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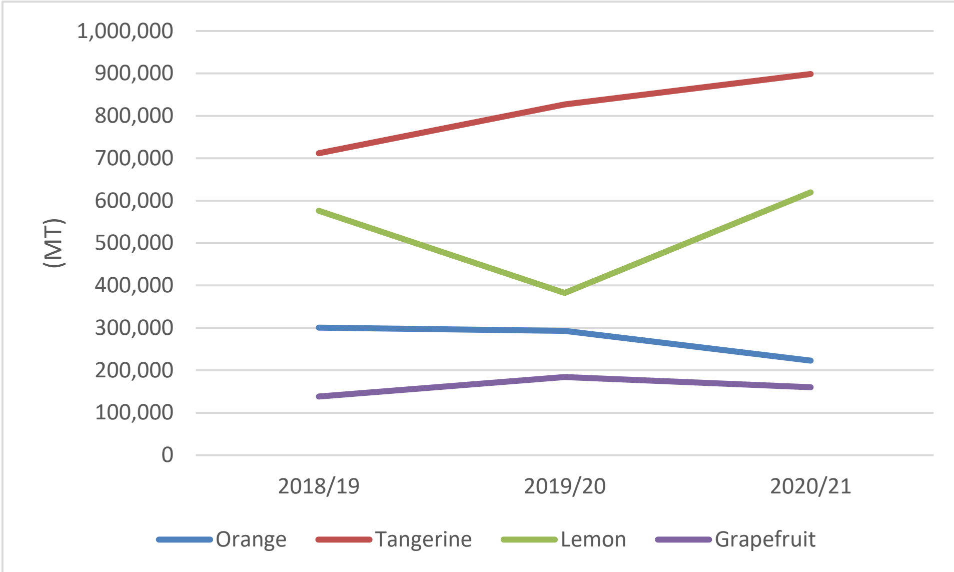
Prepared By: Sinem Duyum

Approved By: Christine Mumma

Report Highlights:

In MY 2021/22, the orange yield is forecast to increase 40 percent to 1.82 million metric tons (MMT) due to favorable rainy weather conditions in March and April 2021. The input costs for items such as fertilizer, fuel, and pesticides are still considered too high while farm gate prices are too low to compensate for the high production costs. Orange exports in MY 2021/22 are expected to increase 20 percent to 265,000 MT when compared with the previous season in correlation with high yield expectations. Tangerine exports in MY 2021/22 are expected to increase 11 percent to 1 MMT in correlation with higher production expectations. In 2021/22, lemon production is expected to increase 27 percent to 1.4 million MT with good quality fruit due to favorable weather conditions in late spring in 2021. The main problems reported by lemon producers in Turkey are diseases and pests, input costs such as fertilizers and chemicals, labor costs for tree trimming, crop quality, and marketing issues.

Figure 1. Turkish Citrus Exports by Products, Marketing Years (MY) 2018-2020



Sources: Trade Data Monitor, LLC

Harmonized System (HS) Codes:

Oranges 080510

Tangerines/Mandarins 080520, 080521, 080522, 080529

Lemons 080550

Grapefruits 080540

Orange Juice 200911, 200912, 200919

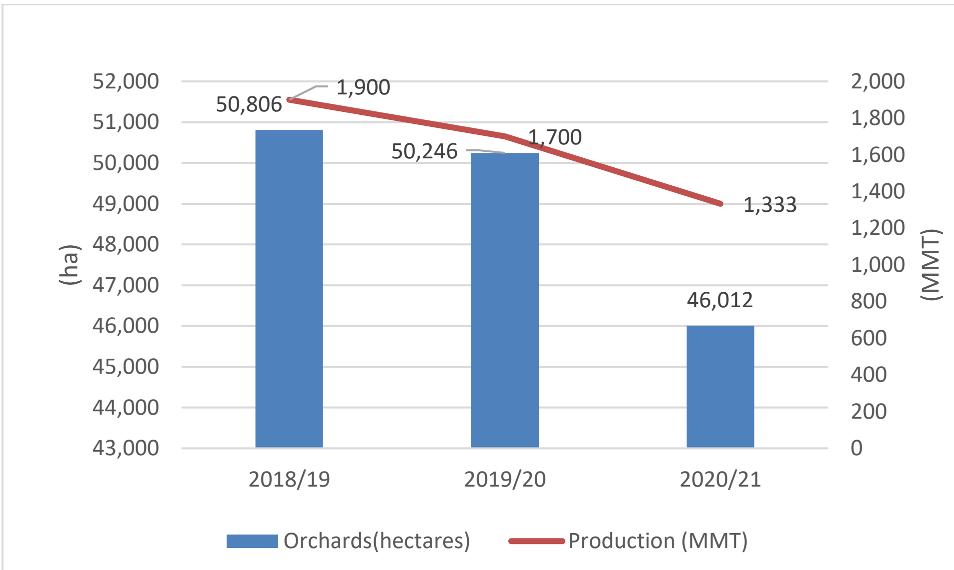
Abbreviations used in this report:

FAS	USDA Foreign Agricultural Service
TDM	Trade Data Monitoring
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
GoT	The Government of Turkey
MinAF	Turkish Ministry of Agriculture and Forestry
MY	Marketing year
PS&D	Production, Supply and Distribution
TL	Turkish Lira
TurkSTAT	Turkish Statistical Institute
USD	U.S. Dollar

Commodities:
Oranges, Fresh

Production:
In MY 2021/22, the orange yield is forecast to increase 40 percent to 1.82 MMT due to favorable rainy weather conditions in March and April 2021. However, in recent months, producers have become concerned about drought conditions affecting the fruit. According to producers, water which is provided by the Irrigation Unions in the region, has already been restricted for orchards due to overall decreasing water levels in local dams because limited rainfall. This issue affects the quality of the fruit but doesn't greatly affect the yield, according to producers. On the other hand, the yield in the Aegean region is expected to decrease 15 percent due to the freezing weather conditions during the Spring 2021 months.

