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Report Highlights:

Turkey is projected to have a high production year for grains. Snow cover and rains reversed the effects of dry weather earlier in the season. High tariffs on imports have continued and the GOT is restricting wheat imports to quota country allocations and flour exporters. TMO recently announced that it may tender for 300,000 tons of corn, including 200,000 tons US corn under the GSM program. The GOT signed a letter of intent with the IMF which should result in lower grain prices and decreased surpluses.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Ankara [TU1], TU

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Executive Summary

MY 2000 is projected to be another high production year for Turkish grains. Extremely good weather, started shortly after the new year, eliminated most of the adverse effects of previous dry weather. Production of wheat, barley, and corn are all projected to increase while rice production is projected to maintain 1999 levels. Chick pea and lentil production are projected to decrease due to decreases in planting areas.

During MY 1999, TMO purchased 5.5 MMT of grains and paid TL 408 trillion -- about USD 885 million. New support prices will not be announced until late May. Most observers expect the government will announce relatively lower prices parallel to the standby agreement signed with IMF to control the budget deficit and inflation. To encourage domestic sales, TMO increased domestic selling prices by 11 percent, well below the inflation rate. It also revised its three month deferred payment system for wheat, corn, and barley and TMO will be charging three, three and five percent (four percent for corn) for the first, second and third 30 day periods after purchase, respectively. Flour and flour product exporters are currently eligible to buy wheat from TMO at reduced prices comparable to the world market prices. The quality of TMO wheat, however, is far from the needs of the millers.

With another year of high production of most grains and substantially reduced export prospects, Turkey is likely to continue to use high duties to control and limit grain imports. The recently published 2000 Import Regime

maintained the previous duty rates of 50 percent for durum wheat, 55 percent for milling wheat, 50 percent for corn, 85 percent for barley, 35 percent for milled rice and 27 percent for paddy. Import duties for chick peas and lentils, however, were increased from 17 percent to 21.5 percent.

United States grain exports to Turkey are also facing stiffer competition from other suppliers both traditional and new players in the market. The EU and some Eastern European countries enjoy tariff advantages which ranged from low to zero duty tariff rate quotas due to the EU Customs Union Agreement or bilateral agreements. Neighboring countries also have an ability to sell grain in small consignments and offer faster and lower priced shipping. Quality remains an important issue in choosing suppliers, but many of our competitors continue to improve in this area and are able to expand their share of the market. Others gain market share through their low c&f prices. GSM-102, which was used to purchase USD 40.8 million feed grains, USD 6.0 million wheat, and USD 22.0 million rice in FY99 remains an important marketing tool. So far in FY2000, feed grains used USD 26.9 million, wheat used USD 7.7 million, and rice used USD 15.8 million from GSM-102. About 64 percent of the FY2000 GSM-102 allocation (USD 350 million for Turkey) was used by mid February.

Price support, procurement and export policies have resulted in enormous costs and a heavy inflationary impact, but have continued because of their perceived social and political benefits. The GOT signed an agreement with the IMF to decrease budget deficits. It will take a few years for the implementation of the full program even though a pilot program is anticipated to be started in 2000. It will be a long and difficult program for politicians who have manipulated price support to achieve political goals, considering wheat is the staple food item and wheat and barley are the two largest crops in Turkey

With this agreement, the GOT accepted to reduce the income support to farmers through support prices and is instead moving towards providing direct support to small farmers. The GOT also agreed to pay farmers a 35 percent premium over the Chicago Board of Trade price for HRW, for milling wheat in 2000, with a floor price of USD 150 per MT. The Minister of Agriculture has identified one region to test the direct payment system. He has also challenged the feasibility of setting such a low floor price.

(as of March 10, 1999, app. TL580,000 = US\$ 1.00)

Production

MY 2000 is projected to be another year of high grain production in Turkey. The weather was very dry until the new year, especially in December, especially effecting the Cukurova Region, due to its warmer climate and early vegetation. Wheat and barley yields in Cukurova are projected to be about twenty percent lower than normal and about ten percent of the total grain is produced in this region. Snow fronts throughout the grain growing regions since the new year, however, has been extremely good for grain production and eliminated the adverse impact of the dry weather in most areas. Continuation of rains in March, April, and May will provide further support for good yields in general. Pest control programs, particularly for Sunni bug and "aelia rostrata" are also very important factors for yield and quality, although snow coverage and cold weather should decrease the impact of these pests in the most commonly infested areas.

