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Turkey

Dried Fruit

Semi-Annual

2004

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Report Highlights:

Turkish raisin production is estimated at 250,000 MT in MY 2004, which is a record high. This was accomplished even after a frost in most growing areas in early April. Good weather during the drying season also improved the quality. TARIS has not announced a procurement price, however TARIS has already procured about 50,000 MT of the MY 2004 crop raisins with an advance payment of 1,000,000 TL per kg. Due to the larger supply, Turkey is projected to export higher quantities (220,000 MT) at lower prices.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
Ankara [TU1]
[TU]

After having frosts in early April in most parts of the country, including raisin-growing areas, raisin producers were concerned of lower production. Despite the frost, plant vegetation was very good and yields were even higher than normal. This was attributed by industry sources to the irrigation of orchards by growers right after the frost. Raisin production estimates for MY 2004 (September 2004 – August 2005) vary in between 240,000 MT and 260,000 MT by the majority of industry sources. Currently, PSD production estimate for MY 2004 is 250,000 MT, which is a record high level, about 8 percent higher than our earlier estimate, and 16 percent higher than the last year's estimate.

The weather was also very favorable during the drying season, which also improved the quality of the crop. The earlier estimates on the quality of MY 2004 crop is about 10 percent for standard #10, 45 percent for standard #9, and 45 percent for standard #8. The quality of MY 2003 crop was very good as 75 percent of the crop was standard #9 or better and 25 percent was standard #8.

TARIS has not yet announced a procurement price. However, TARIS already bought about 50,000 MT of MY 2004 crop raisins with an advance payment of TL 1,000,000 (about USD 0.67) per kilogram. TARIS is expected to procure a total of 60,000 MT in MY 2004. This will be fifty-percent higher than the quantity TARIS procured (about 40,000 MT) in MY 2003 with a lower payment. TARIS paid TL 1,400,000 per kilogram of standard #9 raisins in MY 2003.

TEKEL has not announced any procurement price either. TEKEL has not bought any of MY 2004 crop raisins, and does not currently have a procurement plan. TEKEL bought a total of 6,000 MT at a price of TL 1,040,000 per kilogram in MY 2003.

On the Izmir Commodity Exchange spot market the price is around TL 1,000,000 (about USD 0.67) per kilogram of standard #9 raisins. In early April, the price for standard #9 raisins was TL 1,300,000 (about USD 1.00 at the time) at the same commodity exchange.

Total MY 2004 domestic consumption is estimated at 28,000 MT, of this total, about 20,000 MT for domestic consumption and the remainder is for producing alcohol by TEKEL.

Due to larger supplies and lower prices in MY 2004, Turkey is projected to export 220,000 MT of raisins, which is ten percent higher than the earlier estimate and about 15 percent higher than MY 2003 revised exports. In between September 1 – October 7, 2004, Turkey exported 40,280 MT of raisins, which is significantly higher (nearly 20 percent) than the same period last year. On the other hand, the average export price in MY 2004 (about USD 1,035 per MT) was slightly lower than the average export price in MY 2003 (about USD 1,100). Exporters enjoyed high prices of their earlier sales, but prices are currently on the decline. Export prices for standard #9 currently are around USD 900 per MT. MY 2003 exports were revised according to data received from the Aegean Exporters Union. In MY 2003, TARIS exported about 27,600 MT with an average price of USD 1,088 per MT.

Ending stocks in MY 2004 are expected to increase slightly because of a larger supply. TARIS had 20,000 MT of raisins in its stocks at the beginning of MY 2004. PSD domestic consumption and ending stocks in MY 2003 were revised downward because of increased exports.

Statistical Tables

PSD Table for Raisins

Turkey Raisins							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Area Planted	82000	82000	83000	83000	83000	83000	HA
Area Harvested	79000	79000	81000	81000	83000	82000	HA
Beginning Stocks	47623	47623	23398	23398	29398	24103	MT
Production	230000	230000	215000	215000	230000	250000	MT
Imports	1759	1759	1000	1621	1000	1000	MT
TOTAL SUPPLY	279382	279382	239398	240019	260398	275103	MT
Exports	205984	205984	180000	191916	200000	220000	MT
Domestic Consumption	50000	50000	30000	24000	30000	28000	MT
Ending Stocks	23398	23398	29398	24103	30398	27103	MT
TOTAL DISTRIBUTION	279382	279382	239398	240019	260398	275103	MT

Export Trade Matrix for Raisins

Export Trade Matrix

Country Turkey

Commodity Raisins

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2003	January - July	2004
U.S.	106	U.S.	30
Others		Others	
United Kingdom	47045	United Kingdom	23641
Germany	37066	Germany	17274
Netherlands	27480	Netherlands	12601
Italy	18226	France	7453
France	12730	Australia	5318
Australia	12525	Italy	3474
Belgium	8179	Belgium	3328
Ireland	4980	Ireland	2445
New Zealand	3803	New Zealand	2396
Spain	3148	Spain	1441
Total for Others	175182		79371
Others not Listed	20720		7055
Grand Total	196008		86456

Import Trade Matrix for Raisins

Import Trade Matrix

Country Turkey

Commodity Raisins

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2003	January - July	2004
U.S.		U.S.	
Others		Others	
Uzbekistan	331	Greece	256
Greece	288	Netherlands	167
United Kingdom	271	France	136
Canada	237	Uzbekistan	132
Netherlands	196	Portugal	105
Germany	102	Germany	42
Portugal	96	Austria	40
Denmark	83	United Kingdom	21
Sweden	54	New Zealand	21
France	46	Norway	21
Total for Others	1704		941
Others not Listed	317		34
Grand Total	2021		975