to finish those stocks because they are fresh so, we should sell them in a short term. Finally, we finished all the stocks. This was a good example for solidarity.

We established a small facility and started producing masks in our farms for TIGEM which is a good example in these days. We established the digital agricultural market called "DİTAP" in April. By this platform our farmers found markets related their products, our consumer will have a good quality products. Small producers are not crushed. We have more than 10.000 members of DİTAP, nowadays it's increasing, it is really good platform to become together about supply and demand to find market for the food article especially. Now, we made a launching for the phase one and we are now working for phase two. So, all animal products will come in and the articles will enlarge. Unfortunately we have seen long supermarket lines and empty shelves during this pandemic. We did not experience such problems in Turkey, but we understood again that food is really important so, we started another campaign in coordination with FAO. The name of the campaign is "Save Your Food". We want to be confident for the future. So, we need to decrease the waste as much as possible for everyone. Also, we are open to make trade with Denmark. We can make joint meetings in order to create good trade between two countries.





AYÇA AKAT ÖZYILDIRIM

Country Manager, Chr. Hansen Turkey

Christian Hansen has been selected as the most sustainable company in the world which is a bioscience company and has been developing not only solutions for food, but also for pharma and agricultural industries for 146 years. 82% of our revenue contributes positively to the UN goals especially focused on three of them very much.

When we look at the world's problems, we need to think how we have to feed 10 billion people by 2050 and to do this in a sustainable way. Actually, the 60% of global consumers are worried about climate change, because we waste so much food and actually there are also losses in supply chain and if that was be a country, it would be the third biggest contributor to the greenhouse gas emissions after US and China. So, it's a big thing and actually reducing that, we would also feed more people naturally.

There are some global challenges. Firstly, there are a lot of people to feed and this has to be done in a sustainable way. The food production should also be sustainable. Secondly, the one third of all food is wasted. So, it's a big thing. As we also see in this current Corona crisis, there are a lot of burden on healthcare and currently, 700.000 people are dead each year because of resistant infections. This number will go up dramatically in coming years, approximately in 2050 the number will rise to 10 million deaths per year, if no other precautions are taken. So, Chr. Hansen basically works to find solutions to these three main problems in respect to the 3 UN sustainable development goals (SDGs), namely, zero hunger, good health & well-being, and responsible consumption & production. Why should we reduce food waste? Because there are a lot of hungry people on earth and if we could just save the 25% of the waste, that would feed all the hungry people in the world. So, it also contributes to the "zero hunger" initiative

of the UN and also number 12 which is “responsible production”. When you look at the 3 UN SDGs, these three are very much in line with the products of Chr. Hansen. To give an example, we have solutions for each of them, by which we can have more efficient production or increase crop yields, so we can get more crops per square meter or we get more out of milk. When we look at the health aspect, you can increase your immune system and therefore, get less affected by diseases, and the same is valid for animal health as well.

You can protect your food without any chemicals by completely natural ways, using some of our solutions. So, what does food cultures do? Actually food cultures can help keep your food fresh and safe and it is not only applied in dairy, but also we see more and more ready to eat foods and salads. It could be applied in dairy for sure, both cheese and yogurt, and wine, meat and fish. So, our aim is not only extending shelf life by natural means, but also keeping your products fresher for longer. That means you can spoil the yogurt in the supply chain but also in your fridge. So, to eliminate these things, you put some good bacteria into the yogurt or into other products to extend shelf life. It is a natural way and completely validated by a lot of customers so far as well. So, the overall aim is increasing product quality and safety therefore, decreasing food waste both at home or in supply chain and creating more sustainable production methods for our customers. So, how did this the bacteria do that? The food culture helps extend shelf life. For example, if you add the good bacteria into your yogurt, that help protect the yogurt. So, 30% of the yogurt waste could be reduced with that.

What happened after Corona? Packaged good is more or less the only item that has increased in sales and although it was expected to decrease, if there was no Corona. After Corona, we can see 6% increase in packing. So, people tend to buy more packaged foods because, they are afraid of the artisan and all other production methods. So, in the short to mid-term, the Covid is expected to realign consumers’ priorities and food waste, animal welfare, food security will be front-lined much more than ever. Healthy eating will become more important. So, actually what we think of natural, healthy, reducing food waste is very relevant to discuss right now. I think, it’s quite clear that reducing food waste has an impact. We can do it naturally and that savings of food waste would benefit us both economically, but also, just feeding more people on earth.



