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Prepared By: Kubilay Karabina

Approved By: Christine Mumma

Report Highlights:

The total cherry production forecast in Turkey in Marketing Year (MY) 2020/21 is 918,000 metric tons (MT), which is 72,000 MT more than MY 2019/20. The peach and nectarine production forecast for MY 2020/21 is 870,000 MT, 40,000 MT more than MY 2019/20. Stone fruit exports are increasing due to abundant production and strong demand from the Russian and EU markets. Turkey aims to improve its exports of fresh sweet cherries to China. This report covers cherries, peaches, and nectarines.

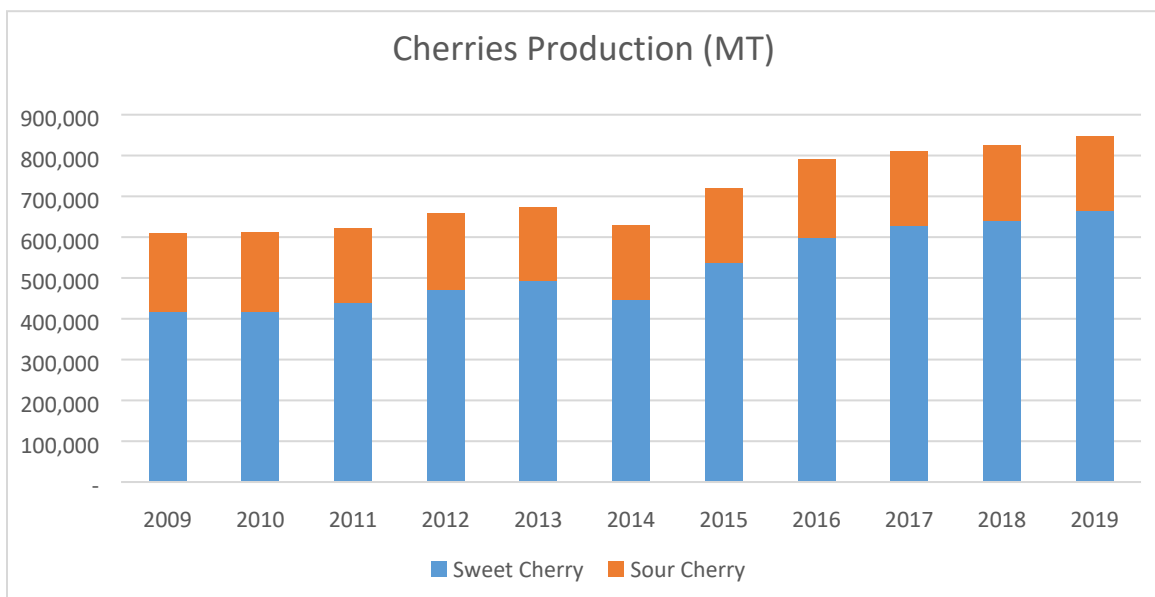
PRODUCTION

Sweet and Sour Cherries

Turkey has historically been among the top cherry producing countries in the world and is usually a top four exporter. Sweet cherries are grown mainly in the Central Anatolia, Aegean, Marmara, and Mediterranean Regions in Turkey. Konya, Izmir, Manisa and Denizli are the top cherry-producing provinces within these regions. The marketing year for cherries begins in April.

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2020/21 season, total sweet and sour cherry production are forecast to increase to 918,000 MT, of which 732,000 MT are sweet cherries and 186,000 MT are sour cherries. Farmers in major growing areas are generally satisfied with the quality and yield in MY 2020/21 compared to the previous year, although some farmers suffered hail damage in some regions of Bursa and Kutahya provinces.

Figure 1: Cherry Production in Turkey by year (Metric Tons)



Source: TurkSTAT, 2020

While the cherry harvest starts on the Aegean coast in Izmir in late May, it continues further inland in Afyon, Burdur, Salihli and Konya in June and July. Farmers harvest the cherries in Kahramanmaras in August. Cherry trees are cultivated in different parts of Turkey with a variety of different physical and climatic conditions. Because of this, the harvest time can differ by 45-55 days according to the region of planting.

