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*PECUNIA NON OLET
BUT DOES ROSE
MONEY SMELL?
ON ROSE AND ROSE
OIL PRICES AND
MORAL ECONOMY IN
ISPARTA*

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***Pecunia non olet* but Does Rose Money Smell?**

On rose and rose oil prices and moral economy in Isparta¹

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Abstract

“Since every commodity, on becoming money, disappears as a commodity, it is impossible to tell from the money itself, how it got into the hands of its possessor, or what article has been changed into it. ‘*Non olet*’, from whatever source it may come.”

Marx (1986 [1887]). *Capital*, vol. 1, p. 112

This paper investigates rose and rose oil production in the province of Isparta with reference to the discourses on and procedures of price formation. Farmers have been engaging in rose cultivation for over a century and rose oil production is considered to be a traditional industry. The market actors for rose oil are global functioning cosmetic firms and almost all rose oil from Isparta is exported. Prices and production have been steadily increasing in the last seven years. Although prices are seen as good, there are concerns about over-production and harsh competition between the rose oil firms for buying the harvest, hence pushing up rose prices and, leading to a crash of rose oil prices on the world market. Through careful observation of payment and price formation procedures, the paper raises issues concerning the moral economy of price formation. Findings are provisional and the research is on-going, but the discourse on prices clearly suggests that value judgements are embedded in capitalist markets rather than being simply or primarily anti-market.

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Introduction

Pecunia non olet (money does not smell): this famous saying is attributed to the Roman emperor Vespasian (ruled AD 69–79) who is reported to have collected tax money from Rome's latrines. Yet the saying is equally famous through Karl Marx who used it in volume one of *Capital* (1887), to illustrate how money attached to a commodity through exchange does not reveal its source, has no smell so to speak. In this paper I use the image of the 'non-smelling money' to look metaphorically backwards, at how money earned from smells (of roses, which are distilled into rose oil to become raw material for perfumes) loses its smell when it becomes price and profit. In order to follow this process of exchange and transformation, I examine the conditions and process of rose farming and the procedure of rose oil production in Isparta. The analysis is based on 3.5 months of fieldwork in the region and city of Isparta, southwest Turkey, carried out in three visits in 2015 and 2016, and results are preliminary.

The smell I address here is that of roses, specifically that of the fragrant oil bearing rose, *Rose Damascena*. The fragrance is described as quickly evaporating after harvesting (Baydar and Kazaz 2013: 73). The money to be earned from harvested roses and produced rose oil however does not reach rose farmers and rose oil producers until months after the harvest time and in the interim they do not even know how much it will be. Harvesting is done within 6–7 weeks from about May till the end of June; yet the prices of the roses and rose oil were made public to all the immediate actors only at the beginning of September (in 2015) and early October (in 2016). In this paper I examine the factors affecting the price formation in an ethnographic way following Jane Guyer (2009). She is not the first to take an interest in the composition of prices and price formation as a process has been central to many economic sociological and economic anthropological analyses. These analyses have critically assessed simplistic assumptions about price formation (e.g. that price is determined only through the law of supply and demand) by positing markets as social fields (Bourdieu 2005), highlighting the institutional aspects of price formation (Veblen 1994 [1904], cited in Tool 2002; Beckert 2011), and underlining classical arguments concerning the embeddedness of prices in institutions, power and social relations, from Aristotle and Karl Marx to Karl Polanyi and John Kenneth Galbraith (cf. Krul 2016). My interest in the formation of prices in and around rose oil industry is related to my efforts to explore the 'moral dimensions' of this process, if not the 'moral economy' per se (Hann 2016; Palomera and Vetta 2016). I found that the sentiments and norms of traditional obligations expressed by rose farmers and rose oil producers in Isparta, drew predominantly on the language of market economy, notably with reference to 'good prices'. This led me to ponder how 'good prices' expressing a 'market-based moral economy' are related to the more familiar notion of 'just prices' as defined by an 'anti-market moral economy', in which discourses on unjust prices reflect moral outrage and anxiety about the market. Stephen Gudeman and Alberto Rivera (1990: 139–159) have discussed "just prices" from the perspective of Columbian peasants and suggested that peasants have multi-vocal views on prices, as well as institutions of (market) trade and traders. They argued that the specialisation implicated in the circulation of products from the locality to the markets (the *campo*/countryside and the *centro*/center) through farmers, traders, intermediaries such as transporters lead to the kind of disadvantaged (and marginalised) terms in which the peasants think of themselves in controlling

the prices and profits.³ In the production chains I examine in this paper, I discuss where and how marginalisation, disadvantageous terms of trade and comparative advantages may be emerging. The main difference, however, between the Andean peasant economy examined by Gudeman and Rivera and mine has to do with the way Isparta's rose producers are embedded into the global capitalist market economy. Roses in Isparta are cultivated for their good price but they are not the only source of income for farmers. Furthermore rose and rose oil production start in Isparta but pricing is determined by the international market of cosmetic and aroma industry.

I argue that rose and rose oil production and the way prices are formed should be studied as a processual chain of integrated systems of production (of roses), trade (of roses) and production of rose oil (P-T-P), in which uncertainty is partly mediated in through sociality between rose producers, scale keepers (*kantarçıs*) in the villages and regional rose oil firms. Within this web of sociality prices are expressed as payments and profits are veiled through being related to distant markets, where big players engage in transforming the raw product of the rose oil through laboratory tests, perfume creation, branding, marketing, and advertisement. Knowledge of this industry is not completely and differentially available to all local rose oil producers and hardly to rose farmers. Those rose oil producers who have tacit knowledge of these markets have an advantage over the rose producers but they still have to compete with other rose oil firms to be able to dispose of their product at good prices. Following Elyachar (2012), I suggest that rose oil producers have a 'sense of the market' which enables them to muddle through unclear processes of price formation.

