



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

**Date:** 4/30/2004

**GAIN Report Number:** TU4015

## Turkey

### Grain and Feed

### Grain and Feed Update

## 2004

**Approved by:**

Robert Hanson, Acting Agricultural Counselor  
U.S. Embassy

**Prepared by:**

Unal Sarigedik, Agricultural Specialist

---

**Report Highlights:**

Due to higher than expected feed demand, corn imports are expected to reach 700,000 MT. High feed demand will also result in higher barley imports. Rice, imports, which are currently constrained by a new quota system, are reduced to 200,000 MT. Some wheat and barley areas received inadequate rainfall in March. Production and quality are likely to be affected as a result.

---

Includes PSD Changes: Yes  
Includes Trade Matrix: No  
Unscheduled Report  
Ankara [TU1]  
[TU]

In MY 2003, Turkey imported a record amount of U.S. corn. At the end of the 2003 import season Turkey harvested a large corn crop. These large supplies have also been met with large demand. Currently imports are constrained by a seasonal 80 percent tariff that is expected to be lifted in May. End-users are beginning to feel the price pressure as domestic supplies are utilized. Bilateral agreements with the EU, Romania and Hungary amount to 152,000 MT corn that can be imported duty-free (52,000; 45,000; and 55,000 respectively). Once these supplies and TMO stocks clear the market (within one month's time), the import duty will be lowered. Once the duty is lowered, imports of corn in Turkey are expected to reach 700,000 MT in MY 2004.

To combat high prices for feed barley, TMO has elected to import barley. For reference, local barley prices are about TL 430,000/kg, or about USD 325/ton. To date, 175,000 MT has been imported. Recently, TMO announced an additional tender for 75,000 MT but bought only 40,000 MT. Beer brewers also bought some malting barley in addition to this amount. Accordingly, MY2003 imports are revised upwards to 300,000 MT.

The rice market has experienced a slightly different fate. In MY 2002 Turkey commercially imported 405,000 MT. According to industry and government sources, this large level of imports and resulting large stocks, has resulted in lowered domestic-crop purchases from traders and millers. Accordingly, TMO stepped in to purchase relatively large domestic supplies. For reference, TMO purchases less than five percent of the wheat crop annually. In 2003, TMO purchased over thirty percent of the domestic rice crop at relatively high prices. As a result, TMO has extended the annual ban on rice imports late into the spring. In a recently announced policy, TMO will allow importers to import rice only after they purchase rice from TMO stocks. This quota will be allocated on a 1-to-1 basis. Based on estimations of TMO stocks, imports of only about 120,000 MT rough rice basis will be permitted. Traders have significantly more than this (milled and rough) in bonded warehouses waiting customs clearance. It is likely that traders will first clear their milled rice.

As a result of this policy, MY 2003 imports are not expected to exceed 200,000 MT. Further, high domestic prices will also lead to a reduction in domestic consumption.

End Report.

## Statistical Tables

## PSD Table for Wheat

Turkey Wheat							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		06/2002		06/2003		06/2004	MM/YYYY
Area Harvested	8550	8550	8600	8600	0	8650	1000 HA
Beginning Stocks	1011	855	1258	1395	1108	1395	1000 MT
Production	16800	16800	16800	16800	0	17200	1000 MT
TOTAL Mkt. Yr. Imports	1241	1485	800	1000	0	800	1000 MT
Jul-Jun Imports	1217	1445	800	1000	0	800	1000 MT
Jul-Jun Import U.S.	0	28	0	65	0	100	1000 MT
TOTAL SUPPLY	19052	19140	18858	19195	1108	19395	1000 MT
TOTAL Mkt. Yr. Exports	794	745	750	750	0	1000	1000 MT
Jul-Jun Exports	839	780	800	750	0	1000	1000 MT
Feed Dom. Consumption	1000	1250	1000	1150	0	1000	1000 MT
TOTAL Dom. Consumption	17000	17000	17000	17050	0	17200	1000 MT
Ending Stocks	1258	1395	1108	1395	0	1195	1000 MT
TOTAL DISTRIBUTION	19052	19140	18858	19195	0	19395	1000 MT

