

**Required Report:** Required - Public Distribution

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**Report Name:** Fresh Deciduous Fruit Annual

**Country:** Turkey

**Post:** Ankara

**Report Category:** Fresh Deciduous Fruit

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**Report Highlights:**

In marketing year (MY) 2020/21, Turkey's total apple crop is expected to increase to 4.3 million metric tons (MMT) and the pear crop to 550,000 MT, according to the Turkish Statistics Institute. The Turkey table grape production forecast for MY 2020/21 is 2 MMT. Fresh fruit exporters are hopeful for the new marketing year with a weak Turkish Lira supporting additional exports.

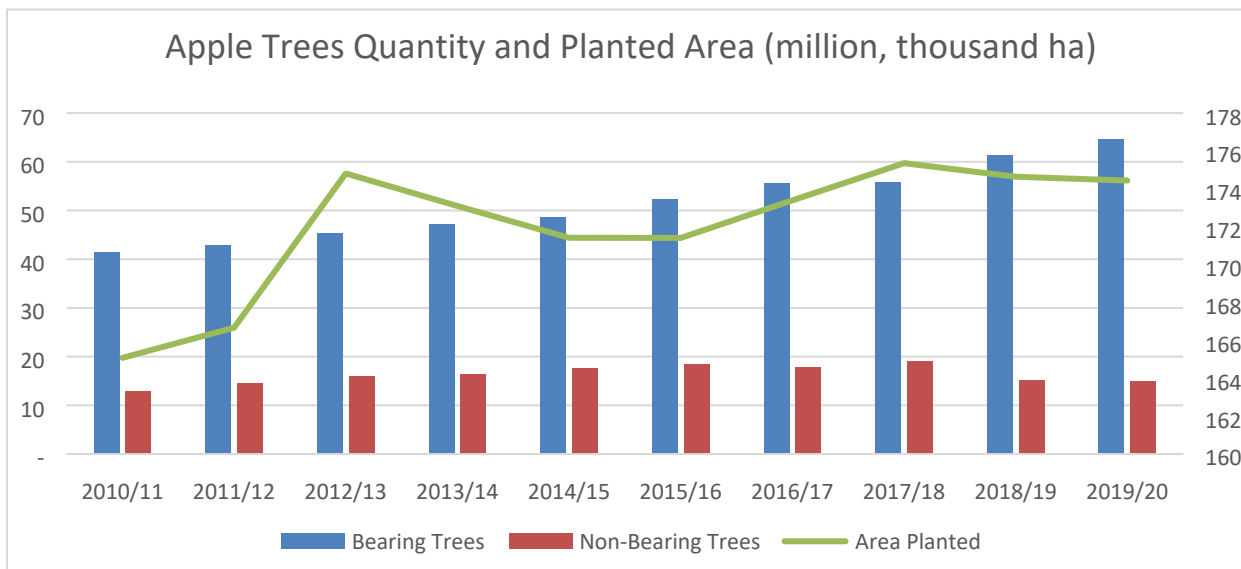
## Production:

Due to increasing export opportunities, Turkish farmers have invested in new orchards, uprooted non-commercial varieties, and replanted with trees suitable for export markets in recent years. There are also new private sector entities with investments in juice production and fruit exports. Over time, commercial production of fresh deciduous fruits has accounted for a larger portion of overall production. For this reason, while former post estimates were based on post's field travel observation of commercial orchards, production data in this report has been prepared based on Turkey's official data reflecting total production.

### *Apples*

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2020/21 season, total apple production is forecast to increase to 4.3 MMT, up 19 percent from the 3.6 MMT of apple production in MY 2019/20. Harvest starts around July and continues until October with favorable weather conditions. Farmers in major growing areas are generally satisfied with the yield in MY 2020/21 compared to the previous year, although some farmers suffered hail damage in some regions of Kayseri and Isparta (Central Anatolia) provinces.

