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## Turkey

### Grain and Feed

### Annual

### 2007

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**Report Highlights:**

Turkey is projected to produce less grain in MY 2007 due to dryer than normal weather conditions. However, final cereal yields will depend on rains received in Central Anatolia in April and May. In MY 2006, TMO procured lower quantities of all grains except paddy rice. TMO did not procure any corn because of lower production and high market prices. TMO procured more rice because the government changed its import requirements because of the WTO case brought by the United States. TMO bought 95,000 MT of milling wheat and 235,000 MT of corn from the international markets in March 2007. In addition, the Turkish government distributed the EU quota of 200,000 MT of milling wheat to millers for imports. The pulse situation in MY 2007 is forecast as little changed from MY 2006.

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Includes PSD Changes: Yes  
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**Executive Summary**

Turkey is projected to produce less grain in MY 2007 due to dry weather conditions. Turkey has had less precipitation than normal since last November, and snow coverage was not sufficient in the major grain producing areas. However, the most significant factor for Turkish grain production is the precipitation level in April and May, especially in the Central Anatolia and Thrace regions. If these regions receive normal rains in the spring Turkey's grain production should be at normal levels. Otherwise, Turkish grain production is estimated to be significantly lower than normal.

The Turkish Grain Board (TMO) procured smaller quantities of grains in MY 2006 compared with the previous year due to lower production and high market prices. TMO procured a total of about 2.3 MMT of grains in MY 2006. Of this total, 1.45 MMT were wheat, including 233 TMT of durum and 1.22 MMT of milling wheat. The remainder was composed of about 725 TMT of barley and about 87 TMT of paddy rice. TMO paid about YTL 724 million (about \$509 million), including about YTL 489 million for wheat, about YTL 179 million for barley, and about YTL 54 million for paddy rice. TMO did not procure any corn in MY 2006. In MY 2005, 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 or price policy it intends to follow in MY 2007. However, higher procurement and/or premium prices are expected in MY 2007 as a favor to farmers because of the projected lower production and upcoming general parliamentary elections in November.

Corn planting area and production both are projected to increase significantly in MY 2007 because of high prices in MY 2006. In MY 2005, Turkey had record high corn production that caused very low market prices. Even Turkey exported corn for the first time. As a result, corn production declined in MY 2006, which caused significantly high market prices. Especially poultry producers suffered from these high prices since world market prices and import duties for corn were also very high (130 percent) and the Turkish government raised the duty for soybeans from zero to ten percent last year.

The Turkish government issued a decree on February 16 to allow imports of 400,000 MT of milling wheat and 300,000 MT of corn and to designate the Turkish Grain Board (TMO) as the importer of these products. TMO held two tenders in February and March 2007 and bought a total of 95,000 MT of milling wheat and 235,000 MT of corn. In addition to those imports, the Foreign Trade Undersecretariat (FTU) distributed the total EU wheat quota of 200,000 MT to the millers. TMO officials believe that these quantities of wheat and corn imports should be sufficient as there is sufficient wheat in the market until the new harvest begins in May and since feed wheat and barley may replace corn for feed, if needed. Turkey is not expected to import or export significant quantities of corn in MY 2007, due to the projections that production will be increased because of high market prices in MY 2006.

There was another Avian Influenza outbreak in Turkey in February 2007. Unlike the one that occurred a year ago, this outbreak was limited to only two provinces (Batman and Diyarbakir) and was restricted to backyard poultry thanks to effective measures taken by the Turkish government. The outbreak was far from commercial production areas and, as a result, domestic consumption of poultry and eggs was not affected. Only table egg exports to Iraq and Israel were stopped by the outbreak. Egg production has not yet been affected. However, it is projected that it may be reduced if these exports to Iraq and Israel do not restart soon. There has not been any new AI case reported since February 26, 2007, according to the official announcement made by the Ministry of Agriculture. The official quarantine period is three weeks from the last occurrence so, if there are no new cases, it is expected that the Ministry of Agriculture will report the situation to the OIE and remove the

quarantine measures. However, active surveillance will continue because Turkey is on the major migrating bird routes.

Turkey uses high import duties, seasonal bans, and quota systems to control grain imports to protect local farmers. In recent years, periodic decisions by the government to deny importers control certificates, or import licenses, was another tool used to protect local production. Although the government has provided control certificates for imports of paddy and milled rice since August 2006, in October it introduced a reference price system. Since February 2007, Turkish exporters have been able to resume importing wheat with zero duty against their flour and product exports. There are also seasonal bans on imports of pulses. Licenses to import pulses were distributed shortly before the New Year to protect local producers.

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. Neighboring countries also have the ability to sell grain in small 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 has been 130 percent for all countries. Duties for chickpeas and lentils have remained at 19.3 percent since that date. In 2007, import duties were announced as 34 percent for paddy rice, 36 percent for brown rice and 45 percent for milled rice, the same as announced earlier. After removing 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. 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. This decision has not been implemented since the notification to explain how the quotas will be distributed has not been issued yet.

Turkey began to impose a reference price system (minimum import price of USD 1,500) on all dry beans since February 2006. Turkey also started to impose 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 is to increase the domestic prices for dry beans and rice in order to protect the Turkish dry bean and rice sectors.

(As of March 15, 2007, USD 1.00 was YTL 1.41 compared to YTL 1.32 a year ago.)

