

Required Report: Required - Public Distribution

Date: April 02, 2021

Report Number: TU2021-0016

Report Name: Cotton and Products Annual

Country: Turkey

Post: Ankara

Report Category: Cotton and Products

Prepared By: Caglar Erdogan, Senior Specialist

Approved By: Michael Conlon

Report Highlights:

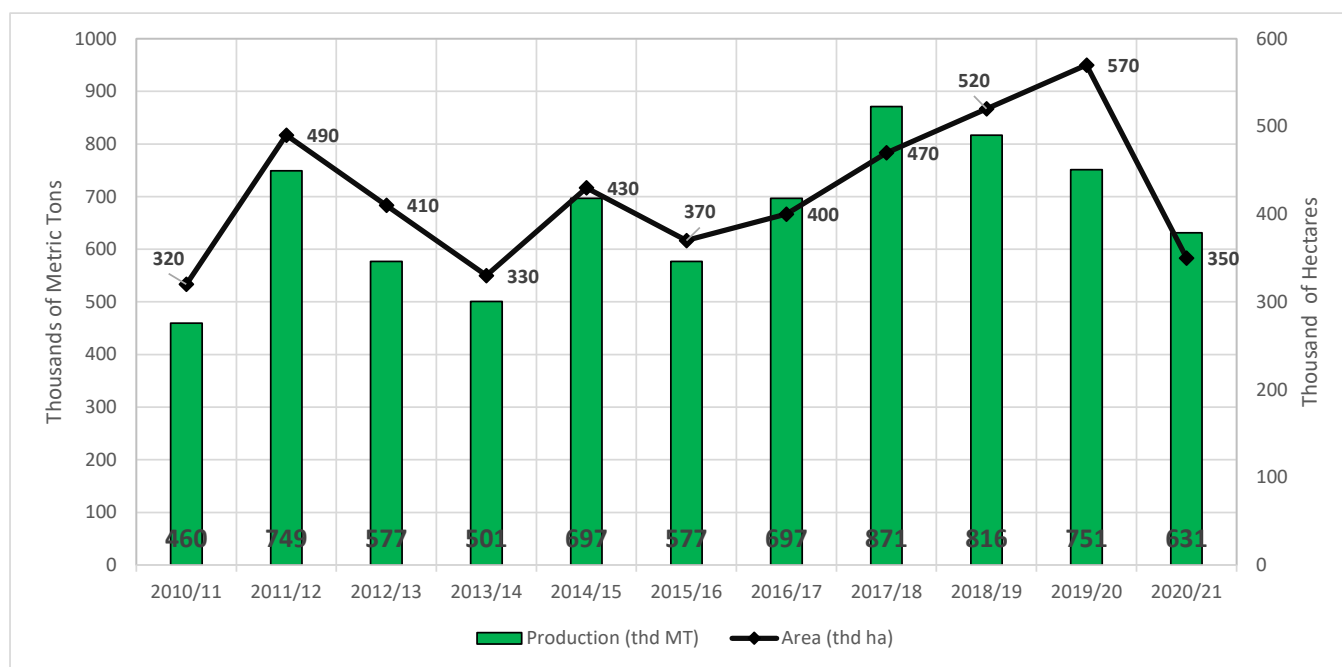
Turkish cotton planting area and production for Marketing Year (MY) 2021/22 is projected to be about 450,000 hectares and 740,000 metric tons (MT) (3.4 million bales). Turkish cotton area and production for MY 2020/21 is estimated at 350,000 hectares and 630,000 MT (2.9 million bales) because of a contraction in planted area. Domestic consumption in MY 2020/2021 is estimated at 1.6 million MT (7.35 million bales) and expected to increase slightly in MY 2021/22, reaching 1.65 million MT (7.58 million bales). The Turkish textile industry continues to be one of the leading sectors in the Turkish economy and the United States remains one of the top suppliers of cotton to the Turkish market.

I. Production

Post forecasts approximately 740,000 MT (3.4 million bales) of cotton fiber production on 450,000 hectares (ha) in Turkey for MY 2021/22. This early forecast indicates that the production of cotton will expand in Turkey for MY 2021/22 compared to the previous marketing year because of favorable prices and weather conditions. Most of Turkey is experiencing drought conditions, especially in the western regions of the country. However, the effects of these conditions in MY 2021/22 cotton production are not yet fully known. Precipitation in the spring at the right time might help the cotton crop.

The Government of Turkey (GoT) has indicated that irrigation water provided by State Hydraulic Works (SHW) will be more limited compared to the previous year, especially in the Aegean Region, because of budget considerations. Market sources indicate that Turkey can produce cotton in drought conditions with limited irrigation, but farmers need to be cautious on the ways they regulate the available irrigation. The current drought has triggered discussions about new and better irrigation techniques and technologies that are lacking in the country.

Chart 1: Cotton production amounts (left axis) and cotton production area (right axis) in Turkey



Source: USDA official data.