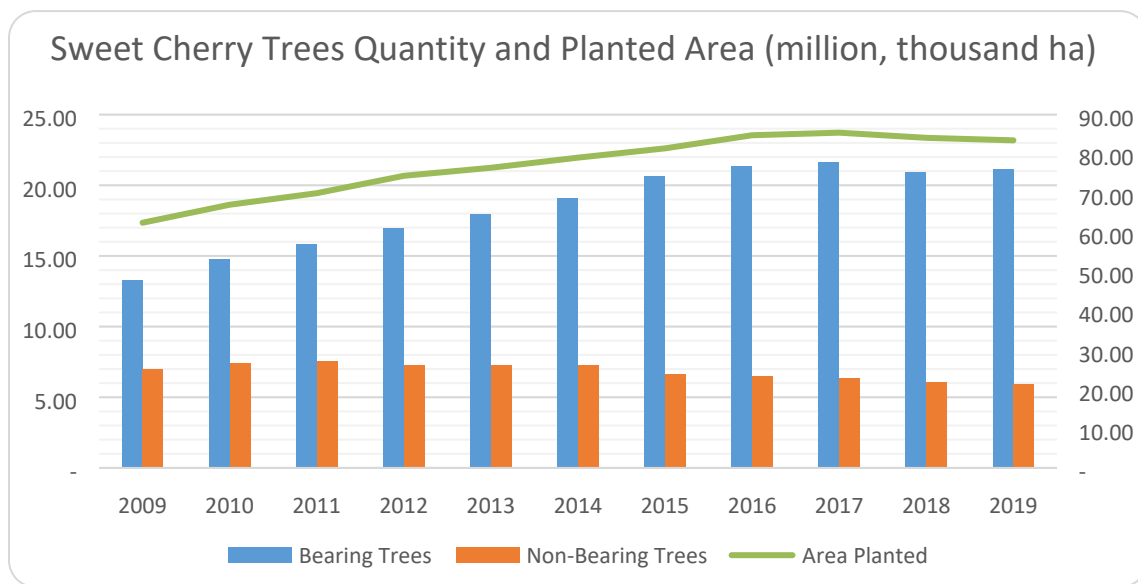
Strong export demand in recent years is the driving force of cherry production. Turkey has been slowly changing from traditional to modern cherry production. Recently, modern high-density orchards have been established, using new cultivars, rootstocks, training systems, and growing techniques. However,

most cherry production is still carried out using predominantly traditional methods among the agricultural holdings operated by family-owned farmers. A relatively cheap labor force with seasonal workers and family-owned farms provides the advantage of a stable, affordable labor supply.

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. There are also new private sector entities with investments in juice production and fruit exports.

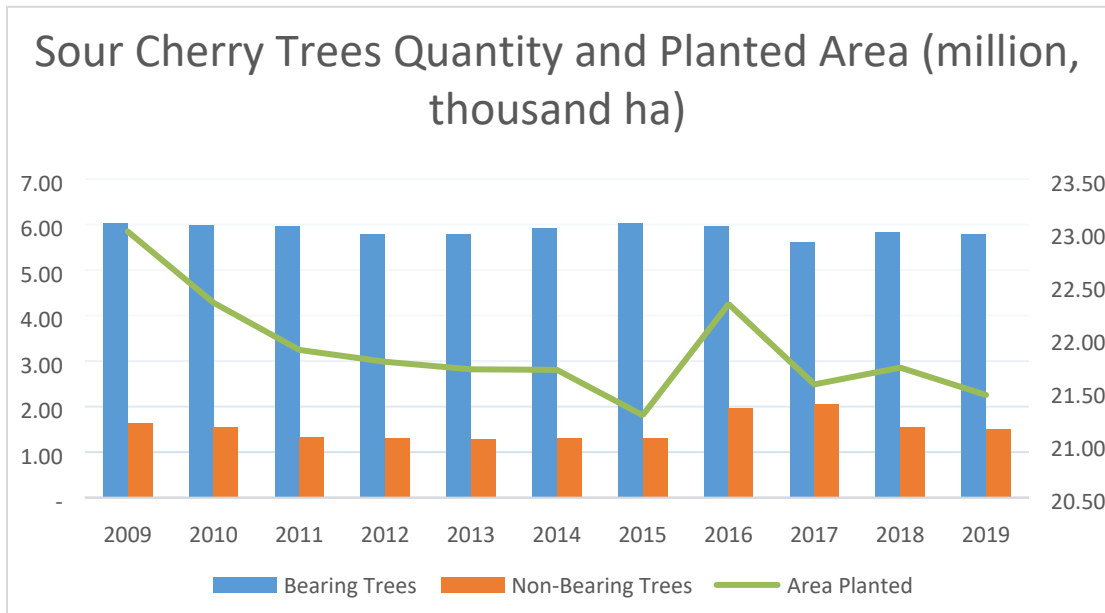
MY 2020/21 total cherry planting area is expected to remain at about 106,000 hectares, of which about 84,000 ha is for sweet cherries, similar to last year. Farmers have been replacing their older varieties of sweet and sour cherry trees with higher yield varieties. According to Turkish official data, the total estimated number of all cherry trees was about 34.3 million in 2019. The total number of bearing trees for sweet cherries increased from 14.7 million to 21.1 million in ten years. However, sour cherry production area has decreased during the same period from seven million in 2010 to six million in 2019 although the total production remained almost the same. The increase in production of better-quality cherries to meet the specifications of export markets also helps to increase the quality of cherries for the domestic market.

