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Tree Nuts

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Report Highlights:

In MY 2003, Turkey is expected to produce about 500,000 MT of hazelnuts which is 20 percent less than last year. Exports are expected to decline as a result. This is primarily due to the very cold winter and hot and dry summer in the growing areas. Following poor crops during the last two years, pistachio production is expected to increase dramatically (currently estimated at 100,000 MT) in MY 2003. U.S. exports of almonds to Turkey in the current marketing year have already doubled last year's record level.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
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Executive Summary

Hazelnut production estimates vary a lot this year, ranging from 465,000 MT to 550,000 MT. In MY 2003, production is expected to fall 20 percent compared to last year – to about 500,000 MT. This is primarily due to the very cold winter and hot and dry summer in the growing areas. The harvest is also delayed by about two weeks due to the weather conditions.

Turkey is forecast to export less in MY 2003, because of shorter supply and, as a result, export prices are expected to be higher than in MY 2002.

The Chairman of the Union of Hazelnut Sales Cooperatives (FISKOBIRLIK) announced the procurement prices for MY 2003 on August 21, 2003 at TL 2,500,000 per kilogram before taxes and TL 2,200,000 per kilogram after taxes. Neither exact procurement prices of Giresun type and Levant type has been established nor funding of the procurement has been finalized. FISKOBIRLIK will procure a limited quantity to regulate the market and protect small growers, according to the Chairman.

Following poor crops last two years, Pistachio production is expected to increase dramatically (currently estimated at 100,000 MT) in MY 2003. Walnut production is relatively stable and consumption is increasing parallel to the population growth rate. In the long-run walnut production is expected to increase gradually as production of new varieties increases. Almond production in Turkey varies greatly depending on weather and consumption is also increasing parallel to the growth rate population. The United States is the major supplier of almonds to Turkey with U.S. exports reaching record levels in the past two marketing years.

There is a 43.6 percent duty on the CIF value of all types of in-shell and shelled tree nut imports. The duty is 60.1 percent on processed tree nut product imports.

US\$1.00 is about TL 1,400,000 on August 22, 2003 compared to TL 1,640,000 a year ago.

Production

Hazelnuts

Turkey is the world's leading producer of hazelnuts, accounting for about 70 percent of the world supply. Hazelnut production is mainly concentrated along Turkey's Black Sea coast, extending about 25 kilometers inland. The region is divided into three distinct growing areas: (1) the hilly region east of Ordu to Trabzon, centered around Giresun, producing 60 percent of the crop, (2) the flatter, mixed-farming region west of Ordu to Samsun, producing 15 percent, and (3) the area west of Samsun, producing the remaining 25 percent. Hazelnuts require relatively little effort to cultivate and therefore inputs and labor costs are low. Harvesting occurs for several weeks in August and constitutes the bulk of the work required.

Hazelnut production is the single most important economic enterprise in the Black Sea region. The total number of growers, estimated at about 400,000, is difficult to determine since almost everyone grows at least some hazelnuts for their own consumption. Tied to this problem, early season crop production and area forecasts are much debated due to the lack of a systematic crop-survey system. Best estimates put total area at about 650,000 hectares. Growers generally have very small plots. Most eastern producers have an orchard size of only 1 to 2.5 hectares and use

hazelnut sales proceeds to supplement other income. Only a few relatively large growers (10 MT or more annually) depend on hazelnut production for the bulk of their incomes. On the other hand, most central and western farmers have 10 to 15 hectare orchards. Because of the importance of the crop to such a large number of people, hazelnut production and pricing policy has important political implications in Turkey. (See Production Policy Section.)

Three years ago, the GOT reorganized the activities of State Economic Enterprises (SEE), including the Union of Hazelnut Sales Cooperatives (FISKOBIRLIK) by giving them autonomy and separating their procurement and processing functions. FISKOBIRLIK, which has 59 member cooperatives, is the most influential policy making organization in the industry. In the past the GOT appointed FISKOBIRLIK's General Director and board members. Now however, FISKOBIRLIK's 216,000 members elect these officers. FISKOBIRLIK has historically served as a conduit for GOT policy decisions.