Figure 2. Turkey Orange Production and Orchards Comparison, MY 2018/19 - 2020/21



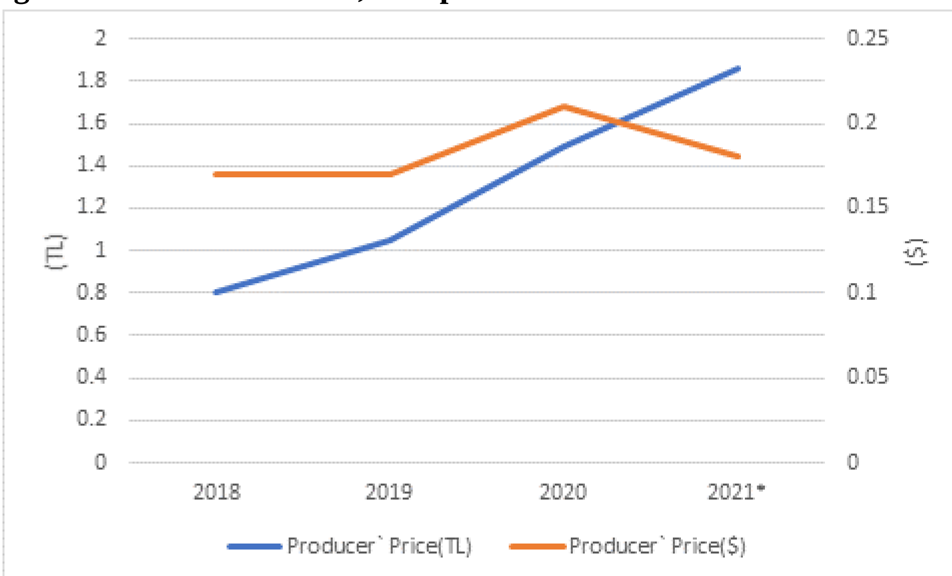
Source: TurkSTAT, 2021

In MY 2020/21, Turkey produced 1.3 million MT of oranges, which is 23 percent lower than MY 2019/20 (1.7 million MT), due to excessive hot weather conditions in May 2020 during the blooming period of trees. Losses and tonnage problems were seen in MY 2020/21, especially for the Washington variety, which produced 25 percent less fruit than the previous season. Orange production totaled 31 percent of Turkey's total citrus production in MY 2020/21.

Turkey produces mostly the Washington variety of oranges, with that variety accounting for 70 percent of total orange production. Eighty-five percent of oranges are produced in the Mediterranean region while 15 percent are produced in Aegean region.

The Mediterranean fruit fly is still a major concern. Producers are planning to harvest and sell their products much earlier than normal in order to prevent exposure to the harmful flies. In addition, the input costs for items such as fertilizer, fuel, and pesticides are still considered too high while farm gate prices are too low to compensate for the high production costs. Producers are concerned about MY 2021/22 production since it is expected that input prices will continue to increase, especially fuel and fertilizers.

Figure 3. Orange Producers Gate Prices, Comparison TL and $ Basis



Source: TurkSTAT, 2021. (With exchange rate 14.40 TL to $1 USD as of December 2021). *2021 data includes only January-October.

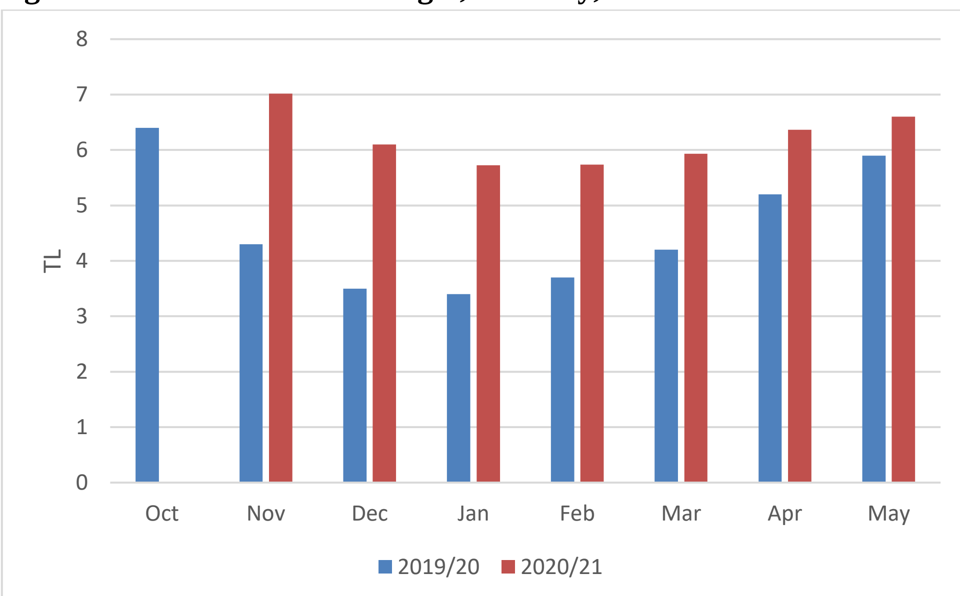
As shown in Figure 2, the number of orchards has been decreasing for the last 3 years as producers convert orchard land or determine profits are not great enough to invest fertilizer and pesticides. However, the area is expected to increase for MY 2021/22. The decrease in MY 2020/21 was seen mostly in orchards of the Washington and yapha varieties while orchards for other varieties have been increasing in correlation with export demands. Also, some of producers has converted their orchards from oranges and tangerines to Pitaya fruit due to high demands from touristic places. In MY 2020/21, orange orchards consist of 29 percent of total citrus orchards areas. According to producers, uncertainity concerning gate prices and lack of production technologies are the main negative factors for marketing of oranges.

