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Report Highlights:

In contrast to the production surplus in MY 2023/24, total citrus production is expected to decrease 36 percent in MY 2024/25 to around 5 million metric tons (MMT) due to excessive heat during the blooming period and drought conditions during the harvest period. Due to projected decreased production, it is expected that citrus prices at supermarkets will increase. According to Turkish citrus exporters, exports in MY 2024/25 will be lower than the previous season, however they expect higher revenue due to lower production in competitor countries. On the other hands, orange exports in MY 2024/25 are expected to stagnate at 260,000 MT despite low yields and increasing production costs, along with high foreign demand. Traders note that their export capabilities and profit margins continue to decrease due to unstable exchange rates, high domestic inflation, and rising production.

Background

In contrast to the production surplus in MY 2023/24, total citrus production is expected to decrease 36 percent in MY 2024/25 to around 5 million metric tons (MMT) due to excessive heat during the blooming period and drought conditions during the harvest period. These weather conditions increased the prevalence of harmful pests (especially the Mediterranean fruit fly) despite the Turkish Ministry of Agriculture and Forestry's (MinAF) mitigation efforts. Last year's high production and the subsequent decision by many farmers to leave fruit us harvested on the trees also negatively impacted this year's production. In MY 2023/24 citrus production in Türkiye was realized at 7.8 MMT, 90 percent more than the previous year.

Turkish citrus producers are concerned about fruit quality this season and continue to struggle with high input costs and low farmgate prices. Additionally, citrus has been significantly impacted by the effects of climate change in Türkiye. Due to projected decreased production, it is expected that citrus prices at supermarkets will increase. According to contacts, consumption per capita is between 28-31 kg, and is trending down due to recently mild winters.

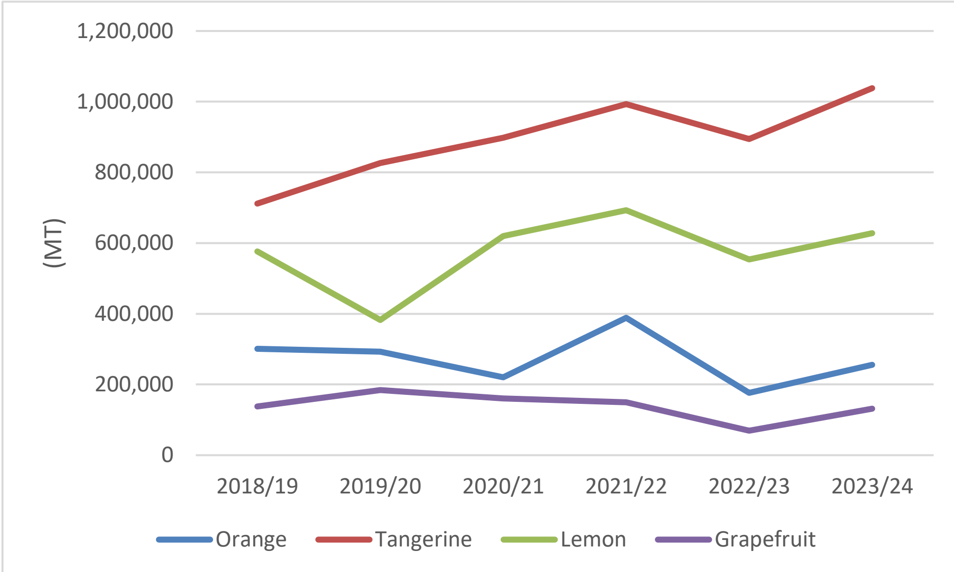
A new government policy titled "Planning of Agricultural Production" will enter into force in 2025. Under the plan, orchards where the soil slope is less than 6 percent will not be permitted to plant fruit trees, including citrus, with the aim to prevent water waste. According to contacts, the new policy will further reduce citrus production, especially in the Mediterranean region, since most orchards there are on flat lowlands.

According to Turkish citrus exporters, exports in MY 2024/25 will be lower than the previous season, however they expect higher revenue due to lower production in competitor countries.

In Türkiye, 40 percent of the total citrus production is exported, with 50 percent of that going to Russia; Russia, Iraq, Ukraine, Saudi Arabia, and Romania are the biggest export markets. Target growth markets for the Turkish industry are Japan, Croatia, Bosnia and Herzegovina, and Poland. Turkish citrus exporters face significant headwinds as it relates to low export unit prices ($468/per ton), high input prices, and logistics issues. In addition, citrus shipments (especially oranges, grapefruits, and lemons) have seen increased rejections in 2024 due to high residue levels, especially Chlorpyrifos.

Traders note that their export capabilities and profit margins continue to decrease due to unstable exchange rates, high domestic inflation, and rising producer prices. Also, sources highlighted export subsidies requested from the Government of Türkiye (GoT) to overcome surplus production, compete with competitors, and manage rising export costs. Producers and exporters also note that the Support Price Stabilization Fund (DFIF) is critical to their future profitability. DFIF is a fund established within the budget framework in 1980 which aims to support sectors deemed important in terms of the country's economy, production, and employment and to provide subsidies for agricultural inputs. Exporters also state that if DFIF is provided for all citrus varieties, it will enable packaging facilities to send fruits to distant export markets such as China.

Figure 1. Turkish Citrus Exports by Products



Source: Trade Data Monitor, LLC

Harmonized System (HS) Codes:

Oranges 080510

Tangerines/Mandarins 080520, 080521, 080522, 080529

Lemons 080550

Grapefruits 080540

Orange Juice 200911, 200912, 200919

Abbreviations used in this report:

FAS	USDA Foreign Agricultural Service
TDM	Trade Data Monitor, LLC
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
GoT	The Government of Türkiye
MinAF	Turkish Ministry of Agriculture and Forestry
MY	Marketing year
PS&D	Production, Supply and Distribution
TL	Turkish Lira
TurkSTAT	Turkish Statistical Institute
USD	U.S. Dollar

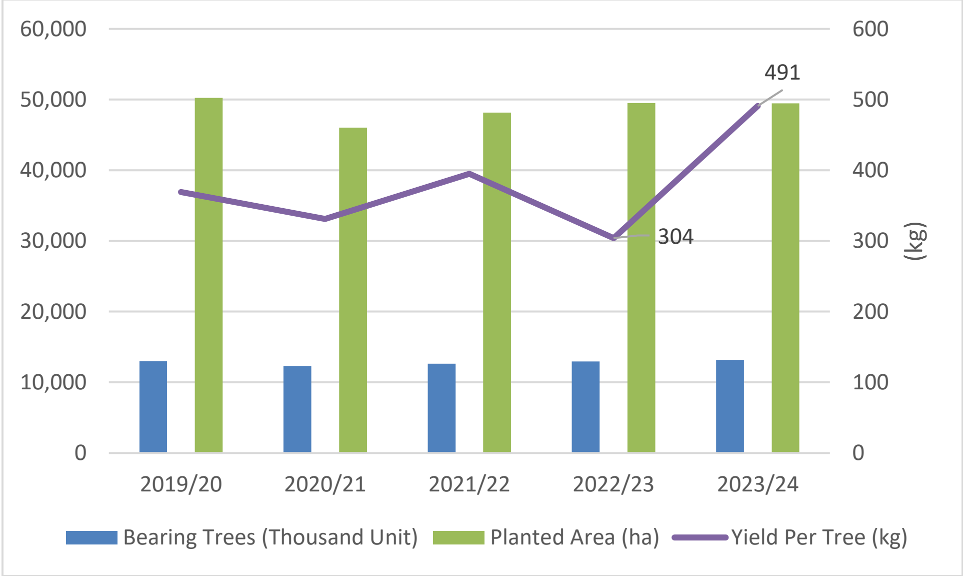
Commodities:
Oranges, Fresh

Production:
In MY 2024/25 orange yield is forecast to decrease 30 percent to 1.6 MMT due to excessive hot weather conditions during the blooming period in spring 2024. Unfortunately, yield per acre has reduced by around 50 percent in this season from 491 to 250 kg/tree. The most affected varieties are the early crops, including *Navelina* and *Fukumoto*.

