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Report Highlights:

MY 2000 PS&D production is expected to decrease to 550,000 MT, mainly reflecting hot and dry weather in July. FISKOBIRLIK announced its MY 2000 procurement price at TL 1,100,000 per kg., 7.8 percent higher than the last years base price. In dollar terms, the price actually decreased from USD 2.30 to 1.70 per kg., reflecting continued efforts to lower production and reduce FISKOBIRLIK's losses.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Ankara [TU1], TU

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Executive Summary

Hazelnut production in MY 2000 is currently estimated at around 550,000 MT, slightly less than last year's revised level.

FISKOBIIRLIK announced the MY 2000 support price at TL 1,100,000 (USD 1.70), compared to \$2.30 last year. Producers are upset with the announcement as the increase (in TL terms) was comparatively lower than the the support price increases received by producers of field crops, and a large decrease in real terms. Traders are hoping that the lower price, and other incentives will begin to attract growers to switch to other crops and that the country's large production surplus will begin to shrink.

Lower export prices for Turkish hazelnuts could also discourage producers in other countries, who are able to take advantage of the high world market prices which have been fostered by Turkey's price support and official purchase programs. FISKOBIIRLIK, which along with many other government parastatals is being restructured and/or privatized, is expected to procure around 120,000 MT during the current season, depending upon the availability of funds and how promptly it transfers funds to the growers. Total hazelnut stocks from MY 1999 are estimated at about 300,000 MT (in shell), with 285,000 in FISKOBIIRLIK warehouses and the balance with farmers and traders.

Following a small crop last year, MY 2000 is expected to be a good production year for pistachios (60,000 MT) although estimates vary a lot at this point. GUNEYDOGU BIRLIK is planning to increase purchases to about 5,000 MT.

Walnut and almond production and consumption are relatively stable. Walnut production is expected to trend upward gradually as expanded plantings of improved varieties begin to come on line. Almond production in Turkey varies greatly depending on weather. Walnut and almond trade is mainly restricted to border exchanges with neighboring countries.

There is a of 45.1 percent duty on the CIF value of all types of tree nut imports.

Production

Hazelnuts

Turkey is by far the leading producer of hazelnuts, accounting for about 70% of world supply. Hazelnut production is concentrated mainly along Turkey's Black Sea coast, extending about 25 kilometers inland. The Black Sea area can be divided into three distinct growing areas: (1) the hilly region east of Ordu to Trabzon, centered around Giresun, producing 60 percent of the crop, (2) the flatter, mixed farming region west of Ordu to Samsun, producing 15 percent, and (3) the area west of Samsun, producing the remaining 25 percent. Hazelnuts are considered to be a "lazy man's crop" because they require relatively little effort to cultivate. Harvesting, for several weeks in August, constitutes the bulk of the work required.

Hazelnut production is the single most important economic enterprise in the Black Sea region. The total number of growers, estimated at about 385,000, is difficult to determine since almost everyone grows at least some hazelnuts for their own consumption. Tied to this problem, early season crop production and area forecasts are much debated due to the lack of a systematic crop surveys. Best estimates put total area at about 536,000 hectares. Growers generally have very small plots. Most eastern producers have an orchard size of only 1-2.5 hectares and use hazelnut sales proceeds to supplement other income. Only a few large growers (10 MT or more annually) depend on hazelnut production for the bulk of their incomes. On the other hand, most central and western farmers have 10-15 hectare orchards. Because of the importance of the crop to such a large number of people, hazelnut production policy has important political implications in Turkey.

The Union of Hazelnut Sales Cooperatives (FISKOBIRLIK), with 59 member cooperatives, is the most influential policy making organization in the industry. The 216,000 hazelnut grower-members of FISKOBIRLIK elect board members, but the general director is appointed by the Government of Turkey (GOT). FISKOBIRLIK serves as a conduit for GOT policy decisions. As a result of past policies, mostly high support pricing from FISKOBIRLIK, hazelnut plantings and production have expanded significantly the past few years and the industry suffers from overproduction, large stocks, and depressed prices.