**Figure 1: Apple Trees Quantity and Planted Area between 2010-2019 (million, thousand ha)**

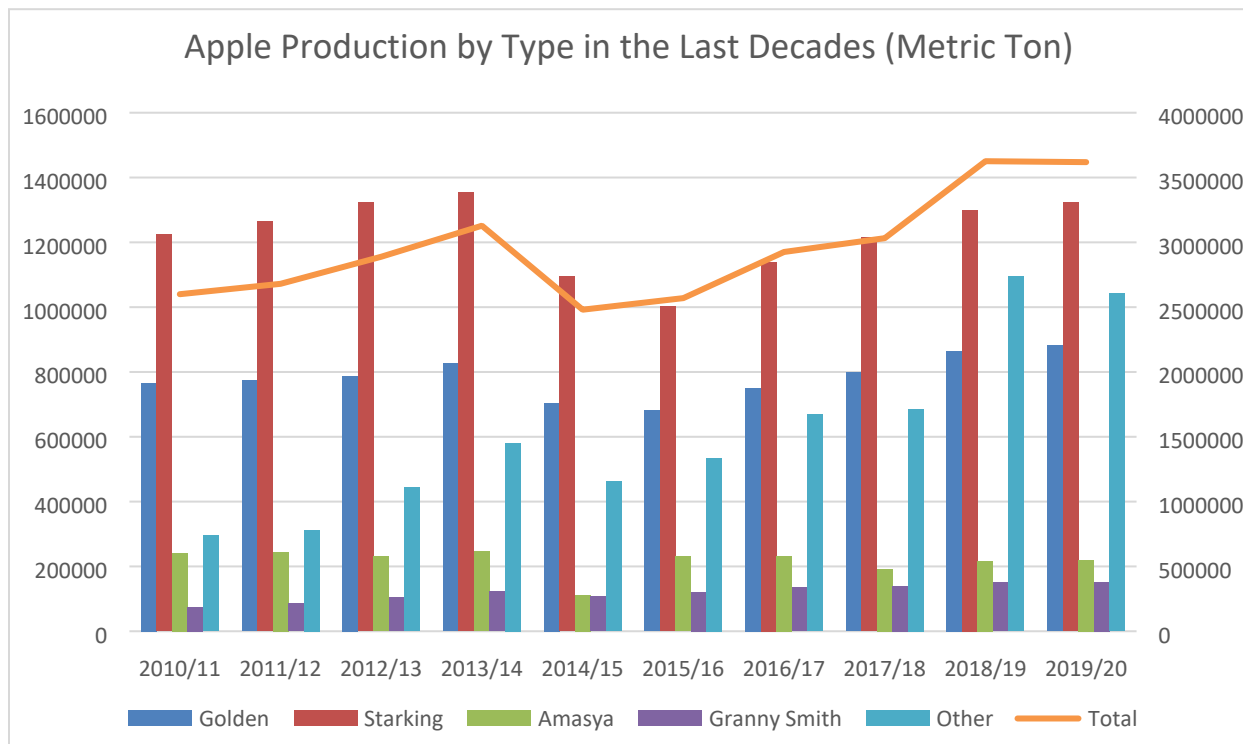


Source: TurkSTAT, 2020

Turkey is the one of the largest producers of apples in Europe. Traditional low-yielding orchards are still a major part of Turkish apple production, so Turkey is not currently a prominent exporter of apples. Turkey's diverse geographic regions allow for the production of hundreds of varieties of apples, but only a few of these are marketed commercially. Commercial orchards are generally located in the southern part of central Anatolia and the northern Mediterranean regions. As seen in Figure 1, production area and tree quantity have increased steadily in last decade.

Approximately 50 percent of all commercial apple production comes from three provinces: Isparta, Karaman, and Nigde. Isparta is the largest apple producing province with about 850,000 MT of apples annually. Commercial apples are also grown in Antalya, Konya, and Amasya. Karaman with 500,000 MT of production is the second largest production center with 12 million trees and around 16 percent of total production of Turkey. Karaman is becoming a prominent player in foreign trade with new investments that encourage traditional small apple growers to convert their orchard areas into more profitable types of apples with higher yields.