In MY 2023/24 Türkiye produced 2.3 MMT of oranges, which was 74 percent higher than MY 2022/23 (1.32 MMT) due to favorable weather conditions in spring 2023. The yield increase was mostly seen in the *Washington* variety, especially in the Aegean region, which accounts for 70 percent of total orange production in Türkiye. In MY 2023/24 yield per tree increased 62 percent when compared with the previous year. (Figure 2)

Most of the orange production in Türkiye can be found in the Antalya province. Farmgate prices have increased this season due to the low yield, however, it remains below production cost. Moreover, the price gap between the farmgate and supermarket is high due to rising costs related to transportation, storage, and middlemen in the supply chain.

Figure 2. Türkiye Orange Orchard Area (ha), Bearing Trees, and Yield Per Tree (kg)



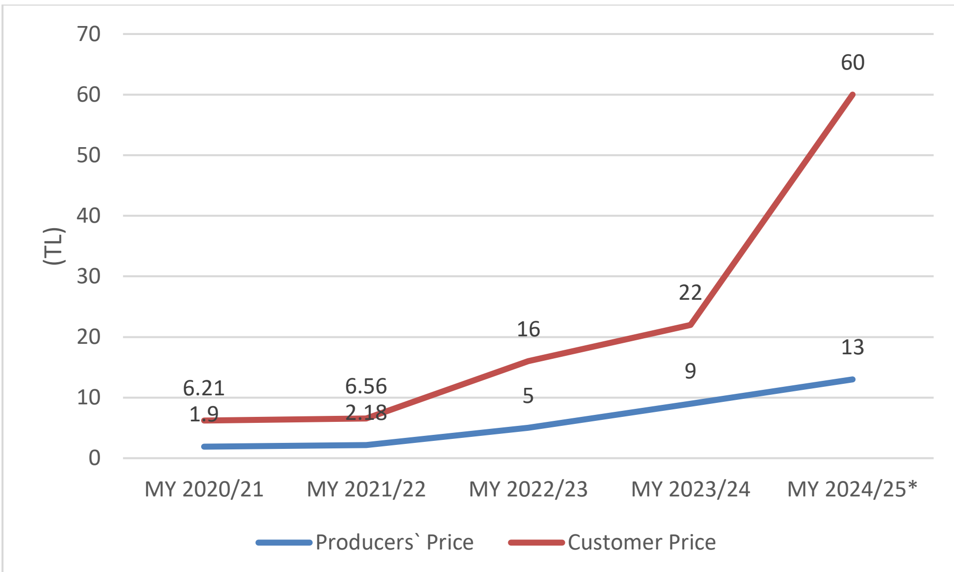
Source: TurkSTAT, 2024

The Mediterranean fruit fly remains a major concern, causing quality and production losses. To combat the pest, the Ministry of Agriculture and Forestry (MinAF) has been distributing free pheromone traps to farmers through provincial offices and member associations. According to MinAF, a significant increase in the pest population in correlation with climate changes has been observed in recent years, and they are relying on farmers to actively combat the issue with MinAF support.

Consumption:
In MY 2024/25 orange consumption is expected to decrease to 1.2 MMT due to low production, stable export, and high retail market prices (due to rising transportation and input costs such as electricity and packaging). Marketing Year 2023/24 orange consumption was realized at 1.9 MMT, 78 percent higher than MY 2022/23 (1 MMT). According to the latest data published by TurkSTAT, orange consumption per capita was 10.6 kg in MY 2023/24.

The average retail price for oranges is about four times more than the farmgate price, as shown in Figure 4. This price difference is attributed to traders and transportation and logistics companies marking up the prices as the product makes its way to retail shelves. Other citrus products also face large price differences between the farmgate and retail stores for the same reason.

Figure 3. Orange Producers' Price versus Retail Market Price, MY 2020/21- MY 2024/25



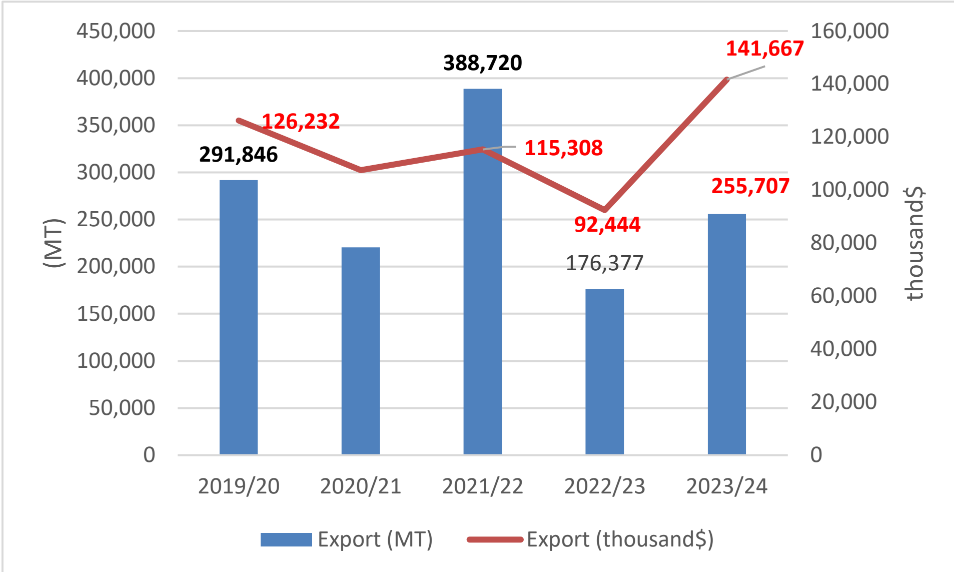
Source: TurkSTAT, 2024 (With exchange rate 34.5 TL to $1 USD as of December 2024)

Trade:
Orange exports in MY 2024/25 are expected to stagnate at 260,000 MT despite low yields and increasing production costs, along with high foreign demand.

Türkiye exports oranges mostly to Russia, Ukraine, and Iraq. Despite the expected decrease in production, orange exports have already increased 126 percent in October 2024 and 22 percent in November 2024 when compared to the same months of the previous season due to foreign demand. Turkish exporters continue to lobby for export subsidies and consider them crucial in coping with rising costs and competition.