The GOT paid all the debts of the State Economic Enterprises (SEE), including FISKOBIRLIK, by May 1, and adopted a new law last June which reorganizes their activities. According to the new regulations, SEE's will be given autonomy and their procurement and processing functions will be separated. New General Director will be elected at the first general assembly meeting of each SEE and control of the organizations transferred to the member cooperatives and growers. The next general assembly meeting of FISKOBIRLIK is expected to be held early in 2000.

Weather conditions were very favorable during the early growing season but extremely hot during the several weeks in late June and early July, especially in the hilly side of the Eastern Black Sea Region. The resulting production decrease is estimated at 10 percent to 30 percent of the total crop. Producers estimate the production on the lower side (428,000 MT) while traders' estimates are higher at 550,000-600,000. Our production estimate for MY 1999 was revised upward according to the industry sources, exports, and FISKOBIRLIK stocks.

Turkish nut yields are generally high in part because of the practice of cultivating a many-stemmed shrub, rather than a single-trunked tree. Sources also report that kernel or "meat" yield per nut (in-shell to shelled conversion), which averages about fifty percent, are expected to be about 2-4 percent lower than the MY 1999 average yield of about 52 percent.

Nut quality is determined by type, oil and moisture content, and numbers of broken/shrunken kernels. Turkey has three types of hazelnuts: Giresun, Levant, and Akcakoca. In general, Giresun type hazelnuts (round shape) are reputed to be the best quality and taste because of their higher oil content. Because of this, Giresun types generally are used in snack foods while Levant type hazelnuts (round but pointed shape) are processed into paste. Although much depends on relative supply, as a rule of the thumb, the prices of Giresun type hazelnuts command a five percent premium over Levant types. Akcakoca hazelnuts generally are almond shaped, pointed hazelnuts and are usually processed into paste. For this type of nut, kernel size and moisture content are also measures of quality. Due to the hot weather conditions in June and July, the kernel quality of MY 2000 crop is expected to be slightly lower than last year when 60-70 percent of the crop was first quality, and the remainder second quality.

Hazelnut yields vary between 700 and 1,500-kilogram per hectare depending upon location and fertility of the land. Yields are lower on hillsides and higher in the valley. The cost of hazelnut production was estimated by the Farmers Union at TL 1,217,000 per kilogram, with the assumption of a 800 kilogram yield per hectare. Traders estimate the cost much lower than that. About half of the price is assumed to be the cost of harvesting. To maximize returns, crackers are selling the shell (about fifty percent and used for heating) for TL 15,000 per kilogram and processors are selling the skin (about three or four percent) to feed millers for TL 30,000 per kilogram.

The primary support for hazelnuts is price. However, like all other supported crops, this is being changed with the GOT policies to reduce inflation, parallel to commitments made with the IMF. On August 15, the General Director of FISKOBIRLIK announced the MY 2000 support price at TL 1,100,000 per kilogram (in-shell, 50 percent shelling rate), about USD 1.70 (USD 1.00 is currently around TL 650,000). This is an increase of about 7.8 percent from the price FISKOBIRLIK announced last year and 2.8 percent from the subsequent adjusted price. Growers who had anticipated a price of about 27%, similar to support prices increases given to grain and sunflower seed producers, are extremely unhappy. Traders have a different view since the new FISKOBIRLIK price is much closer to the price most traders they consider the "logical price", defined as somewhere between USD 300-330 per hundred kilograms of shelled hazelnuts (USD 1.50 - 1.65 per kilogram in shell). FISKOBIRLIK had announced a price of TL 1,020,000, equal to USD 2.30 in the beginning of MY 1999 and raised this price to TL1,070,000 later in the year. The annual rate of inflation was around 55 percent during the last twelve-month period.