**Production**

Precipitation was normal in most parts of the country in early autumn of 2006. Major grain producing regions, including Central Anatolia and Thrace, received normal rains during and after the planting season. Grain planting in these regions was completed in October. Vegetation was normal in these regions prior to the onset of winter weather conditions. Dry weather followed in November so the development of the early-planted crops has not been affected in these regions. Some areas in the Aegean, Southeastern Anatolia, and Cukurova Regions, however, had vegetation problems stemming from dry weather conditions since plantings were later. Precipitation was close to normal again in late January, with rains on the coastal areas and snow in the inland areas, especially in Southeastern Anatolia. Precipitation stopped again in most parts of Anatolia around mid February. Due to these dryer-than-normal climatic conditions, yields are expected to be lower in those areas (such as, parts of Cukurova, Aegean and Southeastern Anatolia Regions) where plantations were late.

However, it is too early to estimate the yield and production in major growing areas, especially in Central Anatolia and Thrace Regions, because the most important yield factor is the rain amount in these areas during April and May. If precipitation in these two months is normal or better, Turkey still should have about normal crop in MY 2007 because most of the grains are produced in these regions. On the other hand, Turkey may be significantly short in grain supply if Central Anatolia and Thrace do not receive sufficient rains in these months. The wheat harvest starts first in Cukurova late in May and continues in the Southeastern Anatolia and Aegean Regions and in Thrace through June. Harvest in Central Anatolia starts in late June or early July and in August in the Eastern Anatolia region. The barley harvest starts about two weeks prior to the wheat harvest in all regions.

The Turkish Grain Board (TMO) completed MY 2006 grain procurement and procured smaller quantities of all grains, except paddy rice, due to shorter domestic supply and market prices higher than TMO procurement prices. Procurement of all grains totaled about 2.3 MMT, compared to about 5.7 MMT in MY 2005 and about 3.5 MMT in 2004. Of this total, 1,223,000 MT were milling wheat, about 233,000 MT were durum wheat, about 725,000 MT were barley, about 6,000 MT were rye, about 2,000 MT were oats, and about 87,000 MT were paddy rice. TMO did not procure any corn in MY 2006 since the market prices were higher than the TMO procurement price even during the harvest.

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

**Wheat**

MY 2007 wheat production currently is forecast at 17 MMT, which is 500,000 MT lower than Post's revised MY 2006 production estimate. As always in Turkey, precipitation in April and May is the most significant factor determining cereal yields, so production projections may change.

In MY 2006, TMO procured nearly 1.5 MMT of wheat and paid YTL 489 million (USD \$344 million). This quantity is significantly lower than the amount TMO procured a year ago, mainly because of shorter supply. MY 2006 wheat quality was about normal, but lower than in MY 2005 due to dry weather and Sunni bug damage.

The MY 2005 wheat crop estimate was revised slightly upward (18.5 MMT) due to higher yields. The MY 2006 wheat production was revised slightly downward (17.5 MMT) due to lower yields because of hot weather in June.

### **Barley**

In MY 2007, barley production is projected at 7.3 MMT, slightly lower than it was estimated in MY 2006. Weather conditions for barley were pretty much the same as they were for wheat. Precipitation through May will affect final yields. Barley planted area was revised slightly upward in MY 2006 according to the public and industry sources. TMO procured slightly smaller quantities of barley in MY 2006, because of slightly lower supply. TMO procured about 725,000 MT of barley in MY 2006 and paid about YTL 179 million (USD \$126 million).

### **Corn**

Corn area and production are projected to increase significantly in MY 2007 because of high prices. Record high production in MY 2005 reduced domestic market prices for corn significantly. As a result, corn planting area and production were reduced in MY 2006. Consumption, on the other hand, bounced back to about normal levels because of the government's successful efforts to overcome the adverse effects of the Avian Influenza outbreak: poultry feed production was only five percent lower in CY 2006 than in CY 2005. The expectation of higher prices encouraged big producers, who can store their crop, to not sell corn. Having the same expectations, TMO did not buy any corn in MY 2006. As a result, domestic corn prices reached unexpectedly high levels, as high as YTL 450 (USD \$317) per MT, during the first few weeks following the New Year. The government assigned TMO to import corn after these high price increases, thus reduced the pressure on prices. Corn prices declined to about YTL 390 (USD \$275) per MT after the announcement. Tender results were discussed in details in the Trade and Trade Policy Section and the Gain Report TU7022.

### **Rice**

Turkey's rice production has increased significantly in recent years (especially in MY 2004 and in MY 2005) with government support for production and protectionist trade policies. Yields also increased significantly because of the use of recently-developed high yielding varieties, especially the Osmancik variety. However, planting area and production both are projected to decline in MY 2007 because of changes in import restriction and dry weather conditions. Area is projected to decline about ten percent and yields also about ten percent, leading to a twenty percent drop in production.

Turkey applied a restrictive import regime for rice during MY 2004 and MY 2005. Under this regime, an importer would only be issued a "control certificate," which acts as an import license, for paddy or milled rice if he bought domestic paddy from producers or paddy or milled rice from TMO. As a result of this policy, TMO did not have to procure large quantities of paddy rice from producers in recent years. TMO bought only about 12,000 MT and paid a total of YTL 7.7 million in MY 2005 with paddy procurement prices of YTL 760 per MT for Baldo, YTL 720 per MT for other long grain, YTL 650 per MT for medium grain, and YTL 590 per MT for short grain. These prices were lower than what TMO paid a year before when TMO paid YTL 864 per MT for Baldo, YTL 756 per MT for other long grain, YTL 685 per MT for other medium grain, and YTL 621 per MT for short grain in MY 2004.

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.