There are three major production regions in Turkey for cotton. The first one is the Aegean region by the Aegean Sea in the western part of the country, mostly around Aydin and Izmir provinces. The second is the Cukurova region, which is in the southern part of the Adana province, in the Eastern Mediterranean area. Cukurova has traditionally been a cotton production area for Turkey, but in the last decade many cotton fields have been replaced by citrus orchards because citrus is easier to export. In addition to increasing the citrus area, farmers have been planting alternative crops such as wheat, maize and soybeans. The third and largest area of production for cotton is in the southeast of Turkey where the Southeast Anatolia Project (GAP) has been underway since the late 1980s. GAP is a major hydroelectric and irrigation project for the plains of South East Turkey supported by GoT. The GAP area is the northern Mesopotamia region, north of the Turkish – Syrian border. According to market sources, the investment pace has slowed in the last decade or so, especially in terms of the irrigation

phases of the project. In addition to these three major planting zones, there is a small amount of cotton production around Antalya. Most of Turkey’s cotton is planted between mid-March and mid-May and harvested from mid-August through November.

There are a number of reasons to forecast an increase in production for MY 2021/22. After two poor crop years, with low yields, growing conditions were good in MY 2020/21 that contributed to higher yields. In addition, there were no extraordinary pest attacks to increase production costs or decrease the amount of production in MY 2020/21. These conditions are encouraging farmers to plant more cotton for the upcoming season.

In addition to these encouraging conditions mentioned above, in October 2020, GoT increased the subsidy producers receive to 1.10 Turkish Lira (TL) per kg from 0.80 TL/kg. This increase was announced after the harvest was nearly completed for MY 2020/21. The subsidy was kept fixed for the previous three marketing years that made it difficult for some farmers to achieve profitability due to increased costs because of high inflation on production inputs such as fuel, fertilizer, pesticides, and seeds. Now, as farmers are making planting decisions for the MY 2021/22, they know that they will be receiving a higher subsidy. This 37.5 percent increase in subsidy is a major reason for expected expansion of the production area in MY 2021/22. Moreover, there has been a recent increase in cotton prices, which had gone down during the start of COVID-19 pandemic.

As mentioned in [earlier reports](#), GoT promotes crop rotation for soil quality. Farmers are unable to get subsidies if they keep planting the same crop three years in a row. As some farmers chose to rotate to a different crop in MY 2020/21, which was the third year after the rotation rule was established, they are now qualified for subsidies for cotton production in MY 2021/22. These subsidies are critical for making profits as margins are tight for cotton producers in Turkey. Post predicts that some of these farmers who changed to a different crop due to the mandatory rotation rule will go back to growing cotton.

Not all conditions for planting decisions for MY 2021/22 are favorable for cotton farmers in Turkey. Although the subsidy level was increased, it is not enough of an increase to motivate some cotton farmers to switch to cotton, as TL lost a lot of its value in the last few years. The inflation rate for agricultural inputs is very high in Turkey. Inflation, according to Agricultural Producers’ Index (API) prepared by [Turkish Statistical Institute](#) (TurkStat), was 21.24 percent for 2020. Additionally, GoT has been late paying the earned subsidies to farmers for the last marketing year. There are doubts GoT will pay on time for MY 2021/22.

Furthermore, according to feedback from market sources, there has been problems with seeds of several seed supplier companies in Turkey for cotton seeds for the upcoming planting season. During inspections, traces of GMOs have been noted in seeds. Turkish laws and regulations ban all GMO products except a few special cases for animal feed. GMO contamination is punishable by prison. This could result in a cotton seed shortage, increasing seed prices for the planting season for MY 2021/22. The situation would lead to farmers not getting the kind of seed they demand which might in return cause yield problems. If a seed shortage occurs this will affect our cotton production forecasts for

Table 1: Indicative Cotton Prices in Turkey

Aegean Cotton Price *	Color Grade 41
MY 2020/21	US cent per lb.
2020, February	78.54
2020, March	75.16
2020, April	64.28
2020, May	67.81
2020, June	69.30
2020, July	67.28
2020, August	66.13
2020, September	64.18
2020, October	69.41
2020, November	75.74
2020, December	77.45
2021, January	88.37

* Average of prices that occurred at [Izmir Commodity Exchange](#) during real time transactions in each month.

2021/22, we will indicate it in later updates. However, many in the trade believe that the situation will not lead to a major shortage of seeds.

Moreover, as discussed above, dry conditions could potentially become a problem for MY 2021/22 cotton production. Turkey does not allow GMO seeds in accordance with the Biosafety Law. In addition, according to market specialists' feedback, GoT's agricultural research centers work less on non-GMO seed improvements in comparison to some decades ago. In the mid-to-long term, cotton productivity in Turkey will be affected by these developments, and with poor yields, less farmers will be willing to cultivate cotton. Farmers and farmer associations indicate that research centers operated by GoT should work more intensely on new and better local seed types that can adapt to new farming conditions in Turkey. Allowing imports/development of GMO seeds can help improve yields. Due to Turkey's Biosafety Law, farmers in Turkey do not have access to genetically engineered insect resistant or drought resistant seeds. Please see our [Agriculture Biotechnology Annual Report](#) for more information about the Biosafety Law in Turkey.