Planting areas for wheat and barley in MY 2000 are estimated at about the same levels as they were in MY 1999. It is too very early for accurate production estimates for rice, corn, chick peas, and lentils in MY 2000 but the area and production for rice and area for corn are expected to be similar to MY 1999 levels. Corn production may increase with higher yields. About ten percent of the corn area is reported to be devoted to silage. Area and production for both chick peas and lentils are projected to continue to decrease in MY 2000, due to heavy labor requirements and continued out migration of young people from rural areas.

Wheat is the largest and barley is the second largest crop and barley is the most important feed grain in Turkey. Even though wheat and barley are grown throughout the country, Central Anatolia grows more than any other region (about 40 percent). Most of the rice, on the other hand, is grown in the Marmara Region (60 percent in the Trace Region and 10 percent in the Southern Marmara Region around Gonen District) and remaining part (30 percent) in the Central Black Sea Region. Cukurova Region grows more corn than any other region (about 50 percent), because both first and second crop corn are grown. Eastern Marmara and Black sea Regions (especially western provinces) are also significant first crop corn producing regions. Red lentils are grown primarily in the Southeastern Anatolia and green lentils are grown primarily in the north-central Anatolia. Chick peas are also grown in most areas, but primarily in Central Anatolia.

TMO purchased less grains in MY 1999 than in MY 1998, but still much more than it can store in the existing-covered storage capacity of about 4.5 MMT. The decrease in procurement was primarily due to decreased production, but also because there was only a moderate increase in procurement prices and somewhat delayed payments. TMO procured 5.5 MMT of grains including about 4.2 MMT of wheat (TL 320 trillion or about USD 700 million), 820,000 MT of barley (TL 49 trillion or about USD 110 million), 380,000 MT of corn (TL 25 trillion or about USD 49 million), 47,000 MT of paddy rice (TL 9 trillion or about USD 17 million), 73,000 MT of rye (paid TL 4 trillion or USD 8 million), and 14,000 MT of oats (TL 800 billion or USD 1.6 million). This procurement was expensive, costing a little over of TL 408 trillion (USD 885 million). TMO's paddy rice procurement price was TL 240,000 for long grain, TL 225,000 for medium grain and TL 204,000 for short grain. TMO has not procured any chick peas or lentils since 1994. GUNEYDOGUBIRLIK, a quasi-governmental buying cooperative, which buys red lentils, pistachios, red peppers, etc., to boost prices in high production years bought 5,752 MT of red lentils when the prices were low at of TL 210,000 per kilogram (a total of about TL 1.2 trillion or USD 3 million) and a few months later sold back to the domestic market after prices improved. TMO's MY 2000 procurement prices are expected to be relatively lower than they were in recent years, but still above world market prices.

Consumption

MY 2000 wheat and barley consumption is projected to increase slightly, parallel to the increase in population. Corn consumption is projected to increase significantly due to more use by the corn fructose and starch industry, in addition to the steady increase for the poultry industry. Cargill's new corn fructose plant started its test runs and is expected to operate at full capacity this summer, processing 300,000 MT of corn per annum.

To reduce stocks, TMO started to finance domestic wheat, barley and corn sales in late December, 1999. TMO is selling wheat and barley with a monthly interest rate of three percent for the first two months and a five percent interest for the third month. Monthly interest rates for corn sales were originally announced at four percent for the first two months and five percent for the third, but later reduced to three percent for the first two months and four percent for the third. The delayed payment program and heavy snow, which created difficulty to carry grains to the commodity exchanges, helped TMO to reduce its stocks. TMO is selling currently about 250,000 MT of wheat per month.