Consumption:

In MY 2021/22, orange consumption is expected to increase to 1,488 MMT in correlation with high production expectations. In MY 2020/21, orange consumption was realized at 1,018 MT in correlation with lower production. The market price of oranges at supermarkets has been increasing, like many commodities, due to multiple stakeholders in the market chain and increasing food inflation. On the other hand, retail prices decreased in January and February 2021 since the GoT applied export restrictions to address EU regulations regarding limited pesticides residues. Many Turkish citrus exports are routinely rejected from the EU and Russia due to maximum residue levels above the importing allowances. Less exports helped the domestic orange market prices to decrease.

In 2019/20, orange consumption per capita was 12.3 kg. In Turkey, oranges account for 49 percent of total citrus consumption. According to the sector, orange consumption has shrunk 17 percent over the last five years.

Figure 4. Orange Retail Market Price Changes, Monthly, 2019-2020-2021



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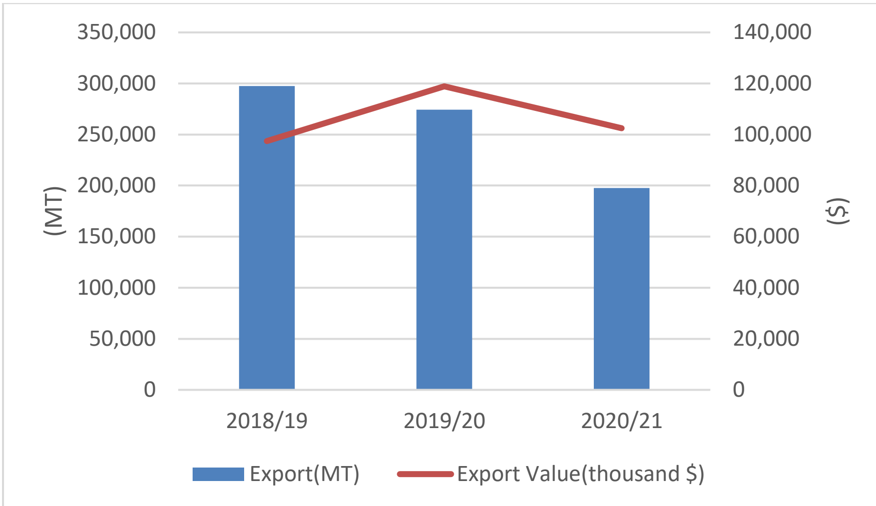
Source: TurkSTAT, 2021 (With exchange rate 14.40 TL to $1 USD as of December 2021)

Trade:

Orange exports in MY 2021/22 are expected to increase 20 percent to 265,000 MT when compared with the previous season in correlation with high yield expectations and assuming normal levels of precipitation over the winter months.

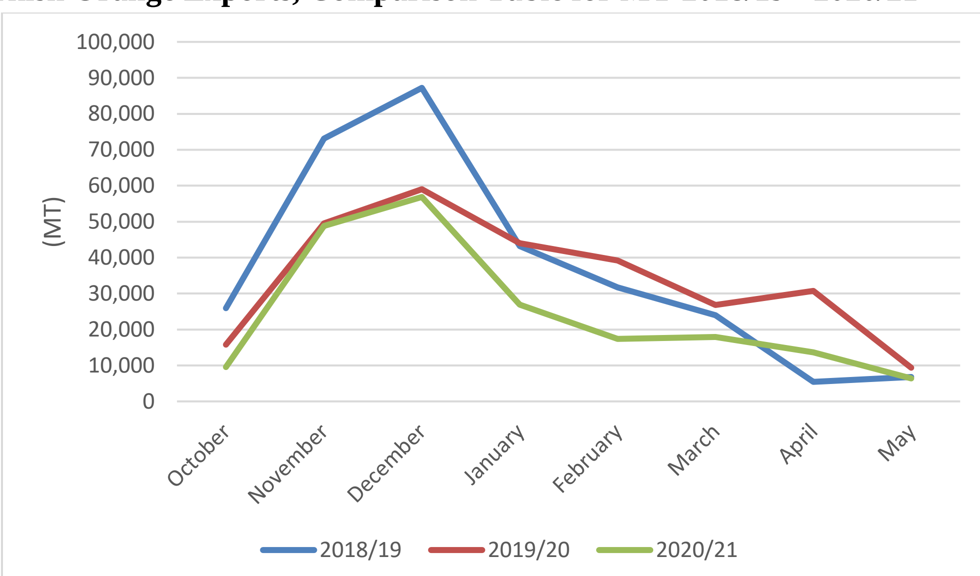
In 2020/21, Turkey exported 220,630 MT of oranges, which was 24 percent lower than the MY 2019/20 total of 291,846 MT, due to very low yields and the export restrictions laid down by MinAF at the beginning of 2021. For more information about the restrictions, please click here. In MY 2019/20, although orange exports in volume were lower than the previous season due to logistic problems because of the COVID-19 pandemic, the export value was higher than the previous season.