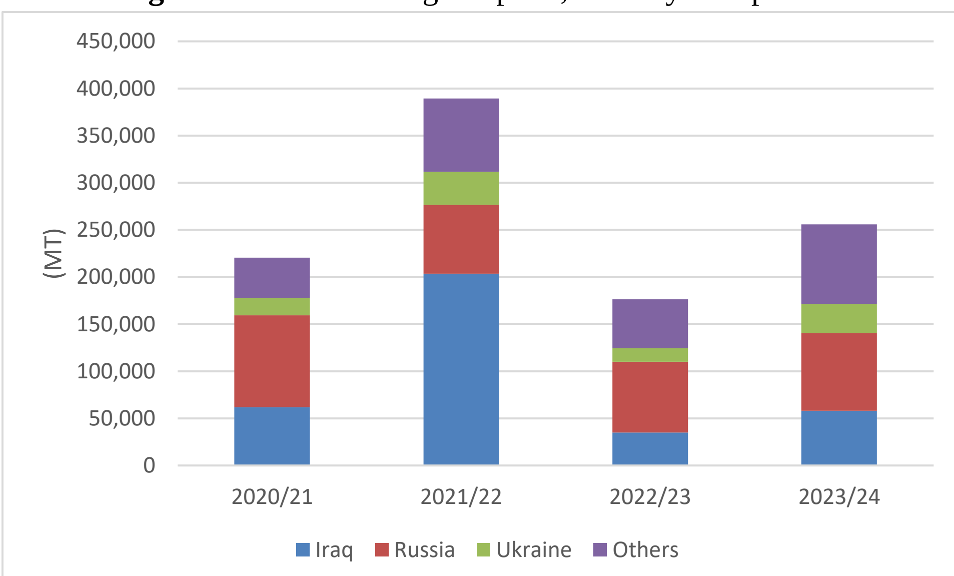
In MY 2023/24 Türkiye exported 255,707 MT of oranges, 45 percent more than in MY 2022/23 (176,377 MT). This increase was based on increased production due to favorable weather conditions during the orange blossoming period in March 2023 and export demand.

Figure 4. Türkiye Orange Exports (MT) and Export Value ($) Comparison



Sources: Trade Data Monitor, LLC

Figure 5. Turkish Orange Exports, Country Comparison



Sources: Trade Data Monitor, LLC

As of January 2022, the EU and UK started requiring a conformity certificate for Turkish oranges to address MRL concerns. To qualify for a conformity certificate, shipments must be tested for certain residues prior to export, adding costs for exporters. Turkish orange exports to the UK are still subject to increased testing for pesticides on arrival; the rate of testing by shipment is 50 percent.

Imports:

Orange imports in MY 2024/25 are expected to increase to 30,000 MT due to low domestic production. Orange imports in MY 2023/24 were realized at 611 MT, which is almost 100 percent decrease from the previous season due to surplus of domestic production and greening disease seen in Turkish Republic of Northern Cyprus (TRNC). In MY 2022/23 Türkiye imported 31,000 MT of oranges from TRNC. Türkiye's orange imports depend on domestic production, but imports from TRNC are also a way for Türkiye to economically and politically support TRNC.

Table 1: PSD Oranges, Fresh

Production, Supply and Distribution Statistics:

Oranges, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	49535	49535	51000	49481	0	49500
Area Harvested (HECTARES)	50000	50000	51000	49000	0	49500
Bearing Trees (1000 TREES)	12966	12966	14000	13177	0	12000
Non-Bearing Trees (1000 TREES)	1786	1786	1700	1652	0	1600
Total No. Of Trees (1000 TREES)	14752	14752	15700	14829	0	13600
Production (1000 MT)	1320	1320	1731	2311	0	1600
Imports (1000 MT)	32	31	2	1	0	30
Total Supply (1000 MT)	1352	1351	1733	2312	0	1630
Exports (1000 MT)	177	176	275	256	0	260
Fresh Dom. Consumption (1000 MT)	1083	1083	1340	1935	0	1260
For Processing (1000 MT)	92	92	118	121	0	110
Total Distribution (1000 MT)	1352	1351	1733	2312	0	1630
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

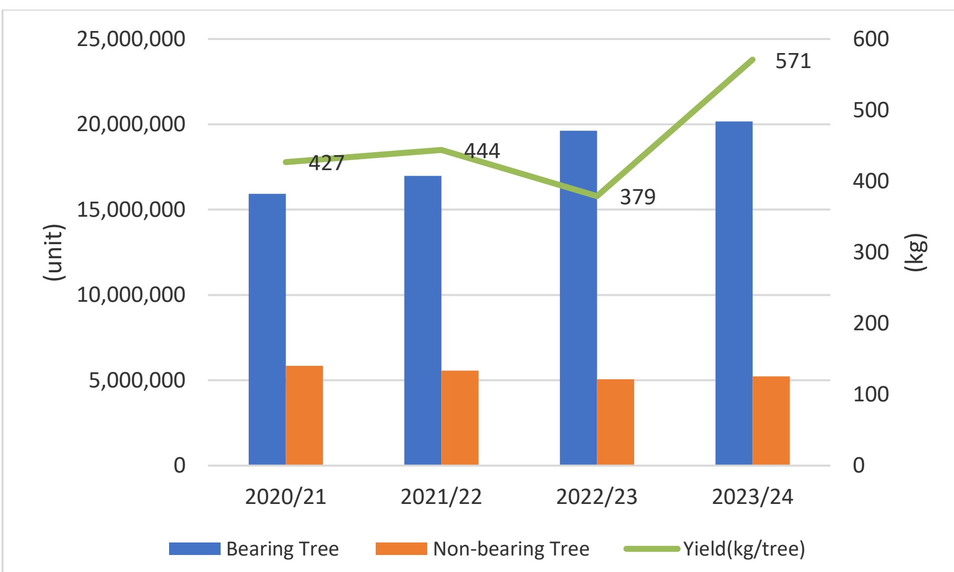
Commodities:
Tangerines/Mandarins, Fresh

Production:
Marketing Year 2024/25 tangerine production is forecast to decrease 35 percent to 1.88 MMT due to excessive hot weather conditions during the blooming period in spring 2024 which caused fruit flowers to burn. Despite hot weather conditions, fruit quality is expected to remain stable. The harvest season for early *Primasol*, *Eary-N*, *Okitsu Wase* and *Miho Wase* varieties began in September. With lower yields, it is expected that farmgate prices will be high, but producers will still not be able to compensate for high input costs such as fuel, electricity, fertilizers, and crop protectants. Further exacerbating tangerine producer issues is a labor shortage.

In MY 2023/24 tangerine production was realized at 2.9 MMT, which is 55 percent more than MY 2022/23 (1.86 MMT). The increase was due to favorable spring rains and temperature conditions during blossoming in March 2023. However, one third of the tangerine crop was left on the trees in MY 2023/24, leading to low yields in MY 2024/25.

The *Satsuma* variety is the most widely produced in Türkiye and is crucial for both domestic consumption and exports. Eighty percent of total *Satsuma* production is sent to export. Future production volume is uncertain because of increasing construction and tourism investments on what was traditionally agricultural land close to the Aegean. Tangerines are the most produced citrus fruit in Türkiye, with 84 percent being produced in the Mediterranean region.