## Pulses

Chickpea area and production are projected to increase slightly in MY 2007 due to higher prices driven by higher domestic and international demand in MY 2006. MY 2007 projected area is 630,000 hectares and production is 650,000 MT, five to ten percent higher than they were in MY 2006. The limited availability of high quality of seeds, however, may restrict this increase.

On the other hand, lentil area and production are projected to decrease slightly due to dry weather last fall in Southeastern Anatolia where most red lentils are grown. Red lentils are grown in the Southeastern Anatolia Region and planted in the fall whereas green lentils are grown mostly in the Central Anatolia Region and planted in the spring. Recent rains were good in the Southeastern Anatolia Region, which should improve the yields for red lentils. However, April rains are the most significant factor affecting these yields. Even though it is very difficult to project total production at this point, Post estimates that lentil planting area and production will decrease slightly (500,000 hectares and 620,000 MT) in MY 2007.

GUNEYDOGUBIRLIK (Southwestern Association), which used to procure large quantities of red lentils to protect farmers, procured only minimal quantities of lentils (about 600 MT) in MY 2006 because of its financial instability. In the past, the Turkish government used to assist procurement by all of the State Economic Enterprises (SEEs), including GUNEYDOGUBIRLIK. However, the government stopped supporting SEEs because of tight budget policies in recent years. SEEs are now borrowing from commercial banks to pay for their procurement.

## Consumption

### Wheat

MY 2007 food wheat consumption is projected to increase slightly parallel to the increase in population, which is currently estimated at about one percent. However, consumption for feed wheat is projected to be at similar levels to the MY 2006 levels. Thus, MY 2007 total domestic consumption is projected to be only slightly higher than estimated for MY 2006.

TMO announced prices for selling wheat to millers at the beginning of the harvest and has not changed them, although it stopped selling (Table 1).

**Table 1: TMO 2006 Wheat Selling Prices (Plus VAT) Through February, 2007**

Type of Wheat	YTL / MT
<b>Durum Wheat</b>	
Anatolian Durum No: 1	425
Anatolian Durum No: 2	410
Low Quality Durum	350
<b>Milling Wheat</b>	
Anatolian Hard Red or White No: 1	415
Anatolian Hard Red or White No: 2	400
Anatolian Hard Red or White No: 3	390
Semi Hard Red or White No: 1	400
Semi Hard Red or White No: 2	385
Semi Hard Red or White No: 3	375
Other Milling (Red or White) No: 1	365
Feed Wheat	320

Source: TMO Website – [www.tmo.gov.tr](http://www.tmo.gov.tr)

Currently USD 1.00 is around YTL 1.41 compared to YTL 1.32 a year ago.

TMO stopped selling wheat directly to millers at previously-announced prices in early February 2007. Instead, TMO announced that it would sell wheat either at the commodity exchanges or through tenders because some traders bought large quantities of wheat from TMO. These sales and an expectation of smaller than normal crop in MY 2007 disturbed the market. Wheat prices rose about ten percent in the domestic market right after TMO stopped sales. The Director General of TMO made several announcements about the availability of wheat in Turkey and also indicated that, if necessary, TMO will enter the market and take necessary steps, including imports. These announcements, the government's assignment of TMO to import wheat, and the distribution of wheat quotas for 200,000 MT to millers reduced wheat market prices. All of these imports must be completed before May 31, 2007.

The prices at the major grain commodity exchanges, which may be considered market prices, were nearly ten percent higher than TMO's earlier prices, as indicated in Tables 2 and 3.

**Table 2: Wheat Prices at the Konya Commodity Exchange on February 26, 2007**

Type of Wheat	Average Price (YTL/MT)	Quantity Sold (MT)
Durum Wheat	429.3	163
Hard Red Milling Wheat	450.9	184
Semi Hard White Milling Wheat	441.5	522
Feed Wheat	340.0	987

Source: [www.ktb.org.tr](http://www.ktb.org.tr)

**Table 3: Wheat Prices at the Polatli Commodity Exchange on February 26, 2007**

Type of Wheat	Average Price (YTL/MT)	Quantity Sold (MT)
Hard Red Milling Wheat	463.6	597
Other Milling Wheat	428.9	82
Feed Wheat	421.3	204

Source: [www.polatliborsa.org.tr](http://www.polatliborsa.org.tr)

The Polatli Commodity Exchange started publishing average monthly prices for wheat. Average monthly prices for Anatolian hard red wheat at the Polatli Commodity Exchange for the last five years are provided in the following table (Table 4) to show seasonal price variations.

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

MONTHS	2002 YKr. / Kg.	2003 YKr. / Kg.	2004 YKr. / Kg.	2005 YKr. / Kg.	2006 YKr. / Kg.
January	25.49	38.04	42.67	38.60	40.00
February	26.13	37.93	42.38	38.00	41.96
March	27.48	38.78	41.53	36.70	42.15
April	29.52	39.72	41.79	37.20	43.76
May	28.41	38.61	42.49	37.00	43.38
June	26.35	36.90	42.44	36.80	42.24
July	25.76	37.98	36.14	32.60	37.55
August	30.66	37.28	36.46	32.60	39.18
September	32.19	37.57	36.91	34.80	39.78
October	33.69	37.94	38.71	36.70	42.51
November	33.99	40.59	38.67	36.40	--
December	37.15	41.68	38.91	37.00	--

Source: [www.polatliborsa.org.tr](http://www.polatliborsa.org.tr)

### Barley

Barley is an important feed ingredient, especially for ruminants, in Turkey. From time to time barley may also be used to some extent to replace corn when corn is not available or very expensive. Barley consumption in MY 2007 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 for making their own feed mix. Malting barley consumption, which is estimated at 900,000 MT, has been rather steady in recent years.

