



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 4/8/2008

GAIN Report Number: TU8012

Turkey

Grain and Feed

Annual

2008

Approved by:

Ralph Gifford, Agricultural Counselor
U.S. Embassy

Prepared by:

Unal Sarigedik, Agricultural Specialist

Report Highlights:

Following a drought in 2007, Turkey is projected to have an average year for grain and feed production if weather conditions remain normal throughout the harvest in MY 2008 even though rainfall in Southeastern Anatolia has been about half of normal levels. Since April and May rains are the most significant factor for determining yields, as long as weather conditions remain normal through the harvest, production of all grains is projected to increase due to increased yields. Corn production is projected to increase even more due to the projected increase both in area and yield. The only reduction that is projected is for red lentil production because it is grown mostly in Southeastern Anatolia. The Turkish Grain Board (TMO), with its total procurement at the lowest level ever, procured only wheat, barley and paddy rice. Due to a deficit from last year's drought, in an effort to allow more imports into Turkey, the government provided quotas to TMO and also reduced import duties for wheat, barley and corn.

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

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Executive Summary

Turkey is projected to have relatively normal yields for grain and feed production in MY 2008, except in Southeastern Anatolia, provided weather conditions remain normal through the harvest season. In Southeastern Anatolia precipitation has been about half of normal levels and farmers there are facing very poor crops. MY 2008 production of wheat, barley, corn, rice and chickpeas all are projected to be higher than in MY 2007, which was badly affected by the drought, but still below average. On the other hand, lentil production is projected to decline because most of the red lentils are grown in Southeastern Anatolia. However since the most significant factor for Turkish grain production is the rainfall in April and May, if the Central Anatolian region receives normal rains in the spring Turkey's grain production should approach normal levels. Otherwise, Turkish grain production will likely be lower than normal once again.

The Turkish Grain Board (TMO) procured the smallest quantities of domestic grain ever in MY 2007 due to lower production and high market prices. TMO procured only about 160,000 MT of grains in MY 2007 compared to 2.3 MMT in MY 2006. Of this total, about 122,000 MT was wheat, including about 20,000 MT of durum, and about 102,000 MT of milling wheat. The remainder was composed of about 3,000 MT of barley and about 34,000 MT of paddy rice. TMO paid about YTL 69 million (about USD 55 million) for grains in MY 2007 compared to YTL 724 million (about USD 509 million) in MY 2006. This is much less than in MY 2005, when TMO procured a total of about 5.7 MMT of grains and paid about YTL 1.76 billion. TMO has not yet announced the procurement prices or price policy it intends to follow in MY 2008.

Corn planting area and production are both projected to increase significantly in MY 2008 because of high prices for the last 2 years. In MY 2005, Turkey had record high corn production levels that caused very low market prices, prompting Turkey to export corn for the first time. As a result, corn production declined in MY 2006, which caused significantly high market prices. Corn prices were also high in MY 2007 because of drought which reduced both crop area and yield of all feed grains.

In October 2007 the government authorized TMO to import 800,000 MT of milling wheat and 300,000 MT of corn duty-free in order to regulate the market. TMO held six tenders between October 2007 and March 2008 and bought a total of 600,000 MT of milling wheat and 295,000 MT of corn. TMO tried to hold another tender to import 250,000 MT of corn from the United States using the GSM-102 Export Credit Guarantee Program, but the credit was not available at the time. Turkey is projected to import smaller quantities of corn in MY 2008, if domestic production returns to normal levels as expected. In April 2008 TMO was provided another quota to import an additional 700,000 MT of wheat and 300,000 MT of corn with zero duty. TMO is expected to open a tender for importing corn immediately, but will wait to observe the rainfall and yield outcome before using the new quota for wheat.

There were a few Avian Influenza outbreaks in Turkey in early 2008. Unlike the one that occurred two years ago, these outbreaks were limited to the northern provinces (Black Sea and Thrace regions) and are believed to have been spread by hunters from wild birds to backyard poultry. There were no secondary outbreaks, thanks to effective measures taken by the Turkish government. These outbreaks all were far from commercial production areas and, as a result, domestic consumption of poultry and eggs, and hence feed demand, was not affected. However, active surveillance will continue because Turkey is located along the major bird migration routes.

The Turkish government continues to use high import duties, licensing, and quota systems to control grain imports. Because of a short crop in 2007, however, since February 2007, Turkish millers have again been allowed to import wheat duty free if it was to be made into flour or processed products for export.

U.S. grain exporters continue to face stiff competition in the Turkish market. EU countries enjoy tariff advantages, particularly under the tariff rate quota system stipulated by the EU Customs Union Agreement. Black Sea and Central Asian producers also have the ability to sell grain in smaller consignments and offer faster and lower shipping costs.

Since January 2006, the import duty for durum has been 100 percent and for milling wheat and corn the duty had been 130 percent for all countries. Duties for importing wheat for millers and traders other than TMO were reduced to zero percent on February 23, 2008 during the remainder of the marketing year. However, starting from May 15, 2008 the duties will be increased to 50 percent. The import duty for corn, except for popcorn which was still 130 percent, was set at 35 percent in the 2008 Import Regime until May 15, 2008, however it was reduced once again on April 8, 2008 to 20 percent. This duty will be valid until July 31, 2008 and will increase to 50 percent after that date.

Duties for chickpeas and lentils have remained at 19.3 percent since January 2006. Similarly import duties have remained at 34 percent for paddy rice, 36 percent for brown rice and 45 percent for milled rice since January 2007. When they removed the quota to procure local paddy, the government eliminated the reduced duty application for paddy, brown and milled rice, which were 20 percent, 25 percent, and 43 percent respectively. The Turkish government signed a bilateral agreement with the Egyptian government in 2006. Turkish government allocated a quota for 30,000 MT of brown rice with zero duty and additional 10,000 MT quota for milled rice with 22.5 percent (or 50 percent of the applied) duty. The Egyptian quota and the EU quota to import rice is being allocated to TMO and TMO has not imported any rice in recent years.