First I outline the location, the population and economy of the field site. I then describe the rose oil industry and how the price of rose oil and of harvested roses is set, drawing on the literature in economic anthropology. I close by focusing on the moral dimensions and moral economy.

Background: the province and the city of Isparta

Isparta is situated to the north of Antalya, which is internationally known for its beaches along the Mediterranean. Being located just to the north of the Taurus mountains and within the Turkish 'Lake District', the province enjoys a Mediterranean climate, with relatively cool summers (compared to the coast) and mild winters (compared to central Anatolia); this is conducive to rose cultivation. Isparta has an ancient history and was long contested by the Byzantine Empire and the early Seljuk Turkish principalities. From the Middle Ages onwards it was an Ottoman province, and lost some of the political and cultural significance it had during the Seljuk era.

Since the foundation of the Turkish Republic in 1923 Isparta is known primarily as an agricultural province, growing grain, vegetables and fruit. In recent decades apples, pears and cherries have developed into important export cash crops.⁴ Although an important craft centre Isparta remained throughout the Ottoman period in the hinterland of Izmir (Smyrna), dependent on Christian and Muslim traders' networks for the sale of local products.

³ Gudeman and Rivera (1990: 151) contrast the traders and peasants as follows: "Personal need for a commodity never forces traders to enter the market. In contrast, say the rural people, they themselves lack withholding power and have to make transactions based on necessity, which lowers their bargaining power."

⁴ In 2014 according to official agricultural statistics, 28% of the area in Isparta was used for agriculture. Of this some 82.6% is used for growing grains, 2.8% for vegetables and 14.6% for fruit production. See <http://isparta.tarim.gov.tr/Sayfalar/Detay.aspx?SayfaId=29>, accessed on 11.09.2015.

Rose cultivation in Isparta started in the late Ottoman period (Temurçin 2004; Altıntaş 2009). There are diverging narratives as to who initiated rose cultivation within and around the city, but legend has it that Ismail Efendi was the honourable patron of rose cultivation and first entrepreneur of rose oil production. The neighbourhood where he is said to have set up the first rose gardens and to have lived is named after him as ‘Rose(r) neighbourhood’ (*Gülcü mahallesi*) – the city of Isparta has made the rose its cultural symbol and brand, even if within the city there are no more extensive rose gardens or rose cultivation. Today the villages around the city of Isparta are the main locations for rose production, though many remember with nostalgia the existence and smell of rose gardens within the city boundaries (Karakuş 2009: 170–174).

In order to understand the conditions of rose and rose oil production, one needs to look at the general economic and socio-demographic features of the province. Isparta’s urban population (60% of the provincial total, see Dulupçu and Gövdere 2012: 152) was employed mainly in trade and services sector, urban incomes derived primarily from rent (renting property to university employees and students, also to military personnel). Population decline continues in all districts of the region (to other big cities and other provinces).

The province’s economy is evaluated by experts as being somewhere in the middle of Turkey’s general. As economists working at the University in Isparta put it: “*Karnımız doyuyor ama o kadar, bunu da şükür deyip yetinen bir profil çiziyoruz*” (Dulupçu et al. 2010), meaning “we are not hungry but that is all, we remain satisfied with what we get, saying thank God for this”.⁵ Dulupçu et al. also complain that the people of the province do not have an entrepreneurial spirit (*girişimci ruhu yok*). There is wealth, but this is not converted to investments, they argue, and the historical images of the carpet and rose oil no longer have any developmental strength (*itici güç*).

A second trend of discourse on economy and society in the province evokes more conservative and religious values. This discourse identifies rose oil as a symbol of Muslim culture and cultural consumption (e.g. rose oil is referred to in this discourse as being a symbol of the Prophet’s facial sweat), rose water is considered a natural and non-alcoholic (hence *halal*) cosmetic product, desired by many devout Muslims.⁶ The director of Gülbirlik (the major cooperative in rose and rose oil production in the province, more on it below) was cited in a newspaper interview as wanting to donate rose water to wash the holy places of Mecca.⁷ Even if these discourses have no direct impact on rose and rose oil production, they show how this special industry is evoked as having significance in local culture, hence as worth engaging with and sustaining.

⁵ All translations from Turkish are by the author.

⁶ Roses and rose gardens indeed have long been part of the Islamic and Eurasian cultures as Goody (1993: 101–119) illustrates. Goody (ibid.: 103–106) mentions also the everyday but also therapeutic use of rose water and rose oil in Muslim countries from the Middle Ages onwards. (See also Altıntaş 2009) Apart from Isparta, rose cultivation and rose water in traditional and cultural usage are claimed also by another province in Turkey, namely Diyarbakır (see Haspolat and Yanmış 2012). This, however, is less known and economically insignificant in contemporary Turkey. For the news and views of the director of Gülbirlik, concerning donating rose water to Mecca, in order to wash the holy space with it, see <http://www.ispartahaberleri.com/isparta-haberleri/isparta-kabeyi-yikayacak-gul-suyuna-talip-h1110.html>, published on 13 May 2013, accessed on 18 July 2015.