The first harvest of Better Cotton Initiative (BCI) cotton in Turkey was in 2013. BCI refers to cotton produced with sustainable farming practices such as using less chemicals and water during production. Higher profitability in BCI cotton production generated interest among farmers in all regions. The BCI cotton produced in Turkey was about 67,000 MT (308,000 bales) in MY 2020/21 as reported by the [Association of Better Cotton Initiative](#) (of Turkey). The Association forecasts that BCI cotton production will increase further to approximately 100,000 MT (459,000 bales) in MY 2021/22 due to increased demand from local textile companies for this type of cotton.

The [Turkish Ministry of Agriculture and Forestry](#) (MinAF) reports that Turkey produced about 23,960 MT (110,048 bales) of organic cotton as of 2019/20 and there was 29,108 MT (32,000 bales) "in transition to organic" cotton production during the same time period. Post estimates that about 38,000 MT of organic cotton will be produced in Turkey in MY 2021/22, not including the crop in transition. Turkey exports a part of this production through ready-to-wear clothing/apparel/garment producers. However, the GoT limits organic cotton exports since they are having difficulty sourcing organic cotton locally.

Increased utilization of certified seeds, estimated to be about 95 percent of total seeds, compared to a few decades ago has also helped increase yields. The increase in certified seed use is driven by a 10 percent higher production bonus for certified seed users. Additional information can be found in the [Planting Seeds Sector Report](#). The GoT is also increasing its efforts to combine small, fragmented, and divided lots that make up many Turkish farms. Therefore, better planting techniques and economies of scale are helping farmers achieve higher yields. Mechanical harvesting is reported to have increased field and ginning yields and reduced picking cost.

II. Production Policy

The GoT has spent more than US\$ 25 billion over the past three decades on a gigantic irrigation and agricultural extension project in southeast Anatolia known as the GAP project. When finished, the ultimate goal is that some 1.4 million hectares of land will be irrigated and a total of 22 dams will be completed. So far, about 79 percent of the hydroelectric projects are completed, but only 23 percent of the irrigation projects. During the last four years, the GoT allocated funds for the project to revitalize some of the irrigation projects. In a few years, it is expected that a total of 1.04 million hectares of land

will be irrigated (both through the project and through the private sector's independent efforts), which could eventually increase cotton planting and production in the region.

The most popular varieties in the Aegean region are "Fiona," "Gloria" and "Lima." In Cukurova, the most popular varieties are "Delta Pine-BP 332," "Lima" and "Gloria." In the Southeast, the most popular varieties are "Stone Mill ST 468," "Candia," "Delta Pine 339," and "Lima."

Aegean cotton is considered the best quality and is preferred by textile producers. Aegean cotton is longer staple (1 5/32") than cotton from Cukurova (1 3/32") or the GAP (1 1/8") region, although the quality of the cotton has improved significantly in the GAP region due to improved seed quality.

The total number of mechanical harvesters in Turkey has increased rapidly to 1,297 by the beginning of 2020, according to the [Turkish Statistical Institute](#) (TurkStat). The majority of harvesters are modern and new, and about 20 percent are used and modified harvesters. According to the same data, about 50 percent of these harvesters are in the Southeast Anatolian region, 30 percent are in the Aegean region, and 20 percent of the harvesters are in the Adana region, including Cukurova, Osmaniye, Mersin, Antalya, and Hatay. Roughly about 90 percent of Aegean cotton, 85 percent of Cukurova cotton, and 75 percent of Southeast Anatolian (GAP) cotton is picked by a harvester. The demand for mechanical harvesters has increased in recent years because the high cost and scarcity of labor have caused cotton picking delays and losses.

There are an estimated 575 cotton gins in Turkey, all of which are owned privately by companies or cooperatives. The great majority of the gins in Turkey are roller gins. However, the recent increase in machine harvesting has triggered the construction of new saw gins. The agricultural cooperatives Taris and Cukobirlik have invested in new saw gins to meet the needs of their members. Private groups continue to invest in saw gin projects in the GAP region as well.

The ginning rate average is about 38 - 39 percent in Turkey depending on the season's cotton quality and the region where farming/ginning is done. Ginners generally purchase seed cotton directly from growers. In recent years, an increasing amount of local cotton is graded by HVI machines at the measurement centers run by the regional commodity exchanges. The Izmir Commodity Exchange is the pioneer in the area with [its laboratories](#) serving the region with two laboratories. They also have established a branch in the GAP region in Sanliurfa.

III. Consumption

Post forecasts that consumption will increase to 1.65 M MT (7.58 million bales) in MY 2021/22 compared to 1.6 MMT (7.35 million bales) for MY 2020/21, representing a 3 percent increase.