Turkey imposed a reference price system (minimum import price of USD 1,500 per MT) on all dry beans in February 2006. Turkey imposed a reference price system for paddy, brown, and milled rice on October 19, 2006, and under this scheme, minimum import prices are USD 340 per MT of paddy, USD 425 per MT of brown rice, and USD 570 per MT of milled rice. The goal of this system was to increase the domestic prices for dry beans and rice in order to protect the Turkish dry bean and rice growers.

(As of April 4, 2008, USD 1.00 was YTL 1.29 compared to YTL 1.41 a year ago.)

Production

Turkey had a severe drought during the first half of 2007 especially in the western and central parts of Anatolia. In Southeastern Anatolia rainfall was very good in the beginning of the vegetation period in MY 2007 but was insufficient in the second half of the year. So far in MY 2008 weather conditions are closer to normal, except in the Southeastern Anatolian region where severe drought continues. Turkey had a good snow cover throughout the country in mid February, but the weather has been fairly warm since. Rains started again the latter part of March and continued through April and May. Grain production is forecast to be about average at this point provided weather conditions remain normal until the harvest. However, we need to emphasize the importance of spring rains for Turkish grain production, especially in April and May. If precipitation is normal or better, Turkey still should have a near normal crop in MY 2008; On the other hand, Turkey's grain supply may be significantly short for the second year in a row if Central Anatolia does not receive sufficient rains before the harvest. Lower grain yields in Southeastern Anatolia may be compensated by higher yields in other regions. However, Turkey's lentil production is projected to decline since most of the red lentils are produced in Southeastern Anatolia.

The wheat harvest starts first in Cukurova in late May and continues in Southeastern Anatolia and Aegean Regions and in Thrace through June. The harvest in Central Anatolia starts in late June or early July and in Eastern Anatolia in August. The barley harvest starts about two weeks prior to the wheat harvest in all regions.

The Turkish Grain Board completed MY 2007 grain procurement long ago with record low purchases of grain due to shorter domestic supply and market prices that were above TMO procurement prices. Procurement of all grains totaled only about 160,000 MT, compared to about 2.3 MMT in MY 2006, about 5.7 MMT in MY 2005 and about 3.5 MMT in 2004. Of this total, 102,287 MT were milling wheat, 19,680 MT were durum wheat, 2,755 MT were barley, 46 MT were rye, and 33,440 MT were paddy rice. TMO did not procure any corn or oats in MY 2007 since the market prices were much higher than the TMO procurement prices.

TMO paid about YTL 47.8 million for grain procurement in MY 2007, compared to YTL 724 million in MY 2006, YTL 1.76 billion in MY 2005, and YTL 820 million in MY 2004. In MY 2007, TMO also paid about YTL 21.0 million for the procurement of paddy rice. By law, TMO is required to purchase all grains offered by Turkish farmers. According to the TMO procurement system, farmers are paid half of the value of the purchases at the time of the procurement and the balance is paid 30 days later.

Wheat

MY 2008 wheat production currently is projected at 16.5 MMT, which is 1 MMT higher than the MY 2007 production estimate of 15.5 MMT but still lower than the MY 2006 estimate of 17.5 MMT. Precipitation levels in Turkey have been normal in major grain producing areas. As always in Turkey, however, precipitation in April and May is the most significant factor determining grain yields, so MY 2008 production projections may change.

In MY 2007, TMO procured 121,968 MT of wheat. Of this total, 102,287 MT were milling and the remaining 19,680 MT were durum wheat. The total procured quantity was the lowest amount TMO procured in many years, mainly because of the shorter supply.

The government announced YTL 45 per MT of premium for wheat growers in MY 2007. This premium was YTL 35 per MT in MY 2006.

TMO announced procurement prices for wheat at the beginning of the harvest is provided in Table 1.

Table 1: TMO Wheat Procurement Prices in MY 2007

Type of Wheat	YTL / MT
Durum Wheat	
Anatolian Durum	440
Low Quality Durum	360
Milling Wheat	
Anatolian Hard White	425
Anatolian Hard Red	425
Semi Hard Red	400
Semi Hard White	390
Other Milling (Red or White)	375
Feed Wheat	330

Source: TMO Website – www.tmo.gov.tr

Barley

In MY 2008, barley production is projected at 7 MMT which, like the wheat forecast, is slightly higher than the estimated of MY 2007's poor crop but still lower than in MY 2006. Weather conditions for barley have been pretty much the same so far as they were for wheat and precipitation through May will affect final yields. TMO procured only 2,755 MT of barley in MY 2007, because of low supply and high market prices, compared to about 725,000 MT in MY 2006.

The government announced YTL 35 per MT of premium for barley, rye, and oat growers in MY 2007. This premium was YTL 30 per MT for the same crops in MY 2006.

Corn

Planted area and production levels of corn are projected to increase significantly in MY 2008 because of high prices and resulting switches from cotton to corn in the cotton growing areas. Part of this projected increase, however, is projected to be offset by reduced yields in the Southeastern Anatolia due to reduced precipitation. TMO did not buy any corn in MY 2007 again, for a second year in a row, as a result of a shortage in supply and high market prices.

The premium for corn producers for MY 2007 crop corn was announced in the Official Gazette on April 3, 2008 as YTL 20 per MT. This premium was much less than it was in MY 2006, which was YTL 67 per MT.

Rice

Turkey's rice production has increased significantly since 2004 due to government support for production and protectionist trade policies. Yields have also increased significantly because of the use of recently-developed high yielding varieties, especially the Osmancik variety. Therefore planting area and production both are projected to increase in MY 2008 because of a projected increase in demand stemming from the high market prices for grains and increased government supports for rice, if the weather conditions continue to be favorable.