⁷ A similar image was evoked by a journalist who interviewed me on local television for a program about Isparta’s roses and rose oil industry; he asked me what I thought of the idea that all mosques in Turkey should be sprinkled with rose water and smell of roses. I have heard others expressing such cultural and religious aesthetics.

Rose Production and Rose Oil Industry

The rose oil industry is considered one of the most important industries in contemporary Isparta. Some 18 firms produce and export rose oil, including other rose products like rose concrete and rose absolute, all of which are used in cosmetic, aroma, perfume, food and health products industries worldwide (Baydar and Kazaz 2013: 26).⁸ For this production, distillation and extraction machines and some laboratory equipment are necessary, but on the whole it is not considered to be a very complicated or sophisticated procedure. The specificity of the production has to do with the immediate link between the rose harvest and rose oil production. During the harvest season, roses have to be picked daily from sunrise – ideally – for about five-six hours. Roses should not be harvested after 10 o'clock in the morning because the sun warms up the roses and causes the fragrant oil to evaporate. After harvesting, roses should be delivered to the factories as quickly as possible to be poured into cauldrons and then to be filled with water for distillation. After about three-four hours the raw rose oil can be collected.

The ratio of rose to rose oil in the production process is equally crucial: depending on the quality of the rose one needs from 2.5 to 3.5 tons of roses to produce one litre of rose oil. The productivity of a rose garden, depending on climatic, soil, altitude and other factors is typically 3.5 tons from 5 decares land, meaning that from the harvest of this size rose garden one can extract 1 liter rose oil (Baydar and Kazaz 2013: 8).

In Isparta province roughly 10.000 farms (farming households) engage in rose cultivation.⁹ These households cultivate roses in addition to other agricultural products and animal husbandry. Baydar and Kazaz (2013: 20) indicate that only 20% of individual farm land is used for rose cultivation and that the average acreage under rose cultivation is 4–5 decares.

According to official statistics, 20,487 decares land (0.88% of total cultivable land) was cultivated for oil bearing roses (and lavender) and some 8,382 tons of roses were cultivated in 2015.¹⁰ Most income (69% of agrarian income) is attained from fruit production, and farmers use most of their land for this branch. However, the work load and the complexities of fruit cultivation and trade were mentioned as disincentives: rose cultivation involves fewer problems of dependency on intermediaries (between the market and the producer) and is less vulnerable to climatic fluctuations (than cherries for instance). Indeed rose harvest involves a much more direct process of harvest and transfer to the factory than other agrarian products. Roses cannot be stored and need to be transported immediately to the factory, hence implying that not many intermediaries are needed.

At harvest time one needs first labourers; for instance, a farming household I stayed with, with 3 working household members, needed another 2 extra labourers at peak season in 2015 for harvesting about 2 decares. After picking, the sacks of roses are brought to the weighing station in the same village and are weighed by *kantarcıs* (scale keepers), men or women who are assigned by

⁸ Rose concrete is a solid extract and rose absolute is liquid. Rose concrete is distilled with hexane as solvent, which is different than the water-distillation method for extracting rose oil. 350–400 kg of flowers are needed to produce 1 kg of rose concrete; this makes rose concrete also less expensive than the rose oil. Rose absolute is attained from rose concrete through using alcohol. All of these products are used in cosmetic and aroma industries.

⁹ This is a very rough estimate and even if it is often cited by authorities and the cooperative, is nevertheless challenged by some rose oil producers as being an exaggeration.

¹⁰ These are figures taken from the governmental statistics. See <http://isparta.tarim.gov.tr/Sayfalar/Detay.aspx?SayfaId=29>, accessed on 11.09.2015. These figures are also challenged by some rose oil producers as being an exaggeration.

the rose oil firms to manage the specific weighing stations in the village. In villages where roses are cultivated there are at least 5–6 such *kantarcıs* buying for different factories, the cooperative and private firms. Their tasks are to weigh and issue receipts for the amounts collected from each household each day. They also record the amount picked by each hired labourer, which forms the basis for the labourers to claim their pay from their employers, the owner of the rose gardens. After weighing and recording the amounts, the sacks are transported by company trucks to the factories. The *kantarcıs* may be members of the Cooperative¹¹ and/or farmers themselves who may have some larger rose gardens. They must enjoy the trust of both the villagers and the firms. They are the key mediators between the firms and the rose producers, particularly in extending advance payments, e.g. to combat agrarian parasites in the rose gardens.

The factories are not significant as places of labour extraction. They have few permanent employees and employ up to 10–15 workers seasonally for not longer than two months. Many firms have just one or two specialists responsible for the production of rose oil, rose concrete and absolute; (other employees include white collar administrators and laboratory technicians, and at least one watchman.) A few firms produce other natural herbal oils (like lavender, and thyme) and may have more permanent staff and continuous production throughout the year. Producers feel they enjoy close contact with their firms, especially since the *kantarcıs* are close-by and act as credit-givers on behalf of the rose oil firms in the village, an issue I shall come back to when discussing price formation.