Figure 2: Sweet Cherry Trees Number and Planted Area (million trees, thousand ha)



Source: TurkSTAT, 2020

Figure 3: Sour Cherry Trees Number and Planted Area (million trees, thousand ha)



Source: TurkSTAT

Turkey has a lot of valuable cherry genetic resources because northern Anatolia is a center of the fruit’s origin. There are more than one hundred varieties of sweet cherries produced in Turkey. The 0900 Ziraat variety, also known as a Turkish Napoleon, was developed in Turkey and is the most popular variety in Turkey because it meets the higher quality characteristics demanded by export markets.

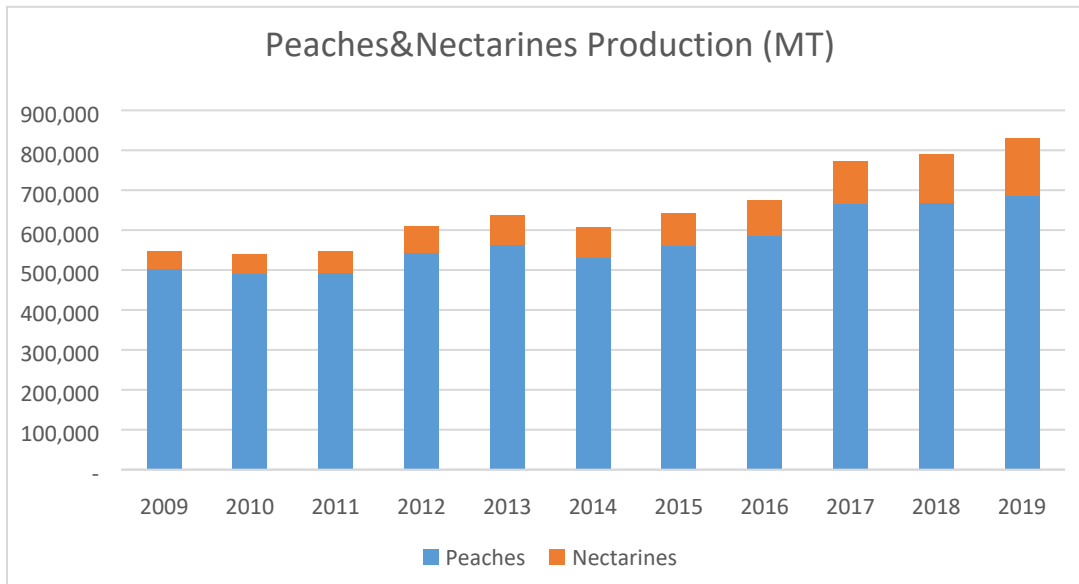
However, producers have started to try new cherry varieties such as Sweet Heart, Celeste, Early Lory, Kordia, Regina, Sam, and Sunburst for higher quality products, later harvest (to capture higher prices later in the season) and higher yields.

Fresh Peaches and Nectarines

Turkey continues to be among the top ten exporters in the world for peaches and nectarines. Bursa, Canakkale, Izmir, and Mersin, are the top provinces where peaches and nectarines are produced. Typically, they are harvested between April and early October. The marketing year starts in April.

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2020/21 season, total peach and nectarine production will increase to 870,000 MT, 40,000 MT more than MY 2019/20, with a continued stable increase in the last decade. (see Figure 4). Farmers in major growing areas are generally satisfied with the yields and quality of their crop in MY 2020/2021 compared to the previous year due to favorable weather conditions during the blooming and harvest period. Most of the peach varieties planted in Turkey are *Early Amber*, *Spring Crest*, *May Crest*, *Red Haven* and *Early Red*.

