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## Turkey

## Tomatoes and Products

## Annual Report

## 2008

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**Report Highlights:**

Fresh tomato production is predicted to continue increasing in MY 2008/09. Fresh tomato exports in MY 2007/08 increased significantly compared to the previous year. Russia continued to be a top export market for Turkish fresh tomatoes. However, a recent Russian import ban on Turkish fresh fruits and vegetables may reduce fresh tomato exports significantly in MY2008/09.

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Includes PSD Changes: No  
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Annual Report  
Ankara [TU1]  
[TU]

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## Executive Summary

Turkey's climate has supported the growth of its fruit and vegetable sector and led to its status as a major producer. As Turkey looks to gain membership in the European Union, fresh fruits and vegetables are among the commodities which will be most competitive in the European market.

Tomato production accounts for approximately 38 percent of all vegetable production in Turkey. Tomatoes can be grown throughout Turkey; tomatoes for fresh consumption are mainly grown in the Mediterranean Region, typically in greenhouses. Total tomato production increased slightly in MY 2007/08 from the previous year and reached 9,945,000 MT in MY 2007/08.

Fresh tomato exports increased 29 percent to 395,000 MT in MY 2007/08. Russia, Romania and Bulgaria continue to be the top export destinations for Turkish fresh tomatoes.

MY 2008/09 was predicted to be a very good marketing year for Turkish fresh tomato exports until the Russian Federation banned several fresh fruit and vegetable imports, including tomatoes, from Turkey on June 7, 2008. From January through April 2008 Turkey exported a record high level of fresh tomatoes to Russia, reaching \$120 million.

## Production

Thanks to its climate and geography, Turkey is one of the world's leading producers of fresh fruits and vegetables, ranking third globally in tomato production. Tomatoes account for approximately 38 percent of all vegetable production in Turkey. Approximately 20 percent of all tomato production is processed into products such as tomato paste, tomato juice, ketchup, tomato puree and chopped tomatoes. Tomato paste is the leading export among Turkey's processed fruit and vegetable sector.

Tomatoes can be grown throughout Turkey; tomatoes for fresh consumption are mainly grown in the Mediterranean Region, typically in greenhouses. Antalya is the top tomato producing province as about 17 percent of all tomatoes are grown there. Izmir, Canakkale and Mersin are also significant producers. Industrial tomatoes, however, are grown mainly in the provinces of Balikesir, Bursa, Manisa and Canakkale in the Aegean and Marmara regions.

Total tomato production increased slightly in MY 2007/08 from the previous year and is estimated at 9,945,000 MT. Current field and weather conditions indicate that fresh tomato production is going to increase further in MY 2008/09.

**Table- 1: Tomato Production and Trade**

Unit: metric tons			
	<b>2006</b>	<b>2007</b>	<b>2008</b>
Production for Fresh Mkt.	7,885,000	7,956,000	8,000,000
Production for Processing	1,970,000	1,989,000	2,200,000
Total Production	9,855,000	9,945,000	10,200,000
Fresh Tomato Exports	306,000	395,000	420,000
Consumption by Fresh Mkt.	7,580,000	7,561,000	7,580,000
Consumption by Processing	1,970,000	1,989,000	2,200,000

Tomato production is labor intensive and the bulk of commercial production occurs on small family farms. Most farms contract with processors who may provide seed and chemicals, as well as advance payments<sup>1</sup>. and more than 50 percent of the varieties that are grown are hybrids. Therefore, a wide range of varieties are grown in Turkey. The Ministry of Agriculture and Rural Affairs has approved approximately four hundred fresh tomato seed varieties and sixty industrial seed varieties. Sabrina, Dalmone, Gigante and Fantastic 144 are some of the leading fresh varieties and New Crimson, Delicious Red, Bonanza and Rio Grande are among the leading industrial varieties.

Planting is mainly done by hand and most farmers have their own nurseries. Seedlings are started around mid-March and transplanted after the frost risk passes. Most harvesting is still done manually and there could be up to three rounds of picking in the same field. Depending on the weather conditions, hand picking can extend the harvest until early October. The mechanized harvesting is still quite rare.

## Consumption

Traditionally, approximately 80 percent of total tomato production in Turkey is consumed fresh and the remainder is processed. Of the 20 percent of the crop that is processed, 85 percent is used to produce tomato paste, 10 percent is canned and the remainder is used to produce dried tomatoes and other products.

<sup>1</sup> Information from [www.amitom.org](http://www.amitom.org)