On February 8, TMO increased its selling price for A1 quality hard white or red milling wheat to TL 98,000 per kilogram, a 11.4 percent increase since last June which significantly lags behind the ongoing inflation rate of about 40 percent for the same period. TMO's selling price for Anatolia durum is TL 108,000 per kg (\$186mt), semi hard wheat- TL 93,000 per kilogram (\$160 mt), white feed barley- TL 76,000 kg. (\$131mt) and corn- TL 86,000kg. (\$148mt). The comparable prices for some imported wheat which may be used to upgrade local wheat are: U.S. DNS Wheat USD 277.50 per MT (USD 170.00 CIF +93.50 duty+14.00 discharge & storage), Australian Hard Wheat USD 289.90 per MT (USD178.00 CIF+97.90 duty+14.00 discharge & storage), Canadian CWRS Wheat USD 280.60 per MT (USD 172.00 CIF+94.60 duty+14.00 discharge & storage), Argentine Wheat USD 223.25 per MT (USD 135.00 CIF+74.25 duty+14.00 discharge & storage), and Kazak Wheat USD 248.05 per MT (USD 151.00 CIF+83.05 duty+14.00 discharge & storage).

Millers finally persuaded the GOT and TMO to selling wheat to them at prices closer to the world market price. With the new policy, after exporting their wheat products (flour, pasta, etc.), millers can buy wheat from TMO at similar prices TMO sells for exports, eg. A1 hard white and hard red milling wheat at USD 102 per MT. Selling prices decrease gradually to USD 96 per MT for A1 or B1 semi hard milling wheat. A USD 2 per MT will be added to these prices for handling costs. Not much of the wheat has been yet sold under this new program, which is reported to be very complex in its documentation requirements. Also, transport from TMO depots poses additional problems.

Rice, chick pea, and lentil total consumption are projected to stay at MY 99 levels. Per capita rice consumption is estimated about 7.5 kilograms. This figure is closer to 9 kilograms in big cities. Rice consumption has been under severe competition from pasta. Pasta prices, especially for bulk pasta produced by smaller producers, have been very low, due to excess supply which resulted from increased capacity and decreased exports. Large potato supplies are also competing with rice this year. The GOT has been carrying campaigns to eliminate excess potato stocks.

Turkey used to be one of the leading chick pea and lentil consuming countries. However, this has been changing in recent years. Primarily due to the migration from rural to urban and high prices, per capita chick pea and lentil consumption decreased significantly in recent years. Consumption projections for chick peas and lentils in MY 2000, however, projected at the same revised levels as they were in MY 1999. MY 1998

and MY 1999 consumption estimates were revised slightly according to reflect revised industry estimates.

The price of hard red milling wheat was around TL 100,000, semi hard white milling wheat was around TL 96,000, soft white wheat was around TL 92,000, feed wheat was around TL 90,000, and feed barley was around TL 80,000 at the major grain commodity exchanges in Polatli, Eskisehir, and Konya in mid February. Retail rice prices currently are around TL 550,000 per 900 grams pack for calrose and around TL 800,000 per 900 gram pack for baldo at the retail stores in Ankara. Chick peas and green lentils are sold around TL 800,000 TL and red lentils are sold around TL 700,000 per 900 gram pack at the retail stores in Ankara. Currently USD 1.00 is around TL 580,000.

Trade

In MY 2000, Turkey's wheat imports and exports are expected to remain stable, reflecting another year of high production due to current GOT policy. To help TMO sales, the GOT stopped issuing any import licences for wheat last November, with exceptions for millers who export flour and products and wheat imports under EU TRQ's and bilateral agreements. The EU Customs Union agreement includes a TRQ for duty free imports of 200,000 MT for milling wheat and 100,000 MT for durum. Bilateral agreements allow duty free imports of 35,000 MT from Romania and 30,000 from Hungary. TRQ wheat imports should be completed by May. In addition to wheat, the GOT established TRQs of 46,000 MT feed barley, 52,000 MT corn, and 28,000 MT rice for the EU with zero import duty. Similarly, the GOT has TRQs of 45,000 MT corn and 10,000 MT wheat bran with zero duty for Romania and of 55,000 MT corn and 10,000 MT wheat and corn bran with again zero duty for Hungary. The GOT has recently decided to assign the Hungarian and Romanian TRQs to the TMO. In addition, TMO is seriously considering imports of about 200,000 tons on U.S. corn under the GSM 102 program (see TU9010).