DR. UMUT KÖROĞLU

Commercial Director for MEA & Country
Manager for Turkey, Novozymes

We have seen some extremely difficult changes in majority cases, but Covid-19 made us change very fast in agile ways. There will be 3 billion more people in the world by 2050 which means that there will be more mouths to feed and I believe the activities or the actions that we are taking right now will be a kind of game changer by 2050. If you're going to do the things in the way that it should be, we will see the positive outcome of it and vice versa.

I believe the Covid-19 proved that we are still very vulnerable. The supply chains and healthcare systems that we have are vulnerable. The other thing is, we keep speaking about generating supply chains, which is self-feeding itself or self-sufficient. Another thing is that when we look at, for example, grain markets, majority of the grain products are being produced in one part of the globe and then being delivered into another. And when your supply chain is disrupted, the borders are closed, there is no way that you can bring it and feed your people. So, that is why we just need to make our countries self-sufficient in sustainable ways. This is a true eye-opener and another reason why we should work together. Prior to Covid-19, we were so much on digitalisation and how we can use the digital on mining the data, working on the data, generating outcomes with it. We also understood that the large part of food and beverage, and agricultural industries are still on a kind of manpower base.

When it comes to Novozymes, like the other Danish companies, we are extremely purpose driven, sustainability to win and the basic reason why we do this is mainly we just aim for better lives. The world is growing and becoming more and more difficult to be able to secure better lives. All of our products are either enzymes

or microbes that we find it from “mama nature” we call it. We are also inspired by the UN SDGs, focusing on 17 elements among them, given the nature of it as business, given the nature of what we do. So, we have initiatives around “zero hunger” and also “climate action” on quality education, clean water and sanitation. For example, clean water is a strategic opportunity area for Novozymes which is also a business area for us, we just focus on it because by 2030 and 2050, we know that reaching to clean water will be a difficulty.

If you also focus on responsible consumption and production, like many Danish companies, we proudly also focus on affordable and clean energy and biological solutions are our core. We have three divisions in our organisation that each of them is focusing on certain business areas. One of them is called agriculture and bioenergy where we have our enzymes and microbes for improvement of agricultural and bioenergy products or industries, then we have food and beverage, we call it as household care and technical industries, where we use the enzymes and microbes mainly for hand washing, dish washing, textiles and so. Referring to the growing population by 2050, there is a pressure put into the supply chain and production. When we look at our solutions in food and beverage, they are mainly for improving the efficiency of production, so to say, producing more with less and also enabling products to be remaining longer in the shelf life.

Anchor efficiency of grain sorghum in Italy is six times higher than that in Kenya. They have land, but not enough efficiency to produce the right amount of the product and probably not with the right quality parameters. We have products that we just coat the seed of any kind of grain that this seed becomes more tolerant to the adverse conditions. It makes the seed more tolerant to these adverse conditions and with this way you increase the efficiency and total output from per hectare of a land. The efficiency question, we should ask ourselves that we have separate activities together, but we should be thinking all together to make it more efficient and take more outcomes with it.

Q&A SESSION

- **How does Turkey secure and sustain national food security in terms of food variety and storage, optimum volumes and geographical storage locations?**

Ayşe Ayşin Işıkgece

We are promoting licensed warehouses in our country and our aims are to stop product waste, decrease shipment cost and take trade under registration. Also, we are providing a price and market stability. Our capacity is about 5 million tons. We have 91 companies in 130 points. The government also gives subventions for the farmers, choosing licensed warehouses and we also work on standards. Our staffs responsible for quality assurance are writing guides, new standards and it will help us keep, sell and transfer the food. It is something new and it's protecting us from the Corona effect.

- **Which kind of vaccines was conducted and what was the effect?**

Ayşe Ayşin Işıkgece

We are working on vaccine as do the other ministries and nowadays they are discovering some new things. They are making some trials on especially horses in order to see the results, but the last situation on the vaccine is not clear, yet.

- **How soon digitalisation, artificial intelligence and advanced technologies will be applied in agriculture and what kind of educational requirements does such a wide spread application entail? And what is Denmark's experience in this regard?**

Dr. Umut Köroğlu

We keep speaking highly about digitalisation. From one side, it has benefits; you just need to set up the digitalisation in a way that it just gives you the right outcome for your decisions to pace your decisions. From the other side, you still need to design the things with the brain power. So, this is important. I think what we need to do is just to combine the things into each other. Referring to seed coating, we collect the data, then model it, and try to fit into each other.