The textile industry continues to be one of the most important sectors for the Turkish economy. Turkey's production capacity is estimated at 7.5 – 8 million spindles and 700,000 -800,000 rotors. Turkey ranks among the top five countries in the world in terms of yarn production capacity and number six in ready-to-wear-items production. Turkish textile exporters have the advantage of faster order response times and higher quality compared to many of their competitors.

As of March 2021, cotton yarn producers are working at full capacity, and orders are booked for several months. There has been an increasing demand from both European and U.S. markets and the domestic market for comfortable home style clothing due to COVID-19. Market sources indicate that there are new cotton yarn production investments being made in Turkey and there is a shortage of cotton fabric in the country because of a scarcity of cotton yarn. Post predicts that this is a short-term situation because

of the instability created by COVID-19 in 2020. Because of this shortage, textile and apparel producers would like the Government of Turkey to put in place measures to limit exports of cotton yarn. However, there is no indication from the GoT that they are contemplating such restrictions.

[Istanbul Apparel Exporters' Union](#) declared that Turkey had a record high level of exports of ready-to-wear clothing/apparel from July through October 2020. Pandemic related apparel and accessories including overalls and masks contributed to these exports. It is reported that the industry has invested roughly \$4.3 million USD¹ in 2020 just for pandemic related apparel and accessory production machinery.

After a minor recession during the first half of 2019, the Turkish economy went into a recovery phase in the second half of 2019, and overall GDP in 2019 grew at 0.88 percent. Analysts were originally expecting better growth in 2020 than 2019. However, COVID-19 hit Turkey in March 2020 and resulted in a 10.3 percent contraction in the economy for April – June 2020. Because of the pandemic, the Turkish government-imposed weekend lockdowns and retail closures and the Turkish consumer had less of an ability to spend during these uncertain times. Moreover, tourism and exports suffered. To combat this economic crisis, GoT began expansionary money and credit policies in the third quarter of 2020 to stimulate growth. State banks have given low interest rate loans to the public, aiming to increase spending, especially on houses and cars. This has caused a sudden growth in the GDP of 6.3 percent in the third quarter of 2020 which spilled over to the fourth quarter as 5.9 percent, despite reversion of expansionary monetary and credit policies. In spite of expectations of contraction due to COVID-19, 2020 ended with a GDP growth of 1.8 percent for Turkey caused by the GoT's expansionary policies. Inflation seems to be a persistent problem for the country for the last several years and has been exacerbated by the GoT's expansionist economic policies.

After the initial shock of the pandemic in March 2020, the economy recovered by summer 2020, as the pandemic measures were eased in Turkey, Europe, and the United States. Shopping malls were reopened in May 2020 in Turkey after two months of shut down. Some foreign tourists still came to Turkey in summer 2020 from the Middle East and Europe, although in more limited numbers. Many Turkish clothing brands reported doubling and tripling their online sales in the second half of 2020 when compared to pre-pandemic times. Europe, Turkey's largest ready-to-wear apparel market, also eased COVID-19 restrictions in summer 2020, and textile sales has stabilized going into 2021. Reportedly, online sales for European apparel brands have increased, especially cotton made comfortable loungewear for in-house use.

As vaccination rates increase in Europe, the United States and Turkey, it is expected that COVID-19 related effects will start to ease somewhat by the summer 2021, which should increase apparel/garment shopping in Turkey. A small increase in tourism activity is predicted for the summer 2021 for Turkey. For example, Russian tourism operators have indicated bringing more Russian tourists this summer. Some vaccinated European tourists might also decide to pursue excursions to Mediterranean towns of Turkey. Touristic activity normally gives a boost to garment/apparel/fast-fashion sales.

Post expects that the long-term trend will be positive for cotton consumption in Turkey. Over the years, Turkish mills have invested in new machinery and technology to increase quality and to lower costs in order to stay ahead in the very competitive international textile trade. The increasing youth population, immigration to urban areas, and rapid growth in number of shopping malls with clothing stores significantly increased the total volume of textile products sold in Turkey in recent

¹ The amount is about 3 billion TL. Average exchange rate for 2020 (7.022TL/USD) is used for conversion.

years. The total number of shopping malls with textile stores increased two-fold over the last ten years. As of 2020, there are 436 shopping malls in Turkey of which 125 are in Istanbul according to [Shopping Malls and Shopping Mall Investors Association](#) of Turkey. These shopping malls significantly contribute to domestic textile products sales. According to the KPMG retail sector report, the continuous increase in number of shopping malls for the last decade in Turkey will level off in 2023 as the market matures. In recent years, the increase in the number of tourists visiting Turkey from neighboring Middle Eastern countries also contributed to local sales of textile products. In some shopping malls, sales to foreigners are reported to be up to 30 percent, according to the Interbank Cards Center report. In addition, market sources indicate that there is a luggage trade going to especially North African and a few Middle East countries in recent years. This is cash purchases of ready to wear garments/apparel by travelers in bulk to sell in their home countries.