**Figure 2: Apple Production by Type in the Last Decade (Metric Ton)**



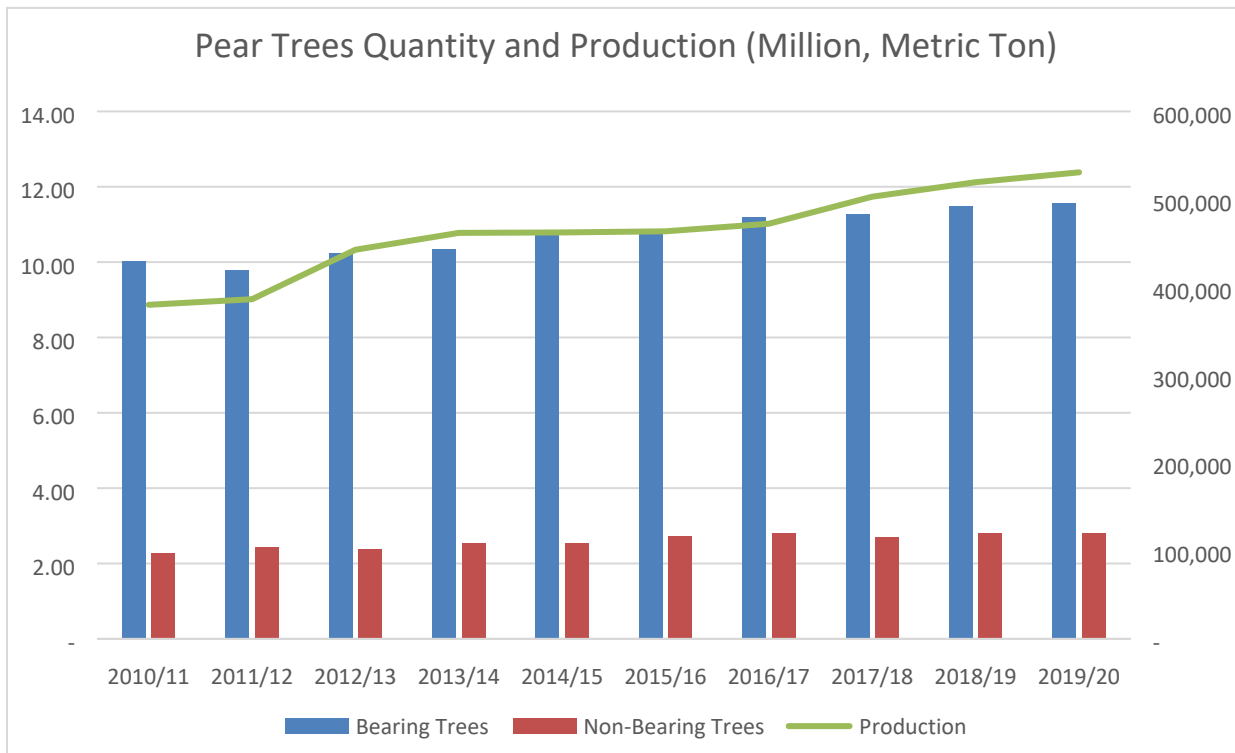
Source: TurkSTAT, 2020

The main apple varieties are *Starking*, *Golden*, *Amasya*, and *Granny Smith*, which represented 70 percent of all production in MY 2019/2020. *Starking (Red Delicious)* is the most popular variety and constitutes about 37 percent of total production with about 1.3 MMT.

*Pears*

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2020/21 season, total pear production is forecast to increase to about 550,000 MT, up about 4 percent from 530,000 MT of pear production in MY 2019/20. The pear planting area forecast is 26,400 ha, similar to last year. Harvest starts around July and continues until October.