MY 1999 U.S. wheat exports to Turkey as of Feb. 17, had reached 93,000 MT, almost double the same period last year, but still low when compared to the size of the market. In addition to the previously mentioned TRQs, low priced but good quality wheat from former CIS countries (Ukraine, Romania and Bulgaria) and Australia won a sizeable share of the market. High duties and the GOT's restrictions on wheat imports since last November also affected U.S. sales. Several traders also point to continued concerns about quality issues (total defects, moisture, etc.). U.S. corn exports to Turkey are strong (285,000 MT since June compared to 65,000 MT the previous year). Many observers expect the duty to be lowered after TMO exhausts its stocks, which could further spur sales.

Most Turkish rice imports are handled by seven traders, some with interrelated companies. Most of this rice was originally from Egypt where the price was reportedly around \$360 mt compared to \$450mt for calrose. In addition, other traders brought rice from Syria through border trade or barter. With a lower duty and better rate of return, paddy rice imports have increased, with prices reported at \$200mt from Arkansas per MT and \$250 from California. During the first ten months in CY 1999 (Jan. - Oct.), Turkey imported 112,500 MT of milled rice (Egypt, Italy, China, and U.S. are the major suppliers) and 136,000 MT of paddy rice (U.S. and Australia are the major suppliers). Rice imports (round grain type) from China have also become significant recently due to their low prices. U.S. farmers in Missouri have recently begun to grow baldo rice for the Turkish market, with an initial shipment of about 3,000 tons due to arrive in April.

During MY 1999 through February 29, TMO sold (but not all shipped) 1,130,000 MT of wheat (of which 470,000 MT was durum) and 75,000 MT of barley (white feed) for export. According to unofficial sources Turkey imported 927,000 MT of wheat and 362,000 MT of corn in MY 2000. On the other hand, Turkey is

reported to have exported 286,000 MT of wheat (including 110,000 MT durum).

During the first ten months in CY 1999 (Jan.-Oct.), Turkey imported 7,500 MT of chick peas and 46,000 MT of lentils (mostly green lentils from Canada) and exported 85,000 MT of chick peas and 92,000 MT of (mostly red) lentils, according to the official data.

The GSM-102 credit guarantee program continues to be an important marketing tool although its benefits for grains are limited in the current scenario. In FY 2000 (up to February 18, 2000), Turkish importers used GSM-102 of USD 7.7 million for wheat imports, of USD 26.9 million for feed grain imports, and of USD 15.8 million for rice imports.

Turkey is expected to remain a significant importer of high quality wheat for the foreseeable future for local and export products. With depressed economies in some of its major markets and political problems with others. Flour exports declined significantly in MY 1998 and MY 1999, causing a reduction of high quality wheat imports. On the other hand, domestic demand for this quality has been slowly increasing. Similarly, Turkey is also expected to stay as a significant corn and rice importer. Demand for corn will be increasing in time from the starch, fructose, and feed sectors. Poultry production continues to grow over 12 percent per annum. Unless a significant portion of the GAP Project area is used for corn production, corn supply will be short and imports will continue. Rice producing areas are also limited and its production is not likely to increase significantly.

MY 1999 trade estimates were revised to reflect the available official and unofficial data. Wheat and barley export estimates include TMO sales and assumes one more successful tender for exports of about 500,000 MT of grains before the new crop, probably in late March or April. MY 1999 export estimates for barley, chick peas, and lentils were revised downward to reflect a supply shortage. MY 1999 rice import estimates were lowered because of increased supply and decreased consumption, but corn import estimates were raised slightly due to increased corn usage by the industry.

MY 1998 import and export estimates for Turkey have been revised to reflect the official data which is now available through October 1999.

Stocks

TMO will be holding about 3.1 MMT of wheat-- after completion of the remaining shipments of 808,000 MT which was sold at the recent tenders. Current stocks include about 610,000 MT durum wheat, 2,450,000 MT milling wheat and 40,000 MT feed wheat. In addition to wheat, TMO has about 550,000 MT of barley, and 275,000 MT of corn in its stocks as of mid February.

Policy

Production Policy

Price support, procurement and export policies have resulted in enormous costs and a heavy inflationary impact, but have continued because of their perceived social and political benefits. The GOT gave a letter of intent to the IMF in order to sign a standby agreement and promised to decrease budget deficits. It will take a few years for the implementation of the full program even though a pilot program is anticipated to begin in 2000. It will be a long and difficult path to adopt such a program as politicians are used to manipulated price supports to achieve political objectives. There is also concern about the GOT's ability to maintain rural income, if the price support program is radically changed. In the letter of intent, the GOT agreed that its

present agricultural support policies were not the most cost-effective way of providing support to poor farmers. Distorted market prices tend to benefit rich farmers more than poor ones, and lack coherence -given the fragmentation of the policy making process in this field among several ministries and public institutions. Above all, they have become quite burdensome to the tax payers with an average cost of about three percent of GNP in recent years.