The main labour issue was the shortage of labourers for harvesting. Small farms try to solve this problem by mobilizing their own networks of relatives and neighbours. However, rural settlements are losing population, the labour supply in the villages is diminishing. Young people living in cities are asked and paid by their distant relatives or non-kin rose farmers to work as harvesters; young recent rural-urban migrants are the most suitable candidates. In May 2016 when I accompanied rose pickers in two different locations, my impression was that rose pickers (mostly women) had to work fast, fighting against time, often without a break for nearly seven hours; their labour conditions were different than from those in orchards, where workers are paid daily wages and not piece rates. This also means that their wages are fixed even when the price of produce is not known. In May 2016 rose pickers were paid 1.20 TL/kg (ca. 37 cents).¹² A very able picker might harvest about 35–40 kg a day, depending on the condition of the field and the time of season.¹³

Farmers of larger holdings and big firms which have bought or rented large fields for rose cultivation find it difficult to recruit reliable labourers in adequate numbers. Some firms which recently bought or rented large pieces of land for rose cultivation reported having to invest extra to organising the accommodation of seasonal labourers. Migrant seasonal labourers from the Southeast of Turkey (mostly Kurds), the local Gypsy population of Isparta and finally Syrian refugees who seek employment in the agricultural sector were the main population groups recruited. Yet their legal status (Syrian refugees without work permits), their accommodation problems (for Kurdish seasonal workers) and work morale (Gypsies) were constant concerns.

¹¹ The former state owned cooperative Gülbirlik is a major actor in rose cultivation and rose oil production. It is a union of cooperatives for producing and buying roses, and producing and selling rose oil; it also has a firm for producing cosmetic items. More on the cooperative, see below.

¹² On 27 May 2016 1 Turkish Lira was equivalent to 0.30 Euros.

¹³ Despite the very low pay for rose picking, some women said they like this work, as they can combine it with other kinds of work (paid or unpaid household work). One needs to start early and is done by midday. Employers, however, complained that women recruited for a harvest season did not turn up regularly, presumably because of the low pay.

I carried out interviews with the managers and/or owners of 11 of the province's 18 exporting private firms, in some cases returning for further intensive talks. The private firms are mostly small family enterprises, run by the second or third generation. Many are involved in other branches of industry such as the manufacturing and production of carpets, wool, machinery, or construction materials. Almost all sold their rose oil and other rose products abroad, but some were involved in cosmetic industry themselves and were in the process of developing their own brand perfumes, rose water, eau de cologne and similar goods.

Apart from the distillers and exporters, numerous small enterprises produced rose water, and foods flavoured with rose water and rose petals (such as Turkish delight and rose jam). These products were sold almost in all stores in Isparta and were favourite presents from the city. The larger and more established firms considered these smaller firms as the cause of the city's bad name, since many were fake or low quality products, uncontrolled by any public authorities. Presumably they do not have the capital to invest in the modern and factory technology of distillation, nor would they have the business connections for exporting their rose oil. Some of the new comers to the field of rose oil distillation and export were indeed finding it difficult to get into the international market for selling their rose oil and lacked the connections and business skills. The enterprises producing for the local and national markets were led primarily by those who produced jam and other sweets; these were also the ones buying roses directly in the villages from the farmers, offering the highest prices and immediate payment (*peşin fiyat*, in Turkish), but they bought small amounts and needed mostly roses which were not sprayed with chemicals.

Special mention must be made of the former state-owned cooperative Gülbirlik (meaning 'rose union'), which is considered by all to be a major actor in both rose cultivation and rose oil production. It is in fact a union of smaller rose producing agricultural cooperatives (at the beginning there were 9 and nowadays 6 of them) and of a cosmetic industrial firm which is owned by the cooperative but is distinct from the organisation of the agricultural producers. The cooperative's history follows the industrialisation of rose oil production in the region: the first modern rose oil factory in Isparta had been established with state funding in 1935 (Altıntaş 2009: 163), and this was followed by French investments for a second factory in 1952. The Rose and Rose Oil Producers Cooperative Gülbirlik was established in 1954 and took over the latter factory in the same year (Baydar and Kazaz 2013: 19). For nearly half a century it was supported by the state, like other agricultural production cooperatives, before being subjected to restructuring and privatisation in 2000, following the waves of privatisation of many formerly state owned cooperatives and enterprises. Presently it is a rose buying and rose oil and cosmetic producing cooperative which owns four rose oil distillation factories and two rose concrete production units (ibid.: 20). It has about 18 thousand registered members¹⁴ and employs about 40 people permanently as administrators with various fields of expertise and functions. Gülbirlik established the cosmetic firm with the brand name Rosense in 2005 and produces its own cosmetic products, which retail all over in Turkey and abroad (Gülbirlik 2011: 3). It differs from other firms producing rose oil by the fact that it represents producers given its history and structure, and sees itself as a guarantor for the producers' share in rose production. Although it is not anymore financially protected by the state as in the previous years, it still is seen as being the major force for the

¹⁴ Figures provided by Gülbirlik in September 2015. The number of active members 'regularly selling rose to the Cooperative', however, is some 3000.

continuation of rose production in the province. The managers of Gülbirlik in fact were keen in repeating that the farmers would not continue growing roses, if the cooperative would not be there one day. Hence, even if the Cooperative does not give the best price and does not buy the largest share of rose harvest from the producers, it is a major actor in rose oil industry and especially in the formation of rose and rose oil prices. The most significant role of Gülbirlik concerning the price of roses is that in the earlier times they were the first to declare the buying price of roses (*taban fiyatı* in Turkish, which means base price) and the private firms adjusted their own prices to that, offering a small amount on top of Gülbirlik's price. This tradition has been kept after the privatisation of Gülbirlik in 2000. What consequences these price setting mechanisms have is an issue which I address further below.