**Figure 3: Pears Trees Quantity and Production between 2010-2019 (million, Metric Ton)**



Source: TurkSTAT, 2020

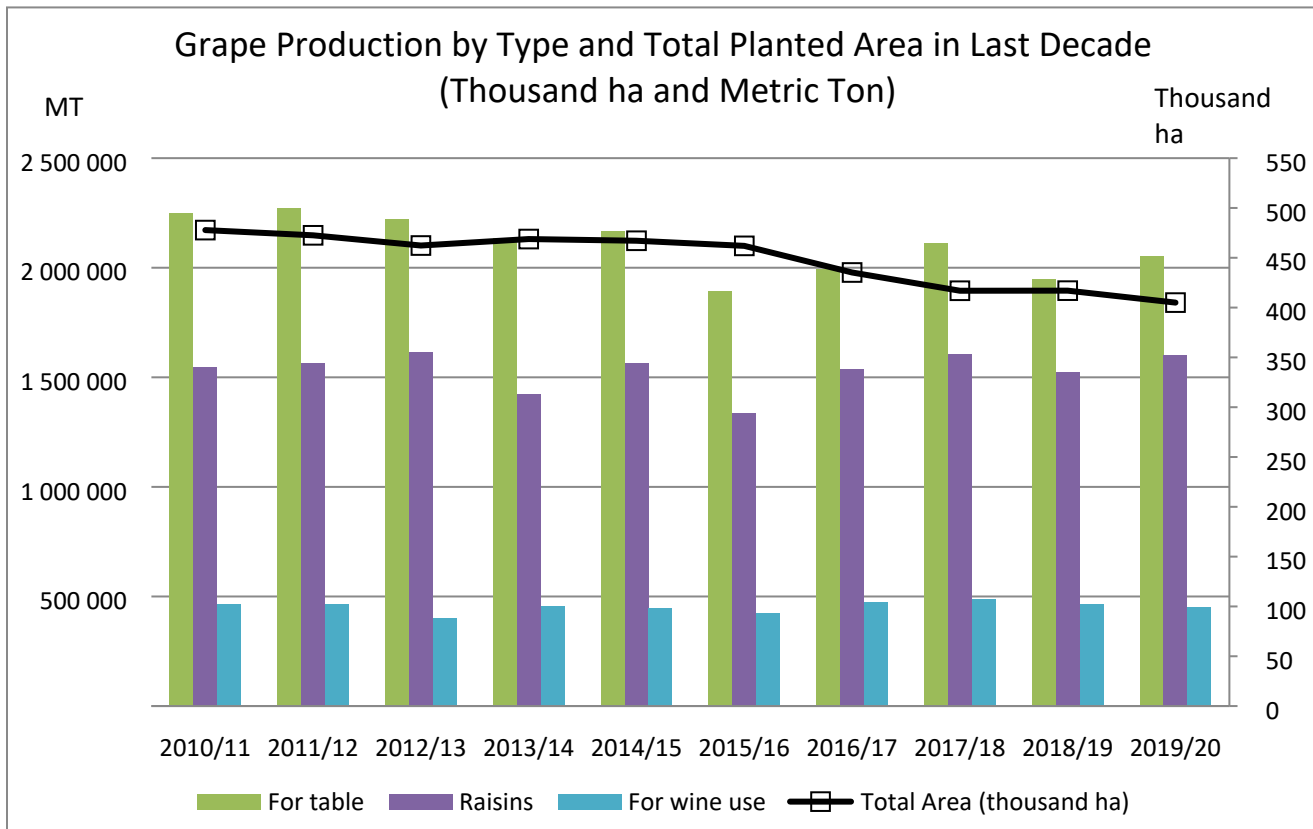
Many different varieties of pears are grown in Turkey and are harvested throughout the year. Almost 50 percent of the production comes from the Marmara region, followed by the Aegean and North Mediterranean regions, concentrated in cities like Bursa, Yalova, Antalya, Ankara, Konya, and Burdur. Both domestic and foreign pear varieties are grown in Turkey. The major varieties are *Santa Maria*, *Akca*, *Mustafabey*, *Cassia*, *Williams*, *Ankara*, and *Deveci*. Enjoying increasing demand, Turkish farmers have invested in new orchards, uprooted non-commercial varieties, and replanted with trees suitable for export markets in recent years.