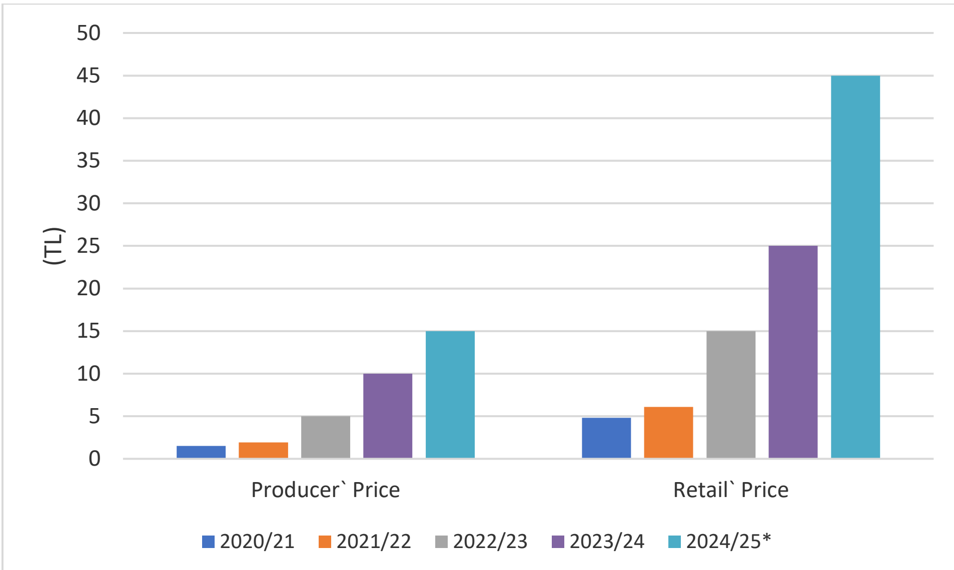
Figure 6. Türkiye Tangerine Bearing and Non-bearing Trees and Yield per tree Comparison, MY 2020/21- MY 2023/24



Source: TurkSTAT, 2024

Consumption:
In MY 2024/25 Türkiye's domestic consumption of tangerines is estimated to decrease to 1 MMT because of low production and high retail prices. In MY 2024/25 retail tangerine prices have increased 80 percent over the previous season. In MY 2023/24, consumption was 1.85 MMT because of increased production. This is despite high market prices and ongoing efforts to increase exports, as well as the later onset of winter (when Turks tend to eat more tangerines). Mandarin consumption was 1.02 MT in MY 2022/23.

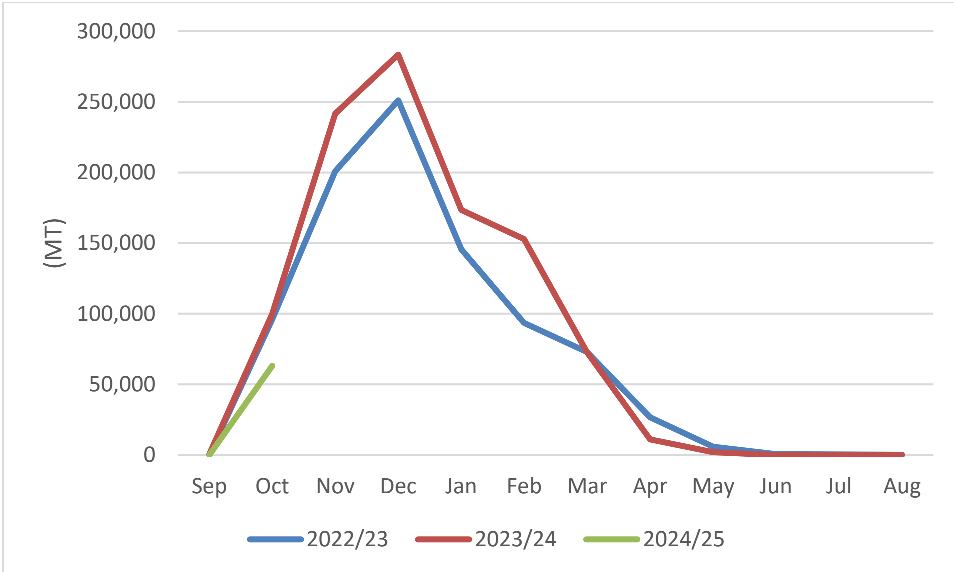
Figure 7. Turkish Tangerines Prices at Local Markets and Gate Price Comparison



Source: TurkSTAT, 2024 (With exchange rate 34.5 TL to $1 USD as of December 2024). *MY 2024/25 consists of October 2024- December 2024 prices).

Trade:
Tangerine exports for MY 2024/25 are forecast to decrease 20 percent to 830,000 MT due to low production, though quality is expected to be good. There is low demand for tangerine exports to Russia this season, and exports to Iraq decreased 85 percent at the beginning of MY 2024/25 following their decision to slow imports of fruits and vegetables during the previous marketing year. In Türkiye, the export season for tangerines started in September.

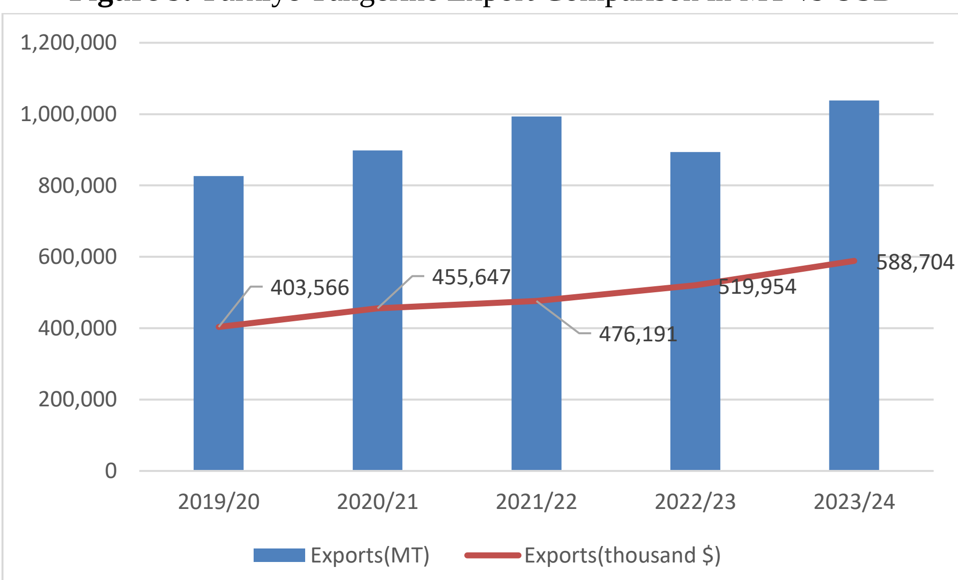
Figure 8. Turkish Tangerine Exports, Monthly Comparison Table from MY 2021/22 to MY 2024/25



Source: Trade Data Monitor, LLC.

Tangerine exports for MY 2023/24 were realized at 1 MMT, which is 16 percent higher than the previous season, due to both increased yield and quality. In MY 2023/24, 52 percent of Türkiye's total citrus export was tangerines. Russia, Ukraine, and Iraq are the biggest export markets for Turkish tangerines.

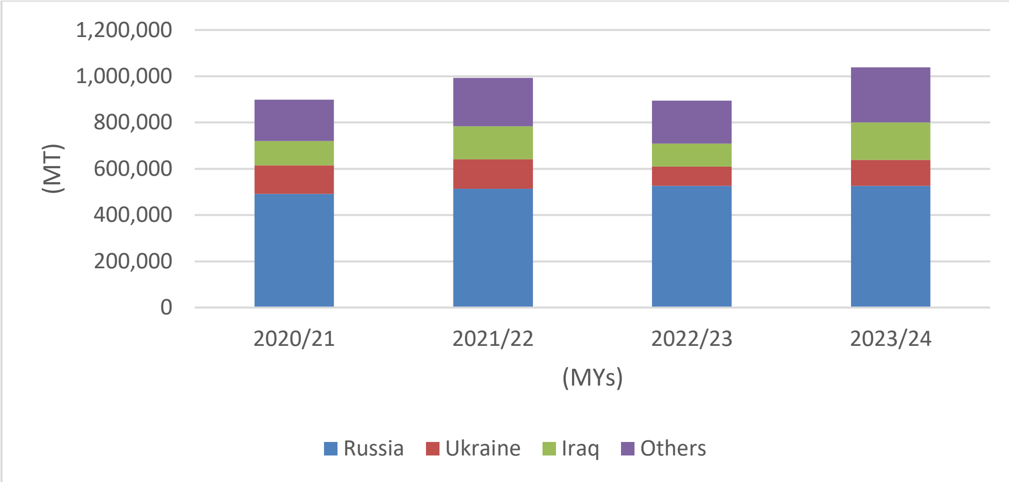
Figure 9. Türkiye Tangerine Export Comparison in MT vs USD



Source: Trade Data Monitor, LLC

Turkish exporters continue to seek supports from the GoT regarding packaging and transportation costs against high exchange rates. They also utilize the Support Price Stabilization Fund (DFIF).