The medium term objectives of the reform programs were to phase out existing support policies and replace them with a direct income support system targeted to poor farmers. This would first be done by setting up a pilot program for the crop year 2000, and, based on the results, the GOT would extend the direct income support system nationwide in 2001. The GOT expected to complete this system, which would be based on a new farmer registration system, by 2002.

Accordingly, the following principles should govern the support policies in 2000, and, if the direct support system is not yet fully implemented, in 2001.

1. The spread between support prices and the projected world market prices will be no more than 35 percent of the projected C.I.F. world price. This spread will be further reduced in 2001, with a floor price of \$150 per MT. Import tariffs will be adjusted so that the tariff- inclusive import price will exceed the support price. The projected world price would be determined based on the price of US #2 HRW at the Chicago Board of Trade. In order to reduce TMO purchases, and to eliminate large stocks, the GOT will announce TMO domestic sales prices which are no less than a) the procurement price of TMO plus storage costs or b) tariff inclusive import price for grains of similar quality.
2. The GOT will gradually phase out credit subsidies to farmers. The total cost of credit subsidies sustained by the Turkish Agricultural Bank (Ziraat Bank) will decline by 50 percent. To achieve this goal, Ziraat Bank will introduce: a) a subsidized interest rate which would not be lowered until its equal to its "reference rate" - defined as the average of the last twelve month treasury bill auction rates, b) the subsidized rate would remain equal to its reference rate, and c) should the reference rate start rising, the percentage spread of the reference rate over the subsidized rate would not increase. Borrowers would be given the choice of borrowing at a fixed interest rate (the subsidized rate at the time when the loan was contracted) or at a floating rate equal to the prevailing subsidized rate. The increase in the subsidized credit granted by Ziraat Bank would not exceed 55 percent in 2000.
3. Subsidies on fertilizer and other inputs would remain constant in nominal terms in 2000 and 2001, and thereby also be reduced in real terms.

These policies are expected to be monitored and coordinated by a new Agricultural Reforms Steering Committee, which was announced on December 21, 1999. This committee was established under the chairmanship of the Undersecretary of the Ministry of Agriculture and Rural Affairs and includes representatives from the Ministry of Finance, Ministry of Industry and Trade, State Planning Organization, Undersecretary of Treasury, Undersecretary of Foreign Trade, General Directorate of Ziraat Bank, and Farmers Union. Studies by the Agricultural Reforms Steering Committee will be supervised by a Ministerial Committee.

The percentage of the population directly involved in agriculture is still estimated at around 40 percent, even though there is a continuous large migration from rural to urban areas, which could make implementation of a reform package difficult. Farmers are not yet affected from the consequences of the new agricultural policies. A major test of farmer reaction will be when the support price for the new crop grain will be announced, considering wheat is the staple food item and wheat and barley are the two largest crops in Turkey. The new grain support price will be announced at the end of May which means that the GOT will have five-months to implement other economic measures before confronting the farm sector. Turkish agricultural policies are historically very difficult to change and the ability of the current coalition government to do this is untested. However, most of the public seems supporting the new policies which were announced during the last couple months in 1999.

If the economic measures are successfully implemented and the rate of inflation is reduced to the target rate by then, it will be much easier for the GOT to gain acceptance of lowered support prices.

Trade Policy

Current import duties are 55 percent for milling wheat, 50 percent for durum, 85 percent for barley, 50 percent for corn, 27 percent for paddy rice, 35 percent for milled rice, and 21.5 percent for chick peas and lentils. Imported wheat which is later re-exported as flour or flour products, is exempt from import duties. GOT officials have stated that these high tariff rates would be reduced after the harvest, but the policy has continued to limit import competition and facilitate TMO sales. Import duty on corn, however, is anticipated to be reduced (probably to 30 percent) after TMO sells out its stocks, probably in April.