Even though paddy procurement prices remained the same in MY 2006 as they were in MY 2005, TMO procured larger quantities, a total of about 87,000 MT, and paid about YTL 54 million because importers did not have to buy paddy from producers to receive a control certificate for their imports. More detailed information was provided in Policy Section of the report.

TMO increased paddy procurement prices slightly in MY 2007 and paid YTL 800 per MT of Baldo, YTL 750 per MT of other long grain varieties including Osmancik variety, YTL 680 per MT of medium grain, and YTL 620 per MT of short grain paddy. TMO procured 33,440 MT of paddy rice in MY 2007 and paid about YTL 21 million to producers. The government also announced YTL 90 per MT premium for rice growers in MY 2007. The premium was YTL 60 per MT in MY 2006.

Pulses

Since spring rains are the most significant factor affecting yields for pulses, low levels of precipitation in Southeastern Anatolia indicate that Turkish red lentil production will be reduced. Rainfall from April through June will determine the severity of this reduction. Post projects that chickpea area and production will increase slightly in MY 2008 due to higher prices driven by higher domestic and international demand in MY 2007 and favorable weather conditions so far. The primary reason for the price increases was the drought in Turkey in 2007. The projected area is 480,000 hectares and production is 600,000 MT for lentils in MY 2008 and 600,000 hectares and 600,000 MT for chickpeas. In MY 2007 these statistics were 490,000 hectares and 650,000 MT for lentils and 560,000 hectares and 540,000 MT for chickpeas. The limited availability of high quality of seeds, however, may limit the extent of the increase for chickpeas.

GUNEYDOGUBIRLIK (Southwestern Association), which used to procure large quantities of red lentils in order to protect farmers, procured only minimal quantities of lentils due to financial instability. They purchased about 50 MT at an average price of about YTL 67.50 per MT in MY 2007. In the past, the Turkish government used to assist with procurement by all of the State Economic Enterprises (SEE's), including GUNEYDOGUBIRLIK. However, the government stopped supporting SEE's because of tight budget policies in recent years. SEE's are now borrowing from commercial banks to pay for their procurement.

CONSUMPTION

Wheat

Wheat consumption as food is projected to increase slightly in MY 2008 along with the increase in population, which is currently estimated at about one percent. However, wheat consumption as feed is projected to be lower assuming that the quality of wheat will be good. Thus, MY 2008 total domestic consumption is projected to be about the same as it was estimated for MY 2007. Wheat consumption as bread in Turkey is projected to increase, but at a rate less than the population increase, since continuing urbanization diversifies the diets. For example, per capita pasta consumption is increasing. According to a study carried by the Pasta Producers' Association recently, per capita pasta consumption in Turkey increased from 4.3 kilogram in early 1990's to about 6.0 kilogram in 2007. The target of the Pasta Producers Association for per capita consumption is eight kilogram in the short run. This could offset some of the decrease in bread consumption.

TMO announced in April that imported wheat would be sold to millers at YTL 590 per MT of wheat with 13 protein and YTL 575 per MT of wheat with 12 protein. VAT and manipulation costs will be added to these prices.

The prices at the major grain commodity exchanges, which may be considered market prices, were significantly higher than TMO's announced prices, as indicated in Table 2 and 3.

Table 2: Wheat Prices at the Konya Commodity Exchange on March 19, 2008

Type of Wheat	Average Price (YTL/MT)	Quantity Sold (MT)
Durum Wheat	813.5	231
Durum Wheat (Low quality)	786.0	290
Hard Red Milling Wheat	633.4	523
Semi Hard White Milling Wheat	629.9	354
Other Wheat	650.0	38
Feed Wheat	617.6	229

Source: www.ktb.org.tr

Table 3: Wheat Prices at the Polatli Commodity Exchange on March 19, 2008

Type of Wheat	Average Price (YTL/MT)	Quantity Sold (MT)
Hard Red Milling Wheat	639.3	178
Other Milling Wheat	626.5	63
Feed Wheat	603.6	179

Source: www.polatliborsa.org.tr

Average monthly prices for Anatolian hard red wheat at the Polatli Commodity Exchange for the last six years are provided in Table 4 to show seasonal price variations.

Barley

Barley is an important feed ingredient in Turkey, especially for ruminants. From time to time barley may be used to substitute for corn when corn is not available or very expensive. Barley consumption in MY 2008 is projected to remain unchanged. Industry sources estimate that about half of the feed barley is used for making commercial feed and the other half is fed directly or crushed by farmers making their own feed mix. Malting barley consumption, which is estimated at 900,000 MT, has been rather steady in recent years.

TMO has not announced selling prices for barley since it does not have any in their stocks. A total of 289 MT of feed barley was sold at an average price of YTL 483 per MT (or Ykr. 48.3 per Kg.) at the Konya Commodity Exchange and 11 MT at YTL 467 per MT (or Ykr. 46.7 per Kg.) at the Polatli Commodity Exchange on March 19, 2008.

Average monthly barley prices, which are provided in Table 5 below, shows the seasonal variations of the barley prices during the last six years.

Table 4: Average Monthly Prices for Anatolian Hard Red Milling Wheat at the Polatli Commodity Exchange, Yeni Kuru/Kilogram (100 Ykr=1 YTL)

MONTHS	2002 Ykr. / Kg.	2003 Ykr. / Kg.	2004 Ykr. / Kg.	2005 Ykr. / Kg.	2006 Ykr. / Kg.	2007 Ykr./Kg.	2008 Ykr./Kg.
January	25.49	38.04	42.67	38.60	40.00	45.60	54.86

February	26.13	37.93	42.38	38.00	41.96	46.42	57.92
March	27.48	38.78	41.53	36.70	42.15	45.68	
April	29.52	39.72	41.79	37.20	43.76	43.94	
May	28.41	38.61	42.49	37.00	43.38	44.95	
June	26.35	36.90	42.44	36.80	42.24	44.68	
July	25.76	37.98	36.14	32.60	37.55	47.10	
August	30.66	37.28	36.46	32.60	39.18	47.20	
September	32.19	37.57	36.91	34.80	39.78	49.39	
October	33.69	37.94	38.71	36.70	42.51	51.21	
November	33.99	40.59	38.67	36.40	42.65	52.70	
December	37.15	41.68	38.91	37.00	43.84	54.51	

Source: www.polatliborsa.org.tr

Corn

Corn consumption as feed is projected to increase slightly in MY 2008 because of greater availability. Consumption by the starch industry is rather stable since there is a quota for sweetener production.