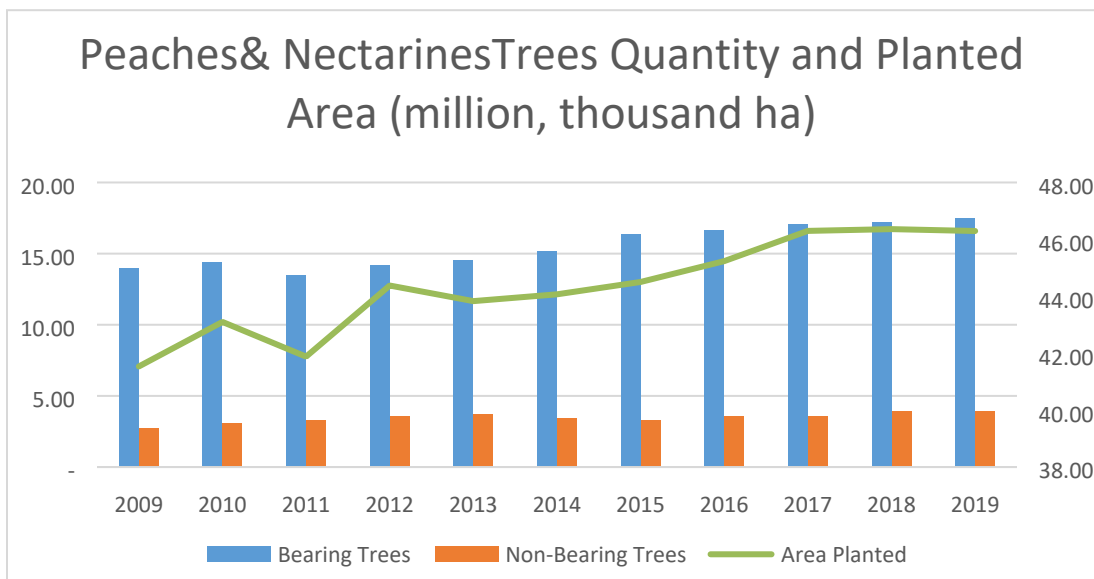
Figure 4: Peach and Nectarine Production in Turkey by year (MT)



Source:TurkSTAT

Planting area for peach production in Turkey continues to increase due to new investments for the export market and juice industry in the last decade (see Figure 5). Planting area remained the same at about 46,000 ha in MY 2019/2020. According to Turkish official data, the total estimated number of all peach and nectarine trees was about 21 million in 2019. The total number of bearing trees increased from 14 million in 2009 to 17.4 million in 2019.

Figure 5: Peach & Nectarine Trees Number and Planted Area (million trees, thousand ha)



Source:TurkSTAT

CONSUMPTION

Over one hundred different varieties of cherries are consumed in many forms in Turkey. More than half of the cherries produced in Turkey are consumed fresh domestically. Approximately 20 percent of all cherry production is used in the processing sector to make canned products, marmalades, frozen fruits, and fruit juice. Use of cherries for processing is forecast at 175,000 MT in MY2020/21 similar to the previous year. Most processed products are made from sour cherries.

Use of peaches/nectarines for processing is forecast at 130,000 MT in MY2020/21, similar to MY 2019/20. Approximately 15 percent of all peach production is used for juice. Turkish consumers prefer fruit juices of peach, cherry and apricot in “nectar” form. Nectars are very popular, but there is also a growing trend for 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold as frozen fruit.

TRADE

Turkey is one of the largest exporters of stone fruit in the world. Turkey exports more than 250,000 MT of stone fruits annually, with the majority going to EU countries and Russia. Turkish exporters are also looking for opportunities for stone fruits such as cherries in the Far East, particularly China in recent years. Turkey exported 884 MT of fresh stone fruit to China in 2019.

Table 1: Turkey’s Fresh Stone Fruit Exports

Turkey’s Fresh Stone Fruit Exports									
Commodity: 0809, Apricots, Cherries, Peaches (Inc. Nectarines), Plums (Inc. Prune Plums) And Sloes, Fresh									
Calendar Year: 2017-2019 and January-June: 2020									
Thousand dollar, Metric Ton									
HS	Description	2017		2018		2019		2020*	
		USD	Quantity	USD	Quantity	USD	Quantity	USD	Quantity
0809	Apricots, Cherries, Peaches (Including Nectarines), Plums (Including Prune Plums) And Sloes, Fresh	258,256	296,914	341,071	311,983	298,091	328,805	190,377	268,568
080930	Peaches, Including Nectarines, Fresh	88,811	69,783	126,814	87,135	105,409	89,827	76,244	74,894
080929	Cherries, Fresh, Other Than Sour	60,121	159,042	75,304	161,674	80,508	183,839	48,712	144,527
080910	Apricots, Fresh	63,538	44,192	70,734	41,019	67,638	38,097	43,127	33,880
080940	Plums, Prune Plums And Sloes, Fresh	45,700	23,767	68,146	22,131	44,502	17,021	22,241	15,259
080921	Sour Cherries (Prunus Cerasus), Fresh	87	130	73	25	35	21	54	8