FISKOBIRLIK's support price is generally considered attractive, compared to trade offers, but the key question is whether Treasury will provide sufficient funds to pay for deliveries. In MY 1999, FISKOBIRLIK procured 143,000 MT of hazelnuts and paid TL 153 trillion (about USD 300 million) to the growers. FISKOBIRLIK announced plans to be active in the market for 2.5 months in MY 2000, and to purchase somewhere between 120,000 MT and 150,000 MT from the growers, at a cost of TL 135 trillion (about USD 200 million). FISKOBIRLIK has asked Treasury to provide a TL 50 trillion for its initial procurement

Although the new procurement price was announced, FISKOBIRLIK purchases will not begin until August 21. Producers are currently selling their crop to traders for about TL 900,000 (in-shell, 50 percent shelling rate) per kilogram in Giresun and TL 850,000 per kilogram in Trabzon.

How much of the MY 2000 hazelnut crop will be procured and kept in stocks by FISKOBIRLIK depends on the timing and amount of funds provided by the GOT. If it can pay farmers in cash at the time of procurement (or shortly thereafter), and adjust the TL denominated procurement price to account for inflation, as they did in MY 1997 and MY 1998, FISKOBIRLIK should be able to buy somewhere between 120,000 and 150,000 MT of hazelnuts in MY

2000. On the other hand, if payments are substantially delayed or significantly eroded through inflation, as was the case in MY 1999, procurement could be closer to 100,000 MT or even lower.

Pistachios

Pistachios are mainly produced in Southeastern Turkey. Gaziantep used to be the major pistachio growing province by far (in fact, the Turkish name for pistachios is “Gaziantep nut”). However, official data shows continued expansion of tree numbers in the Southeastern region, where pistachio trees are replacing olive trees. As a result, Sanliurfa Province has about twice as many trees as the Gaziantep Province.

Turkish pistachios are thinner and smaller than Iranian pistachios, but are considered to have a better flavor. In recent years, farmers have begun to grow a larger type of pistachio in Siirt and neighboring provinces. Siirt type pistachios are similar to Iranian pistachios, except that Iranian pistachios are almost round while Siirt pistachios are oval shaped. Siirt pistachios are bigger and command higher prices on the local market than the normal Turkish nut (Gaziantep). (In Turkey, size is directly related to quality: 90 nuts or less per 100 grams is considered first quality, 90-100 nuts are second quality, 100-120 is third quality, and above 120 is fourth quality.) Siirt type pistachios now comprise about 15 percent of the total production.

Pistachio production is highly variable due to several soil and climactical conditions. There is also cyclical variations from one year to the next. MY 2000 (October-September) is an on-year for pistachio production but the hot and dry summer of MY 2000 lowered yields in some areas, especially Sanliurfa Province. It is very early to have a reliable production estimate. Estimates vary from 50,000 MT to 70,000 MT (in shell, 50 percent shelling rate). The forecast for MY 2001 is lower due to normal cycle expectations. The MY 1999 production estimate was revised upward in accordance with industry estimates.

Walnuts

Walnuts grow naturally throughout most of Turkey. In the past, they generally were not cultivated but simply were harvested from natural forests. However, during the past two decades, increasing demand (and prices) has made walnut cultivation more attractive and increased resources have been devoted to its cultivation. The Horticultural Research Institute (HRI) in Yalova is the leading walnut research facility in Turkey. As a result of the walnut improvement studies it carried out, nine standard varieties with higher yields have been developed. Thus far, only a few of these improved varieties have been planted commercially and are bearing nuts. In addition to the HRI, several private companies have begun to propagate improved walnut varieties commercially.

According to official statistics, the number of bearing and nonbearing trees have been increasing slowly. Based on this trend and the shift to better varieties, sources forecast steadily increasing production as earlier planted trees reach bearing age and more trees are planted. Although official estimates place production at around 120,000 MT (in-shell basis at a conversion factor of 1:2.5), most private sources believe the production is lower at around 70,000 MT. Some international sources report even lower figures. The lack of a systematic crop survey and widely divergent estimates make it difficult to accurately estimate production. FAS Ankara estimate (September-August) is 70,000 MT (in-shell basis with a conversion factor of 1:2.5), with a slight increase in MY 2001.