A total of 7,266 MT of corn was sold at an average price of YTL 446 per MT (or Ykr. 44.6 per Kg.) at the Adana Commodity exchange on March 19, 2008. TMO recently announced its intention to sell imported corn to feed millers, feedlots and poultry operations at YTL 450 per MT.

Table 5: Average Monthly Barley Prices at the Polatli Commodity Exchange, Yeni Kurus/Kilogram (100 Ykr=1 YTL)

MONTHS	2002	2003	2004	2005	2006	2007	2008
	Ykr. / Kg.	Ykr./Kg.	Ykr./Kg.				
January	18.12	20.96	31.91	31.16	25.60	32.55	50.27
February	17.77	20.65	32.55	30.27	26.30	34.91	49.44
March	18.36	21.75	35.02	27.76	24.80	34.80	
April	18.43	23.19	39.33	26.75	24.78	38.00	
May	17.74	24.15	41.60	25.84	24.60	41.71	
June	14.66	24.90	31.44	22.89	24.60	38.75	
July	14.53	25.39	29.22	21.77	24.75	40.70	

August	16.74	24.28	29.37	22.44	25.86	41.30
September	17.63	24.46	29.03	23.24	28.06	43.93
October	17.85	25.85	29.74	24.70	29.74	47.77
November	18.73	30.40	30.59	25.60	30.55	49.06
December	21.11	32.08	31.95	25.30	30.62	49.57

Source: www.polatliborsa.org.tr

Rice

Turkish rice consumption faces stiff competition from both bulgur (steamed, cracked wheat) and pasta, and bulgur and pasta prices affect rice consumption significantly. Most of the rice in Turkey is consumed in big cities and western provinces while rural inhabitants consume substantial amounts of bulgur instead of rice. However, as the population continues to urbanize, the consumption of pasta has been steadily increasing. Even though it may change slightly from year to year depending upon relative price changes among bulgur, pasta and rice, Turkey's per capita annual rice consumption is estimated around 8 kilograms. However, it is estimated that rice consumption in MY 2007 increased due to high bulgur and pasta prices and the availability of rice to consumers due to liberalized imports. Packaged as opposed to bulk rice sales also have increased in recent years.

TMO sold 31,000 MT of Osmancik variety paddy in recent months at varied priced between YTL 690 per MT for those with the milling rate 49 percent or lower to YTL 850 per MT with milling rate 58 percent and higher. The sales prices were in between these two extremes for the paddy with the middle ranging milling rates. It is not yet known at this point what TMO will do the remaining 14,000 MT of paddy; either will sell it as paddy or will have them milled and sold as rice.

In retail outlets in Ankara, Baldo (Gonen) rice is currently sold at around YTL 6.00 per kilogram, Osmancik is sold at around YTL 3.25 per kilogram, Calrose is sold at around YTL 4.50 per kilogram, and Egyptian rice is sold around YTL 2.40 per kilogram. A year ago these prices were about YTL 3.50 for Baldo, YTL 3.00 for Osmancik, YTL 2.50 for Calrose and YTL 2.25 per kilogram for Egyptian medium grain rice.

Turkey's rice consumption in MY 2006 was revised slightly downward from 590,000 MT to 570,000 MT parallel with the announcement made by the government that the population of Turkey is slightly more than 70 million. The earlier population estimate was over 73 million.

Pulses

Pulse consumption decreased slightly in MY 2007 due to short supply and higher prices. Lentil consumption is projected to remain steady, but chickpea consumption is projected to increase slightly along with the projected increase in production. Per capita annual consumption estimates for lentils and chickpeas are estimated to be nearly seven kilograms.

Green and red lentils both are sold at about YTL 3.50 – 3.90 and chickpeas are sold at about YTL 4.00 – 4.40, depending on the quality, in the retail markets in Ankara. A year ago these prices were about YTL 2.50/kg for green lentils, YTL 1.75-2.00/kg for red lentils, and YTL 3.00-3.50/kg for chickpeas.

Trade Wheat

Turkey is projected to import similar quantities of wheat in MY 2008 as in MY 2007 due to similar market expectation in the world.

The government had not issued any control certificates for wheat imports for several years, so wheat imports had been possible only within quotas.

The policy was changed in MY 2007 because of a short crop and reduced TMO stocks. The government not only started to issue control certificates to millers and traders, it also reduced the import duties for everyone. Import duties were reduced from 130 percent to eight percent for milling wheat and from 100 percent to zero for durum wheat with the 2007 Import Regime. The import duty for milling wheat was further reduced to zero percent on February 23, 2008. These reductions, however, will only be in effect through May 15, 2008. Import duties will be increased to 50 percent after this date. In MY 2007, the government also called on the TMO to import 800,000 MT of wheat with zero duty to avoid market disturbances. TMO has held seven tenders in MY 2007 so far to buy wheat and bought a total of 600,000 MT of milling wheat. The average price for these purchases was USD 460.82 per MT (C&F). In addition to these, TMO also intended to buy another 250,000 MT of HRW from the United States, but was not able to do so since GSM-102 was not available. The government provided another wheat quota for 700,000 MT to TMO with zero duty. Imports with this quota can be made by May 31, 2009. However, TMO will follow the weather conditions and decide whether to import or not as early as possible, ideally before market prices rise again.