#### Table Grapes

Turkey produces approximately 4.2 million MT of fresh grapes for all purposes, including raisins. The table grape production forecast in Turkey for MY 2020/21 is about 2 MMT, almost the same as MY 2019/20. Hail damage occurred in some area in the Aegean Region during the summer season, which affected the quality in these areas.

Grapes are grown in many regions throughout Turkey and are a significant commercial crop. About one third of all production is seedless grapes. Seedless grapes are mainly grown in the Aegean Region (Western Turkey). The Marmara Region in north-west Turkey produces grapes for wine production and for fresh consumption. Manisa, Mersin, and Denizli Provinces are the main table grapes producers.

**Figure 4: Grape Production by Type and Total Planted Area between 2010-2019**



Source: TurkSTAT, 2020

**Consumption:**

*Apples*

Apples are one of the most preferred fresh fruits in Turkey due to their widespread access, traditional use, and large number of varieties. Traditionally, about 80-90 percent of Turkey’s apple production is consumed as fresh fruit. About five percent is processed into juice, canned products, vinegar or dried products, and about five to ten percent is exported as fresh produce.

There is a lack of consumer awareness in terms of the differences among varieties. Consumers recognize apples according to their colors (such as red, yellow, and green) and taste. *Starking*, *Golden*, *Amasya*, and *Granny Smith* are the most preferred varieties for consumption in Turkey.

Through the use of controlled temperature storage facilities, apples can be marketed throughout the year. Current cold storage capacity in Turkey is more than 1 million MT and increasing yearly with new investments. Isparta is one of the provinces in Turkey where many cold stores are found because its geography and climate are suitable for growing several different kinds of fruit such as apples, cherries, and plums.

## *Pears*

About 90 percent of pears are consumed fresh. However, three to five percent are exported, and the remainder are canned. The most preferred varieties for domestic consumption are *Santa Maria* (constitutes 30 percent of total production), *Deveci* (20 percent), *Ankara* (10 percent), *Williams* (10 percent), *Keiffer* (5 percent), and *Akca* (5 percent). An increasing number of cold storage facilities in the country helps to provide fresh fruit throughout the winter. Pear consumption is 5 kg per capita.

## *Table Grapes*

The consumption of grapes is around 35 kg per capita, which is one of the highest consumption rates for all fresh fruits in Turkey. Fresh grapes are seasonal and are available throughout the summer until the middle of autumn. Consumption is concentrated during the times of year local grapes are in season.

According to the Turkish Statistics Institute, almost half of Turkey's total grape production was consumed as fresh table grapes, about 39 percent is dried and sold as raisins (including seedless sultanas that are primarily exported), and the remainder was processed, primarily for molasses and wine production in MY 2019/20.

As of October 2020, the average domestic price in retail markets for apples is about 6-7 Turkish lira (TL) per kilogram (compared to 4-5 TL last year). Pears are sold for 6-7TL (about 6 TL last year), and grapes are sold for 5-7 TL (5-6 TL last year). Price increases are lower than the rate of TL depreciation against other currencies, meaning despite the slight increase in nominal prices, the real prices of these fruits are lower than previous years. (Note that as of October 2020 \$1 = 8.2 TL compared to \$1 = 5.7 TL a year before.)

## **Trade**

### *Apples*

According to the Turkish Statistical Institute, during the first three months of MY 2020/21 (July to September 2020), total fresh apple exports were about 31,000 MT, down 10,000 MT compared to the same period in the last marketing year. The apple export forecast for MY 2020/21 is 250,000 MT, which is in parallel with production, assuming continuing demand from neighboring countries.

**Table 1: Turkey's Major Export Destinations - Apples Fresh, MT (year ending June) – HS 080810**

Partner	Year Ending: June (Metric Tons)				
	2014/2015	2015/16	2016/17	2018/19	2019/20
Russia	3,056	461	47,297	8,511	40,131
Iraq	55,884	170,373	60,548	133,214	37,197
Syria	22,313	11,361	33,005	48,417	31,669
India	1,123	4,114	10,475	20,892	29,055
Libya	391	1,147	3,547	4,036	15,741
Saudi Arabia	1,375	6,550	9,819	17,276	8,801
United Arab Emirates	743	2,608	2,621	8,279	8,340
Other	25,527	20,043	21,251	37,208	38,156
Total	110,412	216,657	188,563	277,833	209,090

Source: TDM

Turkey exported about 209,000 MT of apples in MY 2019/20, down 70,000 MT compared to the previous year. The main destinations are Russia, Iraq, and Syria. There was serious market loss in Iraq, including a significant export decrease in the spring, which was related with customs issues amid initial Covid 19 border closures.