In the past, the GOT supported prices for hazelnut production by providing funds to FISKOBIRLIK. As a result of historically high support prices, hazelnut area and production expanded significantly causing overproduction, large stocks, and depressed prices. These policies have also had a significant impact on the national budget. However, in an effort to reduce inflation and in accordance with IMF commitments, the GOT is trying to cease this program. Since the introduction of the direct income support program with support from the World Bank, sales cooperatives like FISKOBIRLIK are not authorized to procure commodities at a loss. FISKOBIRLIK has requested but not received any money from the GOT to be used for hazelnut procurement.

Weather conditions during the past winter were very cold and the winter lasted longer than normal which caused delays in blooming weeks. Dry weather especially in the western provinces in recent months has reduced yields. Hot weather and a lack of rain in summer months has also affected the crop.

As usual, producers estimate production on the lower side (the Farmers Union's estimate is 465,000 MT) while traders' estimates are generally on the high side (550,000 MT). FISKOBIRLIK estimates the production at 475,000 MT, the Ministry of Agriculture estimate is 504,000 MT, and the Exporters Union estimate is 525,000 MT. FAS/Ankara's estimate, at this point, is 500,000 MT.

Turkish nut yields are generally high due, in part, to the cultivation of multi stemmed shrubs, rather than a single-trunk tree. The hazelnut yields vary between 700 and 1,500 kg. per hectare depending upon location and fertility of the land. Yields are lower on hillsides and higher in the valley. Kernel or "meat" yield per nut (in-shell to shelled conversion) is not known yet, since hazelnuts have not been shelled yet. The kernel yield was normal (about 48-50 percent) in MY 2002.

Nut quality is determined by type, oil and moisture content, and numbers of broken/shrunken kernels. Turkey produces three types of hazelnuts: Giresun, Levant, and Akcakoca. In general, Giresun hazelnuts (round shape) are reputed to be the highest quality and best taste because of their higher oil content. As a result, Giresun hazelnuts generally are used in snack foods while Levant hazelnuts (round but pointed shape) are processed into paste. Although much depends on relative supply, as a rule, the prices of Giresun hazelnuts command a five percent premium over Levant varieties. Akcakoca hazelnuts generally are almond shaped, pointed hazelnuts and are processed into paste. For this variety, kernel size and moisture content are also measures of quality. In MY 2002, 35 percent of the crop was first quality (Standard #1 is 13-15 millimeters), 50 percent was second quality (Standard #2 is 11-13 mm) and remaining 15 percent was lower quality (Standard #3 is 9-11 mm, and etc.). Slightly better crop quality is anticipated

in MY 2003.

Producers are very concerned with the uncertain market situation. The Farmers Union is declaring the cost of production at TL 2,700,000 per kilogram and asking a procurement price of TL 3,000,000 per kilogram.

After a series of meetings with the Chairmen of the Farmers Union in 13 hazelnut growing provinces, the FISKOBIRLIK chairman announced the MY 2003 procurement price on August 21, 2003 at TL 2,500,000 per kilogram before taxes and TL 2,200,000 per kilogram after taxes. This price is 25 percent higher than the GOT suggested procurement price. He declared that buying will start in all provinces in mid September. Exact procurement price for Giresun type and Levant type will be announced later.

Aflatoxin is a major industry concern. At the request of the hazelnut industry, the Turkish Technical and Scientific Research Organization (TUBITAK) carried out long-term research on this issue. One development has been the setting of harvest dates for all producers in order to avoid problems with aflatoxin. A different date for harvest was announced for each province depending upon the maturity of the crop. Any farmers which harvested earlier than the announced dates would have their crops confiscated and destroyed. This year's crop is not expected to have a serious aflatoxin problem.