Additionally, Turkish clothing producers are increasing their number of stores in export markets in the Middle East, North Africa and Europe, to penetrate more into the markets where they are already operating. The KPMG retail sector report forecasts that Turkish retail brands will increasingly continue to open stores abroad in coming years².

According to the [Turkish Exporter's Assembly](#) data, in 2020, ready-to-wear items exports were \$17.1 billion and textile and raw materials exports were \$7.3 billion. The first represents a 3 percent decrease compared to 2019 and the second shrank 8 percent compared to a year ago. Considering the effects of COVID-19 on all retail markets, this seems to be better than previously expected. Overall, the share of textiles and products of total exports to Turkey was about 14.5 percent in 2019.

Domestic cotton is mainly sold directly to mills and the remainder is traded on a spot basis at the exchange in Izmir. The Izmir exchange also trades some cotton from other regions and countries. There are smaller spot markets in Adana and in the Southeast.

The [Izmir Commodity Exchange](#) formed a company and built a [large licensed storage facility](#) with 15,000 MT capacity where farmers can leave their cotton for future sales. The [Sanliurfa Commodity Exchange](#) in the GAP region has also built a 20,000 MT capacity [licensed storage facility](#) that started operations as of January 2019. These new facilities will bring new opportunities to Turkish farmers in cotton marketing, ease early season price pressures, and enable them to sell later in the season with higher prices.

IV. Trade

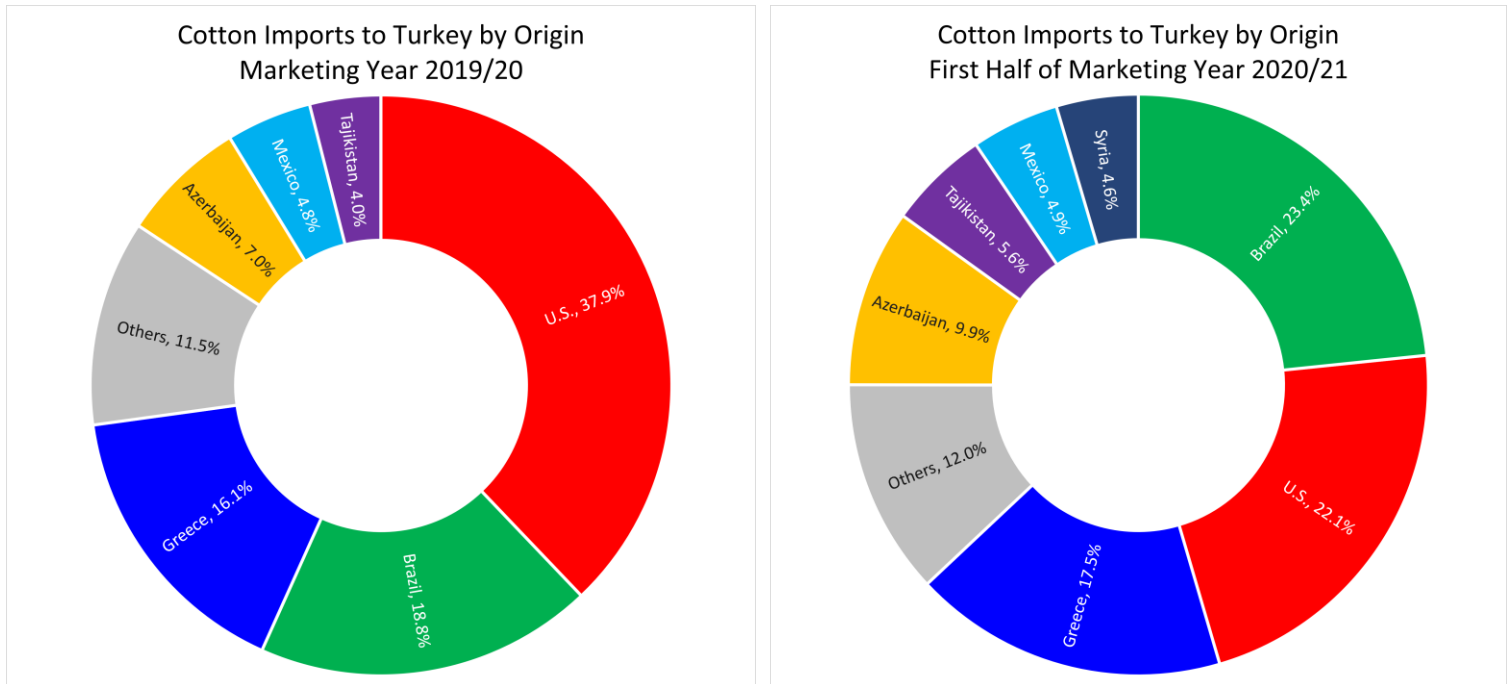
Post forecasts approximately 1.05 million MT of cotton imports for MY 2021/22. Turkey's cotton imports were 514,663 MT (2.36 million bales) during the first half of the MY 2020/21, 7.25 percent more than the same period of the MY 2019/20, despite the pandemic affecting both the domestic market in Turkey and target export markets of the Turkish textile industry³. This was a record high import level for the first half of the marketing year. The textile market has started to recover from the first pandemic shock that occurred in spring 2020 and started to stabilize during the second half of 2020. In the first six months of MY 2020/21, Brazil has been the leading supplier with imports of 120,280 MT (552,442