We also know that the animal proteins are becoming extremely expensive and also generating too much of carbon dioxide, therefore, the protein from vegetable sources is also becoming important, but the taste and texture are different. That's why we also collect data, so what kind of protein profile we have and what kind of flavour and texture it has, and then start generating our products.

Ayça Akat Özyıldırım

Regarding agriculture, actually it has been used to some extent with drone imaging, precision farming and landscaping. Although, its impact to our business today is minimal, it could be game changer in the future like 10-20 years later. We know that the Danish universities are looking into this, but we don't know how advanced they are at the moment. Regarding other services we offer, we use a lot more of digitalisation and not only agriculture, but also for example, milk collection in phage and in many other aspects we start to use heavily the digital services because it increases speed and visibility.

- **The shelf life will cause a shift on consumer demand for the larger packages and this can keep the waste problem ongoing. What is your opinion about this?**

Ayça Akat Özyıldırım

Actually, if the consumer buys yogurt in a five-kilogram pack instead of one-kilogram five times, that will reduce the overall pack size and reduce the waste in terms of packaging, and if that five kilogram yogurt keeps fresh along its shelf life and could be consumed within that period, there would be basically less waste.

- **Can you please share your opinions about recovery after Corona crisis about food services with relevant technologies?**

Emrah İnce

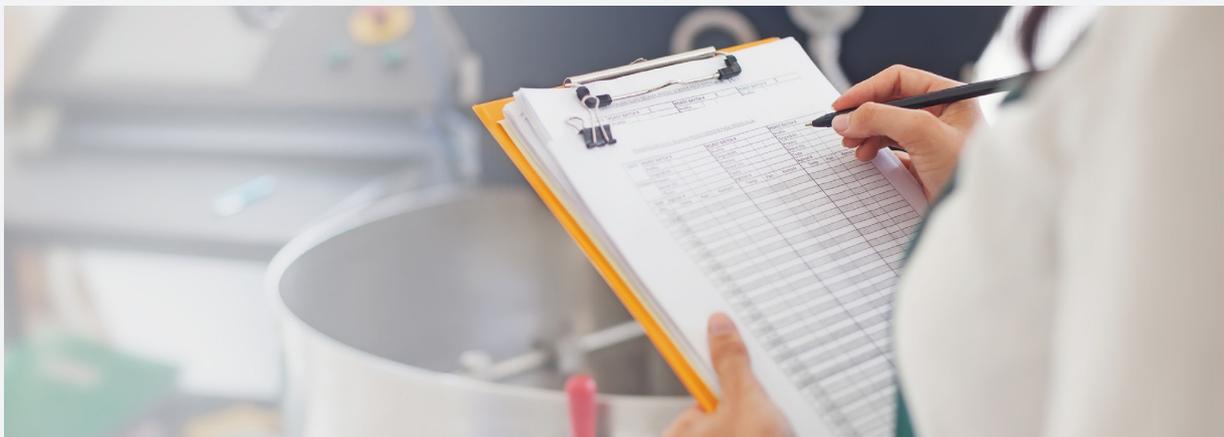
We see in the Far East that online fresh fruit and food categories are extended up to 40% of the whole online sales versus we see only single digits in Europe in food category. So, there is a huge gap on this online platform for Europe countries and for Turkey, even for the rest of the world that consumers'

awareness and interest on buying online services, which also needs to improve online platform deliveries in each country and each location will be the new challenge and there will be a new era of trade. Just in time deliveries for the shelf life regarding the improvements in shelf life extension is going to be a huge challenge and I think 50% of trade for food categories will be online in the upcoming years and will be available via applications as we are experiencing for the last three months extraordinarily.

- **What kind of opportunities is there in Denmark-Turkey collaboration for the circular economy transformation?**

Anette S. Galskjøt

A circular economy is predicted, if implemented in Denmark fully, that transformation by 2035 would be able to increase our GDP with 6 billion Euros and that exports with 3-6%, and CO2 emissions could be reduced 7%. And most importantly, the use of raw material could be decreased with up to 50% in certain sectors which of course is really interesting also from a food weights perspective and the food sector. I think food production is one of the most important sectors where we could cooperate much more between Denmark and Turkey, and I think we should explore that, but also within textiles and specifically within a sustainable energy production like biogas, waste to energy. Looking at those opportunities, it is quite relevant and I think we have a lot of interesting technologies in Denmark that could benefit the Turkish market and we have a lot of knowledge on how to do circular economy business models that we would very much like to share with our Turkish business stakeholders.





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