The GOT has applied severe restriction to wheat imports since November 1999, by refusing to issue licences to importers. Any company which had applied for licence earlier (about 7MMT licenses were previously issued) would be able to receive it without any cost or time restriction. There are rumors that, some traders who received licences earlier, are selling them for about USD 10 per MT premium.

The GOT put a US\$ 73 per MT subsidy on pasta exports in 1999, but it has not been used. A similar subsidy announced in previous years, was never made available to exporters. All flour and products exporters are eligible to buy wheat from TMO at world market prices or to import wheat without paying duty. There are no other subsidies for wheat or other wheat product exports. Similarly, there are no subsidies for the exports of barley, rice, corn, chick peas or lentils.

Marketing

As a result of increasing demand for high quality combined with limited land resources and crop quality, Turkey is expected to remain a significant long term wheat importer. In addition, Turkey is also expected to remain long term rice and corn importer. The United States is well positioned to meet the growing demand for constant quality and value (price for quality). U.S. Wheat Associates, U.S. Grain Council, and U.S. Rice Federation have done good job creating an awareness of the quality and value of U.S. grains. The Rice Producers Association has also recently become active in the Turkish market. There is stiff competition, however, from other suppliers with respect to quality and price. Supply reliability is a major asset of U.S. products. GSM-102 credit guarantee program also remains an important marketing tool for U.S. wheat, feed grains, and rice.

Statistical Tables

Wheat Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		06/1998		06/1999		06/2000
Area Harvested	8550	8550	8650	8650	0	8650
Beginning Stocks	2196	2196	2246	2774	1446	2074
Production	18500	18000	16500	16500	0	17500
TOTAL Mkt. Yr. Imports	1600	2004	1500	1300	0	1300
Jul-Jun Imports	1600	1935	1500	1300	0	1300
Jul-Jun Import U.S.	62	47	0	46	0	100
TOTAL SUPPLY	22296	22200	20246	20574	1446	20874
TOTAL Mkt. Yr. Exports	3000	2626	1500	1500	0	1500
Jul-Jun Exports	3000	2711	1500	1500	0	1500
Feed Dom. Consumption	900	1000	1000	1000	0	1000
TOTAL Dom. Consumption	17050	16800	17300	17000	0	17250
Ending Stocks	2246	2774	1446	2074	0	2124
TOTAL DISTRIBUTION	22296	22200	20246	20574	0	20874

Wheat Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Wheat		
Time period	June-May	Units:	Metric Tons
Exports for:	1998		1999
U.S.	3	U.S.	
Others		Others	
Pakistan	571333	Pakistan	144750
India	466077	India	117605
Tunisia	292873	Tunisia	61841
Bangladesh	273075	Italy	48925
Morocco	177819	Kenya	32250
Jordan	115536	Lebanon	20000
Algeria	67168	Spain	14000
Yemen	49358	Portugal	12950
Italy	47418	Israel	12128
Ethiopia	37980	Albania	10200
Total for Others	2098637		474649
Others not Listed	185761		5360
Grand Total	2284401		480009

Wheat Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Wheat		
Time period	June-May	Units:	Metric Tons
Imports for:	1998		1999
U.S.	71317	U.S.	26728
Others		Others	
Russia	310797	Ukraine	143028
Bulgaria	280712	Romania	82497
Romania	221889	Australi	60361
Hungary	220277	Bulgaria	42674
Ukraine	194023	France	23320
Germany	179774	Canada	18399
Australia	159501	Germany	14197
Kazakistan	105321	Switzerland	10507
Canada	86079	Moldavia	9854
France	65611	United Kingdom	8055
Total for Others	1823984		412892
Others not Listed	108984		14962
Grand Total	2004285		454582

Burley Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Barley				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		06/1998		06/1999		06/2000
Area Harvested	3600	3600	3600	3550	0	3600
Beginning Stocks	1026	1026	726	721	476	521
Production	7600	7500	7000	6800	0	7400
TOTAL Mkt. Yr. Imports	200	210	100	100	0	100
Oct-Sep Imports	150	102	100	100	0	100
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	8826	8736	7826	7621	476	8021
TOTAL Mkt. Yr. Exports	1200	1215	500	300	0	500
Oct-Sep Exports	1200	714	500	300	0	500
Feed Dom. Consumption	6000	5900	5950	5900	0	6000
TOTAL Dom. Consumption	6900	6800	6850	6800	0	6900
Ending Stocks	726	721	476	521	0	621
TOTAL DISTRIBUTION	8826	8736	7826	7621	0	8021