² Sectoral Report 2020, Retail Sector by KPMG Turkey: <https://home.kpmg/tr/tr/home/gorusler/2020/01/sektorel-bakis-2020-perakende.html>.

³ Please note that imports from and exports to free trade zones (FTZ) within Turkey are now included in the trade figures, whereas these were displayed as a separate item in our previous reports.

bales and 23.37% market share), followed by the United States with 113,756 MT (522,477 bales and 22.10% market share). The other leading supplier was Greece with 90,224 MT (414,396 bales and 17.53% market share).

Chart 2: Cotton imports to Turkey from various sources (previous & current MY)



Source: Trade Data Monitor.

Demand for U.S. cotton normally picks up during the second half of the marketing year. At the end of MY 2021/22 post expects U.S. exports to Turkey to reach around 340,000 MT (1.56 million bales). However, this number could change depending on coronavirus developments in addition to various other commercial and political circumstances.

As Turkey is a major yarn/fabric/textile/apparel/fast fashion producer country most of the cotton produced or imported is used domestically; only a minor amount is exported. Turkey’s cotton exports were 37,628 MT (175,824 bales) during the first six months of MY 2020/21. Pakistan (17,666 MT), Bangladesh (7,649 MT), and China (5,282 MT) were the leading foreign destinations for Turkish cotton. Turkey also exported about 21,262 MT (97,656 bales) of hydrophilic cotton for medical use during the same period, which is added to the “exports” line in the [PSD table below](#). EU countries are the primary destination for the Turkish hydrophilic cotton for medical use.

Turkish cotton yarn imports increased by 6.2 percent compared to 2019 reaching 202,592 MT during 2020. Cotton yarn exports, however, decreased about 7.2 percent down to 130,518 MT during the same period. While Central Asian (Uzbekistan, Turkmenistan) and South Asian (Pakistan, India) countries were the main sources for yarn imports, European Union (EU) member countries were the main destination for Turkish yarn exports. In addition to EU countries, Egypt and Pakistan continued to be important cotton yarn importers from Turkey in 2020.

Turkish cotton fabric imports and exports during 2020 were 264 million m² and 429 million m² respectively. Cotton fabric imports decreased about 15 percent year-on-year while cotton fabric exports also went down about 5 percent. EU countries continue to be the main destination for

Turkish cotton fabric exports, together with Tunisia and Morocco. Meanwhile Asian countries, Egypt and few European countries were the main sources for imports of cotton fabrics.

V. Policy

Cotton imports are subject to zero import tax. However, since April 2016, U.S. cotton is subject to a 3 percent antidumping duty. Turkish importers of U.S. cotton benefit from the inward processing regime under which importers are not required to pay the 3 percent antidumping tax if they are exporting the materials produced from this cotton. Overall, despite the 3 percent duty, U.S. cotton still maintains its market share of roughly 40 percent of Turkey's imported cotton market.

Turkey issued a new import tax in January 2019 on imported cotton yarn to stem imports from countries such as Turkmenistan, India and Pakistan, which have been exporting large quantities of cotton yarn to Turkey. According to the new cotton yarn import regime, imports from countries with which Turkey has a trade agreement, such as EU and EFTA member countries and South Korea, Bosnia, Malaysia and Singapore, continue to face zero tariffs. However, imports of cotton yarn from other countries, such as the United States and countries under the Generalized System of Preferences, are subject to 5 percent for HS 520511-520512 and HS 520611-520612. Other categories such as HS 52051-520528 and HS 520613-520625 are subject to 8 percent from these sources.

Furthermore, GoT has decided to apply additional tariffs to imports of some more kinds of cotton yarn to Turkey with a presidential decree in August 2019. This will affect the countries that are not in a free trade agreement (FTA) with Turkey. For these countries, such as the United States and the countries under the Generalized System of Preferences, yarns with HS Codes from 520531 to 520548 and HS Codes from 520631 to 520643 will face an additional tariff of 5 percent or 8 percent depending on the HS Code. The FTA countries will continue to have a zero-import tariff.

The new import tax has slowed down the pace of increase of cotton yarn imports to Turkey in 2020 compared to 2019. The tax on cotton yarns has been met with mixed reactions from the industry. While local yarn producers support the new tax initiative, textile product producers argued that their costs would go up. Turkish importers of cotton yarn also benefit from the inward processing regime and are not required to pay the tax if they export the product made with this yarn.