TMO announced the barley selling prices in the beginning of the harvest and has not changed them (Table 5).

**Table 5: TMO Barley Selling Prices (Plus VAT)**

Type of Barley	YTL / Kg.
Malting	0.295
White No: 1	0.29
White No: 2	0.28
Black and Blue No: 1	0.28
Black and Blue No: 2	0.27
Low quality of White or B&B	0.26

Source: TMO Website – [www.tmo.gov.tr](http://www.tmo.gov.tr)

Similar to what was done with wheat, TMO stopped selling barley directly to millers at previously announced prices in early February. Instead, TMO announced that it would sell barley either at the commodity exchanges or through tenders because some traders bought large quantities of barley from TMO, which disrupted the market. Barley prices rose slightly in the domestic market right after TMO stopped sales.

Compared to TMO prices, 439 MT of feed barley was sold at an average price of YTL 359.2 per MT at the Konya Commodity Exchange and 65 MT at YTL 353.9 at the Polatli Commodity Exchange on February 26, 2007.

Average monthly barley prices, which were provided in Table 6 below, shows the seasonal variations of the barley prices.

**Table 6: AVERAGE MONTHLY BARLEY PRICES AT THE POLATLI COMMODITY EXCHANGE Yeni Kurus/Kilogram (100 Ykr=1 YTL)**

Month	2002 YKr/Kg	2003 YKr/Kg	2004 YKr/Kg	2005 YKr/Kg	2006 YKr/Kg
January	18.12	20.96	31.91	31.16	25.60
February	17.77	20.65	32.55	30.27	26.30
March	18.36	21.75	35.02	27.76	24.80
April	18.43	23.19	39.33	26.75	24.78
May	17.74	24.15	41.60	25.84	24.60
June	14.66	24.90	31.44	22.89	24.60
July	14.53	25.39	29.22	21.77	24.75
August	16.74	24.28	29.37	22.44	25.86
September	17.63	24.46	29.03	23.24	28.06
October	17.85	25.85	29.74	24.70	29.74
November	18.73	30.40	30.59	25.60	--
December	21.11	32.08	31.95	25.30	--

Source: [www.polatliborsa.org.tr](http://www.polatliborsa.org.tr)

### Corn

Corn consumption is projected to increase slightly in MY 2007 because of availability of larger supply. Corn consumption is estimated to stay stable in MY 2006 despite an Avian Influenza outbreak in Southeastern Anatolia in February 2007. Unlike the 2006 outbreak, which caused demand for poultry products and consequently feed to plummet, the 2007 outbreak had minimal effect on commercial poultry consumption and feed use. A total of 3,557 MT of corn was sold at an average price of YTL 385 per MT at the Adana Commodity exchange on February 23, 2007.

### Rice

Turkish people, especially rural inhabitants, consume substantial amounts of bulgur (cracked wheat) and consequently Turkish rice consumption faces stiff competition from bulgur and pasta. Thus, bulgur and pasta prices affect rice consumption significantly. Turkey's per capita annual rice consumption is estimated around 8 kilograms. Government policies aimed at

restricting imports and increasing prices, reduced rice consumption slightly since pasta and bulgur became relatively cheaper. However, it is projected that rice consumption will increase because cheaper rice will be available to consumers due to changes in import restrictions. Most of the rice is consumed in big cities and western provinces. Packaged as opposed to bulk rice sales also have increased in recent years.

TMO has not changed its rice selling prices since MY 2005. TMO is currently selling Baldo rice at YTL 1.65 per kilogram and other long grain rice, primarily Osmancik, at YTL 1.50 per kilogram. These prices are slightly lower in 50-kilogram bags, such as, YTL 1.63 per kilogram of Baldo and YTL 1.47 per kilogram of other long grain. In retail outlets in Ankara, Baldo (Gonen) rice is currently sold around YTL 3.50, Osmancik is sold about YTL 3.00 per kilogram, Calrose is sold around YTL 2.50 per kilogram, and Egyptian medium grain rice is sold around YTL 2.25 per kilogram.

### **Pulses**

Pulse consumption increased significantly in MY 2005 because of the Avian Influenza outbreak, which reduced poultry meat and egg consumption. As a result, per capita annual consumption estimates for lentils and chickpeas both were increased to about seven kilograms. Chickpea consumption fell in MY 2006 because of high domestic prices. It is projected that domestic consumption will bounce back in MY 2007 because of projected increase in production. Lentil consumption in MY 2006 is estimated to stay at about the same levels as in MY 2005; the forecast for MY 2007 is also at about the same levels.

Green lentils are sold at about YTL 2.50/kg, red lentils at YTL 1.75-2.00/kg and chickpeas at YTL 3.00-3.50/kg, depending on the quality, in the retail markets in Ankara.

### **Trade**

#### **Wheat**

Turkey is projected to import larger quantities of wheat in MY 2007 due to forecast lower production. The import estimate for MY 2006 was revised upward because production estimates were revised downward.

The government has not issued any control certificates for wheat imports during the last several years. Wheat imports are possible only within quotas, primarily from the EU, especially Germany. The government stopped issuing control certificates for wheat for flour and product exporters since September 2004 in order to allow TMO to reduce its stocks; however, it started allowing flour exporters to import wheat to mill for export purposes since almost all TMO stocks were eliminated.