Pistachios

Pistachio production is highly variable due to soil and climactic conditions. There are also cyclical variations from one year to the next. MY 2003 (October 03 - September 04) is supposed to be a "good" year for pistachio production. Favorable weather during the growing period also improved yields. Production estimates for MY 2003 vary from 70,000 MT to 130,000 MT (in shell, with a 50 percent shelling rate). FAS/Ankara estimates production at this point at 100,000 MT. This represents an increase of about 185 percent over last year's revised production. The forecast for MY 2004 production is lower due to cyclical variation. Production estimates for MY 2002 have been decreased slightly, in accordance with industry estimates.

Pistachios are mainly produced in Southeastern Turkey. Gaziantep used to be the major pistachio growing province (the Turkish name for pistachios is Antep Fistigi, which means "Gaziantep Nut"). However, official data indicates a continued increase in trees in the eastern parts of Southeastern Anatolia, where pistachios are replacing olive production. Sanliurfa Province now has about twice as many trees as Gaziantep.

Turkish pistachios are thinner and smaller than Iranian pistachios, but are considered to have a better flavor. In recent years, farmers have begun growing a larger pistachio variety in Siirt and neighboring provinces in south east Anatolia. Siirt pistachios are similar to Iranian pistachios, except that Iranian pistachios are almost round while Siirt pistachios are oval shaped. Siirt pistachios, about 15 percent of total Turkish production, are bigger and command higher prices on the local market than the traditional Turkish pistachio. In Turkey, size is directly related to quality: 90 nuts or less per 100 grams is considered first quality, 90-100 nuts are second quality, 100-120 is third quality, and above 120 is fourth quality.

Walnuts

Walnuts grow throughout most of Turkey. In the past, they generally were not cultivated but simply harvested from natural forests. However, during the past two decades, increased demand (and prices) have made walnut cultivation more attractive and increased resources have been devoted to its cultivation. The Horticultural Research Institute

(HRI) in Yalova is the leading walnut research facility in Turkey. As a result, nine standard varieties with higher yields have been developed. Thus far, only a few of these improved varieties have been planted commercially. In addition to the HRI, several private companies have begun commercial propagation of improved walnut varieties.

According to official statistics, the number of bearing and nonbearing trees have been increasing slowly. Based on this trend and the shift to better varieties, sources forecast steadily increasing production as earlier planted trees reach bearing age and more trees are planted. Although official estimates place production at around 120,000 MT (in-shell basis at a conversion factor of 1:2.5), most private sources believe that production is lower, approximately 69,000 MT. Some international estimates report even lower figures. The lack of a systematic crop survey and widely divergent estimates make it difficult to accurately estimate the crop. MY 2002 production was revised downward due to unfavorable weather condition during the growing season, according to industry sources.

Almonds

Almonds are a minor nut crop in Turkey. They are grown throughout the country with production concentrated in the Aegean, Marmara and Mediterranean regions. Most production is grown in orchards for commercial use. Almonds grow naturally in Turkey, but were not cultivated as a commercial crop until recently. Varietal selection during the past 25 years has resulted in an improvement of local varieties which are now grafted to both improve quality and yield as well as to delay blooming, since early frosts are a major problem in Turkey. Other than variations due to weather conditions, almond production in Turkey is relatively stable. MY 2002 production estimate was lowered (shelled basis at a conversion factor of 1:3), to reflect unofficial data. MY 2003 production forecast was also revised downward according to industry sources.

Consumption

Hazelnuts

Processors and/or traders are the first purchasers of hazelnuts. While there are about 350 processors/traders in Turkey, the five largest processors account for an estimated 40 percent of production. For the most part, the industry is not vertically integrated. Only a few firms participate at the various processing stages. For example, there are approximately 170 hazelnut crackers in Turkey with a total capacity of 1,250,000 MT (in shell). Around 20 hazelnut processors have a total capacity of 300,000 MT (shelled).