News reports indicate that as of 2021 ready-to-wear apparel and garment producers complain about a shortage of cotton fabric. Market sources indicate that there is no major scarcity. The textile production industry would like import taxes on cotton yarn/fabric to be taken down and/or put barriers to export Turkish cotton yarn and fabric.

As an interesting note, *electronic warehouse receipt* for cotton has been traded for the first time at [Turkish Mercantile Exchange](https://www.turkishmercantileexchange.com).⁴ Now cotton that is stored in licensed warehouses can be traded with their electronic warehouse receipts.

Turkey has a large textile industry driving the demand for cotton, and due to lower than needed domestic cotton production, the country will continue to import cotton for years to come.

⁴ <https://www.bloomberght.com/turib-de-ilk-pamuk-elus-islemi-gerceklestirildi-2276878>

VI. Production, Supply and Distribution Tables

Table 3: Production, Supply and Distribution Table, Bales
(thousands of hectares, thousands of 480lb. bales)

Cotton	2019/2020		2020/2021		2021/2022	
Market Begin Year	August 2019		August 2020		August 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	570	570	350	350	0	450
Beginning Stocks	1,694	1,366	2,766	2,363	2,516	2,510
Production	3,450	3,445	2,900	2,894	0	3,399
Imports	4,672	4,671	4,800	5,052	0	4,823
Total Supply	9,816	9,482	10,466	10,309	2,516	10,731
Exports	450	459	450	450	0	459
Use	6,600	6,660	7,500	7,349	0	7,578
Loss	0	0	0	0	0	0
Total Dom. Cons.	6,600	6,660	7,500	7,349	0	7,578
Ending Stocks	2,766	2,363	2,516	2,510	2,516	2,693
Total Distribution	9,816	9,482	10,466	10,309	2,516	10,731

Source: USDA forecasts, FAS Istanbul forecasts.

Table 4: Production, Supply and Demand Table, Metric Tons
(thousands of hectares, thousands of MT)

Cotton	2019/2020		2020/2021		2021/2022	
Market Begin Year	August 2019		August 2020		August 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	570	570	350	350	0	450
Beginning Stocks	369	297	602	514	548	546
Production	751	750	631	630	0	740
Imports	1,017	1,017	1,045	1,100	0	1,050
Total Supply	2,137	2,064	2,279	2,244	548	2,336
Exports	98	100	98	98	0	100
Use	1,437	1,450	1,633	1,600	0	1,650
Loss	0	0	0	0	0	0
Total Dom. Cons.	1,437	1,450	1,633	1,600	0	1,650
Ending Stocks	602	514	548	546	548	586
Total Distribution	2,137	2,064	2,279	2,244	548	2,336

Source: USDA forecasts, FAS Istanbul forecasts

VII. Trade Matrices

a. Cotton Trade Matrices

Table 5: Cotton Imports to Turkey (HS Code: 5201), 480lb. Bales

TURKEY					
COTTON					
Import Trade Matrix					
Units:	Bales				
Time Period	Aug/July		Aug/July		Aug/Jan (6 Months)
Imports for:	MY 2018/19		MY 2019/20		MY 2020/21
U.S.	1,651,125	U.S.	1,770,597	U.S.	522,477
Others		Others		Others	
Greece	453,013	Brazil	878,666	Brazil	552,442
Brazil	426,245	Greece	752,925	Greece	414,396
Azerbaijan	315,481	Azerbaijan	327,129	Azerbaijan	233,667
Tajikistan	181,895	Mexico	222,364	Tajikistan	132,962
Australia	92,828	Tajikistan	184,706	Mexico	115,977
Mexico	71,898	Turkmenistan	85,815	Syria	108,068
Turkmenistan	67,737	Kyrgyzstan	69,133	Uzbekistan	47,588
Argentina	62,763	Sudan	63,622	Argentina	45,388
Kyrgyzstan	40,138	Uzbekistan	60,296	Kyrgyzstan	45,337
Burkina Faso	37,956	Kazakhstan	52,341	India	40,308
Total of others	1,749,956	Total of others	2,696,998	Total of others	1,736,131
Others not listed	206,109	Others not listed	204,033	Others not listed	105,220
GRAND TOTAL	3,607,190	GRAND TOTAL	4,671,627	GRAND TOTAL	2,363,829

Source: Trade Data Monitor

Table 6: Cotton Imports to Turkey (HS Code: 5201), metric tons (MT)