After market disturbances, wheat prices rose significantly around the New Year. Pointing at the domestic wheat shortage, millers requested permission from government officials to import wheat for purposes other than re-export. TMO, the government authorized to import 300,000 MT of wheat, bought only 95,000 MT in two tenders held in February and March 2007, due to high world prices. The Foreign Trade Undersecretariat also distributed the EU quota of 200,000 MT for milling wheat with zero duty to millers late in February. In MY 2006, the quota of 100,000 MT for durum wheat was not distributed and may not be distributed since all of the imported wheat must arrive in country by the end of May.

Turkey exported record quantities of wheat flour (about 2 MMT) and became the world's largest flour exporter in MY2005. Turkey is still one of the leading exporters even though flour exports declined in MY 2006 primarily because of reduced imports by Iraq.

**Table 7: Export Trade Matrix for Wheat Flour**

Time Period	June – May	Units:	Metric Tons
Exports for:	2005		2006
U.S.	15	U.S.	8
Others		Others	
Iraq	1148046	Iraq	518966
Libya	228853	Libya	133,494
Sri Lanka	154473	Israel	36757
Georgia	57222	Indonesia	29226
Pakistan	50000	Azerbaijan	25828
Indonesia	49296	Georgia	12545
Eritrea	46546	Madagascar	10791
Israel	31144	Gambia	7105
Azerbaijan	26032	Sri Lanka	5787
Albania	22272	Northern Cyprus	4550
Total for Others	1813884		785049
Others not Listed	166155		454433
Grand Total	1980054		1239490

Source: Turkish Statistical Corporation (TUIK)

Turkey is projected to export similar or slightly larger quantities of wheat flour in 2007 compared to the quantities exported in MY 2006. Turkey also increased its pasta exports significantly in recent years. Turkey's pasta exports in recent years are provided in Table 8 as follows:

**Table 8: 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 (Est)	193,205

Source: [www.makarna.org.tr](http://www.makarna.org.tr)

The GOT 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. There are no other support programs for exports of any other cereals, cereal products, or pulses.

The import duties are 100 percent for durum wheat and 130 percent for milling wheat since August 31, 2005. However, TMO has been authorized to import up to 400,000 MT of wheat with zero duty. In February 2007 TMO announced a tender and bought 80,000 MT of milling

wheat with an average price of USD 212.22 per MT. TMO announced another tender for March 14, 2007, but bought only 15,000 MT of milling wheat with an average price of USD 218.76 per MT.

### **Barley**

Turkey is not expected to export any barley in MY 2007 because of the projected decrease in production. TMO sold a total of 125,000 MT of feed barley in CY 2006. Turkey may import small quantities of malting barley. The duty on barley imports is 100 percent.

### **Corn**

Turkey is not projected to import or export significant quantities of corn in MY 2007. It is expected that high prices in MY 2006 will encourage farmers to grow more corn in MY 2007. The corn import duty currently is 130 percent for all countries.

Feed millers and poultry producers met with the Minister of Agriculture and high Ministerial officials to complain about the corn shortage and to ask the government to permit imports. As a result, early in 2007 the Council of Ministers produced a decree to assign TMO to import 400,000 MT of corn with zero duty. On the other hand, corn producers have been complaining about the import decision and indicating that there are about a million tons of corn in stocks in Turkey, enough to cover most needs. Farm groups accused poultry producers of stockpiling large quantities to drive up market prices to force a situation where millers would be permitted to start importing themselves. TMO announced two tenders to buy corn in late February and mid March. TMO did not buy any corn from the first tender and bought a total of 235,000 MT from the second tender with average FOB prices of around USD 163 per MT and C+F prices of USD 225 per MT.

### **Rice**

It is very difficult to project at this point how much paddy and milled rice Turkey will import in MY 2007 because of changing government production and import policies. Turkey is forecast to import around 250,000 MT of rice (total of paddy and milled rice in milled terms), which is similar to the quantity estimated for MY 2006 now. Turkey's rice imports in MY 2006 were revised slightly downward according to the industry sources.

Some importers were able to receive control certificate since April 1, 2006 for paddy and 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 zero duty. Duty rates are 34 percent for paddy, 36 percent for brown, and 45 percent for milled rice imports currently. 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. This decision has not been implemented pending announcement of how the quotas will be allocated.

### **Pulses**

Turkey exported about the same quantities of chickpeas in MY 2006 as in MY 2005. On the other hand, Turkey imported smaller quantities, but exported larger quantities of lentils due to increased supply. Turkey is projected to import about the same quantities and export smaller quantities of lentils and export larger quantities of chickpeas parallel to projected changes in supplies in MY 2007. Turkey mostly exports red lentils and imports green lentils. The government does not issue import licenses for pulses during the harvest. Instead, it

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. The goal of this system is to increase the domestic prices for dry beans and to protect the Turkish dry bean sector.

### **Stocks**

Official stocks data are not available. PSD stock data were derived according to the information received from industry and trade sources. TMO had about 500,000 MT of wheat and 400,000 MT of barley in stocks in February. TMO had about 87,000 MT of paddy rice, but no corn in its stocks as of late February.