Hazelnuts continue to be a popular snack food in Turkey and the majority are consumed as whole nuts. With the devaluation of the TL against the USD and other foreign currencies over the last couple years, there was a decline (in real terms) in retail prices for hazelnuts, encouraging consumption. This situation is expected to be changed in MY 2003 due to the short supply. In addition to increased domestic consumption as a snack food, consumption of processed hazelnuts for confectionary items is gradually increasing. Production of a wide range of hazelnut products also increased. It is now estimated that about 80,000 MT (in shell) hazelnuts are consumed domestically as snack foods and confectionary products. Our consumption estimates also include the quantities crushed for oil.

The current retail price for shelled roasted hazelnuts in Ankara is about TL 10,000,000 (about USD 7.14) per kilogram unchanged for the last two years. This is significantly lower than the annual rate of inflation (which is targeted at 20 percent for 2003). The appreciation rate of Turkish Lira against the United States Dollar during the last twelve months was about 15 percent.

Pistachios

Official estimates of pistachio consumption are not available. Pistachios are a popular snack food and are also used a lot in making pastries and sweets in Turkey. Pistachios can even be found in sausages in Turkey.

Currently, the retail price for in-shell, roasted Gaziantep pistachios in Ankara is around TL 14,000,000 per kilogram which is 40 percent higher than last year's price. Normally, the harvest starts in late August and lasts through mid-October. The harvest started about two weeks earlier this year. This was because of the hot and dry summer in the Southeastern Anatolia. The price of newly harvested (dried, red peeled, in-shell, row) nuts is around TL 3,500,000 per kilogram in Gaziantep. This price was about the same in the beginning of the harvest last year. The early crop is used for the confectionary industry.

GUNEYDOGUBIRLIK, which is a producers' cooperative similar to FISKOBIRLIK, procured only 160 MT of pistachios in MY 2002. GUNEYDOGUBIRLIK officials hope to buy several thousands metric tons of pistachios after September 20, 2003, in order to regulate the market and protect farmers from depressed prices. They are not very optimistic, however, since they think it is unlikely to get sufficient funds for the procurement.

Walnuts

Per capita walnut consumption appears relatively stable, with long-term increases in aggregate consumption resulting from increases in population. About fifty percent of the crop is used for home consumption and the remainder is marketed commercially. Most of the commercially-marketed walnuts are consumed directly with very little processed. The retail price for shelled walnuts in Ankara currently is about TL 20,000,000 per kilogram, compared to TL 15,000,000 a year ago.

Almonds

Almond consumption grew slowly parallel to the population growth in Turkey. Almonds are generally consumed whole as a snack food and only limited amounts are used in confectionary products. Snack food consumption appears to be increasing significantly over the past few years. The retail price for one kilogram of shelled sweet roasted almonds in Ankara is around TL 20,000,000 for local and good quality imported almonds (such as US almonds), compared to TL 18,000,000 a year ago.

Trade

Turkey accounts for about eighty percent of world hazelnut trade. Indicative export prices in mid August were around USD 310 per 100 kilograms (bagged, FOB Black Sea) compared to USD 210 a year ago.

The European Union is the major market for Turkish hazelnuts. In the past, most shipments were by sea on an FOB basis. Today, shipping by trucks on a CIF basis is becoming increasingly popular. Although some sales are made directly to end users, most are done through traders. The government inspects and certifies exports.

About seventy percent of Turkey's hazelnut exports comprise of raw kernels and the remaining thirty percent are processed kernels, including roasted, sliced, chopped, paste, meal, and flour. Very few hazelnuts are exported as finished consumer confectionary items. The trend, however, is to move from raw kernel exports to processed and finished products to capture the increased value-added. One constraint to increasing exports of hazelnut confectionary items is the relatively low quality of Turkish chocolates (primary base for hazelnut products) compared to European

chocolates.

In addition to a shift in the export product mix, Turkey is also hoping to expand its market presence in the Far East, former Soviet Union and the United States. Industry representatives in Turkey closely monitor the hazelnut and almond industry in the United States.