TURKEY					
COTTON					
Import Trade Matrix					
Units:	Metric Tons				
Time Period	Aug/July		Aug/July		Aug/Jan (6 Months)
Imports for:	MY 2018/19		MY 2019/20		MY 2020/21
U.S.	359,490	U.S.	385,502	U.S.	113,756
Others		Others		Others	
Greece	98,632	Brazil	191,307	Brazil	120,280
Brazil	92,804	Greece	163,930	Greece	90,224
Azerbaijan	68,688	Azerbaijan	71,224	Azerbaijan	50,875
Tajikistan	39,603	Mexico	48,414	Tajikistan	28,949
Australia	20,211	Tajikistan	40,215	Mexico	25,251
Mexico	15,654	Turkmenistan	18,684	Syria	23,529
Turkmenistan	14,748	Kyrgyzstan	15,052	Uzbekistan	10,361
Argentina	13,665	Sudan	13,852	Argentina	9,882
Kyrgyzstan	8,739	Uzbekistan	13,128	Kyrgyzstan	9,871
Burkina Faso	8,264	Kazakhstan	11,396	India	8,776
Total of others	381,008	Total of others	587,202	Total of others	377,998
Others not listed	44,875	Others not listed	44,423	Others not listed	22,909
GRAND TOTAL	785,373	GRAND TOTAL	1,017,127	GRAND TOTAL	514,663

Source: Trade Data Monitor

b. Cotton Yarn Trade Matrices

Table 7: Cotton Yarn Imports to Turkey (HS Code: 5204, 5205, 5207), metric tons (MT)

TURKEY	COTTON YARN		
Import Trade Matrix	Units: Metric Ton		
Time Period	Jan-Dec	Jan-Dec	Jan-Dec
Import from:	CY 2018	CY 2019	CY 2020
U.S.	45	5	8
Others			
Uzbekistan	42,208	76,166	90,183
Turkmenistan	52,166	51,767	50,529
India	17,025	14,157	25,233
Pakistan	13,879	16,181	12,564
Tajikistan	7,511	6,290	5,986
Azerbaijan	3,623	7,875	5,314
Egypt	3,570	5,043	4,655
Vietnam	10,484	8,895	2,660
Syria	53	127	1,899
China	1,959	1,965	1362
Total of others	152,478	188,466	200,385
Others not listed	3,724	2,325	2,199
GRAND TOTAL	156,247	190,796	202,592

Source: Trade Data Monitor

Table 8: Cotton Yarn Exports from Turkey (HS Code: 5204, 5205, 5207), metric tons (MT)

TURKEY	COTTON YARN		
Export Trade Matrix	Units: Metric Ton		
Time Period	Jan-Dec	Jan-Dec	Jan-Dec
Export to:	CY 2018	CY 2019	CY 2020
U.S.	632	1,330	1,417
Others			
Portugal	30,418	26,015	21,304
Italy	27,686	25,681	20,868
Pakistan	15,685	7,773	16,805
Egypt	11,901	17,301	16,598
Germany	8,409	7,986	8,137
Spain	9,758	8,617	6,123
Bulgaria	4,408	4,724	4,450
Greece	3,979	4,006	4,236
North Macedonia	1,767	2,215	2,899
Poland	8,308	5,209	2638
Total of others	122,319	109,527	104,058
Others not listed	30,557	29,851	25,043
GRAND TOTAL	153,508	140,708	130,518

Source: Trade Data Monitor

c. Cotton Fabric Trade Matrices

Table 9: Cotton Fabric Imports to Turkey, thousands of square meters (m²)

TURKEY	COTTON FABRIC		
Import Trade Matrix	Units: 1,000 m2		
Time Period	Jan-Dec	Jan-Dec	Jan-Dec
Import from:	CY 2018	CY 2019	CY 2020
U.S.	131	97	40
Others			
Pakistan	103,346	89,242	81,354
Turkmenistan	57,658	72,759	65,039
China	68,272	58,323	50,993
Egypt	33,798	27,514	28,001
Italy	12,815	10,487	10,254
India	6,209	12,125	4,985
Greece	1,417	4,933	4,503
Germany	4,692	4,024	3,337
Spain	4,420	3,756	2,268
North Macedonia	1,245	999	1,993
Total of others	293,873	284,164	252,726
Others not listed	22,990	26,014	11,152
GRAND TOTAL	316,993	310,274	263,918

Source: Trade Data Monitor

Table 10: Cotton Fabric Exports from Turkey, thousands of Square Meters (m²)

TURKEY	COTTON FABRIC		
Export Trade Matrix	Units: 1,000 m2		
Time Period	Jan-Dec	Jan-Dec	Jan-Dec
Export to:	CY 2018	CY 2019	CY 2020
U.S.	7,908	3,665	3,003
Others			
Italy	73,597	72,344	67,847
Pakistan	17,909	36,582	31,021
Belgium	21,639	29,275	28,600
Spain	30,586	25,570	21,537
Tunisia	19,621	19,677	21,191
Romania	21,476	20,595	20,329
France	15,493	14,705	18,625
Morocco	19,205	19,114	16,712
Georgia	13,045	18,154	16,365
Netherlands	5,383	6,381	15,058
Total of others	237,956	262,395	257,286
Others not listed	217,492	188,268	169,154
GRAND TOTAL	463,356	454,328	429,443

Source: Trade Data Monitor

Attachments:

No Attachments