### **Policy**

#### **Production Policy**

Turkey has been implementing economic reforms, most of which were initiated by the IMF after the 2001 economic crisis, in order to reduce the budget deficit. As a part of these reforms, the GOT eliminated most price supports and export subsidies. Instead, direct payment and premium support systems were implemented. One of the primary aims of applying direct payment system was to improve the farmers 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 is 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, in MY 2005, TMO bought the largest quantities it has ever bought in recent years due to larger supply. The amount of premium in MY 2005 was YTL 30 per MT of wheat, corn and paddy rice and YTL 20 per MT of barley, rye, and oats. In MY 2006, TMO procured lesser amounts because of declining production and 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. It is not yet known what the grain procurement policy will be and whether or not a new premium system will be announced in MY 2007. However, the announcements of these premiums were late and payments of these premiums were also slow. The government has not paid all of its debts to producers for MY 2006 premium payments.

The GOT adopted a law to organize a licensed warehousing system to decrease TMO involvement with procurement. Most of the related regulations were also published in the Official Gazette. However, the system is still far from becoming effective since the industry does not believe that the government will be able to refrain from interfering with grain procurement. The government has also 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.

### **Marketing**

TMO procured smaller quantities of grains in MY 2006 than in MY 2005 and did not even procure any corn since supply was short and market prices were higher than the TMO procurement prices. TMO paid a total of about YTL 724 million for MY 2006 grain procurement.

Early in 2007 TMO was authorized by the government to import wheat and corn to regulate the market needs and prices. TMO announced two tenders to import 200,000 MT of wheat

and 300,000 MT of corn in February and March. TMO bought total of 95,000 MT of milling wheat and 235,000 MT of corn from these two tenders. TMO had announced a sale tender for export in November 2006 and sold a total of 125,000 MT of feed barley.

Even though it may be considered self-sufficient in wheat, Turkey will be an importer in the medium term because of large flour exports and the needs for high quality wheat. Turkey was the world's top flour exporter in 2005. Exports in 2006 have declined due to reduced imports by Iraq. However, Turkey is expected to remain an important flour exporter because of its very large milling capacity, which is estimated around 30 MMT compared to the needs of less than 15 MMT, and its location. Pasta producers have also increased their exports significantly in recent years, to Iraq, the Caucasus and Central Asia.

Turkey used to be a net corn importer. Turkey has been producing more corn in recent years because of shifts from cotton and sugar beets and increased government payments. 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 significant quantities during the next few years because it is projected that Turkey can grow most of its needs domestically.

Turkey will also be rice importer in the medium term because of high cost of domestic production and availability of cheaper rice in the world market. Turkey is not expected to export or import significant quantities of barley, other than some for malting, during the next few years either.

The United States is well positioned to meet the growing demand for constant quality and value. U.S. Wheat Associates, U.S. Grains Council, and U.S. Rice Federation have done a good job creating awareness of the quality and value of U.S. grains. There is stiff competition, however, from other suppliers with respect to both quality and price. 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										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		06/2005	06/2005		06/2006	06/2006		06/2007	06/2007	MM/YYYY
Area Harvested	8600	8600	8600	8600	8600	8600	0	0	8600	1000 HA
Beginning Stocks	1795	2040	1795	596	740	1275	496	840	1125	1000 MT
Product.	18000	18000	18500	18000	19000	17500	0	0	17000	1000 MT
MY Imports	74	100	50	700	100	1000	0	0	1500	1000 MT
TY Imports	64	100	64	700	100	1000	0	0	1500	1000 MT
TY Imports from U.S.	48	0	2	0	0	0	0	0	0	1000 MT
Total Supply	19869	20140	20345	19296	19840	19775	496	840	19625	1000 MT
MY Exports	3173	3000	2970	2000	2500	2000	0	0	2000	1000 MT
TY Exports	2900	3000	3080	2000	2500	2000	0	0	2000	1000 MT
Feed Consumption	400	500	400	800	500	800	0	0	800	1000 MT
FSI Consumption	15700	15900	15700	16000	16000	15850	0	0	16000	1000 MT
Total Consumption	16100	16400	16100	16800	16500	16650	0	0	16800	1000 MT
Ending Stocks	596	740	1275	496	840	1125	0	0	825	1000 MT
Total Distribution	19869	20140	20345	19296	19840	19775	0	0	19625	1000 MT
Yield	2.09302	2.093023	2.151163	2.093023	2.209302	2.034884	0	0	1.976744	(MT/HA)

## Export Trade Matrix for Wheat

Turkey  
Wheat

Time Period	June - May	Units:	Metric Tons
Exports for:	2005		2006
U.S.	5	U.S.	9
Others		Others	
Italy	134446	Germany	119
Libya	63100		
Bangladesh	63000		
Algeria	42920		
Sudan	27500		
Yemen	26250		
Egypt	19599		
Portugal	10750		
Tunisia	10500		
Israel	10500		
Total for Others	408565		119
Others not Listed	20926		
Grand Total	429496		128

## Import Trade Matrix for Wheat

Turkey  
Wheat

Time Period	June - May	Units:	Metric Tons
Imports for:	2005		2006
U.S.	20351	U.S.	
Others		Others	
Russia	13937	Kazakhstan	116091
Kazakhstan	12883	Russia	47777
Northern Cyprus	2095		
Italy	458		
Israel	42		
Croatia	40		
Bulgaria	30		
France	20		
Ukraine	3		
Mexico	1		
Total for Others	29509		163868
Others not Listed			76006
Grand Total	49860		239874