Official trade data for hazelnuts for MY 2002 is not available. According to data from the Black Sea Exporters Union, Turkey exported almost another record large quantity of hazelnuts in MY 2002. Exports in MY 2002 (September 1, 2002 through August 15, 2003 (the most recent data available) totaled 253,406 MT (shelled basis). Exports for the corresponding period were 253,468 MT in MY 2001 and 203,171 MT in MY 2000. The total value of the exports was USD 586 million in 2002 compared to USD 630 million during the same period in MY 2001 and USD 679 million in MY 2000. MY 2003 exports are forecast to be lower due to short supply, although they may generate more revenue due to higher prices.

The first column of the Export Trade Matrix for hazelnuts represents unofficial data received from the Black Sea Exporters Union for the first eleven months (September 2002 - July 2003). The first columns of all other Export and Import Trade Matrices represent the official data for the first nine months (September - May) except for pistachios which represent only first eight month data (October - May). Second columns of all of the Export and Import Trade Matrices represent the official data for CY 2002. Turkey imports and exports small quantities of these nuts. Most walnut imports are inexpensive, low quality nuts from neighboring countries, with the better quality domestic nuts exiting as exports. Turkey imported lots of walnuts in MY 2002 due to shortage in production and low exchange rate which is expected to increase the carryover stock level significantly. The United States is the major supplier of almonds for Turkey.

Stocks

FISKOBIRLIK bought around 48,000 MT of hazelnuts in MY 2002 and sold all of this crop to traders in four tenders in recent months. FISKOBIRLIK has about 120,000 MT of MY 2001 crop and an unknown quantity of older years' crops in its stocks. Older years' crops will be crushed for oil, however, part or all of MY 2001 crop may be sold in the market if the demand for hazelnuts is high. Hazelnuts are crushed for oil at a loss, since only 10-15 percent of the actual cost of production is recouped. Much of the oil is sold to the food oil industry, where it is used as an extender, imparting no discernable flavor. Some of FISKOBIRLIK's hazelnut oil has been marketed mainly in the Black Sea area, but sales are limited.

Official statistics on total pistachio, walnut, and almond stocks are not available. Industry sources estimate that pistachio stocks vary a lot from one year to another according to the supply. Walnut and almond stocks usually represent around ten percent of production.

Policy

Production Policy

To reduce the persistent glut of hazelnuts, past administrations tried to shift area out of hazelnut production, particularly in the flatter, mixed farming areas in the central and western Black Sea Regions. These programs were not adequately funded and met with very limited success. High support prices continue to attract new producers into the market. Since the introduction of the direct income support program with support from the World Bank, sales cooperatives like

FISKOBIRLIK are not authorized to procure commodities at a loss. FISKOBIRLIK has requested but not received any money from the GOT to be used for hazelnut procurement. Political pressure remains, however, to provide price-support funding.

The World Bank is also supporting a project to promote alternative crop production. According to the GOT regulation, growing areas are restricted and hazelnuts may be grown in only 13 provinces. Ordu and Trabzon are the two provinces in which all districts are suitable for hazelnut production. In other provinces (Artvin, Bartin, Duzce, Giresun, Kastamonu, Kocaeli, Rize, Sakarya, Samsun, Sinop and Zonguldak) not all, but some districts are suitable for production.

Some funds were provided for farmers to replace hazelnut orchards from 1st and 2nd class land and 3rd class land with a slope below 6 percent with alternative crops. A long list of alternative crops (which includes but not restricted to corn, corn for silage, sunflowers, vegetables, soybeans, colza, vetch, fodder crops, alfalfa, strawberries and all other berries, kiwis, rose hips, traditional fruits, garlic, aromatic and medical plants, etc.) is also provided in the published regulation. Farmers will be paid a total of USD 2,000 per hectare for the cost of inputs and the loss of income due to the switch from hazelnuts to an alternative crop. If the program is successful, hazelnut production could decrease about 25 percent by the end of the project. Interest in the program was not overwhelming with only a small number of farmers applying. Farmers complained about the insufficient amount of support.