Almonds

Almonds are a minor nut crop in Turkey. They are grown throughout the country, with production concentrated in the Aegean, Marmara and Mediterranean regions. Most of the crops are grown in orchards on a commercial basis and

only a small portion is produced in gardens for home consumption. Almonds grow naturally in Turkey but were not cultivated as a commercial crop until recently. Selection of natural varieties during the past 25 years has resulted in the improvement of local varieties. These varieties are now grafted to both improve quality and yield as well as to delay blooming, since early frosts are a major problem in Turkey. Other than the variations in weather conditions, almond production in Turkey is relatively stable. MY 2000 (September-August) production estimate and forecast for MY 2001 both are at 14,500 MT (shelled basis at a conversion factor of 1:3), which are slightly larger than the revised estimate in MY 1999. Production for MY 1999 was revised upward to reflect official data.

Consumption

Hazelnuts

Processors and/or traders are the first purchasers of hazelnuts. The industry is characterized by a large number of small firms, including about 350 private processors and/or traders, but the five largest processors account for an estimated 40 percent of production. The industry is not very vertically integrated. Only a few firms participating at multiple stages of the process. The number of hazelnut crackers is estimated at 170 with a total capacity of 1,250,000 MT (in shell). Around 20 hazelnut processors have a total capacity of 300,000 MT (shelled).

Hazelnuts continue to be a popular snack food in Turkey. The bulk of domestic consumption consists of whole nuts. Since devaluation of the TL against the USD was regulated to a level below past inflation rates, there was a decline (in real terms) in retail prices for hazelnuts, encouraging consumption. In addition to increase domestic consumption as a snack food, consumption of processed hazelnuts for confectionary items is gradually increasing, with new confectionary capacity being established to produce a wide range of hazelnut products. Only very limited quantities of hazelnut confectionary products are exported. It is estimated that about 70,000 MT (in shell) hazelnuts are consumed domestically as snack foods and confectionary products. Our domestic consumption estimate includes the quantity crushed for oil and, as a result, varies a lot according to FISKOBIRLIK's crushing plans.

The current retail price for shelled roasted hazelnuts in Ankara is about TL 5,000,000 per kilogram. This price is about 25 percent higher than last year, but the increase was significantly lower than the annual rate of inflation (around 55 percent).

Pistachios

Official estimates of pistachio consumption are not available. Pistachios are a popular snack food in Turkey and per capita consumption is expected to increase in the long run. Currently, retail prices for in-shell, roasted Gaziantep type pistachios in Ankara are around TL 8,000,000 per kilogram, about 100 percent above the last year's price, and again higher than the rate of inflation. The pistachio harvest has just started in Gaziantep. Normally, the harvest starts in late August and lasts through mid-October. The harvest started about two weeks earlier this year due to the hot weather and the price of newly harvested (wet, red peeled, in-shell) nuts is around TL 1,200,000 per kilogram in Gaziantep, compared to TL 1,000,000 a year ago. The early crop is used for the sweets industry.

GUNEYDOGU BIRLIK, which is a producers' cooperative similar to FISKOBIRLIK, was able to procure only 1,000 MT of pistachios in MY 1999 at TL 1,900,000 per kilogram. GUNEYDOGU BIRLIK prices in MY 2000 will vary according to quality. It will pay TL 2,400,000 per kilogram of first quality pistachios (90 pieces of in shell pistachios or less in 100 grams), about 26 percent over last year's price. The increase in the MY 2000 price is still lower than the rate of inflation, and reflects new GOT policy. Procurement price will be reduced as low as TL

2,000,000 per kilogram for lower qualities. GUNEYDOGU BIRLIK officials expect to start the procurement on September 18 and buy about 5,000 MT of pistachios in shell, if funding is available.