Turkey had exported a record 2 MMT of wheat flour in MY 2005 and became the world's top flour exporter. This quantity was reduced in MY 2006 because Iraq started to import wheat and mill flour domestically. Turkey's exports were further reduced in MY 2007 due to short supply and high market prices. Turkey's flour exports are projected to decline further in MY 2008 because of projected continuation of the high market prices for wheat.

Turkish exports of wheat flour in 2007 are provided in Table 6.

Table 6: Export Trade Matrix for Wheat Flour in 2007

Turkey Wheat Flour			
Time Period	Jan.-Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.		U.S.	
Others		Others	
Iraq	480041		
Libya	213349		
Indonesia	162453		
Israel	35464		
Gambia	35393		
Cuba	26334		
Azerbaijan	20015		
Palestine	14404		
Tanzania	10632		
Djibouti	9747		
Total for Others	1007533		0

Others not Listed	208089		
Grand Total	1215622		0

Source: Turkish Statistical Corporation (TUIK)

Turkey also increased its pasta exports significantly in recent years; however, these were slightly reduced in 2007 due to high durum wheat prices. Turkey's pasta exports are provided in Table 7 as follows:

Table 7: Turkey's Pasta Exports in Recent Years

Years	Exported Quantity (MT)
2000	27,350
2001	35,950
2002	49,051
2003	68,450
2004	126,810
2005	163,830
2006	193,205
2007 (P)	177,000

P: Provisional

Source: www.makarna.org.tr

The government usually announces a small export subsidy for pasta: USD 66 per MT with a quantity limit of 32 percent and up to 10 percent of the total payment. This subsidy is not paid back as cash; instead, it may be used to compensate for debts such as taxes and public utilities. There are no other support programs for exports of wheat flour and products.

Barley

Turkey is not expected to import or export any barley in MY 2008, other than the possibility of importing some small quantities of malting barley.

Corn

Turkey is projected to import only small quantities of corn in MY 2008 due to projected increase in production. It is expected that high prices in MY 2007 will encourage farmers to grow more corn in MY 2008. The import duty for corn was also reduced from 130 percent to 35 percent with the 2008 Import Regime because of short supply and high prices. The government asked TMO to import 300,000 MT of corn to regulate the market in MY 2007. TMO imported a total of 295,000 MT of corn through five tenders with the average price of USD 426.76 per MT in MY 2007. The government provided another quota to TMO to import 300,000 MT of corn with zero duty. The quota may be used until May 31, 2009.

Due to shortages and high prices of wheat and corn, some feed millers and producers have started to replace corn by-products for corn in their rations. However, the quantities of corn by-products used declined after their prices increased as well.

Rice

In MY 2008, Turkey is projected to import smaller quantities of rice (around 100,000 MT of rice-total of paddy and milled rice in milled terms) due to a projected increase in production. Turkey's rice imports in MY 2007 were revised downward based on information from industry sources. The reason for this reduction is the global shortage in supply, high prices and market uncertainties.

All importers have been able to receive control certificate since April 1, 2006 for paddy and since August 1, 2006 for milled rice. Importers are required, however, to comply with a reference price system, which was implemented on October 19, 2006. The reference prices—minimum prices on which duty is assessed—are USD 340 per MT of paddy, USD 425 per MT of brown, and USD 570 per MT of milled rice. Turkey also has an agreement to import 30,000 MT of milled rice from EU countries (primarily from Italy) with no duty. As part of a bilateral trade agreement with Egypt, the Turkish government created a quota for 30,000 MT of brown rice with zero duty and additional 10,000 MT quota for milled rice with 22.5 percent duty, half of the applied rate. Normal applied duty rates are currently 34 percent for paddy, 36 percent for brown, and 45 percent for milled rice imports.

Turkish rice import data does not always match export data from the United States. Traders are buying U.S. rice, shipping it to Turkey and storing it in bonded warehouses. Turkish importers are only nationalizing the quantities they think they can sell, so that they only have to pay customs duties for the amount that they nationalize. Only after nationalization are these U.S. exports registered as Turkish imports.

Pulses

Turkey exported significantly less lentils and chickpeas in MY 2007 compared to MY 2006 due to reduced supply and high prices. Turkey also imported smaller quantities of lentils due to high prices in the international markets. In MY 2008, Turkey is projected to import larger quantities but export smaller quantities of lentils due to projected reduction in production. Chickpea exports are projected to increase parallel to the projected increase in supplies in MY 2008. Turkey traditionally exports red lentils and imports green lentils, but MY 2008's short crop will make this difficult. The government does not issue import licenses for pulses during harvest. Instead, it only permits imports around the beginning of the calendar year, after the domestic situation is clearer.

Turkey began to impose a reference price system, set at USD 1,500 for all dry beans, since February 2006.

Stocks

Official data on stocks are not available. PSD stock data were derived from information received from industry and trade sources. According to their analysis, TMO did not have significant quantities of any grain in its stocks.

Policy

In order to reduce its budget deficit Turkey has been implementing economic reforms initiated by the IMF after the 2001 economic crisis. As a part of these reforms, many price supports and export subsidies were eliminated. Instead, direct income payment and premium support systems were implemented. One of the primary aims of applying a direct income payment system was to improve the farmer registration system, which is expected to

be a critical part of the EU accession process. The farmers registration system is also expected to improve Turkey's agricultural production estimates.

The government introduced a premium system for grains for the first time in MY 2005. Its aim was to allow producers to sell their crop not only to TMO, but also to any trader or miller in the market, and still receive this premium as long as they could document the sale. Thus, it was anticipated that TMO would not have to buy large quantities of grains. However, this policy did not work well and, TMO bought the largest quantities it has ever bought in recent years due to larger supply. The amount of the premium in MY 2005 was YTL 30 per MT for wheat, corn and paddy rice and YTL 20 per MT for barley, rye, and oats.