Until MY 1994, the GOT provided price support to pistachio growers through GUNEYDOGUBIRLIK. Nine years ago, in keeping with the government's liberalization program to privatize marketing channels, the GOT stopped direct supports and allowed GUNEYDOGUBIRLIK announce a support price which more closely reflected market conditions. Since then, pistachios have received limited support. After procuring only a rather symbolic quantity (160 MT) in MY 2002, GUNEYDOGUBIRLIK officials hope to buy several thousands metric tons of pistachios in MY 2003, if they can find some funds.

Walnuts and almonds are not considered important commercial crops and receive no GOT support. There are also no producer associations or marketing cooperatives for these crops.

Trade Policy

High production and large carryover stocks resulted in low hazelnut prices in international markets in MY 2002. Low Turkish prices and large stocks in Italy and Spain encouraged the European Union to somewhat limit Turkish hazelnut imports to allow Italy and Spain to eliminate their stocks.

The control certificate for aflatoxin has become standard and compulsory. Tests for aflatoxin carried out at customs points and even suppliers had to have a valid control certificate (which indicated that the product was clean) issued by the Turkish Ministry of Agriculture laboratories.

In the past, the GOT levied a significant export tax on hazelnuts, partly to raise revenues and partly to raise domestic prices to preclude charges of unfair competition. Over the years the tax has been reduced in an effort to facilitate exports. It remains at USD 10 per 100 kilograms for whole shelled hazelnuts, although there have been rumors of increases at the beginning of every marketing year. There is no export tax on exports of processed hazelnut products.

There is no subsidy, tax, or other restriction on pistachio, walnut and almond exports. Importers, however, have to pay

a 43.6 percent import duty on the CIF value of all types of tree nut imports, including shelled or in shell hazelnuts, pistachios, walnuts and almonds and a 60.1 percent import duty on all processed tree nut products.

Marketing**Turkey's Market Promotion Activities**

In addition to efforts to shift its export product mix, Turkey hopes to expand its hazelnut markets, mainly in the Far East and the United States. Industry representatives are very interested in hazelnut and almond production in the United States. They see the United States as a major competitor, although producers in other countries have also increased production to take advantage of high prices in the past.

In Turkey, most export commodities are represented by an Exporters Union, which operates under the Undersecretariat of Foreign Trade. The Secretary Generals of the Unions are appointed by the GOT, but the operating capital is mainly provided by members, comprised largely of private traders. The largest tree nut representative organization, the Black Sea Exporters' Union which is located in Giresun, promotes hazelnut exports. The Union employs a total staff of about 25 people in five offices. It functions much like a USDA Market Development Cooperator, influencing domestic and trade issues, acting as an information resource, conducting marketing studies and sponsoring promotional events. So far, market development activities have focused on participation in European trade fairs.

PSD Table						
Country	Turkey					
Commodity	Filberts, Inshell Basis				(HA)(1000 TREES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2002		09/2003		09/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	285000	285000	283000	283000	0	282000
Non-Bearing Trees	12000	12000	11000	11000	0	10000
Total Trees	297000	297000	294000	294000	0	292000
Beginning Stocks	235000	235000	200000	170000	170000	70000
Production	625000	625000	625000	500000	0	600000
Imports	0	0	0	0	0	0
TOTAL SUPPLY	860000	860000	825000	670000	170000	670000
Exports	480000	510000	480000	450000	0	480000
Domestic Consumption	180000	180000	175000	150000	0	150000
Ending Stocks	200000	170000	170000	70000	0	40000
TOTAL DISTRIBUTION	860000	860000	825000	670000	0	670000