Figure 5. Turkey Orange Exports (MT) and Export Value ($) Comparison, MY 2018/19-MY 2020/21



Sources: Trade Data Monitor, LLC

Figure 6. Turkish Orange Exports, Comparison Table for MY 2018/19 - 2020/21

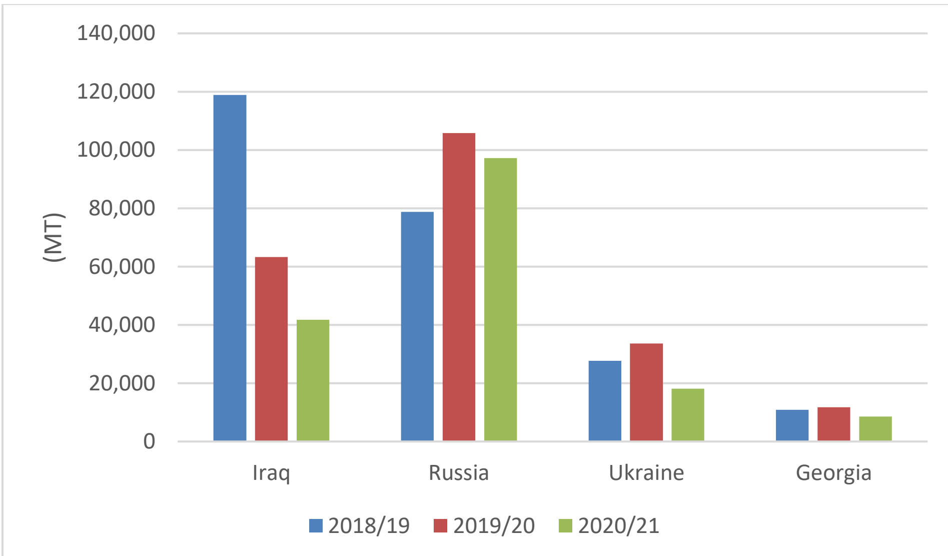


Sources: Trade Data Monitor, LLC

Russia, Iraq, and Ukraine are the main Turkish orange export markets. In January 2021, the exports to Ukraine reduced 79 percent, the exports to Romania reduced 59 percent and exports to Iraq reduced 52 percent due to the MinAF export restrictions.

According to exporters, varieties and fruit quality need to be improved and new markets such as China, Far East Countries, South Korea, and the U.S. need to be opened in order to make profits from exports. Storage conditions also need to be improved in order to avoid price fluctuations in the domestic market and foreign markets as well. Better storage facilities will enable Turkish producers to sell their products at a steady supply throughout the year, including at higher prices during lower harvest months. Recently, the European Union has increased import control inspection frequency for Turkey from 10 percent to 20 percent to address pests and maximum residue levels (MRLs) of pesticides. Turkey's orange export value has decreased 44 percent compared to five years ago.

Figure 7. Turkish Orange Exports, Country Comparison for MY 2018/19- MY 2020/2021



Sources: Trade Data Monitor, LLC

Imports: Orange imports In MY 2021/22 are expected to stagnate at 43,000 MT, as realized in MY 2020/21. Turkey imported 43,628 MT of oranges in MY 2020/21, and 98 percent of the orange imports came from the Turkish Republic of Northern Cyprus (TRNC). Turkey`s orange imports depend on the low production, climate change and dispersion of production with small size orchards.

Table 1: PSD Oranges, Fresh
Production, Supply and Distribution Statistics:

Oranges, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	53400	50446	51000	46012	0	49000
Area Harvested (HECTARES)	50246	50000	49000	46000	0	48000

Bearing Trees (1000 TREES)	12980	12985	12306	12306	0	12400
Non-Bearing Trees (1000 TREES)	865	866	1151	1052	0	1000
Total No. Of Trees (1000 TREES)	13845	13851	13457	13358	0	13400
Production (1000 MT)	1700	1700	1300	1300	0	1820
Imports (1000 MT)	42	49	44	43	0	43
Total Supply (1000 MT)	1742	1749	1344	1343	0	1863
Exports (1000 MT)	293	292	225	220	0	265
Fresh Dom. Consumption (1000 MT)	1339	1347	1014	1018	0	1488
For Processing (1000 MT)	110	110	105	105	0	110
Total Distribution (1000 MT)	1742	1749	1344	1343	0	1863
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Commodities:

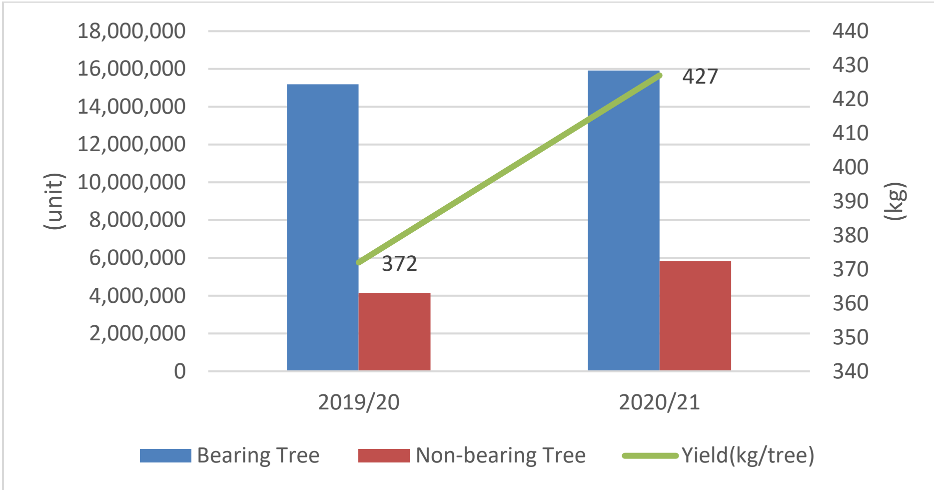
Tangerines/Mandarins, Fresh

Production:

MY 2021/22, tangerine production is forecast to increase 9 percent to 1.75 MMT with high yields per tree, and increasing orchard areas and bearing trees, due to favorable weather conditions in the Mediterranean region. However, the yield in the Aegean region, especially the Satsuma variety, is expected to decrease approximately 20 percent due to low temperature conditions in March and April 2021. In MY 2020/21, production was 1.6 MMT, 14 percent higher than in MY 2019/20, due to the favorable timing of rains and good temperatures. Orchard areas increased 26 percent and bearing trees increased 45 percent In MY 2020/21 when compared with the previous season.

In MY 2019/20, tangerine production totaled 1.4 MMT, which is lower than the previous season, due to freezing conditions and heavy storms during the blooming period of the trees.

Figure 8. Turkey Tangerine Bearing and Non-bearing Trees and Yield per tree Comparison, MY 2019 - 2020/21



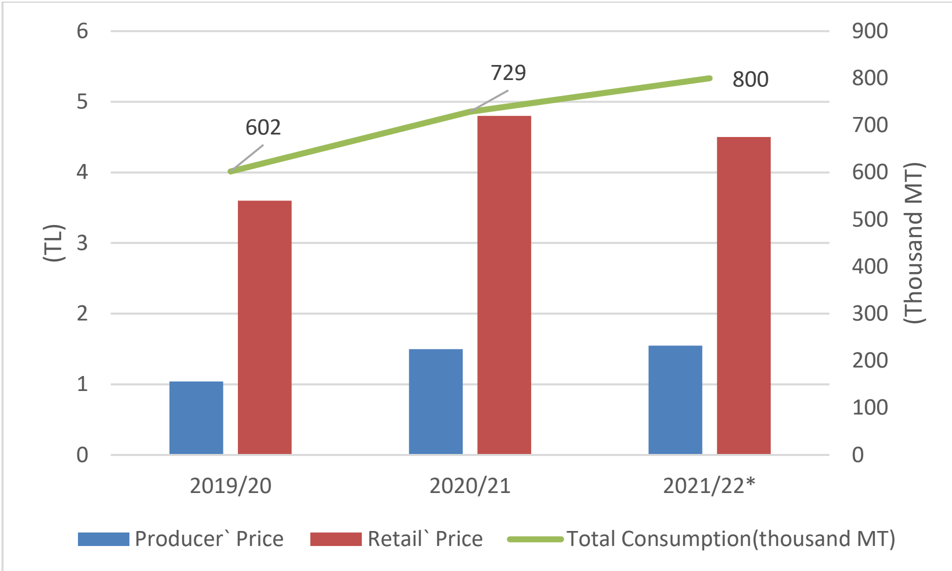
Source: TurkSTAT, 2021

Tangerines are the most produced citrus fruit in Turkey, and 84 percent of tangerines are being produced in the Mediterranean region. Satsuma is the dominant variety, among others.
However, producers are struggling with farm gate prices which are too low to compensate for the high production costs. The farm gate prices have decreased 50 percent when compared to the previous season due to low demand from foreign markets. According to exporters, there is not adequate demand from foreign markets during excessively high summer temperatures.

For MY 2021/22, harvesting of early varieties such as Eary-N, Okitsu and Miho Wase started in October 2021. Turkish producers have been tending towards planting new mandarin varieties since they believe that exports of new varieties (Nova, Murkott, and Fremont) are more profitable. Most tangerines are consumed fresh, and the satsuma variety is the most preferred domestically.

Consumption:
In MY 2021/22, Turkey's domestic consumption of tangerines is estimated to increase to 784,000 MT because of increasing orchard areas and bearing trees. In MY 2020/21, Turkey's domestic consumption of mandarins was 739,000 MT; in MY 2019/20 consumption was 614,000 MT. The gap between lower farmer wholesale prices and higher retail market prices remains a concern for farmers.