In MY 2006, TMO procured smaller amounts because of declining production. The premiums were announced as YTL 35 per MT of wheat, YTL 25 per MT of barley, rye, and oats, YTL 60 per MT of paddy rice and YTL 67 per MT of corn. The grain support policy for MY 2007 crop was announced very late. The premium amount was YTL 45 per MT for wheat, YTL 35 per MT of barley, rye, and oats, YTL 90 per MT of paddy rice. The government just recently announced the premium for corn as YTL 20 per MT. All of these premiums are slightly larger than those in MY 2006, except for corn, which is significantly lower than it was in MY 2006. The announcements of these premiums are generally late and payments of them are also very slow. The government has not yet paid all its debts to producers for MY 2006 premiums.

The government has undertaken construction of a licensed warehousing system to decrease TMO involvement with procurement. However, the system is still far from effective as industry does not yet believe that the government will be able to refrain from interfering with grain procurement. In addition, the government has not yet assigned the initial funds to insure the stored crops at licensed warehouses, nor has it established an adequate system of grades and standards.

The Prime Minister earlier this year made an announcement about changes in support programs. According to his announcement, direct income payments to producers will be eliminated and support program for crops will be continued in order to encourage the production of those crops needed most. This announcement came as a surprise to many, as the general trend around the world has been to replace crop payments with direct payments. The most recent rumors about the direct income payments is that it will be reduced from last year's YTL 100 to YTL 70 per hectare. Direct income payments were YTL 135 per hectare two years ago.

Rice production and trade policy have changed a lot in recent years. To protect domestic producers, in 2004 the Turkish government began requiring traders to procure equivalent quantities of domestic paddy in order to receive control certificates for imports. After efforts to persuade the Turkish government that this policy was inconsistent with WTO rules proved unsuccessful, the United States carried the case to the WTO dispute process. The Turkish government modified its import policies in 2006, but started to provide premiums to protect domestic farmers at the same time. In MY 2006, the premium for paddy production was announced as YTL 60 per MT. This was increased by 50 percent to YTL 90 per MT in MY 2007. In addition, a minimum import price was established.

The Turkish government does not hold any specific production policy for pulses, however it does withhold control certificates during the harvest and impose a minimum import price to protect the industry and tax revenues.

Marketing

TMO procured the smallest quantities of grains ever during the last two years. TMO did not procure any corn for the second year in a row in MY 2007. These changes in TMO purchasing were the result of short supply and high market prices. TMO paid a total of about YTL 68.8 million (about YTL 47.8 million for grains and about YTL 21.0 million for paddy rice) for MY 2007 procurements.

Although it was clear the wheat crop was low by July, 2007, only in October did the government authorize TMO to import 800,000 MT of wheat and 300,000 MT of corn with zero duty to regulate the market needs and prices. TMO eventually announced seven tenders and bought total of 600,000 MT of milling wheat and 295,000 MT of corn. The government provided another quota to TMO to import 700,000 MT of wheat and 300,000 MT of corn with zero duty. These imports must be completed by May 31, 2009.

Even though it may be considered as self-sufficient in wheat in a normal crop year, Turkey will be an importer in the medium term because of large flour exports and the needs for high quality wheat for blending. Turkey was the world's top flour exporter in 2005. Exports in 2006 have declined due to reduced imports by Iraq and flour exports are estimated to have decline further in MY 2007 due to high market prices for wheat. However, Turkey is expected to remain an important flour exporter in the short term because of its very large milling capacity, which is estimated around 30 MMT, compared to domestic needs of less than 15 MMT, and its geographical location. Turkish pasta producers have also increased their exports significantly to primarily African countries in recent years. Iraq, the Caucasus and Central Asia countries are the other destinations for Turkish pasta exports. However, pasta exports also declined slightly in 2007 due to the same reasons for flour.

Turkey is not expected to export or import significant quantities of barley, other than possibly some imports for malting.

Turkey used to be a net corn importer. Turkey has been producing more corn in recent years because of shifts from cotton; production quota implemented by the government for sugar beets, and increased incentives provided by the government for its production. On the other hand, Turkey's corn consumption has also increased due to increased demand for poultry feed and starch-based sweetener production. Turkey may import corn from time to time, but not in significant quantities during the next few years because it is projected that Turkey can grow most of its corn needs domestically.

Turkey's imports of non-grain feed ingredients, such as corn gluten feed, corn gluten meal, and dried distillers grains (DDG's) exploded in MY 2007 as feed millers sought inexpensive substitutes for increasingly expensive grain. Cumulative U.S. exports from June 2007 to March 2008 exceeded a million tons.

Turkey will also be rice importer in the medium term because of short supply and high cost of domestic production.

Turkey used to export large quantities of all of green lentils, red lentils, and chick peas. Turkey is now importing green lentils, but continues to export red lentils and chick peas. However, these exports have been reduced since 1990's. It is projected for the mid-term that Turkey will continue to import green lentils and export red lentils and chick peas.

The United States is well positioned to meet Turkish consumers' growing demand for quality and value. U.S. Wheat Associates, U.S. Grains Council, and U.S. Rice Federation have created awareness of the quality and value of U.S. grains. There is stiff competition, however, from other suppliers. Supply reliability is a major asset of U.S. products. The GSM 102 credit guarantee program also remains an important marketing tool for U.S. grains.

