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Turkey

Fresh Deciduous Fruit

Annual

2003

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Report Highlights:

Turkish apple production will increase slightly in MY 2003 while other deciduous fruits will remain unchanged from last year. Exports remain only a small percentage of total production with the Middle East and Europe Turkey's main markets.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Ankara [TU1], TU

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Executive Summary

Turkey's total deciduous fruit production is expected to remain steady in MY 2003 with only slight changes in fresh apple, pear and table grape production.

Apple production is expected to increase from lower levels in MY 2002 while pear and table grape production are remain at similar levels as in MY 2002. Slight decreases in area in grape production and tree numbers in pear production are expected to continue in MY 2002. Apple and pear tree numbers and area planted and harvested for table grapes in MY 2001 and in MY 2002 have been revised.

Most fruit production is consumed domestically with only about 5 percent exported. The Middle East and Europe remain the primary export markets for Turkish deciduous fruit products.

In order to protect Turkish growers, a 60.9 percent import duty is applied for fresh apple and pear imports and a 55.5 percent import duty to fresh table grape from all origins.

(USD 1.00 is currently worth around TL 1,380,000 compared to TL 1,675,000 a year ago. The rate of inflation in Turkey for the last twelve months is estimated about 25 percent.)

Production

Weather conditions during most of the year, supported normal production levels for Turkey's deciduous fruit crop. Turkey produces about 20% of the world's apple crop and apples constitute the majority of Turkey's deciduous fruit crops. Red (60%) and Golden Delicious (35%) are the predominant varieties although a number of indigenous varieties are also grown including Amasya. Granny Smith apples have been a fairly recent arrival and are grown on a few large commercial farms. For the most part, Turkish orchards are small and apples are grown with a number of other crops.

Grapes are the second most plentiful deciduous fruit in Turkey. Unlike apples and pears, however, grape area has been decreasing over the past few years. Last year favorable weather conditions permitted an increase in production despite the reduced area. More adaptable varieties and improved cultivation practices also contributed to this increase. While the Government of Turkey (GOT) does not provide statistics by variety or use, industry officials estimate that seedless sultana varieties represent approximately 35 percent of total grape production. Sultanas are grown primarily in the Aegean provinces of Izmir, Manisa and Denizli. According to industry officials, sultana production as a percentage of the total crop has increased due to the high export demand as well as the attractive domestic prices for the product. Approximately 10 to 15 percent of sultana production is consumed fresh, depending upon domestic and export market conditions, with the majority dried to produce raisins. The normal conversion ratio is 4.5 - 1. PS&D production, export trade, and import trade figures, however, represent only fresh table grapes.

Pears are Turkey's third most leading deciduous fruit crop. Pears like apples are grown primarily in small orchards along with other crops. Production in 2003 is expected to be about the same as it was in MY 2002. Again, as with apples, both area and the number of fruit-bearing trees have been slight decreasing over the past few years. The most prominent pear varieties grown in Turkey are Santa Maria (22%), Cascia (15%) and Williams (13.5%). There have been reports of fire blight infecting some areas.

Apples and pears are grown primarily in Anatolia with Isparta, Karaman and Nigde the main areas for apples and Busa, Antalya and Ankrara the main growing areas for pears.

Production statistics for 2002 have been revised due to new unpublished data.

Consumption

On average Turkey consumes about 90 percent of its apples fresh, processes 5%, and exports approximately 1 percent with about 4 percent losses. Apples are normally harvested in September. Prices can vary depending on the location. For example, prices in Istanbul and Ankara are higher than in small cities and villages. As of the beginning of September, in small stores prices range from TL 1,500,000 per kilogram to TL 2,000,000 per kilogram.

A similar breakdown exists for pears in Turkey with about 90 percent consumed fresh, 5 percent processed, 2 - 3 percent exported and the remainder as loss. Prices again can vary due to quality and point of sale from TL 1,500,000 per kilogram to TL 2,000,000 per kilogram.

About 45 percent of Turkey's total grape production is consumed fresh, 35 percent is dried, and 15 percent is processed, mainly for wine. About one or two percent is exported and the remainder is loss. PS&D table presents consumption data only for fresh table grapes and do not consider those grapes dried (primarily sultana

grapes for raisins) or processed (primarily for making wine). Current retail prices again depend on variety and point of sale from TL 1,000,000 per kilogram to TL 2,000,000 per kilogram.

Trade

In general, exports of apples, pears, and table grapes have been stable over the past two years.

Turkey's deciduous fruit exports are minimal. For grapes and pears, exports occur normally during the winter months. Apples, on the other hand, are exported during the spring months. The Middle East and Europe are the major markets for Turkey's deciduous fruit exports. For apples, Saudi Arabia and Egypt are the largest markets. While Germany and Saudi Arabia are the largest markets for pears. For grapes, Russian and Germany are the primary markets.

Official foreign trade statistics are only available through May 2003.

Stocks

The GOT does not publish official statistics for stocks. The majority of apples, pears and grapes are stored in climate-controlled facilities and sold throughout the year. The remainder is either processed or exported. In general, there are very few, if any, carry-over stocks from year to year.

Policy

The GOT does not provide any price supports for pears or table grapes. Although it did in the past, in CY 2003, Turkey did not announce export subsidies for apples. On January 1, 2003 the GOT announced slightly lower import duties for fresh apples, pears and table grapes. The old and new duties follow:

Product	Tariff Code	Old Duty	New Duty	Affective Date
Fresh Apples	0808.10	61.6	60.9	January 1, 2003
Fresh Pears	0808.20.10 & 0808.20.50	61.6	60.9	January 1, 2003
Fresh Table Grapes	0806.10	56.1	55.5	January 1, 2003

Marketing

In general, fresh fruits such as apples, pears and grapes are sold domestically or exported through specialized marketing organizations or cooperatives.