Industry sources believe that about 5,000 MT pistachio entered into Turkey from neighboring countries in MY 1999 due to low local production and high prices. Large quantities of imports are not anticipated in MY 2000 because of the higher availability of local nuts. Our MY 1999 consumption estimate was increased to reflect better availability. MY 2000 consumption is also increased for the same reason.

Walnuts

Official statistics are not available for total walnut consumption. Most observers believe per capita consumption is relatively stable, with long-term increases in aggregate consumption resulting from increases in population. Sources estimate that about fifty percent of the crop is utilized for home consumption and the remainder is marketed. Most of the marketed walnut is consumed whole and a very limited amount is processed. The retail price for shelled walnuts in Ankara currently is about TL 5,500,000 per kilogram, compared to TL 3,500,000 a year ago. MY 1999 and MY 2000 consumption estimates were slightly increased to reflect the increase in supply.

Almonds

Almond consumption is growing slowly in Turkey, largely due to the abundant availability of the preferred hazelnuts. Almost all of the increases in aggregate consumption are the result of increasing population, rather than increasing per capita consumption. Almonds are generally consumed whole as a snack food and only limited amounts are utilized in confectionary products. Our consumption estimate for MY 1999 was increased because of increased production. The retail price for one kilogram of shelled sweet roasted almonds in Ankara is around TL 7,000,000 for local almonds and TL 6,000,000 for imported almonds, compared to TL 4,750,000 a year ago. Higher estimates for MY 1999 and MY 2000 consumption reflect increases in supply.

Trade

Hazelnuts

Turkey accounts for more than eighty percent of world hazelnut trade. Indicative export prices in early August were around USD 300 per 100 kilograms (bagged, FOB Black Sea) compared to what it was USD 415 a year ago. Prices are determined by supply and demand as well as by the price of other nuts, particularly almonds (which are considered a lower-cost substitute).

The European Union is the major market for Turkish hazelnuts. In the past, most shipments were by sea on a FOB basis. Today, shipping by trucks on a CIF basis is increasingly popular. Although some sales are direct to the end users, most are through traders. Because of the fluid production and price situation, little advance contracting is done at present. The government inspects and certifies exports.

About seventy percent of Turkey's hazelnut exports comprise raw kernels and the remaining thirty percent are processed kernels, including roasted, sliced, chopped, paste, meal, and flour. Very few hazelnuts are exported as finished consumer confectionary items. The trend, however, is to move from raw kernel exports to processed and finished products to capture the increased value added. One constraint to increasing exports of hazelnut confectionary items is the relatively low quality of Turkish chocolate (primary base for hazelnut products) compared to European chocolates.

In addition to a shift in export product mix, Turkey also is hoping to expand its market presence, mainly in the Far East, former Soviet Union countries and the United States. Industry representatives in Turkey closely monitor the hazelnut and almond industry in the United States. The Hazelnut Exporters Union has been also supporting a promotion program in conjunction with U.S. growers, to increase hazelnut consumption in the United States.

Official trade data for hazelnuts for MY 1999 is not available. According to Black Sea Exporters Union data, Turkey exported a larger quantity of hazelnuts in MY 1999 than in MY 1998, but a smaller quantity than the 1997 record year. Exports in MY 1999 (September 1, 1999 through August 4, 2000 (the most recent data available) totaled 197,564 MT. Exports (shelled basis) for the corresponding period in MY 1998 were 172,890 MT and 211,412 MT in MY 1997. The total value of the exports was USD 685 million in MY 1999 compared to USD 716 million during the same period of MY 1998 and the record level of USD 959 million in 1997. The European Union continues to be the major importer of Turkish hazelnuts.

Pistachios, Walnuts, and Almonds

Only CY 1999 trade data are available at this point for pistachios, walnuts, and almonds. Turkey imports and exports small quantities of these nuts. Pistachio exports are estimated to increase in MY 2000 due to the estimated large production. Pistachio imports are not included in the import trade matrix, since estimates as border trade from Iran are highly speculative and uncertain. Most walnut imports are inexpensive, lower quality nuts from neighboring countries, with the better quality domestic nuts going out as exports. Almond trade in Turkey consists mainly of border exchanges.