PSD Table						
Country	Turkey					
Commodity	Pistachios, Inshell Basis				(HA)(1000 TREES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	28000	28000	28000	28000	0	28000
Non-Bearing Trees	16000	16000	15500	15500	0	15000
Total Trees	44000	44000	43500	43500	0	43000
Beginning Stocks	9000	9000	5000	3000	3000	41000
Production	40000	35000	40000	100000	0	70000
Imports	1000	150	1000	0	0	0
TOTAL SUPPLY	50000	44150	46000	103000	3000	111000
Exports	5000	3500	3000	7000	0	8000
Domestic Consumption	40000	37650	40000	55000	0	55000
Ending Stocks	5000	3000	3000	41000	0	48000
TOTAL DISTRIBUTION	50000	44150	46000	103000	0	111000

PSD Table						
Country	Turkey					
Commodity	Almonds, Shelled Basis				(HA)(1000 TREES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2002		09/2003		09/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	3600	3600	3600	3600	0	3575
Non-Bearing Trees	550	550	550	550	0	550
Total Trees	4150	4150	4150	4150	0	4125
Beginning Stocks	2000	2000	2000	2500	2000	2400
Production	15000	14000	15000	13700	0	13700
Imports	1500	3000	2000	3000	0	3000
TOTAL SUPPLY	18500	19000	19000	19200	2000	19100
Exports	500	500	500	500	0	500
Domestic Consumption	16000	16000	16500	16300	0	16600
Ending Stocks	2000	2500	2000	2400	0	2000
TOTAL DISTRIBUTION	18500	19000	19000	19200	0	19100

PSD Table						
Country	Turkey					
Commodity	Walnuts, Inshell Basis				(HA)(1000 TREES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2002		09/2003		09/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	3550	3550	3575	3575	0	3650
Non-Bearing Trees	1400	1400	1500	1500	0	1800
Total Trees	4950	4950	5075	5075	0	5450
Beginning Stocks	9000	9000	8000	11000	8000	8500
Production	68000	60000	69000	69000	0	70000
Imports	6000	18000	6000	6000	0	8500
TOTAL SUPPLY	83000	87000	83000	86000	8000	87000
Exports	500	100	500	500	0	500
Domestic Consumption	74500	75900	74500	77000	0	78500
Ending Stocks	8000	11000	8000	8500	0	8000
TOTAL DISTRIBUTION	83000	87000	83000	86000	0	87000

Export Trade Matrix			
Country	Turkey		
Commodity	Filberts, Inshell Basis		
Time period	Sep. - July	Units:	Metric Tons
Exports for:	2002	Sep.02/May03	2003
U.S.	14444	U.S.	12830
Others		Others	
Germany	163806	Germany	158638
Italy	65806	Italy	63367
France	44445	France	45930
Netherlands	28971	Belgium	25880
Belgium	28554	Netherlands	25245
Switzerland	19420	Switzerland	18809
Austria	13976	Austria	14591
United Kingdom	12949	United Kingdom	13587
Spain	13619	Spain	13220
Poland	8965	Poland	9514
Total for Others	400511		388781
Others not Listed	80014		78261
Grand Total	494969		479872

Export Trade Matrix			
Country	Turkey		
Commodity	Pistachios, Inshell Basis		
Time period	Oct. - May	Units:	Metric Tons
Exports for:	2002	CY 2002	2003
U.S.	21	U.S.	536
Others		Others	
Italy	274	Germany	825
Greece	84	France	465
Egypt	76	Hong Kong	410
Germany	61	Netherlands	272
Northern Cyprus	24	Spain	206
Syria	20	Greece	187
Israel	13	United Kingdom	142
France	9	China	141
Sweden	8	Algeria	114
Netherlands	8	Sweden	102
Total for Others	577		2864
Others not Listed	1739		2895
Grand Total	2337		6295

Import Trade Matrix			
Country	Turkey		
Commodity	Almonds, Shelled Basis		
Time period	Sep. - May	Units:	Metric Tons
Imports for:	2002	CY 2002	2003
U.S.	696	U.S.	1144
Others		Others	
Germany	61	Germany	148
Northern Cyprus	16	Uzbekistan	100
Spain	15	Spain	74
		Northern Cyprus	31
		United Kingdom	1
Total for Others	92		354
Others not Listed			
Grand Total	788		1498