Source: TDM

Turkey is one of the largest exporters of cherries in the world, representing about 15 percent of total global cherry exports. Chile, the United States, and Hong Kong are the other leading global exporters. Turkey has increased its export markets in Russia and EU countries in recent years. Germany (27,180 MT), Russia (25,388 MT), and Iraq (10,281 MT) were the main destinations for Turkish cherries in calendar year 2019. (see Table 2).

Table 2: Turkey’s Fresh Sweet Cherry Exports

Turkey Exports to _World					
Commodity: 080929, Cherries, Fresh, Other Than Sour					
Calendar Year: 2015-2019					
Partner	Calendar Year				
	2015	2016	2017	2018	2019
Germany	18,167	25,392	22,964	23,651	27,180
Russia	20,219	17,290	14,376	24,012	25,388
Iraq	14,067	14,422	9,479	13,171	10,281
Netherlands	2,274	3,772	2,558	1,298	2,546
Austria	227	3,517	1,756	785	1,961
Norway	1,608	1,761	1,520	1,887	1,392
Belarus	667	1,124	259	548	1,284
Denmark	1,061	1,129	885	1,380	1,243
Italy	1,526	3,498	1,303	1,583	1,166
Sweden	2,003	3,403	1,788	1,289	1,151
China	-	-	2	5	884
Other	6,750	4,481	3,231	5,695	6,032
Total	68,569	79,789	60,121	75,304	80,508

Source: TDM

Total exports are about 49,000 MT in the first 6 six months of 2020 compared to about 51,000 MT during same period in MY 2019/20. However, for MY 2020/21, Turkey’s total cherry export forecast is 80,000 MT due to better expectation in June and August 2020.

Table 3: Turkey's Fresh Sweet Cherry Exports from January to June, Comparison of 2018, 2019 and 2020

Turkey Exports to _ World									
Commodity:080929, Cherries, Fresh, Other Than Sour									
Year to Date: June, 2018 - 2020									
Partner	January - June 2018 (Unit Value: USD/T)			January - June 2019 (Unit Value: USD/T)			January - June 2020 (Unit Value: USD/T)		
	USD	Quantity	Unit Value	USD	Quantity	Unit Value	USD	Quantity	Unit Value
Germany	72,723	19,910	3,653	64,045	18,798	3,407	60,257	14,965	4,027
Russia	25,283	18,256	1,385	26,737	14,446	1,851	32,874	16,560	1,985
Austria	2,323	785	2,960	5,501	1,837	2,994	12,560	3,528	3,561
Norway	8,144	1,804	4,514	5,631	1,191	4,730	7,764	1,455	5,336
Netherlands	5,019	1,057	4,750	6,639	1,497	4,435	4,657	1,203	3,872
Italy	2,538	1,040	2,440	1,167	359	3,248	3,681	1,410	2,610
Hong Kong	2,044	541	3,781	2,779	658	4,223	3,039	640	4,753
Denmark	3,303	1,013	3,262	2,730	945	2,889	2,800	773	3,623
Sweden	3,493	1,024	3,411	2,390	842	2,841	2,793	863	3,237
UK	2,910	927	3,140	840	348	2,413	2,404	785	3,062
Singapore	1,431	318	4,506	1,429	336	4,249	1,376	270	5,089
UAE	369	161	2,293	491	160	3,063	1,299	268	4,853
Belarus	399	372	1,073	1,026	858	1,195	1,208	735	1,644
Poland	22	7	2,924	-	-	-	1,161	369	3,152
Iraq	3,116	10,316	302	1,972	6,453	306	1,102	2,623	420
China	-	-	-	401	80	4,986	852	255	3,338
Other	3,354	2,444	1,372	3,234	2,060	1,570	4,700	2,010	2,338
Total	136,470	59,975	2,275	127,010	50,868	2,497	144,527	48,712	2,967

Turkey exported a total of 105,409 MT of fresh peaches and nectarines in calendar year 2019. Russia (73,096 MT), Iraq (11,401 MT) and Belarus (6,248 MT) were the main destinations for Turkish peach and nectarines in calendar year 2019.