Stocks

Hazelnuts

Industry sources indicate that there are about 300,000 MT (in-shell basis) of MY1999 ending stocks, including approximately 285,000 MT are at FISKOBIRLIK's stores and 15,000 MT with traders and farmers. About half of the FISKOBIRLIK stocks are MY 1998 crops and the other half is from MY 1999. FISKOBIRLIK already announced that the MY 1998 stocks will be crushed for oil and is expected to announce a similar policy for its MY 1999 crop to support grower prices. The annual crushing capacity of FISKOBIRLIK is 100,000 MT in-shell basis, but there are plans for expansion. Hazelnut is crushed for oil at a loss, since it pays only 10-15 percent of the actual cost of production. Much of the oil is sold to the food oil industry, where it is used as an extender, imparting no discernable flavor. Some of FISKOBIRLIK's hazelnut oil has started being retailed in the country, mainly in the Black Sea area, but sales are limited.

In order to reduce the extremely large hazelnut stocks, the hazelnut industry, including FISKOBIRLIK and Exporters Union, sponsored a heavy promotion activity in the country (including a campaign which advertised that hazelnuts had properties similar to Viagra) in addition to deliveries made to schools and military. Some sources believe that the promotion was successful at increasing consumption.

Pistachios, Walnuts, and Almonds

Official statistics on total pistachio, walnut, and almond stocks are not available. Industry sources estimate that pistachio stocks vary according to the supply, and walnut and almond stocks usually are around 10 percent of production.

Policy

Production Policies

Hazelnuts

To reduce the persistent glut of hazelnuts, past administrations tried to implement incentive programs to shift area out of hazelnut production, particularly in the flatter, mixed farming areas in the central and western Black Sea Regions. These programs have not been adequately funded and met with very limited success. High support prices have drawn an excess of new producers into the market. Parallel to the letter of intent given to IMF, the GOT changed its support policy in 2000. If the current GOT policy continues, there is a chance that some of the orchards may be switched to other crops in the future.

Pistachios

Until MY 1994, the GOT provided price supports to pistachio growers through GUNEYDOGU BIRLIK. Six years ago, in keeping with the government's liberalization program to privatize marketing channels, the GOT stopped direct supports and let GUNEYDOGU BIRLIK announce a support price more closely reflecting market conditions (GUNEYDOGU BIRLIK was to arrange concessional loans for this purpose, with GOT approval). Since then, pistachios have had varying, limited support. After procuring only a symbolic quantity in MY 1999, GUNEYDOGU BIRLIK officials are planning to buy a larger quantity in MY 2000, if they can find funds to support the purchases.

Walnuts and Almonds

Walnuts and almonds are not considered important commercial crops and receive no GOT support. There are also no producer associations or marketing cooperatives for these crops.

Trade Policies

Hazelnuts

In the past, the GOT levied a significant export tax on hazelnuts, partly to raise revenues and partly to raise domestic prices to preclude charges of unfair competition. Over the years the tax has been reduced in an effort to facilitate exports. It remains at USD 10 per 100 kilograms for whole shelled hazelnuts. There is no export tax on exports of processed hazelnut products.

Pistachios, Walnuts, and Almonds

There is no subsidy, tax, or other restriction on pistachio, walnut and almond exports. Importers, however, have to pay a 45.1 percent import duty on the CIF value of all types of tree nut imports, including shelled or in shell hazelnuts, pistachios, walnuts and almonds.

Marketing

Turkey's Market Promotion Activities

Hazelnuts

In addition to efforts to shift its export product mix, Turkey is looking to expand markets, mainly in the Far East and the United States. Industry representatives in Turkey are very interested in hazelnut and almond production in the United States. They see the United States as a major competitor, although producers in other countries (EU, Brazil) have also increased production to take advantage of high prices.