**Trade**

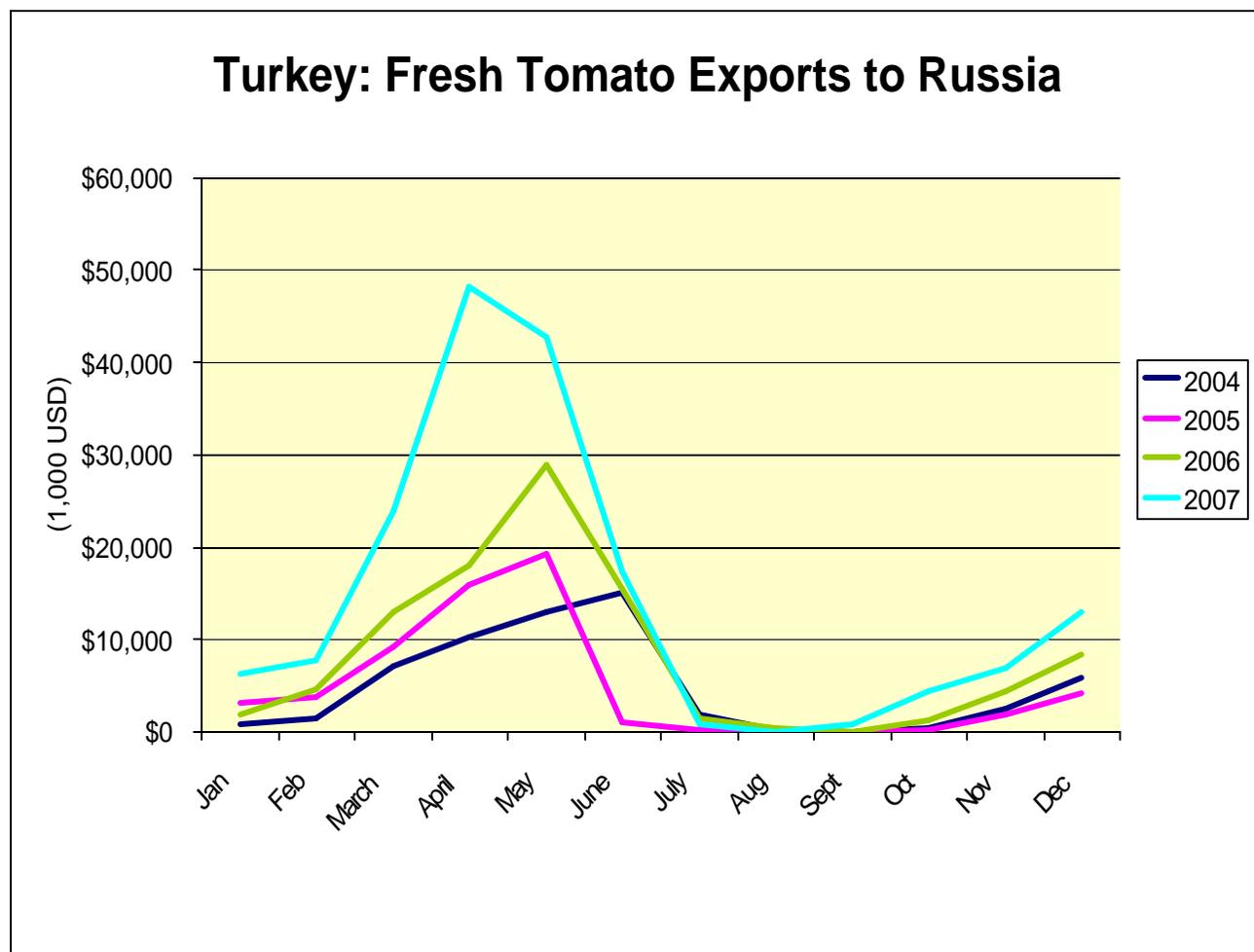
Fresh tomato exports increased 29 percent to 395,000 MT in MY 2007/08. Russia, Romania and Bulgaria continue to be the top export destinations for Turkish fresh tomatoes. Russia alone accounted for about 60 percent of exports. Traditionally March, April and May are the peak season for fresh tomato exports to Russia.

**Russian Import Ban**

Early in 2008, Turkish exporters were predicting a record 35 percent increase in fresh tomato exports for MY 2008/09. Tomato exports to Russia had set a record in the first four months of 2008 and reached \$120 million<sup>2</sup>. However, their hopes came to a standstill, as on June 7 Russia banned imports of certain Turkish fresh fruit and vegetable products, including fresh tomatoes. Russian officials stated that the ban was a result of finding continued high pesticide residues on Turkish products since the beginning of 2008. As a result of the ban exports now are expected to decrease about 20 percent in MY 2008/09.

Officials from the Turkish Ministry of Agriculture and Rural Affairs have invited their Russian counterparts to Turkey to discuss the problem. Some exporters, who have held protests in Turkey, claim that the ban is a political move meant to create a trade barrier.

**Table- 2: Turkey: Fresh Tomato Exports to Russia<sup>3</sup>**



<sup>2</sup> Source: Global Trade Atlas

<sup>3</sup> Source: Global Trade Atlas

Because Russia is the top destination for Turkish fresh tomatoes and summer is the peak season for fresh tomato production, the June ban is expected to greatly affect total tomato exports. Domestic retail fresh tomato prices have plunged from 2 YTL/kg (\$1.6) to 0.3 YTL/kg (25 cents) since the Russian ban.

This was not the first time Russian authorities had blocked imports from Turkey. In May 2005, Russia banned all Turkish fresh fruit and vegetable imports after Mediterranean fruit fly was found on fresh fruits. This ban was in effect for almost a month before it was resolved through the efforts of the Turkish Ministry of Agriculture and Rural Affairs (MARA). The issue was finally resolved when Russian and Turkish authorities signed a protocol in 2006. According to the protocol, plant health certificates issued from the General Directorate of Protection and Control would be required for all Turkish fresh fruit and vegetable exports to Russia. Before these certificates are issued, the products need to be tested for pesticide and chemical residues by accredited Turkish laboratories.

### **Stocks**

There are no official statistics on stocks for tomato and tomato products. Fresh tomatoes cannot be stored for long periods but with appropriate cooling systems they can be stored for a short time.

### **Policy**

According to the new Wholesalers Law, fresh tomatoes have to go through wholesale houses in the city where they are produced and where they are going to be sold. Because these additional steps to bring the product to retail stores add to costs and increase spoilage, retailers are disappointed with the law.

The Agricultural Bank of Turkey (Ziraat Bank) no longer provides subsidized loans to agricultural producers and the government does not support tomato prices or otherwise assist with tomato production. However, the Government of Turkey indirectly supports tomato paste exports by giving exporters US\$ 68 per ton in the form of a tax deduction. All production and domestic and international marketing is handled by the private sector.

### **Import policy**

In the Turkish 2008 import regime, the import tariff levels for fresh tomatoes and paste did not change. Fresh tomato and tomato paste imports are subject to a 48.6 and 135.9 percent import tariff, respectively.