Rose Oil Industry in Contemporary Local and Official Discourses

Rose oil and other rose products are considered to be a traditional industry, which has given the province a name and brand (Sallan Gül et al. 2010). Yet many are worried that it might share the fate of another traditional industry, that of the hand woven carpets which were known as Isparta carpets until the 1970s–1980s (see Erçetin 2014: 102–124). Since the introduction of machine woven carpets, no carpets have been produced in the province by traditional methods.

Despite these anxieties, rose oil production remains an attractive industry, primarily because of rising prices and earnings for all (producers as well as firms). In the history of rose production in the province, however, there have been several cases of boom and bust, e.g. in the early 1990s, the early 2000s, and 2010.¹⁵ My interlocutors at Gülbirlik explained this phenomenon with the attractiveness and ease of entering rose production when rose and rose oil prices increase, before crashing due to over-supply at the world market, where they claim demand is stable. Presumably at times of high rose oil prices and high rose production, new small and middle size firms start up business as well; this seemed to be the case in the last six-seven years. More established and older rose oil firms were complaining about the many new comers to the market, fiercely competing with them for buying the roses, as I shall elaborate further below. Official sources claim that the province supplies at least 50–60% of world market demand for rose oil.¹⁶ Gülbirlik, representing the majority of rose producers in Isparta, demands state control of production areas and state support in developing the quality of rose cultivation.¹⁷ The rose gardens need to be renewed every 20–30 years as the yields decrease, hence Gülbirlik – and private rose oil firms – were seeking state support for the farmers who want to renew their gardens and be subsidized during those few years of planting new rose sticks.

The boom and bust and how to prevent the bust is a major discourse in the province. Several firm owners support the idea of developing and enlarging the area of rose cultivation, encouraging more

¹⁵ According to the Isparta Trade Chamber (Isparta Ticaret Odası) in 2011, 4,900 decares land was used for rose cultivation and the amount cultivated that year was 1450 tons. These are barely one quarter of the figures (20,000 decares and 8,000 tons roses) given for 2015, cited above. Even if the 2015 figures may be exaggerated, the increase in area of production from 2011 to 2015 seems huge. See, *Isparta Ekonomisi Genel Bilgilendirme Raporu*, Isparta Ticaret Odası 2013, p. 28.

¹⁶ Ayten Altıntaş (2009: 169) claims that contemporary Turkey supplies 70% of the world demand, with Isparta the leading province. In an interview, she also suggested that rose oil has a very broad range of use in food industry because it is a basic natural essence for aromas, used even in the cigarette industry.

¹⁷ See the internal and unpublished report by Gülbirlik (2011: 2).

organic cultivation (as a response to world market changes and demand) and improving the quality control.

Some of the problems related to rose cultivation were of more general character and related to demographic problems and growing problems of the rural sector in the last decades. In Isparta, decline in rural population and increase in city population are common trends, like in many other parts of Turkey. Hence agrarian land ownership and agricultural production are said to be in need of being differently organized.¹⁸ Privately owned rose oil firms saw often small land ownership as an obstacle to improving the quality and productivity of gardens, whereas for Gülbirlik small land owners were their actual and potential members, accordingly its managers were favouring varying kinds of state support and incentives for the farmers. Nevertheless they also saw the continuous increase in the area of cultivation as a potential danger which could lead to bust of rose and rose oil prices.

Rose Oil Industry and Price Formation

As indicated in the introduction, each year the price of the roses bought from farmers is determined not at the time of harvesting the rose fields, but after the roses have been processed into rose oil and rose concrete and these products have been sold on the world market. The price of rose in 2015 was 'declared' by Gülbirlik at the end of September (in 2016 it was early October), hence three or more months after cultivating the roses and producing rose oil within the same time.

The Logic and Structure of Price Formation

The contemporary narrative which I construct on the basis of my talks with all parties involved in it goes something like this: rose production is easy but productivity is dependent on climatic conditions. If winter has been late, cold with sudden spells of frost, or if spring rain is insufficient, the harvest may be low and there will be a shortage of roses for the rose oil producing firms. This was the case in 2015. In 2016 winter was exceptionally mild, hence the roses blossomed earlier than usual; the harvest started at the beginning of May. During the harvesting season frequent rains prolonged the work.

Chronic shortages of labour may cause delays in picking the roses, causing their oil substance to evaporate.¹⁹ If these two conditions of ecology and labour are fulfilled, the firms produce the oil and the rose concrete according to their capacities and available technologies and have in early summer these rose products which they aim to sell primarily to international cosmetic firms. Firms in France, Switzerland, USA, UK, Japan and Germany are the most important buyers (Altıntaş 2009: 173; Baydar and Kazaz 2013: 21). The sale of rose oil to these cosmetic firms takes place during the late summer months. The narrative has it that the customer companies wait for price offers, which the rose oil producers say they try to make their offers on the basis of the prices from the previous year and their own estimates about the overall production level of rose oil that year. But these production levels are estimates only and how much rose oil is actually produced by each company remains a company secret. Experienced producers of course know roughly how many

¹⁸ The government, for instance, has recently changed the inheritance laws in the countryside, in order to prevent the fragmentation of cultivable lands through inheritance. See <http://isparta.tarim.gov.tr/Sayfalar/Detay.aspx?SayfaId=22>, accessed 11 September 2015.