Barley Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Barley		
Time period	June-May	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Saudi Arabia	506184	Syria	10019
Morocco	297531	Northern Cyprus	4809
Jordan	11850		
Algeria	86338		
Lebanon	67021		
Syria	49742		
United Arab Emi.	25588		
Northern Cyprus	23946		
Tunisia	23205		
Israel	13560		
Total for Others	1104965		14828
Others not Listed	110005		
Grand Total	1214970		14828

Barley Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Barley		
Time period	June-May	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	102762	France	15444
Ukraine	55028	Ukraine	3125
Russia	25893	Slovakia	15
Germany	12167		
Romania	8488		
Bulgaria	2723		
Hungary	2455		
Moldavia	92		
Denmark	5		
Austria	5		
Total for Others	209618		18584
Others not Listed			
Grand Total	209618		18584

Corn Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Area Harvested	650	600	650	650	0	650
Beginning Stocks	184	428	129	440	179	430
Production	2300	2300	2400	2400	0	2500
TOTAL Mkt. Yr. Imports	1000	921	900	950	0	1100
Oct-Sep Imports	1000	917	900	950	0	1100
Oct-Sep Import U.S.	689	720	0	750	0	900
TOTAL SUPPLY	3484	3649	3429	3790	179	4030
TOTAL Mkt. Yr. Exports	5	9	0	10	0	10
Oct-Sep Exports	5	9	0	10	0	10
Feed Dom. Consumption	2300	2200	2300	2250	0	2300
TOTAL Dom. Consumption	3350	3200	3250	3350	0	3600
Ending Stocks	129	440	179	430	0	420
TOTAL DISTRIBUTION	3484	3649	3429	3790	0	4030

Corn Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Corn		
Time period	Sep-Aug	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Italy	5584	Germany	201
France	1553	France	162
Germany	1182	Italy	43
Spain	230	Netherlands	2
Hungary	59	Austria	1
Belgium	8		
Northern Cyprus	6		
Azerbaijan	6		
Austria	3		
Sweden	2		
Total for Others	8633		409
Others not Listed	1		
Grand Total	8634		409

Corn Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Corn		
Time period	Sep.-Aug.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	712572	U.S.	74285
Others		Others	
Hungary	44923	Bulgaria	8043
Romania	41220	Canada	2500
Argentina	31224	Argentina	364
Ukraine	23550	South Africa	323
France	22364		
Bulgaria	21673		
Moldavia	8961		
Croatia	5501		
Serbia	3904		
South Africa	1807		
Total for Others	205127		11230
Others not Listed	3743		
Grand Total	921442		85515

Rice Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Rice, Milled				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Area Harvested	90	75	80	80	0	80
Beginning Stocks	156	170	86	146	106	116
Milled Production	230	190	220	220	0	220
Rough Production	354	292	338	338	0	338
MILLING RATE (.9999)	6500	6500	6500	6500	6500	6500
TOTAL Imports	250	287	350	250	0	275
Jan-Dec Imports	250	275	350	250	0	275
Jan-Dec Import U.S.	0	117	0	100	0	120
TOTAL SUPPLY	636	647	656	616	106	611
TOTAL Exports	0	1	0	0	0	0
Jan-Dec Exports	0	1	0	0	0	0
TOTAL Dom. Consumption	550	500	550	500	0	500
Ending Stocks	86	146	106	116	0	111
TOTAL DISTRIBUTION	636	647	656	616	0	611

Rice Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Rice, Milled		
Time period	Sep.-Aug.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	22	U.S.	11
Others		Others	
Northern Cyprus	165	Northern Cyprus	32
Kazakhstan	96	United Kingdom	27
Albania	82	Serbia	10
Azerbaijan	50	Azerbaijan	3
Germany	31	Turkmenistan	3
Turkmenistan	22	Macedonia	2
United Kingdom	21	Germany	1
Russia	18		
Romania	17		
Georgia	17		
Total for Others	519		78
Others not Listed	43		
Grand Total	584		89