Statistical Tables

PSD Table for Wheat

Turkey Wheat										
	06	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		06/2006	06/2006		06/2007	06/2007		06/2008	06/2008	MM/YYYY
Area Harvested	8600	8600	8600	8600	8600	8600	0	0	8600	1000 HA
Beginning Stocks	1096	1275	1096	1737	1125	1737	787	825	637	1000 MT
Production	17500	17500	17500	15500	17000	15500	0	0	16500	1000 MT
MY Imports	1791	1000	1791	1500	1500	1500	0	0	1500	1000 MT
TY Imports	1833	1000	1833	1500	1500	1500	0	0	1500	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	20387	19775	20387	18737	19625	18737	787	825	18637	1000 MT
MY Exports	2000	2000	2000	1500	2000	1300	0	0	1000	1000 MT
TY Exports	2000	2000	2000	1500	2000	1300	0	0	1000	1000 MT
Feed Consumption	800	800	800	600	800	800	0	0	600	1000 MT
FSI Consumption	15850	15850	15850	15850	16000	16000	0	0	16200	1000 MT
Total Consumption	16650	16650	16650	16450	16800	16800	0	0	16800	1000 MT
Ending Stocks	1737	1125	1737	787	825	637	0	0	837	1000 MT
Total Distribution	20387	19775	20387	18737	19625	18737	0	0	18637	1000 MT
Yield	2.035	2.035	2.035	1.802	1.977	1.802	0	0	1.919	MT/HA

Export Trade Matrix for Wheat

**Turkey
Wheat**

Time Period	Jan.-Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.		U.S.	
Others		Others	
Germany	92		
Netherlands	4		
France	NA		
Italy	NA		
United Kingdom	NA		
Denmark	NA		
Belgium	NA		
Norway	NA		
Sweden	NA		
Austria	NA		
Total for Others	96		0
Others not Listed	18185		
Grand Total	18281		0

Import Trade Matrix for Wheat

**Turkey
Wheat**

Time Period	Jan.-Dec.	Units:	Metric Tons
Imports for:	2007		2008
U.S.		U.S.	
Others		Others	
Russia	975611		
Kazakhstan	670302		
Germany	140971		
Hungary	118588		
France	54163		
Syria	40419		
Ukraine	28103		
Spain	27500		
Bulgaria	9899		
Romania	6573		
Total for Others	2072129		0
Others not Listed	74978		
Grand Total	2147107		0

PSD Table for Barley

Turkey Barley										
	2006	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		06/2006	06/2006		06/2007	06/2007		06/2008	06/2008	MM/YYYY
Area Harvested	3600	3500	3600	3600	0	3600	0	0	3600	1000 HA
Beginning Stocks	650	760	650	653	760	653	403	0	153	1000 MT
Production	7500	7600	7500	6500	0	6500	0	0	7000	1000 MT
MY Imports	53	0	53	250	0	0	0	0	50	1000 MT
TY Imports	57	0	57	250	0	0	0	0	50	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	8203	8360	8203	7403	760	7153	403	0	7203	1000 MT
MY Exports	250	200	250	0	0	0	0	0	0	1000 MT
TY Exports	250	200	250	0	0	0	0	0	0	1000 MT
Feed Consumption	6400	6500	6400	6100	0	6100	0	0	6100	1000 MT
FSI Consumption	900	900	900	900	0	900	0	0	900	1000 MT
Total Consumption	7300	7400	7300	7000	0	7000	0	0	7000	1000 MT
Ending Stocks	653	760	653	403	0	153	0	0	203	1000 MT
Total Distribution	8203	8360	8203	7403	0	7153	0	0	7203	1000 MT
Yield	2.083	2.171	2.083	1.806	0	1.806	0	0	1.944	MT/HA

PSD Table for Corn

Turkey Corn										
	2006	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		09/2006	09/2006		09/2007	09/2007		09/2008	09/2008	MM/YYYY
Area Harvested	425	650	425	450	800	450	0	0	550	1000 HA
Beginning Stocks	398	398	398	522	398	522	322	498	212	1000 MT
Production	2800	3000	2800	2900	3700	2900	0	0	3500	1000 MT
MY Imports	1034	500	1034	800	0	500	0	0	300	1000 MT
TY Imports	1052	500	1052	800	0	500	0	0	300	1000 MT
TY Imp. from U.S.	366	0	366	0	0	0	0	0	0	1000 MT
Total Supply	4232	3898	4232	4222	4098	3922	322	498	4012	1000 MT
MY Exports	10	0	10	0	0	10	0	0	0	1000 MT
TY Exports	10	0	10	0	0	10	0	0	0	1000 MT
Feed Consumption	2800	2600	2800	3000	2700	2800	0	0	2800	1000 MT
FSI Consumption	900	900	900	900	900	900	0	0	900	1000 MT
Total Consumption	3700	3500	3700	3900	3600	3700	0	0	3700	1000 MT
Ending Stocks	522	398	522	322	498	212	0	0	312	1000 MT
Total Distribution	4232	3898	4232	4222	4098	3922	0	0	4012	1000 MT
Yield	6.588	4.615	6.588	6.444	4.625	6.444	0	0	6.364	MT/HA

Export Trade Matrix for Corn

**Turkey
Corn**

Time Period	Jan.-Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.	3	U.S.	
Others		Others	
France	279		
Germany	66		
Northern Cyprus	7		
Austria	5		
United Kingdom	3		
Total for Others	360		0
Others not Listed	7957		
Grand Total	8320		0

Import Trade Matrix for Corn

**Turkey
Corn**

Time Period	Jan.-Dec.	Units:	Metric Tons
Imports for:	2007		2008
U.S.	365317	U.S.	
Others		Others	
Ukraine	268598		
Hungary	130953		
Romania	97271		
Bulgaria	93262		
Argentina	22947		
Serbia	19739		
Moldova	8068		
Croatia	5984		
France	375		
Bosnia-Herzeg.	180		
Total for Others	647377		0
Others not Listed	115762		
Grand Total	1128456		0