Figure 10. Türkiye Tangerine Export Comparison by Main Export Markets



Source: Trade Data Monitor, LLC

As with oranges, tangerine exports to EU countries require a conformity certificate. In addition, as of January 2022 Turkish tangerine exports to the UK are now subject to increased testing for pesticides on arrival; the rate of testing by shipment is now 50 percent.

Imports:

Tangerine imports in MY 2024/25 are expected to slightly increase to 10,000 MT due to decreased domestic production. In MY 2023/24 Türkiye imported 8,106 MT of tangerines, mostly from the Turkish Republic of Northern Cyprus (TRNC). In MY 2022/23, tangerine imports were realized at 56,000 MT. Türkiye's tangerine imports depend on domestic production, but imports from TRNC are also a way for Türkiye to economically and politically support TRNC.

Table 2: PSD Tangerines, Fresh
Production, Supply and Distribution Statistics:

Tangerines/Mandarins, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Sep 2022		Sep 2023		Sep 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	67853	67853	69000	69000	0	68000
Area Harvested (HECTARES)	67853	67853	69000	69000	0	68000
Bearing Trees (1000 TREES)	19620	19620	21000	21000	0	20000
Non-Bearing Trees (1000 TREES)	5053	5053	5000	5000	0	5000
Total No. Of Trees (1000 TREES)	24673	24673	26000	26000	0	25000
Production (1000 MT)	1860	1860	2883	2883	0	1880

Imports (1000 MT)	56	56	9	8	0	10
Total Supply (1000 MT)	1916	1916	2892	2891	0	1890
Exports (1000 MT)	894	894	1045	1038	0	830
Fresh Dom. Consumption (1000 MT)	1021	1021	1846	1852	0	1059
For Processing (1000 MT)	1	1	1	1	0	1
Total Distribution (1000 MT)	1916	1916	2892	2891	0	1890
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Commodities:
Lemons/Limes, Fresh

Production:
In MY 2024/25 lemon production is expected to decrease 31 percent to 1.6 MMT due to excessive hot weather conditions during the blooming period in spring 2024. Due to low yield, it is expected that both farmgate and retail prices will be high. In Türkiye, the harvest of early lemon varieties, such as *Mayer*, begins in September], then the varieties of *Lamas* and *Kutdiken* are harvested for storage. According to producers, use of the *Enterdonat* variety has been decreasing in recent years due to unfavorable weather conditions. There are fewer lemon orchards in Türkiye than some other citrus varieties since lemons are particularly sensitive to cold weather conditions.

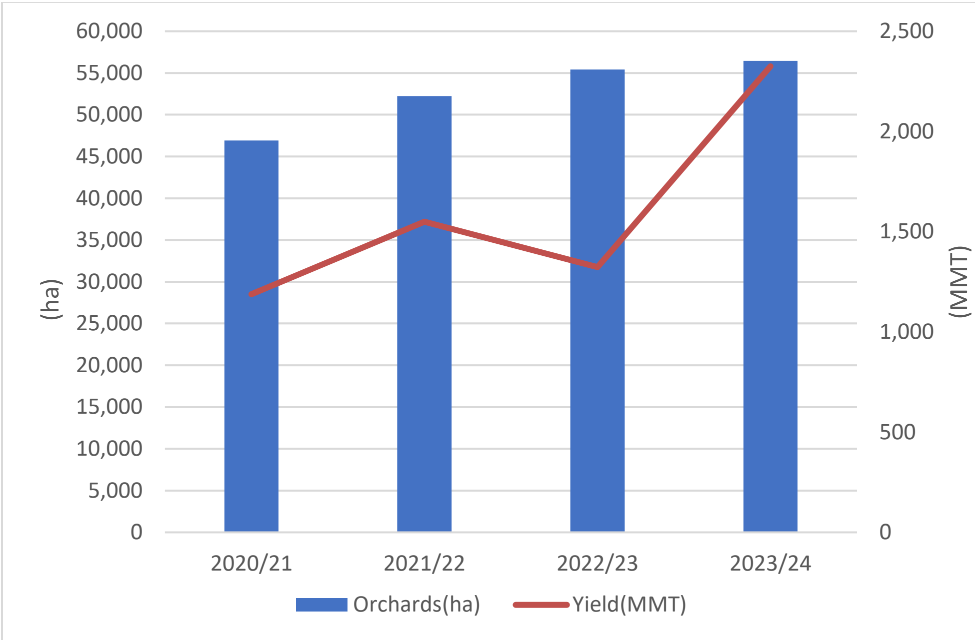
In MY 2023/24 Türkiye produced 2.3 MMT of lemon, a 75 percent increase over MY 2022/23 (1.3 MMT) due to favorable weather conditions during spring 2023. However, due to high production costs, high yield, and low export prices, some producers opted not to harvest their fruit.

One of the biggest problems for Turkish lemon producers is the struggle to keep lemons in cold storage for export. Conventional storage costs are expensive, and producers sometimes use workarounds; for example, producers in Urgup in Cappadocia are known to store lemons in natural caves.

Due to low yields in MY 2024/25 at the beginning of the season, lemons stored in warehouses from the previous season have been used for domestic supply. However, retail prices are high since hot weather conditions and other factors affected the quality of lemons in cave storage. Retail prices are expected to increase for the rest of the season because of low yields. In addition to these difficult conditions, the Ministry of Commerce is conducting inspections on storage facilities and sanctioning them if they are found to be storing more than the quantity that they are permitted.

Since the beginning of MY 2024/25 farmgate prices have fallen to 4 TL/kg ($0.12), below the previous season, and still are not enough to compensate for production costs and input costs.

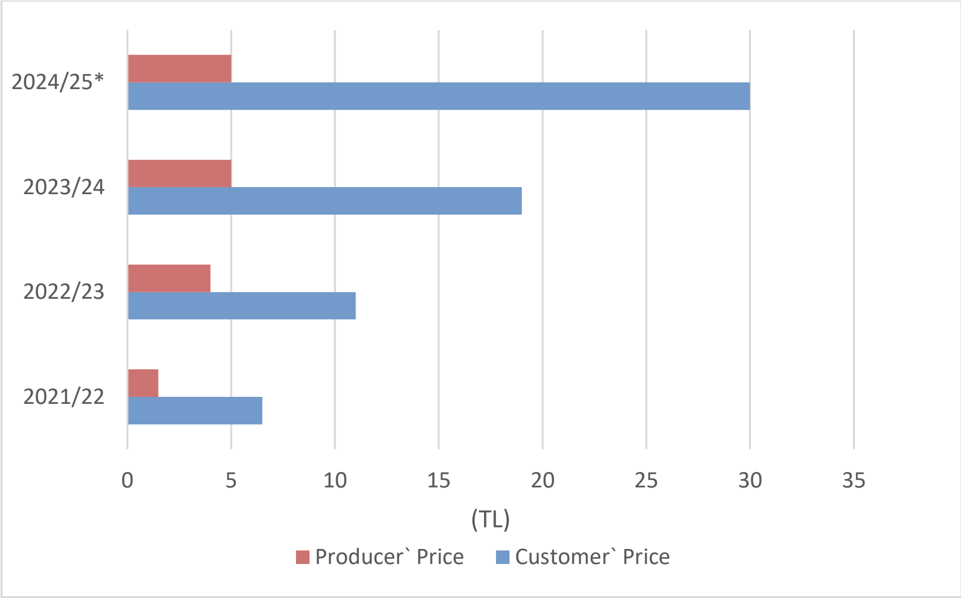
Figure 11. Lemon Orchards Area and Yield (MT) Comparison



Source: TurkSTAT, 2024.