Table 4: Turkey's Fresh Peach & Nectarine Exports by Year

Turkey Exports to _World						
Commodity: 080930, Peaches, Including Nectarines, Fresh						
Calendar Year: 2017 - 2019						
Partner	2017		2018		2019	
	Value	Quantity	Value	Quantity	Value	Quantity
Russia	54,195	55,907	66,576	72,673	75,557	73,096
Belarus	378	850	1,110	2,225	4,687	6,248
Iraq	4,724	13,842	5,530	22,230	3,084	11,401
Saudi Arabia	4,376	7,780	2,569	6,685	1,605	2,971
Syria	1,052	3,546	1,771	9,104	1,274	5,969
Other	5,058	6,886	9,579	13,897	3,620	5,724
Total	69,783	88,811	87,135	126,814	89,827	105,409

Source: TDM

Total peach and nectarine exports are about 76,000 MT in the first 6 six months of 2020, which is 27 percent higher than the same period last year. Turkey's total peach and nectarine export forecast is 130,000 MT due to better yields and the competitive Turkish lira.

Table 5: Turkey's Fresh Peach & Nectarine Exports from January to June, Comparison of 2019 and 2020

Turkey Exports to _World						
Commodity: 080930, Peaches, Including Nectarines, Fresh						
Year to Date: June, 2019 - 2020						
Partner	January - June 2019 (Unit Value: USD/T)			January - June 2020 (Unit Value: USD/T)		
	Value	Quantity	Unit Value	Value	Quantity	Unit Value
Russia	45,930	40,270	1,141	65,132	58,955	1,105
Iraq	2,730	9,473	288	3,033	8,783	345
Romania	414	287	1,444	1,772	1,510	1,173
Ukraine	240	379	634	1,697	2,092	811
Georgia	60	195	308	798	993	803
Belarus	2,305	3,309	697	723	1,186	609
Saudi Arabia	460	890	517	246	553	446
Syria	436	2,483	176	175	672	260
Other	646	861	750	1,318	1,500	879
Total	53,221	58,147	915	74,894	76,244	982

Source:TDM

STOCKS

There are no official stocks of fresh stone fruits in Turkey.

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 August 2020, the exchange rate is 7TL/\$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.

Production, Supply, and Distribution

Cherries (Sweet&Sour), Fresh Market Begin Year Turkey	2018/2019		2019/2020		2020/2021	
	Apr 2018		Apr 2019		Apr 2020	
	USDA Official	USDA Official	USDA Official	New Post	USDA Official	New Post
Area Planted	106000	105800	106000	104900	0	106000
Area Harvested	0	0	0	0	0	0
Bearing Trees	26700	26700	26700	26900	0	27000
Non-Bearing Trees	7600	7600	7500	7450	0	7500
Total Trees	34300	34300	34200	34350	0	34500
Commercial Production	824000	824000	865000	846000	0	918000
Non-Comm. Production	0	0	0	0	0	0
Production	824000	824000	865000	846000	0	918000
Imports	0	0	0	0	0	0
Total Supply	824000	824000	865,000	846,000	0	918000
Dom. Consumption	748600	748600	787000	765457	0	663000
Exports	75400	75400	78000	80543	0	80000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	824000	824000	865000	846000	0	918000

(HA) ,(1000 TREES) ,(MT)

Peaches & Nectarines, Fresh Market Begin Year Turkey	2018/2019		2019/2020		2020/2021	
	Apr 2018		Apr 2019		Apr 2020	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	46360	46360	46400	46290	0	46300
Area Harvested	0	0	0	0	0	0
Bearing Trees	17150	17000	17200	17500	0	17600
Non-Bearing Trees	3900	3900	39000	3900	0	3900
Total Trees	21050	20900	21100	21400	0	21500
Commercial Production	790000	789000	830000	830000	0	870000
Non-Comm. Production	0	0	0	0	0	0
Production	790000	789000	830000	830000	0	870000
Imports	200	208	150	342	0	250
Total Supply	790200	789208	830150	830342	0	870250
Fresh Dom. Consumption	663400	662408	7001500	724942	0	740250
Exports	1268000	126800	130000	105400	0	130000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	790200	789208	830150	830342	0	87025130

(HA) ,(1000 TREES) ,(MT)

Attachments:

No Attachments