## PSD Table for Barley

Turkey Barley										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		01/2005	01/2005		01/2005	01/2006		01/2005	01/2007	MM/YYYY
Area Harvested	3600	3600	3600	3500	3500	3600	0	0	3600	1000 HA
Beginning Stocks	890	860	890	724	760	708	599	760	683	1000 MT
Product.	7600	7600	7600	7200	7600	7500	0	0	7300	1000 MT
MY Imports	75	0	58	25	0	25	0	0	0	1000 MT
TY Imports	100	0	52	25	0	25	0	0	0	1000 MT
TY Imports from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	8565	8460	8548	7949	8360	8233	599	760	7983	1000 MT
MY Exports	541	400	540	250	200	250	0	0	0	1000 MT
TY Exports	550	400	289	250	200	250	0	0	0	1000 MT
Feed Consumption	6400	6400	6400	6200	6500	6400	0	0	6400	1000 MT
FSI Cons.	900	900	900	900	900	900	0	0	900	1000 MT
Total Consumption	7300	7300	7300	7100	7400	7300	0	0	7300	1000 MT
Ending Stocks	724	760	708	599	760	683	0	0	683	1000 MT
Total Distribution	8565	8460	8548	7949	8360	8233	0	0	7983	1000 MT
Yield	2.11111	2.111111	2.111111	2.057143	2.171429	2.083333	0	0	2.027778	(MT/HA)

## Export Trade Matrix for Barley

Turkey  
Barley

Time Period	June – May	Units:	Metric Tons
Exports for:	2005		2006
U.S.		U.S.	
Others		Others	
Syria	323629		
Saudi Arabia	155000		
Northern Cyprus	29750		
Morocco	23204		
Libya	5450		
Albania	100		
Total for Others	537133		0
Others not Listed	3006		125000
Grand Total	540139		125000

## Import Trade Matrix for Barley

Turkey  
Barley

Time Period	June – May	Units:	Metric Tons
Imports for:	2005		2006
U.S.		U.S.	
Others		Others	
Sweden	20000		
Denmark	19500		
France	18614		
Total for Others	58114		0
Others not Listed			
Grand Total	58114		0

## PSD Table for Corn

Turkey Corn										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		09/2005	09/2005		09/2006	09/2006		09/2007	09/2007	MM/YYYY
Area Harvested	800	800	800	650	650	650	0	0	800	1000 HA
Beginning Stocks	431	431	431	572	506	398	372	306	398	1000 MT
Production	3700	3700	3700	3000	3000	3000	0	0	3700	1000 MT
MY Imports	67	50	67	500	500	500	0	0	0	1000 MT
TY Imports	61	50	218	500	500	500	0	0	0	1000 MT
TY Imp. from U.S.	37	37	15	0	0	0	0	0	0	1000 MT
Total Supply	4198	4181	4198	4072	4006	3898	372	306	4098	1000 MT
MY Exports	126	275	300	0	0	0	0	0	0	1000 MT
TY Exports	126	275	128	0	0	0	0	0	0	1000 MT
Feed Cons.	2600	2500	2600	2700	2700	2600	0	0	2700	1000 MT
FSI Cons.	900	900	900	1000	1000	900	0	0	900	1000 MT
Total Cons.	3500	3400	3500	3700	3700	3500	0	0	3600	1000 MT
Ending Stocks	572	506	398	372	306	398	0	0	498	1000 MT
Total Distribution	4198	4181	4198	4072	4006	3898	0	0	4098	1000 MT
Yield	4.625	4.625	4.625	4.615385	4.615385	4.615385	0	0	4.625	(MT/HA)

## Export Trade Matrix for Corn

Turkey  
Corn

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2005		2006
U.S.	1	U.S.	
Others		Others	
Syria	78713	Italy	290
Israel	37176	Germany	59
Northern Cyprus	5680		
Italy	1735		
France	924		
Spain	907		
Pakistan	640		
Germany	240		
Greece	109		
Netherlands	70		
Total for Others	126194		349
Others not Listed	1386		180316
Grand Total	127581		180665

## Import Trade Matrix for Corn

Turkey  
Corn

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2005		2006
U.S.	15030	U.S.	
Others		Others	
Romania	78214	Argentina	8748
Ukraine	41755	France	36
Argentina	35013		
Hungary	32043		
Moldova	7836		
Bulgaria	6438		
Kazakhstan	431		
Spain	399		
Italy	312		
France	209		
Total for Others	202650		8784
Others not Listed	379		21795
Grand Total	218059		30579

## PSD Table for Rice

Turkey Rice, Milled										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		09/2005	09/2005		09/2006	09/2006		09/2007	09/2007	MM/YYYY
Area Harvested	90	90	90	95	90	95	0	0	85	1000 HA
Beginning Stocks	171	95	171	161	95	160	291	85	235	1000 MT
Milled Production	360	360	360	405	360	405	0	0	330	1000 MT
Rough Production	600	600	600	675	600	675	0	0	550	1000 MT
Milling Rate (.9999)	6000	6000	6000	6000	6000	6000	0	0	6000	1000 MT
MY Imports	200	200	200	300	200	250	0	0	250	1000 MT
TY Imports	200	200	267	300	200	250	0	0	250	1000 MT
TY Imp. from U.S.	0	75	15	0	50	0	0	0	0	1000 MT
Total Supply	731	655	731	866	655	815	291	85	815	1000 MT
MY Exports	0	0	1	0	0	0	0	0	0	1000 MT
TY Exports	0	0	0	0	0	0	0	0	0	1000 MT
Total Cons.	570	560	570	575	570	580	0	0	590	1000 MT
Ending Stocks	161	95	160	291	85	235	0	0	225	1000 MT
Total Distribution	731	655	731	866	655	815	0	0	815	1000 MT
Yield (Rough)	6.66667	6.666667	6.666667	7.105263	6.666667	7.105263	0	0	6.470588	(MT/HA)