Turkey also imported 1,185 MT of apple in MY 2019/20. The main suppliers are Iran (651 MT) and Cyprus (165 MT).

### *Pears*

During the first three months of MY 2020/21 (July to September 2020), total fresh pear exports were about 24,500 MT, up about 5,000 MT compared to the same period in the last marketing year. The pear export forecast for MY 2020/21 is 55,000 MT, slightly higher than last year, assuming continuing demand from neighboring countries with a better harvest.

Turkey exported about 209,000 MT of pears in MY 2019/20, up 9,000 MT compared to the previous year, attributable to the increasing demand of the Russian market with about 18,000 MT. Other destinations for pears are Iraq and Romania with 12,700 MT and 5,700 MT respectively.

**Table 2: Turkey's Major Export Destinations - Pears Fresh, MT (year ending June) – HS 080830**

Partner	Year Ending: June (Metric Tons)				
	2014/2015	2015/16	2016/17	2018/19	2019/20
Russia	5,106	132	15,931	10,475	18,217
Iraq	9,526	7,085	12,098	14,654	12,767
Romania	379	298	2,274	2,436	5,744
Israel	53	-	17	826	1,692
Bulgaria	53	117	1,464	883	1,370
Germany	432	438	804	854	1,131
Other	8,670	7,890	11,128	11,743	9,935
Total	24,219	15,960	43,716	41,871	50,856

Source: TDM

*Table Grapes*

According to the Turkish Statistical Institute, during the first four months of MY 2020/21 (June to September 2020) total table grape exports were about 115,000 MT, up about 2,000 MT compared to same period in last marketing year. Russia (60,000 MT) and Ukraine (20,000 MT) are the leading markets in first four months. The table grape export forecast for MY 2020/21 is 200,000 MT, assuming continuing demand from the top markets, including Russia and Ukraine.

**Table 3: Turkey's Major Export Destinations – Table Grapes, Fresh, MT (year ending May) – HS 080610**

Partner	Year Ending: May (Metric Tons)				
	2014/2015	2015/16	2016/17	2018/19	2019/20
Russia	119,447	-	162,696	88,068	101,910
Ukraine	7,519	23,211	27,577	20,479	31,018
Belarus	9,235	49,446	15,357	11,694	10,612
Saudi Arabia	8,797	17,768	13,421	13,880	9,996
Syria	151	290	1,125	3,736	8,525
Germany	9,898	11,422	11,006	7,695	7,779
Other	19,577	71,118	48,513	33,796	35,279
Total	174,624	173,255	279,695	179,348	205,119

Source: TDM

In MY 2019/20, Turkey exported about 205,000 MT of fresh grapes, up 35 percent from 179,000 MT in MY 2018/19 due to far better harvest quality. Russia, Ukraine, Belarus, and Saudi Arabia are the top destinations for Turkish table grape exports, as seen in Table 3.



## POLICY

Stable export demand and government support have helped Turkish farmers to invest in new stone fruit orchards. There are payments for producers who are registered in the Ministry of Agriculture and Forestry's farmer registration system. The Ministry provided supports of 190 Turkish Lira (TL)/ha for fuel and fertilizer and 1000 TL/ha for standard saplings, 4000 TL/ha for certified saplings for the entire fruit sector (including deciduous and citrus trees). This program is to support farmers' investments to buy government-certified dwarf saplings to ensure higher quality trees are being planted in Turkey. As of November 2020, the exchange rate is 8.4 TL/\$1.