Statistical Tables

PS&D for Fresh Apples

PSD Table						
Country	Turkey					
Commodity	Fresh Apples					
				(HA)(1000 TREES)(MT)		
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	32000	32550	32000	32600	0	32700
Non-Bearing Trees	6000	6080	6000	6200	0	6300
Total Trees	38000	38630	38000	38800	0	39000
Commercial Production	2450000	2450000	2500000	2200000	0	2500000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	2450000	2450000	2500000	2200000	0	2500000
TOTAL Imports	800	2892	800	1719	0	1500
TOTAL SUPPLY	2450800	2452892	2500800	2201719	0	2501500
Domestic Fresh Consump	2310800	2312287	2350800	2074634	0	2356500
Exports, Fresh Only	20000	18605	25000	17085	0	20000
For Processing	120000	122000	125000	110000	0	125000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	2450800	2452892	2500800	2201719	0	2501500

Export Trade Matrix for Fresh Apples

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Apples		
Time period	July - June	Units:	Metric Tons
Exports for:	2001	July 02-May 03	2002
U.S.		U.S.	
Others		Others	
Saudi Arabia	8965	Saudi Arabia	7537
Egypt	3275	Egypt	2100
Greece	1649	Northern Cyprus	2046
Jordan	1612	Jordan	740
Northern Cyprus	1406	Libya	538
Tunisia	738	Kuwait	265
Kuwait	196	United Arab Em.	115
United Arab Em.	180	Oman	97
Indonesia	149	Romania	84
Oman	140	Algeria	40
Total for Others	18310		13562
Others not Listed	295		3523
Grand Total	18605		17085

Import Trade Matrix for Fresh Apples

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Apples		
Time period	July - June	Units:	Metric Tons
Imports for:	2001	July 02 - May 03	2002
U.S.		U.S.	
Others		Others	
Chile	1220	Chile	919
Italy	905	Italy	594
Iran	371	France	152
Argentina	248	Argentina	50
France	68	Saudi Arabia	2
Belgium	36		
Northern Cyprus	23		
Total for Others	2871		1717
Others not Listed	21		2
Grand Total	2892		1719

PS&D for Fresh Pears

PSD Table						
Country	Turkey					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	11000	10640	11000	10500	0	10500
Non-Bearing Trees	2000	1960	2000	1950	0	1950
Total Trees	13000	12600	13000	12450	0	12450
Commercial Production	360000	360000	375000	340000	0	340000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	360000	360000	375000	340000	0	340000
TOTAL Imports	10	124	0	85	0	100
TOTAL SUPPLY	360010	360124	375000	340085	0	340100
Domestic Fresh Consump	325010	325505	336500	303499	0	303100
Exports, Fresh Only	17000	16619	20000	19586	0	20000
For Processing	18000	18000	18500	17000	0	17000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	360010	360124	375000	340085	0	340100

Export Trade Matrix for Fresh Pears

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Pears		
Time period	July - June	Units:	Metric Tons
Exports for:	2001	July 02 - May 03	2002
U.S.		U.S.	
Others		Others	
Germany	4343	Germany	4300
Saudi Arabia	4289	Saudi Arabia	4210
Netherlands	1299	Greece	2583
Russia	910	Netherlands	1365
Greece	886	United Arab Em.	1213
Romania	848	Yugoslavia	1109
United Arab Em.	602	Romania	770
Israel	561	Russia	672
Northern Cyprus	418	Northern Cyprus	645
Austria	409	Israel	538
Total for Others	14565		17405
Others not Listed	2054		2181
Grand Total	16619		19586

Import Trade Matrix for Fresh Pears

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Pears		
Time period	July - June	Units:	Metric Tons
Imports for:	2001	July 02 - May 03	2002
U.S.		U.S.	
Others		Others	
Argentina	71	Argentina	46
Chile	47	Chile	30
Sweedden	3	United Arab Em.	7
Saudi Arabia	3	Saudi Arabia	2
Total for Others	124		85
Others not Listed			
Grand Total	124		85

PS&D for Fresh Table Grapes

PSD Table						
Country	Turkey					
Commodity	Fresh Table Grapes				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Area Planted	267000	265000	266000	260000	0	260000
Area Harvested	267000	265000	266000	260000	0	260000
Commercial Production	1750000	1650000	1700000	1750000	0	1750000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	1750000	1650000	1700000	1750000	0	1750000
TOTAL Imports	100	120	100	129	0	100
TOTAL SUPPLY	1750100	1650120	1700100	1750129	0	1750100
Domestic Fresh Consump	1585100	1488326	1535100	1584490	0	1582600
Exports, Fresh Only	80000	79294	80000	78139	0	80000
For Processing	85000	82500	85000	87500	0	87500
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	1750100	1650120	1700100	1750129	0	1750100

Export Trade Matrix for Fresh Table Grapes

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Table Grapes		
Time period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2002	January- May 03	2003
U.S.		U.S.	
Others		Others	
Russia	36659	Saudi Arabia	442
Germany	13402	Russia	238
Austria	8961	Romania	13
Saudi Arabia	6324	United Arab Em.	1
Netherlands	6317		
Kuwait	1404		
United Arab Em.	783		
United Kingdom	703		
Romania	696		
Belgium	408		
Total for Others	75657		694
Others not Listed	2482		
Grand Total	78139		694

Import Trade Matrix for Fresh Table Grapes

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Table Grapes		
Time period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2002	January-May 03	2003
U.S.		U.S.	
Others		Others	
Northern Cyprus	54	South Africa	30
Chile	29	Chile	7
Russia	20	Netherlands	5
South Africa	20		
Saudi Arabia	6		
Total for Others	129		42
Others not Listed			
Grand Total	129		42