## Export Trade Matrix for Rice

Turkey  
Rice, Milled

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2005		2006
U.S.	98	U.S.	
Others		Others	
Northern Cyprus	149	Iraq	25
Iraq	89	Lebanon	17
Pakistan	72		
United Kingdom	70		
Afghanistan	40		
Kazakhstan	27		
Russia	24		
Germany	22		
France	19		
Belgium	15		
Total for Others	527		42
Others not Listed	85		5602
Grand Total	710		5644

## Import Trade Matrix for Rice

Turkey  
Rice, Milled

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2005		2006
U.S.	64110	U.S.	54755
Others		Others	
Egypt	147368	Egypt	86217
Italy	32308	Italy	7037
Vietnam	6342	Vietnam	1010
China	3880	Uruguay	504
Macedonia	2793	Macedonia	292
Russia	2042		
Bulgaria	1257		
Thailand	830		
Uruguay	506		
Pakistan	134		
Total for Others	197460		95060
Others not Listed	364		80794
Grand Total	261934		230609

## PSD Table for Lentils

Turkey Lentils										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		01/2005	01/2005		01/2005	01/2006		01/2005	01/2007	MM/YYYY
Area Harvested	0	450	460	0	480	520	0	0	490	1000 HA
Beginning Stocks	0	20	20	0	25	65	0	50	65	1000 MT
Production	0	560	600	0	600	700	0	0	650	1000 MT
MY Imports	0	65	100	0	50	50	0	0	50	1000 MT
TY Imports	0	50	64	0	50	53	0	0	50	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	0	645	720	0	675	815	0	50	765	1000 MT
MY Exports	0	120	155	0	150	250	0	0	200	1000 MT
TY Exports	0	120	113	0	150	301	0	0	200	1000 MT
Feed Cons.	0	0	0	0	0	0	0	0	0	1000 MT
FSI Cons.	0	500	500	0	475	500	0	0	500	1000 MT
Total Cons.	0	500	500	0	475	500	0	0	500	1000 MT
Ending Stocks	0	25	65	0	50	65	0	0	65	1000 MT
Total Distribution	0	645	720	0	675	815	0	0	765	1000 MT
Yield	0	1.244444	1.304348	0	1.25	1.346154	0	0	1.326531	(MT/HA)

**Export Trade Matrix for Lentils****Turkey  
Lentils**

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2005		2006
U.S.	726	U.S.	1556
Others		Others	
Iraq	52663	Iraq	89528
Sudan	17612	Bangladesh	38442
Egypt	12418	Sudan	26281
United Kingdom	7471	Egypt	25327
Sri Lanka	5841	Sri Lanka	21270
Germany	4322	Saudi Arabia	12939
Israel	3331	United Kingdom	9186
Saudi Arabia	2455	Syria	8128
Italy	1714	Israel	7346
Eritrea	1309	Germany	5649
Total for Others	109136		244096
Others not Listed	8559		54980
Grand Total	118421		300632

**Import Trade Matrix for Lentils****Turkey  
Lentils**

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2005		2006
U.S.	119	U.S.	156
Others		Others	
Canada	43793	Canada	51381
Syria	13990	Syria	1368
Iraq	4345		
Ethiopia	904		
India	579		
Sri Lanka	129		
Russia	123		
Italy	94		
Spain	81		
Argentina	69		
Total for Others	64107		52749
Others not Listed	55		16322
Grand Total	64281		69227

## PSD Table for Chickpeas

Turkey Garbanzos										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
MY Begin		01/2005	01/2005		01/2005	01/2006		01/2005	01/2007	MM/YYYY
Area Harvested	0	600	600	0	630	600	0	0	630	1000 HA
Beginning Stocks	0	45	45	0	30	15	0	40	35	1000 MT
Production	0	610	570	0	640	600	0	0	650	1000 MT
MY Imports	0	0	0	0	0	0	0	0	0	1000 MT
TY Imports	0	0	0	0	0	0	0	0	0	1000 MT
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0	1000 MT
Total Supply	0	655	615	0	670	615	0	40	685	1000 MT
MY Exports	0	125	100	0	140	100	0	0	120	1000 MT
TY Exports	0	125	124	0	140	105	0	0	120	1000 MT
Feed Consumption	0	0	0	0	0	0	0	0	0	1000 MT
FSI Consumption	0	500	500	0	490	480	0	0	500	1000 MT
Total Consumption	0	500	500	0	490	480	0	0	500	1000 MT
Ending Stocks	0	30	15	0	40	35	0	0	65	1000 MT
Total Distribution	0	655	615	0	670	615	0	0	685	1000 MT
Yield	0	1.016667	0.95	0	1.015873	1	0	0	1.031746	(MT/HA)

## Export Trade Matrix for Chickpeas

Turkey  
Garbanzos

Time Period	Jan. – Dec.	Units:	Metric Tons
Exports for:	2005		2006
U.S.	1569	U.S.	566
Others		Others	
India	16071	Saudi Arabia	11653
Saudi Arabia	12443	Jordan	9305
Italy	11190	Egypt	7801
Jordan	8923	Sri Lanka	7446
Sri Lanka	8262	Tunisia	6617
Spain	8021	Pakistan	5975
Algeria	6759	Italy	5950
Israel	5320	Lebanon	5498
United Kingdom	5169	United Kingdom	5000
Portugal	4610	Algeria	3285
Total for Others	86768		68530
Others not Listed	35256		35565
Grand Total	123593		104661