Figure 9. Turkish Tangerines Prices at Local Markets and Gate Price Comparison with Total Consumption, from MY 2019/20 to MY 2021/22



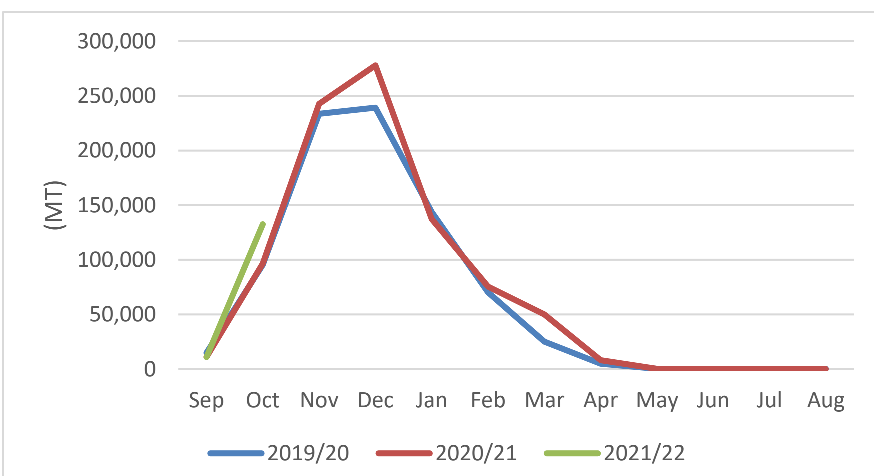
Source: TurkSTAT, 2021 (With exchange rate 14.40 TL to $1 USD as of December 2021). * MY 2021/22 consists of only October 2021` prices and the estimation of total consumption).

In Turkey, tangerines are about 26 percent of total citrus consumption.

Trade:

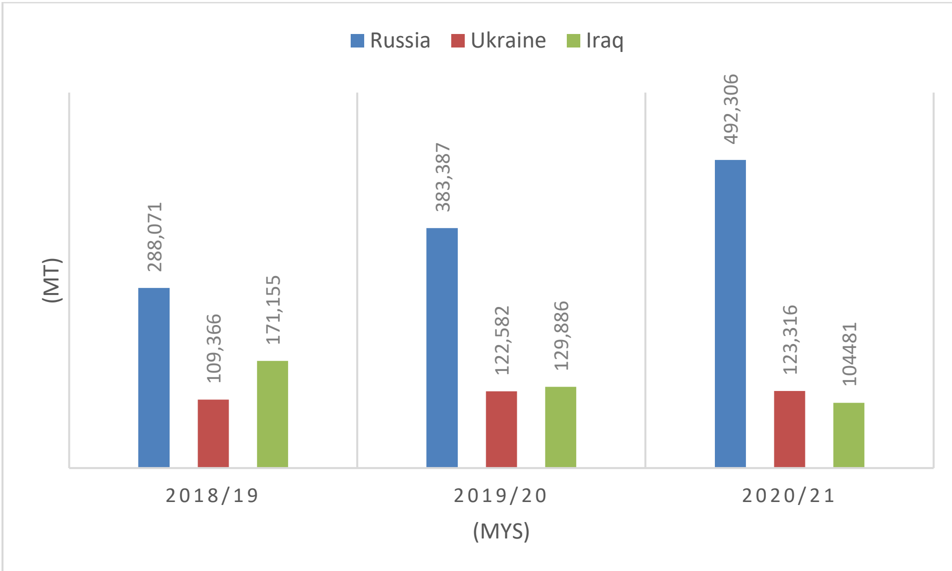
Tangerine exports in MY 2021/22 are expected to increase 11 percent to 1 MMT in correlation with higher production expectations. In Turkey, the export season for tangerines starts in September. Turkish exporters are expecting record tangerine exports this year due to increased high-quality volume and high export demands. In MY 2020/21, Turkey exported 898,483 MT of tangerines mostly to Russia, Ukraine, and Iraq, 8 percent more than MY 2019/20.

Figure 10. Turkey Tangerine Export Comparison in MT for MY 2019/20, MY 2020/21 and MY 2021/22.



Source: Trade Data Monitor, LLC

Figure 11. Turkey Tangerine Export Comparison by main export markets in MY 2019/20.



Source: Trade Data Monitor, LLC

Tangerine exports to Iraq dramatically decreased in MY 2019/20 and MY 2020/21 because of disputes between Iraqi and Turkish industry on marketing preferences (Iraq prefers green tangerines with leaves, not the orange tangerine that Turkey normally exports) and struggles with transportation between the two neighboring countries due to border precautions taken during the COVID-19 pandemic. However, exports to Iraq in MY 2021/22 have started well with improving logistic issues and better preference understandings. Russia is still the main export market for Turkey.

On the other hand, nearly 250 MT of tangerines were rejected by the European Union countries because of the presence of the Mediterranean Fruit Fly (Ceratitis capitata) and MRLs exceeding regulations. The European Union has increased the inspection control frequency from 5 percent to 10 percent.

Table 2: PSD Tangerines, Fresh
Production, Supply and Distribution Statistics:

Tangerines/Mandarins, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Sep 2019		Sep 2020		Sep 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	53553	53553	55000	59832	0	59900
Area Harvested (HECTARES)	51000	52000	54250	58000	0	59000
Bearing Trees (1000 TREES)	15183	15183	15925	15926	0	16000