Rice Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Rice, Milled		
Time period	Sep.-Aug.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	57527	U.S.	5
Others		Others	
Egypt	90464	China	7994
Italy	31018	Egypt	3459
China	13121	Italy	945
Spain	3396	Spain	855
Thailand	883	Syria	360
Jordan	614	Thailand	320
Vietnam	176	India	26
Bulgaria	144	Saudi Arabia	22
Pakistan	138		
India	106		
Total for Others	140060		13981
Others not Listed	135		
Grand Total	197722		13986

Chick Pea Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Garbanzos				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	680	665	680	600	0	575
Beginning Stocks	83	83	33	91	33	86
Production	650	625	650	565	0	540
TOTAL Mkt. Yr. Imports	0	21	0	10	0	10
Jul-Jun Imports	0	23	0	10	0	10
Jul-Jun Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	733	729	683	666	33	636
TOTAL Mkt. Yr. Exports	200	158	150	100	0	75
Jul-Jun Exports	200	116	150	100	0	75
Feed Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	500	480	500	480	0	480
Ending Stocks	33	91	33	86	0	81
TOTAL DISTRIBUTION	733	729	683	666	0	636

Chick Pea Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Garbanzos		
Time period	Jan.-Dec.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	497	U.S.	385
Others		Others	
Algeria	19898	Egypt	14615
India	13593	Algeria	7939
Egypt	13279	India	7803
Italy	7224	Saudi Arabia	6062
Saudi Arabia	6849	Jordan	5123
Tunisia	5526	Sri Lanka	4675
Sri Lanka	4797	Italy	3414
Jordan	3849	Israel	3064
United Kingdom	3453	Tunisia	2569
France	3364	Malaysia	2405
Total for Others	81832		57669
Others not Listed	75560		27106
Grand Total	157889		85160

Chick Pea Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Garbanzos		
Time period	Jan.-Dec.	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	315
Others		Others	
Syria	3340	Syria	700
Iraq	2772	Iraq	504
Bulgaria	325	Mexico	441
Mexico	200	Uzbekistan	78
Iran	122	Spain	64
Israel	100	Saudi Arabia	24
Portugal	43	Turkmenistan	20
Bosnia Herzegovina	20	Romania	16
Australia	15	Germany	13
Kazakhstan	2	Iran	7
Total for Others	6939		1867
Others not Listed	14136		5352
Grand Total	21075		7534

Lentil Production Supply and Demand

PSD Table						
Country	Turkey					
Commodity	Lentils				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	580	549	580	400	0	380
Beginning Stocks	46	46	75	81	105	46
Production	570	540	580	400	0	380
TOTAL Mkt. Yr. Imports	50	79	50	55	0	80
Jul-Jun Imports	50	70	50	60	0	80
Jul-Jun Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	666	665	705	536	105	506
TOTAL Mkt. Yr. Exports	125	154	125	110	0	80
Jul-Jun Exports	125	185	125	100	0	80
Feed Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	466	430	475	380	0	380
Ending Stocks	75	81	105	46	0	46
TOTAL DISTRIBUTION	666	665	705	536	0	506

Lentil Export Matrix

Export Trade Matrix			
Country	Turkey		
Commodity	Lentils		
Time period	Jan.-Dec.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	892	U.S.	750
Others		Others	
Egypt	62981	Egypt	32896
Saudi Arabia	10358	Saudi Arabia	8323
Sri Lanka	10305	United Kingdom	7991
United Kingdom	8458	Sri Lanka	5098
Sudan	5732	Israel	2507
Ethiopia	4513	Germany	2136
Israel	4395	Ethiopia	1862
Jordan	3468	Sudan	1246
Germany	3106	Jordan	1083
Italy	1424	United Arab Emi.	1024
Total for Others	114740		64166
Others not Listed	38378		27532
Grand Total	154010		92448

Lentil Import Matrix

Import Trade Matrix			
Country	Turkey		
Commodity	Lentils		
Time period	Jan.- Dec.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	503	U.S.	
Others		Others	
Syria	50162	Syria	28719
India	16122	Canada	5772
Canada	6116	Iraq	735
Australia	1640	Belgium	503
Iraq	926	India	429
Russia	661	Saudi Arabia	308
Egypt	214	Germany	220
Netherlands	41	Bulgaria	44
Germany	32	France	2
Sudan	20	Northern Cyprus	2
Total for Others	75934		36734
Others not Listed	2396		9550
Grand Total	78833		46284