¹⁹ In 2016 the farmers needed labour – hence rose pickers – for a longer period for instance.

tons of roses were cultivated that year and they also approximately know the capacity of the firms in Isparta, but nevertheless they wait and try to find out what price other companies are offering. During this period of ‘price formation’ there are several guidelines or unwritten rules: 1. the private rose oil firms wait for the Agricultural Cooperative Gülbirlik to ‘declare’ its buying price of rose; 2. They try to understand what the components of that price are (e.g. cooperative membership fee, various kinds of taxes);²⁰ 3. They offer a price which does not ‘exceed too much’ the price offered by the Cooperative. The common formulation goes something like this: Gülbirlik’s (price) plus 50 Kuruş (similar to cent).

I argue that there is a good deal of secrecy and ‘mystery’ about this price formation.²¹ In the weeks after the harvest, the firm owners or managers expressed uncertainty, said that they had a rough idea, but that it was not a fixed price yet. The reason why the private firms followed the price set by the Cooperative was – as some suggested – the ‘security’ the Cooperative was able to offer to rose producers. Both Cooperative and private firms argued that the rose producers would prefer to sell to the Cooperative because (as a former state coop), it would ‘naturally’ defend the interests of the rose producers. The private firms saw themselves at a disadvantage because of this, but at the same time accepted the Cooperative’s mimicry of ‘being like the state sector’ as a historically formed attitude and a given.²² Furthermore they were almost unanimous that the ‘declaration of a minimum rose price’ by the Cooperative was a restraint on private firms’ greed and possible attempts to dominate the market. The common rhetoric was not to ‘cool off’ or ‘disappoint’ (*küstürmek*) the rose farmers and cultivators, who historically and ‘naturally’ would support the Cooperative. That rose farmers did indeed give up cultivating roses and left their gardens uncultivated and changed to another produce has happened on several occasions, when prices crashed and many farmers changed to planting fruit trees instead. One family I got to know well told me that they had planted a new rose garden in which the roses were aligned between rows of newly planted cherry trees. They know that they could not keep both since the plants would hinder one another for lack of space and sunlight. Their logic was that they would wait to see how prices develop and give up on one of them accordingly.

The rose producers too, wait until the Cooperative declares that year’s price of rose. The rose producers get paid for the amount of roses they have delivered that year, but this payment is usually less than the total amount of roses times the fixed price, because all producers have annual agreements to sell their roses to a certain rose oil firm and receive advance payment before the harvest time.²³ After harvest time they receive the rest amount of payment from the harvest deliveries from that year and simultaneously a contract for the coming year. Therefore the announcement of the ‘price of rose’ means that the price is for settling the accounts of advance payments and rest payments: prices are in fact payments, a distinction highlighted by Jane Guyer. She reminds us of Polanyi’s discussion of prices and payments, where he contrasted fees as

²⁰ The cooperative offers different prices to the member rose farmers on the basis of duration of membership, I was told. Also the taxes and payments to the Chamber of Trade etc. are also accounted for, and the private firms adjust their own prices accordingly.

²¹ James Carrier commented that the ‘mystery’ I talk about could be explained with the fact that rose oil firms have to take risks and hence not show their cards. Even if this may be true to some extent, I still think that the secrecy of the price was a concern and an issue of complaint by rose oil firms. One new-comer to the scene said for instance that the price formation procedures were uncommon in the business world for its lack of transparency.

²² This is reminiscent of the ‘custom’ in prices, playing a stabilizing and representational role for those who are involved in the formation of prices, as described by Guyer (2009: 212).

²³ They can and do often sell their roses to more than one buyer, especially if they have larger land holdings.

payments to prices as exchange (Guyer 2009: 215, citing Polanyi 1977).²⁴ I shall return to this point below.

The advance payments (called *avans ödeme* in Turkish) were introduced by the private firms to secure the rose producers' harvest and delivery of a certain amount each year.²⁵ The amount is necessarily an estimate since the harvest may fluctuate and rose producers may deliver more or less than expected. The Cooperative apparently criticized in earlier years the advance payments made by private firms as a mechanism promoting an artificial increase in the price of rose; they express this as "unethical and unpreventable unfair competition" (in Turkish "*etik olmayan ve önlenemeyen haksız rekabet*") in their public reports.²⁶ But in 2015, when rose producers have already been increasingly selling to private firms which pay these advance payments, the Cooperative started paying advance payments as well.²⁷ The advance payments were more controversial a year later, when some complained that they were inflationary – the *kantarcıs* seemed to play a crucial role in guiding the offers of advance payments, and also in checking the reliability of the farmer (for delivering the harvest or being able to pay back any excess advance). Some private rose oil producers talked about a 'war' between rose buyers, alleging that they were like 'cannibals' (*yamyam*, in Turkish), trying to 'eat up' one another by offering ever higher prices to the rose producers. The image of rose buying firms engaging in an unbound and immoral competition with one another was confirmed by some cooperative managers, who would accuse the private sector of greed and 'putting an eye on what is on the producer's table' (*sofraya göz dikmek*).