## PSD Table for Barley

Turkey Barley							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		06/2002		06/2003		06/2004	MM/YYYY
Area Harvested	3550	3550	3450	3450	0	3450	1000 HA
Beginning Stocks	753	623	773	630	673	660	1000 MT
Production	7300	7300	6900	6900	0	6900	1000 MT
TOTAL Mkt. Yr. Imports	29	20	150	300	0	40	1000 MT
Oct-Sep Imports	85	60	150	300	0	40	1000 MT
Oct-Sep Import U.S.	0	0	0	0	0	0	1000 MT
TOTAL SUPPLY	8082	7943	7823	7830	673	7600	1000 MT
TOTAL Mkt. Yr. Exports	509	510	150	70	0	40	1000 MT
Oct-Sep Exports	504	500	150	70	0	40	1000 MT
Feed Dom. Consumption	5900	5900	6100	6200	0	6200	1000 MT
TOTAL Dom. Consumption	6800	6803	7000	7100	0	7100	1000 MT
Ending Stocks	773	630	673	660	0	460	1000 MT
TOTAL DISTRIBUTION	8082	7943	7823	7830	0	7600	1000 MT

## PSD Table for Rice

Turkey Rice, Milled							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	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	MM/YYYY
Area Harvested	70	70	70	70	0	75	1000 HA
Beginning Stocks	141	41	130	115	135	80	1000 MT
Milled Production	234	234	255	255	0	290	1000 MT
Rough Production	360	360	392	392	0	446	1000 MT
MILLING RATE (.9999)	6500	6500	6500	6500	0	6500	1000 MT
TOTAL Imports	325	405	325	200	0	200	1000 MT
Jan-Dec Imports	350	325	200	385	0	200	1000 MT
Jan-Dec Import U.S.	139	116	0	50	0	50	1000 MT
TOTAL SUPPLY	700	680	710	570	135	570	1000 MT
TOTAL Exports	0	5	0	0	0	0	1000 MT
Jan-Dec Exports	0	2	0	0	0	0	1000 MT
TOTAL Dom. Consumption	570	560	575	490	0	500	1000 MT
Ending Stocks	130	115	135	80	0	70	1000 MT
TOTAL DISTRIBUTION	700	680	710	570	0	570	1000 MT

## PSD Table for Corn

Turkey Corn							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
<b>Market Year Begin</b>		09/2002		09/2003		09/2004	MM/YYYY
<b>Area Harvested</b>	550	550	700	700	0	700	1000 HA
<b>Beginning Stocks</b>	281	281	645	875	445	765	1000 MT
<b>Production</b>	2100	2100	2800	2800	0	2800	1000 MT
<b>TOTAL Mkt. Yr. Imports</b>	1474	1804	300	700	0	800	1000 MT
<b>Oct-Sep Imports</b>	1475	1810	300	700	0	800	1000 MT
<b>Oct-Sep Import U.S.</b>	981	650	0	400	0	500	1000 MT
<b>TOTAL SUPPLY</b>	3855	4185	3745	4375	445	4365	1000 MT
<b>TOTAL Mkt. Yr. Exports</b>	10	10	0	10	0	10	1000 MT
<b>Oct-Sep Exports</b>	10	10	0	10	0	10	1000 MT
<b>Feed Dom. Consumption</b>	2300	2400	2400	2700	0	2900	1000 MT
<b>TOTAL Dom. Consumption</b>	3200	3300	3300	3600	0	3800	1000 MT
<b>Ending Stocks</b>	645	875	445	765	0	555	1000 MT
<b>TOTAL DISTRIBUTION</b>	3855	4185	3745	4375	0	4365	1000 MT