Half of the total lemon production in Türkiye is in Mersin province. The main problems reported by lemon producers in Türkiye are low farmgate prices versus high market prices, labor costs for tree trimming, disease and pest management, input costs (such as fuel, fertilizer, irrigation, and chemicals), crop quality, and marketing issues. Producers believe that Turkish citrus exporters should be supported by the GoT in terms of export subsidies. They feel that GoT supports for citrus exporters would allow them to sell their fruit at more reasonable prices against high input costs.

Figure 12. Producer and Customer Price Comparison



Source: Commerce Unions and mid-come Supermarkets, 2024

(With exchange rate 34.5 TL to $1 USD as of December 2024. *MY 2024/25 consists of October 2024-December 2024 prices).

Consumption:

In MY 2024/25 lemon consumption is estimated to decrease 43 percent to 933,000 MT due to low yields, meanwhile lemon prices in domestic markets continue to increase. Consumer prices increased 53 percent in November 2024 when compared with the same month of the previous year, despite decreasing farmgate prices. In contrast to low producer prices, supermarket prices are noticeably higher due to an increase in costs such as packaging, transport, and labor during the marketing process. The highest price difference between producers and the market in November 2024 was seen in lemons, at 253.7%. Turks usually consume lemons fresh.

In MY 2023/24 lemon consumption was realized at 1.65 MMT, which is over 100 percent more than the previous season due to high yields. However, when taking into account the high retail prices, sources indicate that the consumption number includes lost/unconsumed fruit. In MY 2022/23 lemon consumption was 720,000 MT due to decreasing domestic lemon demands.

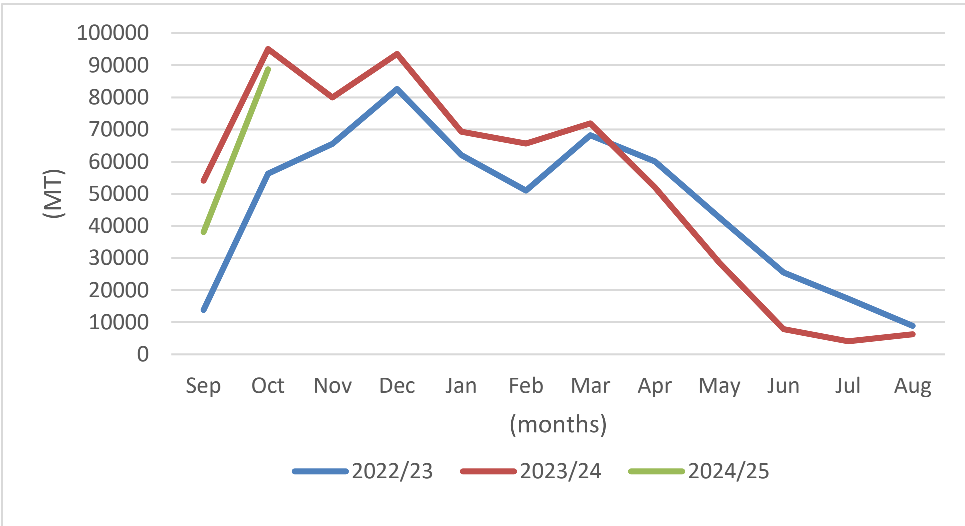
Trade:

In MY 2024/25 lemon exports are expected to stagnate at 620,000 MT, despite low yields, due to increased demand from Russia. Also, exporters are expecting a 50 percent bump in revenue this season, as they believe that competitor countries will have lower yields, leading to advantageous pricing for Turkish product.

In MY 2023/24 Türkiye exported 628,000 MT of lemons, 13 percent more than in MY 2022/23 (553,861 MT), due to supply.

According to exporters, the government's ban on lemon exports in 2021 to prevent domestic shortfalls amid the pandemic hampered Turkish lemon exports and caused export markets to loosen. Lemon producers are now requesting subsidies from the GoT to convert their excess production into lemon sauce or juice to make them more value-added.

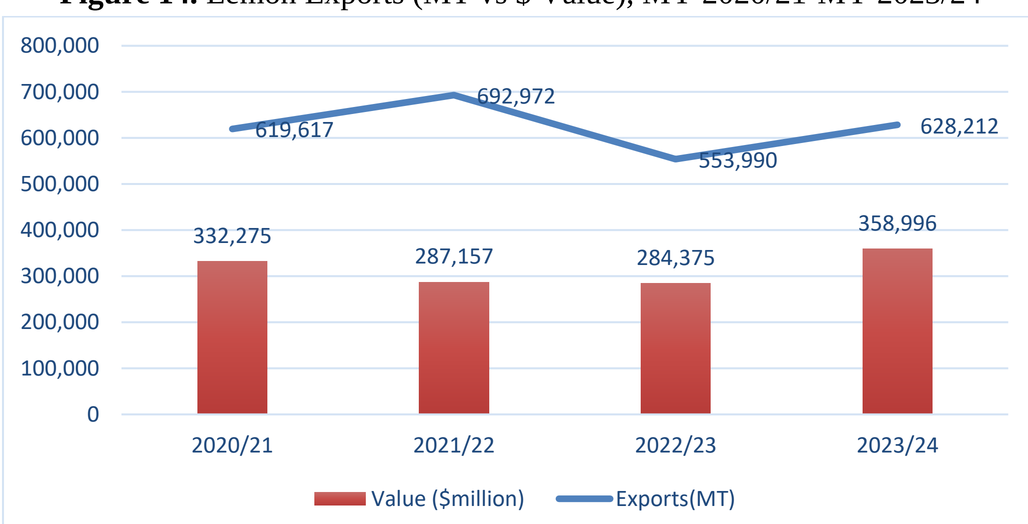
Figure 13. Türkiye Lemon Export Comparison in MT for MY 2022/23- MY 2024/25.



Source: Trade Data Monitor, LLC

As of January 2022 Turkish lemon exports to the EU and the UK are subject to increased testing for pesticides. The rate of testing by shipment has now been raised to 50 percent.