All payments to farmers were made without full legal endorsement. The farmers signed agreements with the firms and advance payments were recorded on paper. Yet the rose oil producing firms were not keen to take any legal action (and said this has never happened), if the promised quantity of roses was not delivered. The contracts (and debt) were simply extended to the following year. One *kantarcı* said that he would be liable for the amount of money which had been lent for distribution to the farmers and the *kantarcıs* would have to follow up the payment from each indebted farmer. In this way the rose oil producers could be seen acting as 'informal' banks, giving credits on the basis of trust and social relations, without interest. The role of the *kantarcıs* is to secure a strategic distribution of debts, tying the farmers to the rose oil firms and then collecting the harvest/debt from the farmers.²⁸

²⁴ Guyer (2009: 215): "Money as exchange is for 'the acquisition (...) of desired goods' (Polanyi 1977: 104), whereas money given in payment "is the discharge of an obligation by handing over quantified units" (ibid.: 105). The former reflects market forces; the latter social relations.

²⁵ This may be as long ago as the 1980s, when numerous new private firms entered the rose oil market.

²⁶ Unpublished report made available by Gülbirlik to the author.

²⁷ Interestingly, the Cooperative explains the payment as the distribution of gains due to exchange rates and not as 'advance payments', although the private firms see it differently.

²⁸ The *kantarcıs* are commonly paid a percentage per kilo rose they collect from the farmers. Some of them (as in the case of the Güneykent cooperative, which has separated itself some years ago from Gülbirlik) do not pay this percentage and the task is carried out by a member of the cooperative, I was told. When *kantarcıs* take on this role of distributing advance payments to the farmers from the total lump sum provided by the rose oil firm, I assume they may be getting a special payment for their efficiency.

Year	Rose price (TL/Kg)	Rose price (Euro/Kg)	Rose oil price (Euro/Kg)
2010	1.85	0.95	5,250
2011	2.20	0.92	5,500
2012	3.00	1.28	6,250
2013	3.50	1.40	7,250
2014	4.20	1.45	7,000
2015	5.80	1.93	9,000
2016	7.65	2.26	11,000+

Table 1: Rose and rose oil prices in Isparta (2010–2016)

Table 1 shows the price increases in rose and rose oil prices in Isparta in the last seven years. Comparing the price increase for roses one sees that in Euros the increase from 2010 to 2016 is more than double; but for rose producers the price calculated in Turkish liras rises more than fourfold. For rose oil, the price increase in Euros within the same time period of seven years is slightly more than 100%. As rose farmers are paid in Turkish liras and the rose oil producers sell their rose oil abroad and are paid in foreign currency, all parties declare themselves satisfied and talk about ‘good prices’.

Concluding Thoughts on Moral Economy of Rose Oil and Rose Prices

The idea of moral economy, as Chris Hann (2010, 2011 and 2016) and others have been critically commenting has been conceptualised and developed primarily in relation to small town and manufacturing industrial contexts. James Scott (1976) is commonly seen as having carried the concept to the rural context, studying Southeast Asian peasants’ concepts of justice and subsistence ethic in relation to rural production (see also Luetchford 2012). I find that the discussions on the moral economy of the peasants cannot be applied to Isparta’s rose farmers, in Scott’s sense. Rose cultivation is considered as being a bonus, as a commodity and source of an extra ‘good’ income. It was seen as a side income, flexible for making ‘good’ extra money, easy to start and give up.

Nevertheless, the formation of prices, i.e. the annual increase of rose and rose oil prices, were seen with apprehension. The farmers evaluated the increase of rose prices positively, yet they were aware of the increase of rose oil prices and did not want to miss out on the best offers of rose buying oil firms. In those villages where rose production is intensive and almost all households engage in it, rose oil firms competed for the roses of the farmers and *kantarcıs* had to use various strategies to convince the farmers to sell to their particular firm. In Güneykent, for instance, which is such a centre of rose cultivation, there were ten *kantars* (scales) for buying roses in May-June 2016, *kantarcıs* lined up often next to one another on the rural settlement’s main roads. As rose prices were promising to be ‘good’ again this year – farmers were expressing their expectations that higher rose oil prices might bring them better rose prices – rose oil prices were not much at the centre of attention.

The buyers of roses, that is the rose oil firms, have the obvious advantage that they are aware of the increasing demand for rose oil on the world market. Nevertheless, they also express great concern that this demand might crash, and that the international cosmetic industry will not buy rose products at these constantly increasing price levels. Rose oil firms compete with one another to buy the best (e.g. the roses of the slopes are considered to contain a higher percentage of fragrant oil) and most roses, they also compete with one another to offer good prices to the cosmetic industry and to maximise their profits.

This is where transparency becomes scarce: The amount of roses used in producing a litre of rose oil remains a company secret. With that the rose producers have as a sole criterion for the quality of their roses nothing other than the continuing payment relationships established with the rose oil producing firm.²⁹ The logic is that if their roses are of good quality, the rose oil producers would be keen on maintaining trade relations with them and willing to make advance payments and offer 'good' prices at the end of the season. The profits of the rose oil producers remain a vague issue and hence a source of mistrust for rose farmers (cf. Luetchford 2012, citing Evers 1994). The small farmers in Costa Rica studied by Peter Luetchford say that cutting out the intermediaries from the trade relations would be an important strategy for restoring justice in exchange (2012: 403). Gudeman and Rivera (1990) report similar concerns among the peasants in Columbia. In the case of Isparta it is the price relationship between the cosmetic industry and the rose oil firm which is the source of lack of clarity and trust.