In Turkey, most export commodities are represented by an Exporters Union, which operates under the Undersecretariat of Foreign Trade. The Secretary Generals of the Unions are appointed by the GOT but the operating capital is provided mainly by the members, comprised largely of private traders. The largest tree nut representative organization, the Black Sea Exporters' Union which is located in Giresun, promotes hazelnut exports. The Union employs a total staff of about 25 in five offices. It functions much like a USDA Market Development Cooperator, influencing domestic and trade issues, acting as an information resource, and conducting marketing studies and sponsoring promotional events. Thus far, market development activities have focused on participation in European trade fairs.

Pistachios

GUNEYDOGU BIRLIK is a similar organization to FISKOBIRLIK, but it has much less control of the market.

Tables

PS&D Table for Hazelnuts

PSD Table						
Country	Turkey					
Commodity	Filberts, Inshell Basis				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	275000	275000	0	276000	0	277000
Non-Bearing Trees	17000	17000	0	16000	0	15000
Total Trees	292000	292000	0	292000	0	292000
Beginning Stocks	275000	275000	275000	300000	0	250000
Production	600000	610000	0	550000	0	600000
Imports	0	0	0	0	0	0
TOTAL SUPPLY	875000	885000	275000	850000	0	850000
Exports	400000	400000	0	400000	0	400000
Domestic Consumption	200000	185000	0	200000	0	200000
Ending Stocks	275000	300000	0	250000	0	250000
TOTAL DISTRIBUTION	875000	885000	0	850000	0	850000

Export Trade Matrix for Hazelnuts

This export table is based on the Black Sea Exporters Union data for MY 1999 (no official data available).

Export Trade Matrix			
Country	Turkey		
Commodity	Filberts, Inshell Basis		
Time period	Sept.-Aug.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	5721	U.S.	11000
Others		Others	
Germany	133854	Germany	150000
France	33091	France	42000
Italy	32761	Italy	38000
Belgium	22587	Belgium	29000
Netherlands	19800	Netherlands	21000
Switzerland	18376	Switzerland	18500
United Kingdom	14041	United Kingdom	15000
Spain	8127	Austria	10000
Austria	7594	Spain	8500
Greece	5100	Egypt	6000
Total for Others	295331		338000
Others not Listed	46425		51000
Grand Total	347477		400000

Export Trade Matrix for Hazelnuts (CY 1999)

Export Trade Matrix

Country Turkey

Commodity Filberts, In shell Basis

Time period January-December.

Exports for: 1999

U.S. 10,947

Others

Germany 133,691

Italy 35,209

France 34,829

Belgium 21,436

Netherlands 17,450

United Kingdom 16,404

Switzerland 15,014

Spain 7,362

Austria 7,246

Greece 5,240

Total for Others 293,881

Others not Listed 42,779

Grand Total 347,607

PS&D Table for Pistachios

PSD Table						
Country	Turkey					
Commodity	Pistachios, Inshell Basis				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	27000	27000	0	27500	0	28000
Non-Bearing Trees	17000	17000	0	16500	0	16500
Total Trees	44000	44000	0	44000	0	44500
Beginning Stocks	20000	20000	12000	12000	0	20000
Production	25000	30000	0	60000	0	40000
Imports	5000	5000	0	1000	0	1000
TOTAL SUPPLY	50000	55000	12000	73000	0	61000
Exports	2000	2000	0	5000	0	4000
Domestic Consumption	36000	41000	0	48000	0	45000
Ending Stocks	12000	12000	0	20000	0	12000
TOTAL DISTRIBUTION	50000	55000	0	73000	0	61000

Export Trade Matrix For Pistachios

Export Trade Matrix			
Country	Turkey		
Commodity	Pistachios, Inshell Basis		
Time period	Oct. - Sep.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	615	U.S.	250
Others		Others	
Germany	760	Algeria	600
Algeria	533	Germany	550
Russia	178	Denmark	80
Spain	141	Netherlands	70
Switzerland	126	Russia	60
Netherlands	109	Spain	55
Israel	97	Switzerland	50
United Kingdom	86	Egypt	35
Italy	79	Belgium	30
Sweden	77	United Kingdom	30
Total for Others	2186		1560
Others not Listed	742		190
Grand Total	3543		2000

Export Trade Matrix For Pistachios (CY 1999)

Export Trade Matrix

Country Turkey

Commodity Pistachios, In shell Basis

Time period January-December.