(More information on Turkey's agricultural government support programs is available [here](#))  
Turkey also subsidizes juice exporters through an export refund program, which allows a tax refund of 360 TL/MT on up to 15 percent of the exported quantity, not to exceed 12 percent of the total value of the exports.

Duties for imports of fresh apples, pears, and table grapes are provided below.

**Table 4: Import Duties for Fresh Apples, Pears, and Table Grapes**

<b>Product</b>	<b>Tariff Code</b>	<b>Duty (percent)</b>	<b>Effective Date (since)</b>
Fresh Apples	0808.10	60.3	January 1, 2019
Fresh Pears	0808.30	60.3	January 1, 2019
Fresh Table Grapes	0806.10	54.9	January 1, 2019

## Production, Supply, and Distribution

Apples, Fresh Market Year Begins Turkey	2018/2019		2019/2020		2020/2021	
	Jul 2018		Jul 2019		Jul 2020	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	170000	174000	170000	174000	0	175000
Area Harvested (HA)	170000	174000	170000	174000	0	175000
Bearing Trees (1000 TREES)	59000	61000	59000	64500	0	65000
Non-Bearing Trees (1000 TREES)	15000	15000	15000	15000	0	15000
Total Trees (1000 TREES)	74000	76000	74000	79500	0	80000
Commercial Production (MT)	2850000	3450000	2850000	3470000	0	4150000
Non-Comm. Production (MT)	150000	150000	150000	150000	0	150000
Production (MT)	3000000	3600000	3000000	3620000	0	4300000
Imports (MT)	500	1591	300	1180	0	1000
Total Supply (MT)	3000500	3601591	3000300	3621180	0	4301000
Domestic Consumption (MT)	2703900	3323758	2820300	3412090	0	4051000
Exports (MT)	296600	277833	180000	209090	0	250000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	3000500	3601591	3000300	3621180	0	4301000
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh Market Year Begins Turkey	2018/2019		2019/2020		2020/2021	
	Jul 2018		Jul 2019		Jul 2020	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	230000	26400	230000	26400	0	26400
Area Harvested (HA)	230000	26400	230000	26400	0	26400
Bearing Trees (1000 TREES)	20000	11500	20000	11550	0	11600
Non-Bearing Trees (1000 TREES)	40000	2800	40000	2800	0	2800
Total Trees (1000 TREES)	60000	14300	60000	14350	0	14400
Commercial Production (MT)	430000	500000	470000	510000	0	530000
Non-Comm. Production (MT)	20000	20000	20000	20000	0	20000
Production (MT)	450000	520000	490000	530000	0	550000
Imports (MT)	100	118	100	144	0	140
Total Supply (MT)	450100	520118	490100	530144	0	550140
Domestic Consumption (MT)	408200	478118	440100	479144	0	495140
Exports (MT)	41900	42000	50000	51000	0	55000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	450100	520118	490100	530144	0	550140
(HA) ,(1000 TREES) ,(MT)						

Grapes, Fresh Table	2018/2019	2019/2020	2020/2021
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Market Year Begins Turkey	Jun 2018		Jun 2019		Jun 2020	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HA)	300000	417000	300000	406000	0	417000
<b>Area Harvested</b> (HA)	300000	417000	300000	406000	0	417000
<b>Commercial Production</b> (MT)	1780000	1830000	1830000	1930000	0	1880000
<b>Non-Comm. Production</b> (MT)	120000	120000	120000	120000	0	120000
<b>Production</b> (MT)	1900000	1950000	1950000	2050000	0	2000000
<b>Imports</b> (MT)	400	400	400	390	0	400
<b>Total Supply</b> (MT)	1900400	1950400	1950400	2050390	0	2000400
<b>Fresh Dom. Consumption</b> (MT)	1721100	1770400	1745400	1845390	0	1800400
<b>Exports</b> (MT)	179300	180000	205000	205000	0	200000
<b>Withdrawal From Market</b> (MT)	0	0	0	0	0	0
<b>Total Distribution</b> (MT)	1900400	1950400	1950400	2050390	0	2000400
(HA) ,(MT)						

**Attachments:**

No Attachments