PSD Table for Rice

Turkey Rice, Milled										
	2006	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		09/2006	09/2006		09/2007	09/2007		09/2008	09/2008	MM/YYYY
Area Harvested	95	95	95	90	85	95	0	0	100	1000 HA
Beginning Stocks	198	160	198	263	235	283	223	225	192	1000 MT
Milled Production	405	405	405	360	330	360	0	0	420	1000 MT
Rough Production	675	675	675	600	550	600	0	0	700	1000 MT
Milling Rate (.9999)	6000	6000	6000	6000	6000	6000	0	0	6000	1000 MT
MY Imports	250	250	250	200	250	150	0	0	100	1000 MT
TY Imports	250	250	250	200	250	150	0	0	100	1000 MT
TY Imp. from U.S.	0	0	0	0	0	80	0	0	50	1000 MT
Total Supply	853	815	853	823	815	793	223	225	712	1000 MT
MY Exports	0	0	0	0	0	1	0	0	0	1000 MT
TY Exports	0	0	0	0	0	1	0	0	0	1000 MT
Total Consumption	590	580	570	600	590	600	0	0	600	1000 MT
Ending Stocks	263	235	283	223	225	192	0	0	112	1000 MT
Total Distribution	853	815	853	823	815	793	0	0	712	1000 MT
Yield (Rough)	7.105	7.105	7.105	6.667	6.471	6.316	0	0	7	MT/HA

Export Trade Matrix for Rice

**Turkey
Rice, Milled**

Time Period	Jan.-Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.		U.S.	
Others		Others	
Iraq	76		
Northern Cyprus	63		
United Kingdom	43		
Germany	31		
Afghanistan	21		
Kazakhstan	20		
Netherlands	4		
Total for Others	258		0
Others not Listed	859		
Grand Total	1117		0

Import Trade Matrix for Rice

**Turkey
Rice, Milled**

Time Period	Jan.-Dec.	Units:	Metric Tons
Imports for:	2007		2008
U.S.		U.S.	
Others		Others	
Egypt	136360		
Italy	28471		
Uruguay	1992		
Thailand	1247		
India	847		
Pakistan	255		
Total for Others	169172		0
Others not Listed	19349		
Grand Total	188521		0

PSD Table for Lentils

Turkey Lentils										
	2006	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008	MM/YYYY
Area Harvested	0	520	520	0	490	490	0	0	480	1000 HA
Beginning Stocks	0	65	65	0	65	33	0	65	37	1000 MT
Production	0	700	700	0	650	650	0	0	600	1000 MT
MY Imports	0	50	69	0	50	30	0	0	50	1000 MT
TY Imports	0	53	69	0	50	30	0	0	50	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	0	815	834	0	765	713	0	65	687	1000 MT
MY Exports	0	250	301	0	200	186	0	0	170	1000 MT
TY Exports	0	301	301	0	200	186	0	0	170	1000 MT
Feed										
Consumption	0	0	0	0	0	0	0	0	0	1000 MT
FSI Consumption	0	500	500	0	500	490	0	0	490	1000 MT
Total Consumption	0	500	500	0	500	490	0	0	490	1000 MT
Ending Stocks	0	65	33	0	65	37	0	0	27	1000 MT
Total Distribution	0	815	834	0	765	713	0	0	687	1000 MT
Yield	0	1.346	1.346	0	1.327	1.327	0	0	1.25	MT/HA

Export Trade Matrix for Lentils

**Turkey
Lentils**

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.	1194	U.S.	
Others		Others	
Sri Lanka	37734		
Bangladesh	28445		
Sudan	19969		
Egypt	17127		
Iraq	16749		
United Kingdom	11588		
Israel	6415		
Saudi Arabia	4913		
Germany	4327		
United Arab Em.	3576		
Total for Others	150843		0
Others not Listed	34234		
Grand Total	186271		0

Import Trade Matrix for Lentils

**Turkey
Lentils**

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2007		2008
U.S.	1229	U.S.	
Others		Others	
Canada	18528		
Iraq	3457		
Syria	476		
Germany	NA		
Spain	NA		
Total for Others	22461		0
Others not Listed	7289		
Grand Total	30979		0

PSD Table for Chickpeas

Turkey Garbanzos										
	2006	Revised		2007	Estimate		2008	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2006	01/2006		01/2006	01/2006		01/2006	01/2006	MM/YYYY
Area Harvested	0	600	600	0	630	560	0	0	600	1000 HA
Beginning Stocks	0	15	15	0	35	32	0	65	23	1000 MT
Production	0	600	600	0	650	540	0	0	600	1000 MT
MY Imports	0	0	2	0	0	5	0	0	0	1000 MT
TY Imports	0	0	2	0	0	5	0	0	0	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	0	615	617	0	685	577	0	65	623	1000 MT
MY Exports	0	100	105	0	120	69	0	0	100	1000 MT
TY Exports	0	105	105	0	120	69	0	0	100	1000 MT
Feed Consumption	0	0	0	0	0	0	0	0	0	1000 MT
FSI Consumption	0	480	480	0	500	485	0	0	490	1000 MT
Total Consumption	0	480	480	0	500	485	0	0	490	1000 MT
Ending Stocks	0	35	32	0	65	23	0	0	33	1000 MT
Total Distribution	0	615	617	0	685	577	0	0	623	1000 MT
Yield	0	1	1	0	1.032	0.964	0	0	1	MT/HA

Export Trade Matrix for Chickpeas

Turkey
Garbanzos

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2007		2008
U.S.	1683	U.S.	
Others		Others	
Jordan	8674		
Italy	6075		
Saudi Arabia	6007		
Lebanon	4864		
Egypt	4221		
United Kingdom	3958		
Syria	3508		
Sri Lanka	2705		
Algeria	2483		
Germany	1638		
Total for Others	44133		0
Others not Listed	23371		
Grand Total	69187		0

Import Trade Matrix for Chick peas

Turkey
Garbanzos

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2007		2008
U.S.		U.S.	
Others		Others	
India	3249		
Mexico	NA		
Israel	NA		
Netherlands	NA		
Germany	NA		
Spain	NA		
Finland	NA		
Russia	NA		
Uzbekistan	NA		
Serbia	NA		
Total for Others	3249		0
Others not Listed	1929		
Grand Total	5178		0