The payments made by rose oil firms on the one hand give the rose oil firms a morally anchored if not superior position in the exchange relationship with the rose farmers, since they offer advance payments for the harvest before the harvest season. These function as social relations and not as prices and the market. Hence with this strategy the non-transparent profits are, if not legitimized, at least veiled. On the other hand, the strategy of advance payments resemble gift economy. The advance payments, although resonating bank credits, differ from these in the following ways: they are offered to rose farmers without interest, quite often without legally endorsable contracts and through intermediaries in the villages in personalized and informal ways. One rose oil producer said for instance that he knows the farmers so well, that he can well estimate when they would be in need of cash, and that he also buys other produce (such as animal produce) from them, suggesting the multi-layered character of his relations with farmers. The purpose is recognised by all; it is to bind the rose farmer to the rose oil producer. But this binding is more like the binding in gift giving, that it is a moral obligation to return and give the harvest to the rose oil firm from which one has taken advance payments. Some claim that the rose oil firms in their effort to bind the farmers with this moral (and hardly legally backed up) obligation ask farmers if they want money before the harvest and independent of the rose money payment times. They offer money whenever the farmer is in need, in installments and without any bureaucratic complicated procedures (without providing collaterals) but primarily on the basis of trust with the firm's *kantarçı*. The *kantarçıs* take the whole responsibility of making payments to the farmers and collecting them back from them. They themselves are financed by a large sum of money from the rose oil firm, which they recoup in terms of harvested roses in May-June. If the farmer brings in less than the amount agreed upon at

²⁹ Other than the rule of thumb about the altitude, soil quality of the location and good care of the gardens, rose farmers do not have any means to be sure about the quality of their roses. The final quality is assessed when rose oil firms offer their product on the world market; it is often the buying cosmetic firms who measure the quality from samples and then make their price offers.

the time of receiving the advance payment, then the remaining amount of harvest/debt/money is transferred to next year. The binding is extended like the exchange of intermediary gifts in the gift exchange described by Malinowski (1984 [1922]) and Mauss (2016 [1925]). The *kantarcıs* employed by the rose oil firms also make agreements about their pay by the rose oil firms; sometimes this payment is left ambivalent, if the relationship is one of trust, lasting across generations (of firm owners and *kantarcıs*) and they might formulate it as ‘satisfactory payment’.³⁰ The idea, therefore, is to continue the payment and exchange relationship as long as the *kantarcıs* ‘keep’ the farmers, farmers bring in harvest and the rose oil firms tolerate the delays and unfulfilled promises of rose harvest. Along these lines of relations where actors are entangled in the process of growing rose and producing rose oil and selling it such that payments represent prices, the components of the price are transformed and rendered ambivalent, without smell, *non olet*.

To conclude, I would like to come back to Jane Guyer’s warning in her 2009 contribution to the book *Market and Society*, that taking price as the simple mediator between supply and demand would be a fallacy, and that there are good reasons for ‘making explicit’ ethnographically the components of price for understanding moral economies. That price veils value has been a long established argument since the time of Marx, picked up among others lately by Julia Elyachar (2015).

Elyachar investigated the nature and embeddedness of the markets in the Middle East and reminds us the region’s long and earlier histories of globalisation, of markets and states, and early monetization (2005: 23). She argues that, contrary to the opposition between gift and market economies as suggested by Mauss, Malinowski and Adam Smith, gift economies have been integral parts of these markets with commodities and monies (ibid.: 21–23). The entanglements between the payments and prices and the sociality involved in making the price of rose and rose oil may well be pre-market and pre-capitalist as well as neoliberal. This needs to be pursued by further exploration of the gift, payment and prices in Turkey on a broader scale.

In her work on public sector and markets in Egypt, Elyachar describes a state employee at a bank who skilfully and with demeanour manages bank loans and access to markets for customers with his “sense (*hiss*) of the market” (2012: 78). For Elyachar this is skillful employment of tacit knowledge. Tacit knowledge, as explored extensively by Michael Polanyi, indicates “unsystematized, unverbilized forms of knowledge that were integrated into the body itself, rather than being formed in the brain through the study of books” (Elyachar 2012: 83). Many of the rose oil firm managers and owners I have talked to suggested to me also this ‘feeling of the market’, that they had to muddle through the possible price changes and “guesstimate” rose harvest. Their ‘feeling for the market’ also functioned to veil price formation.

To understand the tacit knowledge about and veiled components of price making in the rose oil industry and to clarify the tensions inherent in this process of price making and production planning strategy, I have examined the social relations around payments and prices. On the whole mutual harmony and benefits for all are emphasized in conversations about rose oil production. Firms and rose producers share concerns about improving quality and sustainability and also keeping prices stable. Yet knowledge about international firms and the world market for cosmetic

³⁰ In general *kantarcıs* are paid according to the amount of rose they buy for the firm, per kg 10 kuruş, for instance. The *kantarcıs* working for the Coop were paid in this way. But there were cases where the rose oil firm owners would also be involved in long-term relationships with the *kantarcıs* and hence be promising but not precise about the payments at the beginning of the season.

products is often presented as hardly attainable. As one rose producer commented when asked why they do not establish a distillation unit close to the village and get more direct advice about tending their gardens which suffer at times from parasites, 'then we could learn how the whole production system works'. She implied that attaining more knowledge about the production would raise growers' bargaining power. Why they do not indeed engage in organising their own cooperative and production unit was explained by this farmer in terms of a lack of time and knowledge. The moral dimension of the price for her was not an urgent issue, as long as the prices were 'good', and the household could maintain its alternatives of livelihood and good rural life. Whether this diversified mode of livelihood with rose cultivation as an additional source of income would be reproducible for the next generations remains an open question.

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