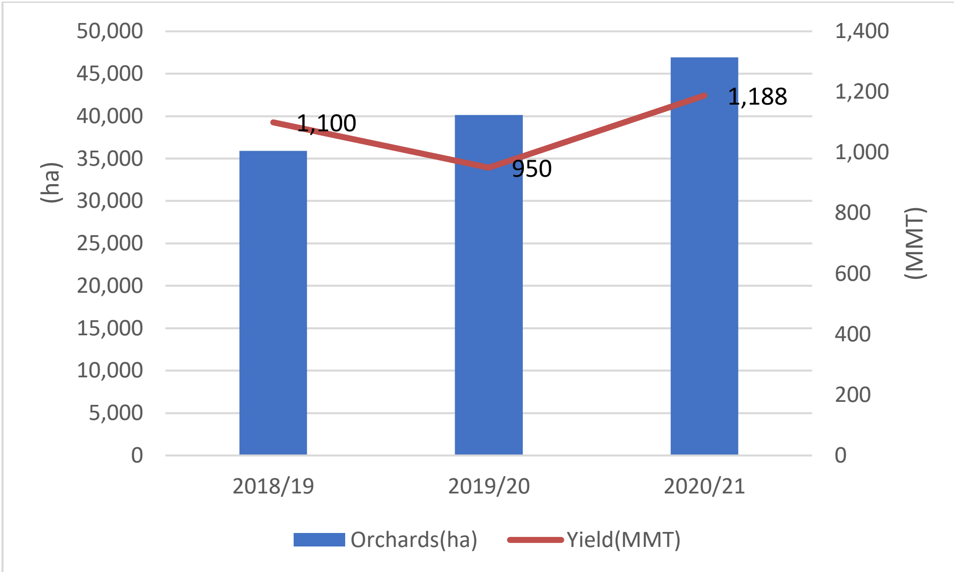
Non-Bearing Trees (1000 TREES)	4158	4158	5841	5842	0	5700
Total No. Of Trees (1000 TREES)	19341	19341	21766	21768	0	21700
Production (1000 MT)	1400	1400	1600	1600	0	1750
Imports (1000 MT)	30	42	30	38	0	35
Total Supply (1000 MT)	1430	1442	1630	1638	0	1785
Exports (1000 MT)	827	827	900	898	0	1000
Fresh Dom. Consumption (1000 MT)	602	614	729	739	0	784
For Processing (1000 MT)	1	1	1	1	0	1
Total Distribution (1000 MT)	1430	1442	1630	1638	0	1785
(HECTARES),(1000 TREES) ,(1000 MT)						

Commodities:
Lemons, Fresh

Production:
In 2021/22, lemon production is expected to increase 27 percent to 1.4 million MT with good quality fruit due to favorable weather conditions in late spring in 2021. Producers are also increasing lemon orchard areas due to its profitability on a price basis compared to other citrus fruits. In MY 2020/21, lemon production reached at 1.1 million MT, which is 13 percent higher than the MY 2019/20 season. For MY 2021/22, the harvesting of the Meyer variety started on August 15, the Enterdonat harvest started on September 1, and the Kutdiken harvest started in November. It is expected that harvest will continue until April 2022.

The main problems reported by lemon producers in Turkey are diseases and pests, input costs such as fertilizers and chemicals, labor costs for tree trimming, crop quality, and marketing issues. The other important problem is the struggle to keep lemons in cold storage for exports. Storage costs are expensive, and producers sometimes use workarounds; for example, producers in Urgup in Cappadocia use caves to store lemons. Recently, packaging costs have exceeded the production costs as a result of high packaging material prices which are dependent on import; producers are waiting for support from the government to maintain their production efficiently.

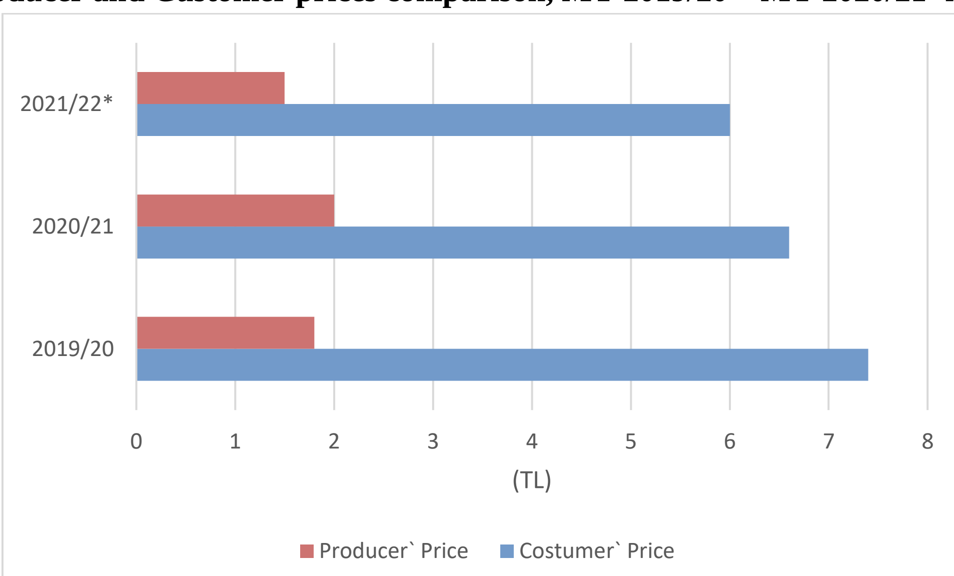
Figure 12. Lemon Orchards Area and Yield (MT) Comparison, MY 2018/19-MY 2019/20-MY 2020/21



Source: TurkSTAT, 2021

In December 2021, the GoT announced that exported lemons will be supported as 100 TL ($7.20) per MT; however, producers do not believe that this level of support will compensate them even for production costs. According to exporters, the support has been authorized due to the decreasing producer price (farm gate price) as shown Figure 13.

Figure 13. Producer and Customer prices comparison, MY 2019/20 – MY 2020/21- MY 2021/22



Source: MinAF, 2021 (With exchange rate 14.40 TL to $1 USD as of December 2021). * MY 2021/22 includes the average data in September and October, 2021.

In contrast to the low producer prices, supermarket prices are noticeably high due to an increase in costs such as packaging, transport, and labor during the marketing process. Turks usually consume lemons fresh.