Exports for: 1999

U.S. 600

Others

Germany 717

Algeria 507

Russia 221

Saudi Arabia 162

Spain 131

Switzerland 109

Israel 89

Netherlands 88

United Kingdom 78

Denmark 69

Total for Others 2,171

Others not Listed 613

Grand Total 3,384

PS&D Table for Walnuts

PSD Table						
Country	Turkey					
Commodity	Walnuts, Inshell Basis				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	3500	3500	0	3500	0	3550
Non-Bearing Trees	1200	1150	0	1200	0	1200
Total Trees	4700	4650	0	4700	0	4750
Beginning Stocks	7000	7000	8500	9000	0	9000
Production	70000	70000	0	70000	0	71000
Imports	2000	5000	0	5000	0	5000
TOTAL SUPPLY	79000	82000	8500	84000	0	85000
Exports	500	500	0	500	0	500
Domestic Consumption	70000	72500	0	74500	0	75500
Ending Stocks	8500	9000	0	9000	0	9000
TOTAL DISTRIBUTION	79000	82000	0	84000	0	85000

Import Trade Matrix For Walnuts

Import Trade Matrix			
Country	Turkey		
Commodity	Walnuts, Inshell Basis		
Time period	Sep. - Aug.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	28	U.S.	1100
Others		Others	
Ukraine	1151	Bulgaria	2000
Bulgaria	674	Ukraine	1200
Moldavia	535	Moldavia	350
Romania	313	Romania	250
Denmark	22	Georgia	50
Uzbekistan	19	Russia	20
Egypt	8		
Krygyzstan	1		
Total for Others	2723		3870
Others not Listed			30
Grand Total	2751		5000

Import Trade Matrix For Walnuts (CY 1999)

Import Trade Matrix

Country Turkey

Commodity Walnuts, In shell Basis

Time period January-December.

Imports from: 1999

U.S. 152

Others

Ukraine 1,276

Bulgaria 1,267

Moldavia 654

Romania 193

Denmark 22

Uzbekistan 16

Russia 14

Egypt 8

Krygyzstan 1

Total for Others 3,451

Others not Listed

Grand Total 3,603

The PS&D Table for Almonds

PSD Table						
Country	Turkey					
Commodity	Almonds, Shelled Basis				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	3700	3700	0	3700	0	3700
Non-Bearing Trees	600	600	0	600	0	600
Total Trees	4300	4300	0	4300	0	4300
Beginning Stocks	1000	1000	2000	2000	0	2300
Production	13000	14000	0	14500	0	14500
Imports	2000	2000	0	2000	0	2000
TOTAL SUPPLY	16000	17000	2000	18500	0	18800
Exports	200	200	0	200	0	200
Domestic Consumption	13800	14800	0	16000	0	16600
Ending Stocks	2000	2000	0	2300	0	2000
TOTAL DISTRIBUTION	16000	17000	0	18500	0	18800

Import Trade Matrix for Almonds

Import Trade Matrix			
Country	Turkey		
Commodity	Almonds, Shelled Basis		
Time period	Sep. - Aug.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	1061	U.S.	1400
Others		Others	
Lithuania	237	Greece	500
Iran	48	Germany	10
Germany	26	Iran	4
Total for Others	311		514
Others not Listed			86
Grand Total	1372		2000

Import Trade Matrix For Almonds (CY1999)

Import Trade Matrix

Country Turkey

Commodity Almonds, Shelled Basis

Time period January-December.

Imports for: 1999

U.S. 925

Others

Greece 398

Lithuania 237

Iran 48

Germany 26

Total for Others 709

Others not Listed

Grand Total 1,634