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GAIN Report #TU3028

## Turkey

## Dried Fruit

## Semi Annual

## 2003

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### Report Highlights:

**Turkish raisin production will decrease in MY 2003 due to plant disease and unfavorable weather conditions during the growing season. However, the quality of the crop is very good because weather conditions were very good during the drying season. Turkish MY 2003 raisin exports are expected to remain steady. Current export prices are higher due to lower supplies and better quality.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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Turkish raisin production has been reduced significantly since the beginning of 2003 due to several factors primarily plant disease and weather conditions. A good portion of the crop was affected by "phomopsis viticola" which reduced the yields. In addition, hot weather during the fruit bearing period and hail in some growing areas just before harvest also damaged the crop. Although final production figures may vary, most industry sources agree that production will be between 50 - 60 TMT less than previously estimated. This is a significant decrease compared to the previous years.

At the same time, the quality of the remaining crop is good due to very good weather conditions during the drying season. About 75 percent of the crop is estimated to be standard #9 or better with about 25 percent of the crop standard #8.

TARIS, the Central Union for Farmers' Sales Cooperatives which is located in Izmir and buys cotton, olives, figs and raisins from members in the Aegean Region, has announced its MY 2003 raisin procurement prices. The price for standard #9 raisins is TL 1,400,000 (about USD 1.00) per kilogram compared to last year's procurement price of TL 1,250,000 (about USD 0.75) per kilogram. In general, TARIS procures anywhere from 20-40 percent of Turkey's raisin crop. Since MY 2000, TARIS has not bought any raisins below standard #8. TARIS has already procured approximately 40,000 MT. This is higher than MY 2002 but still less than MY 2001. [Currently USD 1.00 is approximately TL 1,400,000.]

TEKEL which is the government alcohol monopoly, uses raisins as well as fresh grapes for making "raki" (a Turkish alcoholic drink). It has not yet announced raisin procurement prices. However, TEKEL officials plan to buy about 7,000 MT of raisins directly from farmers beginning mid October. The TEKEL price is expected to be around TL 1,150,000 per kilo. TEKEL bought about 40,000 MT of raisins at TL 1,060,000 per kilogram in MY 2002. This price was one hundred percent higher than their MY 2001 procurement price. TEKEL buys only lower quality of raisins. TEKEL did not buy any raisins from TARIS in MY 2002 and is not planning to buy any in MY 2003 either.

The PS&D carryover stock estimate at the end of MY 2003 is expected to decrease further due to lower supply and better quality of the crop. TARIS had approximately 18,000 MT and TEKEL had 4,000 MT in stocks at the end of MY 2002.

The Izmir Commodity Exchange is the main cash market for raisins. On October 7, 525 MT of raisins were traded. Spot prices ranged from TL 1.325 million to TL 1.4 million per kilo for standard #8 to standard #10, compared to TL 900 thousand and TL 1.4 million on April 8, 2003.

MY 2003 raisin exports are currently estimated at the same level as last year even though supplies will be lower due primarily to the quality of the crop, TEKEL's reduced domestic consumption, and reduced carry over stocks. According to unofficial data, traders exported 181,641 MT of raisins in MY 2002 (September 2002-August 2003) which is somewhat less than the previous year (203,115 MT). According to the same data, the average export price in MY 2002 was USD 832 per MT compared to USD 722 per MT in MY 2001. The United Kingdom, Germany, the Netherlands, Italy, and France were the leading markets for Turkish raisins.

Turkey exported 24,007 MT of raisins in the beginning of MY 2003 (in between September 1, 2003 and October 2, 2003) with an average price of USD 1,044 per MT. During the same period a year ago, exports were 25,020 MT and the average price was USD 782 per MT. The average price represents the export price for standard #9 raisins. Prices may be slightly higher or lower depending on the grade (as A, B, and C). Current export prices are higher compared to last year's prices due to lower supply and better quality.

Official GOT trade data is now available only for the first nine months (September 02 - May 03) of MY 2002. In Export Trade Matrix we are using both Aegean Exporters Union data for the entire marketing year for 2002 (September 2002 - August 2003) and nine months' data officially obtained from the State Institute of Statistics (SIS). However, in the Import Trade Matrix we are only using the official data.

In MY 2002, TARIS exported about 26,000 MT of raisins. This quantity was more than its purchases in MY 2002. The balance was from the MY 2001 crop stocks which were of better quality than in MY 2002.

There is no direct export subsidy for raisins. In 2003, the government announced a 55.5 percent import duty for raisins of all origins based on CIF value in order to protect local producers.

## Statistical Tables

### PS&D Table for Raisins

PSD Table						
Country	Turkey					
Commodity	Raisins					
	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		09/2001		09/2002		09/2003
Area Planted	82	82	82	82	82	83
Area Harvested	78	78	79	79	80	81
Beginning Stocks	69463	69463	47984	47623	20984	27239
Production	220000	220000	220000	220000	240000	190000
Imports	1236	1275	3000	1257	2000	3000
TOTAL SUPPLY	290699	290738	270984	268880	262984	220239
Exports	202715	203115	190000	181641	200000	180000
Domestic Consumption	40000	40000	60000	60000	40000	30000
Ending Stocks	47984	47623	20984	27239	22984	10239
TOTAL DISTRIBUTION	290699	290738	270984	268880	262984	220239

**Export Trade Matrix**

Export Trade Matrix			
Country	Turkey		
Commodity	Raisins		
Time period	Sep. - Aug.	Units:	Metric Tons
Exports for:	2002	Sep. 02-May 03	2003
U.S.	130	U.S.	19
Others		Others	
United Kingdom	38396	United Kingdom	36357
Germany	35460	Germany	31703
Netherlands	26581	Netherlands	25386
Italy	17214	Italy	15702
France	12004	France	11290
Australia	9073	Australia	7834
Belgium	8051	Belgium	7240
Ireland	4685	Ireland	4343
Spain	3344	Spain	3173
New Zealand	3180	New Zealand	3031
Total for Others	157988		146059
Others not Listed	23523		24598
Grand Total	181641		170676

**Import Trade Matrix**

Import Trade Matrix			
Country	Turkey		
Commodity	Raisins		
Time period	Sep. - Aug.	Units:	Metric Tons
Imports for:	2002	Sep. 02-May 03	2003
U.S.		U.S.	
Others		Others	
		United Kingdom	269
		Greece	248
		Uzbekistan	178
		Canada	118
		Portugal	85
		Germany	81
		Netherlands	54
		Italy	48
		Denmark	47
		Uruguay	22
Total for Others	0		1150
Others not Listed			107
Grand Total	0		1257