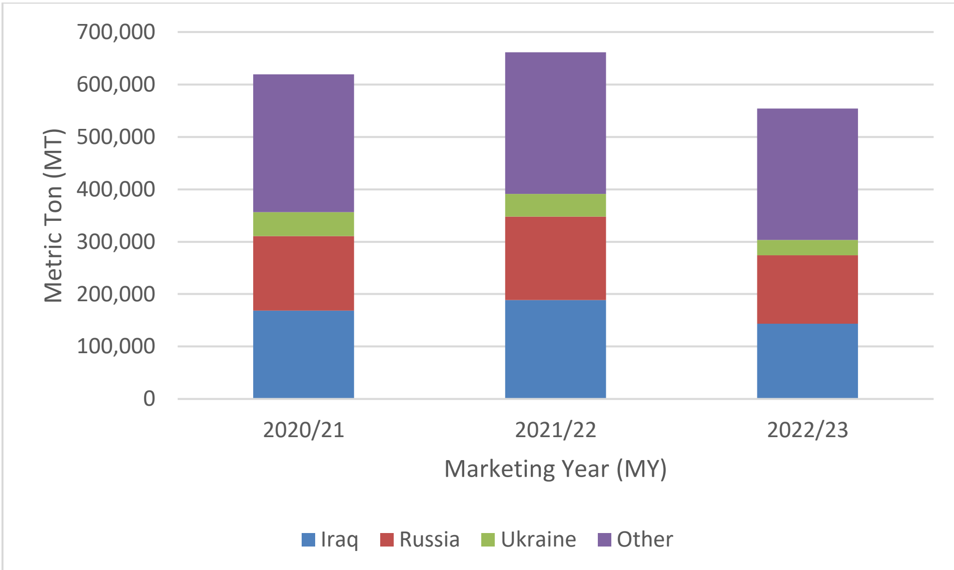
Figure 14. Lemon Exports (MT vs $ Value), MY 2020/21-MY 2023/24



Source: Trade Data Monitor, LLC.

The Mediterranean fruit fly was the biggest concern among exporters as the pest was the reason for many of the rejections of Turkish lemons at EU and Russian ports. However, recently findings of high MRLs account for the rest of the rejections. Türkiye has started to implement biological methods and traps, supported by MinAF, to combat the Mediterranean fruit fly. Additional concerns are the low unit export prices and the residues of products used to extend longevity in storage.

Figure 15. Turkish Lemons Top Export Markets, Comparison in MT



Source: Trade Data Monitor, LLC.

Imports:

Türkiye had minimal imports of lemons, mostly from Brazil.

Table 3: PSD Lemons/Limes, Fresh
Production, Supply and Distribution Statistics

Lemons/Limes, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Sep 2022		Sep 2023		Sep 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	55426	55426	56500	56438	0	56000
Area Harvested (HECTARES)	55426	55426	56500	56438	0	56000
Bearing Trees (1000 TREES)	14699	14699	15500	15443	0	14800
Non-Bearing Trees (1000 TREES)	4676	4676	4600	4967	0	4500
Total No. Of Trees (1000 TREES)	19375	19375	20100	20410	0	19300

Production (1000 MT)	1320	1320	1584	2325	0	1600
Imports (1000 MT)	5	4	3	2	0	3
Total Supply (1000 MT)	1325	1324	1587	2327	0	1603
Exports (1000 MT)	595	554	700	628	0	620
Fresh Dom. Consumption (1000 MT)	680	720	837	1649	0	933
For Processing (1000 MT)	50	50	50	50	0	50
Total Distribution (1000 MT)	1325	1324	1587	2327	0	1603
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query]						

Commodities:
Grapefruit, Fresh

Production and Consumption:
In MY 2024/25 grapefruit production is expected to decrease 37 percent to 180,000 MT due to excessive hot weather conditions during the blooming period in spring 2024. In MY 2023/24 grapefruit production was 285,000 MT, 43 percent more than in MY 2022/23 (198,000 MT), due to favorable weather conditions in the spring and increased yield per tree. Most of the grapefruit in Türkiye (77 percent) is produced in the Adana province.

In MY 2024/25 grapefruit consumption is expected to decrease 51 percent to 75,000 MT due to low supply and decreased domestic demand. Moreover, exporters believe that the consumption number also includes fruit losses, since domestic demand for grapefruit is very small and the fruit is mostly consumed as fresh-squeezed juice. In MY 2023/24 grapefruit consumption was 154,000 MT. Grapefruit consumption in MY 2022/23 was 102,000 MT.

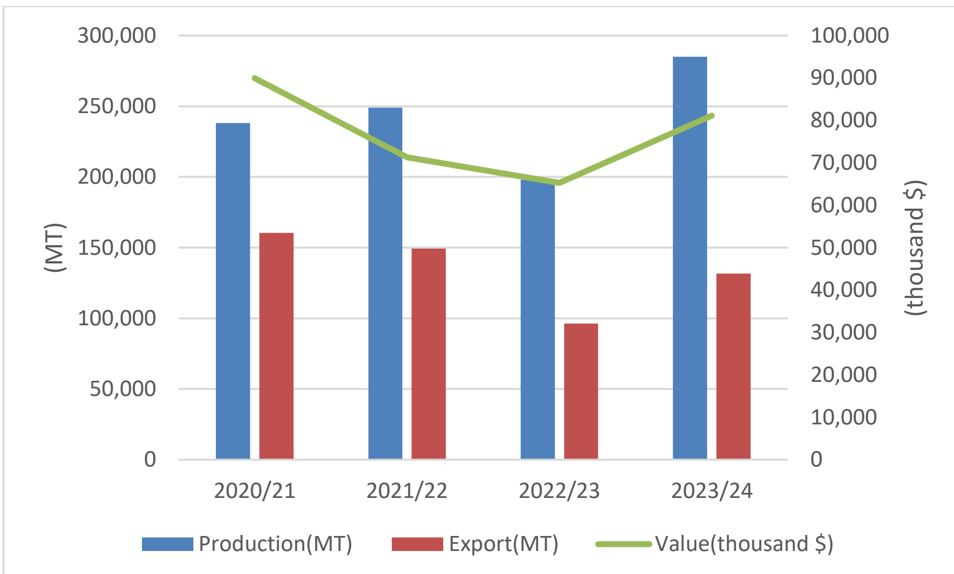
The gap between lower farmer wholesale prices and higher retail market prices remains a concern for farmers. Although grapefruit is not widely consumed in Türkiye, retail prices are still three times more expensive than farmgate prices.

Trade:
In MY 2024/25, grapefruit exports are expected to be 106,000 MT, 20 percent lower than MY 2023/24, due to low production. The main export destinations are Russia, Romania, and Poland. Exports have started with *Ruby Red, Rio Red* and *Marsh Seedless* varieties for MY 2024/25. In October 2024 Türkiye exported 27 percent less grapefruit compared with the same month of the previous year. Moreover, for

the first few months of MY 2024/25 there was decreased demand from EU countries due to high MRL and residue level concerns. In MY 2023/24 grapefruit exports were 131,643 MT, 37 percent higher than MY 2022/23 (96,290 MT).

Türkiye exports 80 percent of its total grapefruit production, and the most exported varieties are *Star Ruby*, *Ruby Red*, *Marsh Seedless* and *Rio Red*.

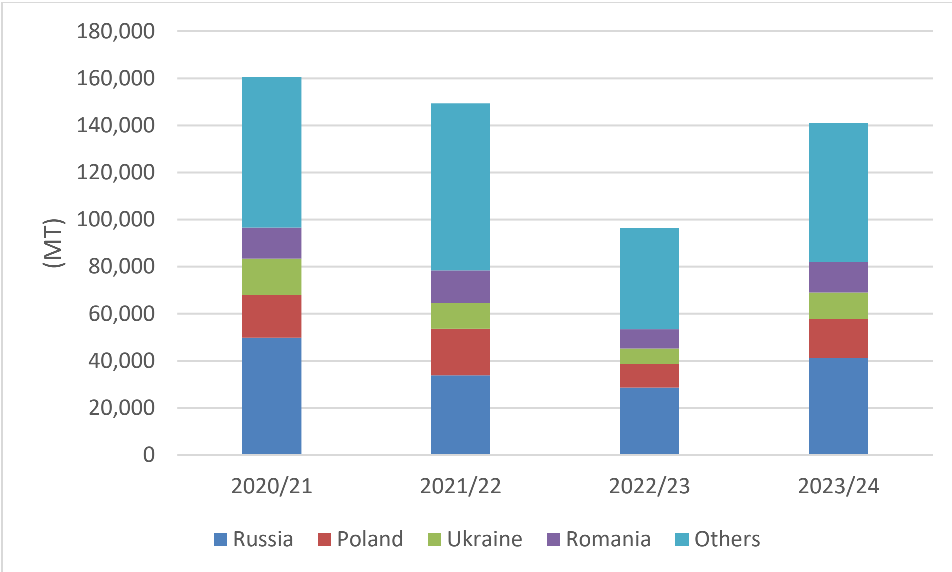
Figure 16. Türkiye's Grapefruit Production versus Exports (MT and $), MY 2020/21 –MY 2023/24



Source: Trade Data Monitor, LLC

Due to climate change, especially extreme temperatures, Türkiye is struggling to maintain sweetness in its grapefruit, and most grapefruits are sour and bitter. For this reason, Türkiye is not a stable supply market but is a backup if the other large, exporting countries are not able to produce enough grapefruits in a given year. Türkiye also has a geographic advantage for exports of citrus fruit to Iraq; however, grapefruit exports to Iraq are very small due to a lack of traditional grapefruit consumption there.

Figure 17. Türkiye's Grapefruit Exports by Top Destination, MY 2020/21 -MY 2023/24



Source: Trade Data Monitor, LLC

According to market sources, exports of citrus to geographically distant countries are becoming more difficult and expensive due to the costs of meeting technical requirements such as cold chain storage and rising transport costs.

Table 4: PSD Grapefruit, Fresh
Production, Supply and Distribution Statistics

Grapefruit, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	4982	4982	5000	4945	0	4900
Area Harvested (HECTARES)	4700	4700	4800	4900	0	4700
Bearing Trees (1000 TREES)	1073	1073	1200	1067	0	1070
Non-Bearing Trees (1000 TREES)	68	68	40	64	0	64
Total No. Of Trees (1000 TREES)	1141	1141	1240	1131	0	1134
Production (1000 MT)	198	198	217	285	0	180
Imports (1000 MT)	1	1	1	2	0	2
Total Supply (1000 MT)	199	199	218	287	0	182
Exports (1000 MT)	96	96	122	132	0	106

Fresh Dom. Consumption (1000 MT)	102	102	95	154	0	75
For Processing (1000 MT)	1	1	1	1	0	1
Total Distribution (1000 MT)	199	199	218	287	0	182
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Commodities:
Orange Juice

Production and consumption:
In MY 2024/25 orange juice production is forecast at 11,000 MT due to fewer oranges sent to processing. In MY 2024/25 it is expected that 110,000 MT of oranges will be sent to processing, down 10 percent compared to the previous year.

In MY 2023/24 orange juice production was 12,100 MT. In MY 2022/23 Türkiye produced 9,240 MT of orange juice.

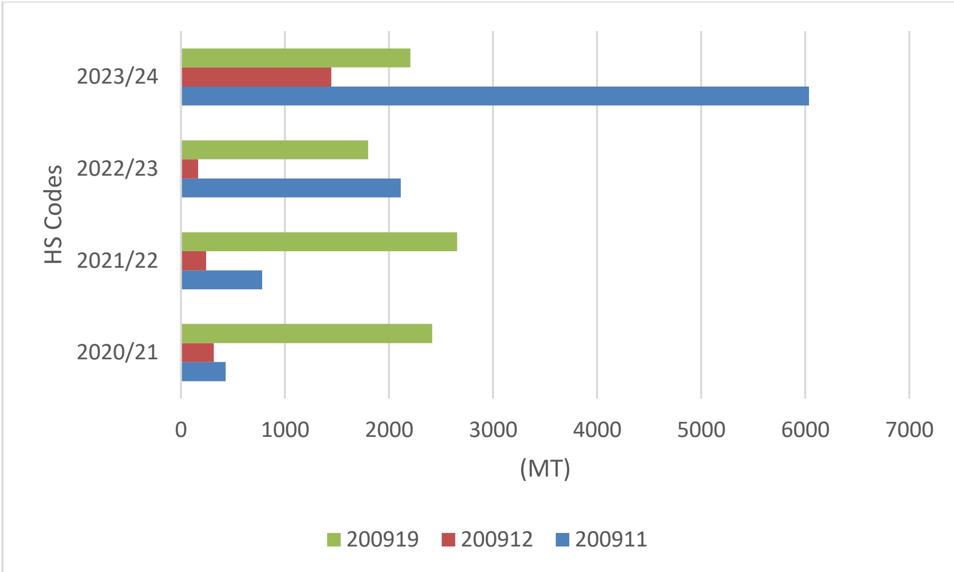
The Turkish fruit processing industry is still under development and continues to seek government support in order to develop the industry and reach potential export markets which are very limited. According to fruit juice exporters, the juicing rates for orange varieties in Türkiye do not always meet the ideal industry standards. To achieve those standards, Turkish producers expect the GoT to support them in establishing a citrus policy plan to improve the standards for juicing fruit.

The most popular fruits in Türkiye for juice production are apples, apricots, cherries, oranges, and pomegranates. Of total citrus production in Türkiye, 5-10 percent is processed into fruit juice.

In domestic markets, an increase in retail prices is expected in correlation with the country’s high inflation. Orange juice consumption is expected to decrease to 5,500 MT in MY 2024/25. Total fruit juice consumption in Türkiye is estimated at 11 liters/year, which is quite low compared to European countries.

Trade:
Exports: Orange juice exports are forecast at 8,000 MT for MY 2024/25 due to lower production. Orange juice exports were 8,501 MT, valued at $36 million, for MY 2023/24 due to expected demand increases from importing countries in concert with China’s decrease in production, according to fruit juice producers. Türkiye exported 4,078 MT of orange juice valued at $8.8 million in MY 2022/23,

Figure 18. Turkish Orange Juice Exports by HS Codes, Comparison MY 2020/21 - MY 2023/24



Source: Trade Data Monitor, LLC. 200919: Orange Juice, Other Than Frozen, Whether Or Not Sweetened; 200912: Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20; 200911: Orange Juice, Frozen, Whether Or Not Sweetened; All categories are converted to 65 degree brix.

Pomegranate and black carrot concentrate are the juice varieties with a very highly competitive power.

Imports: In MY 2024/25, orange juice imports are estimated to increase to 2,500 MT due to low production. In MY 2023/24, orange juice imports were 2,434 MT, mostly from Cyprus and Brazil, due to stable demand from the domestic market. Türkiye imported 2,018 MT of orange juice in MY 2022/23. Türkiye mostly imports frozen, sweetened and unsweetened orange juice.

Table 5: PSD Orange Juice
Production, Supply and Distribution Statistics

Orange Juice	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	92400	92400	121000	121000	0	110000
Beginning Stocks (MT)	150	150	150	150	0	150
Production (MT)	9240	9240	12100	12100	0	11000
Imports (MT)	2000	2000	1800	2434	0	2500
Total Supply (MT)	11390	11390	14050	14684	0	13650
Exports (MT)	4078	4078	5000	8500	0	8000

Domestic Consumption (MT)	7162	7162	8900	6034	0	5500
Ending Stocks (MT)	150	150	150	150	0	150
Total Distribution (MT)	11390	11390	14050	14684	0	13650
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note: Data used in PSD-Orange Juice does not include orange juices processed in Free Trade Zones.

Attachments:

No Attachments