Consumption:

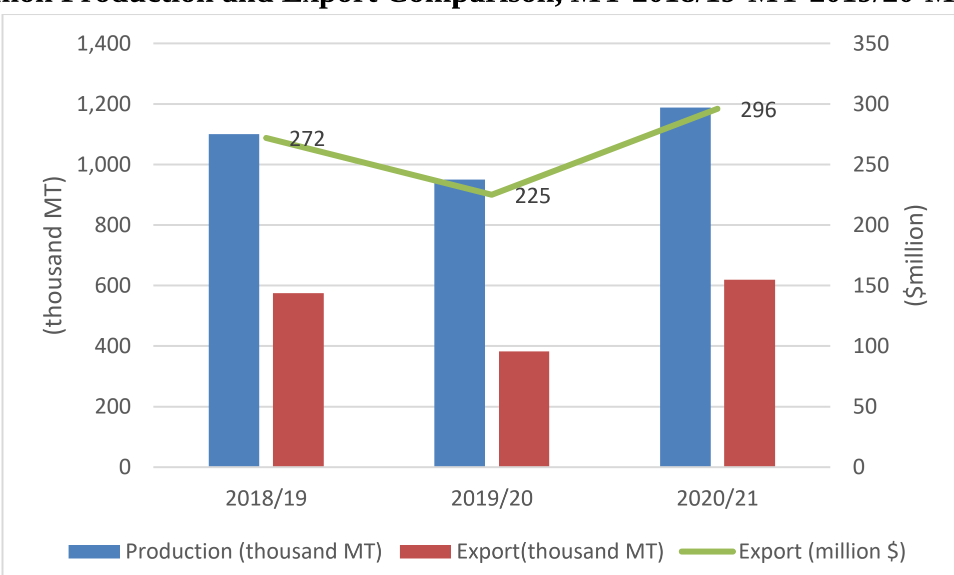
In MY 2021/22, lemon consumption is estimated to increase to 578,000 MT due to high production and the expectation of decreasing lemon prices at markets. With higher market prices and the government mandated closing of restaurants and cafes in response to COVID-19 , lemon consumption in MY 2020/21 was realized at 433,000 MT. Producers are expecting to sell lemons not only at private commercial markets and supermarkets, but also at government-affiliated Agricultural markets which offer consumers lower subsidized prices.

Trade:

In MY 2021/22, lemon exports are expected to increase 25 percent to 775,000 MT due to the high yield of the harvest in August 2021 and high demands from foreign markets as public places re-open after COVID-19 restrictions and consumption increases outside the home. Turkish exporters believe that export demands will be higher since Argentine lemon stocks are reaching low levels. Turkey generally exports half of its total lemon production, and the export season starts in September every year. According to exporters, Spain is the biggest competitor for Turkey, and Turkish exports to Russia and the European Union would be higher in MY 2021/22 if Spanish yield falls due to unfavorable weather conditions.

In 2020/21, Turkey exported 619,533 MT of lemons, which is 38 percent more than MY 2019/20. Exports went mostly to Russia, Iraq, and Ukraine.

Figure 14. Lemon Production and Export Comparison, MY 2018/19-MY 2019/20-MY 2020/21

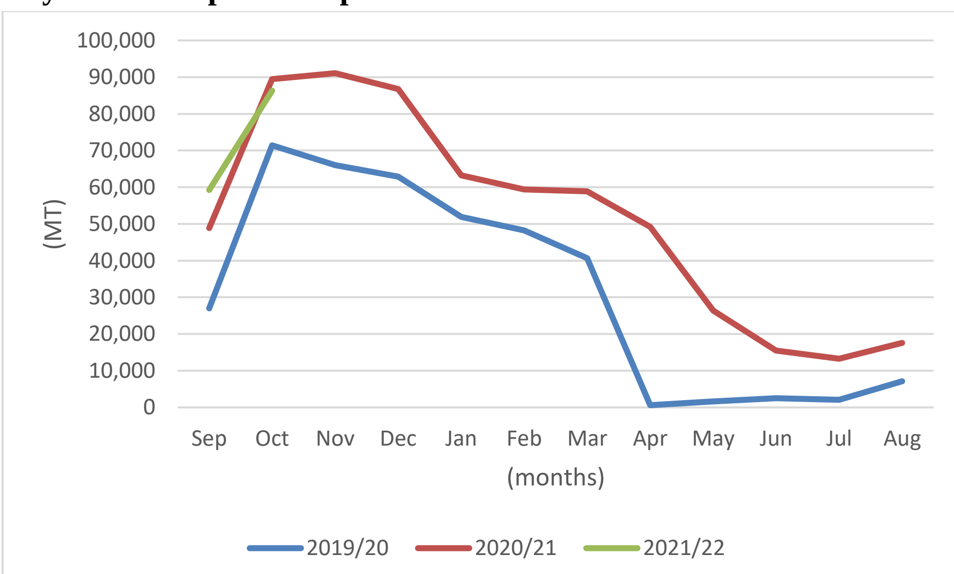


Source: Trade Data Monitor, LLC and TurkSTAT, 2021

The Mediterranean fruit fly issue remains the biggest concern among producers and exporters, as the pest is the reason for many of the rejections for Turkish lemons at EU and Russian ports. Excessively high MRLs account for the rest of the rejections. Turkey has started to try to combat the Mediterranean fruit fly by biological methods and plot studies, notably in Izmir and Antalya provinces.

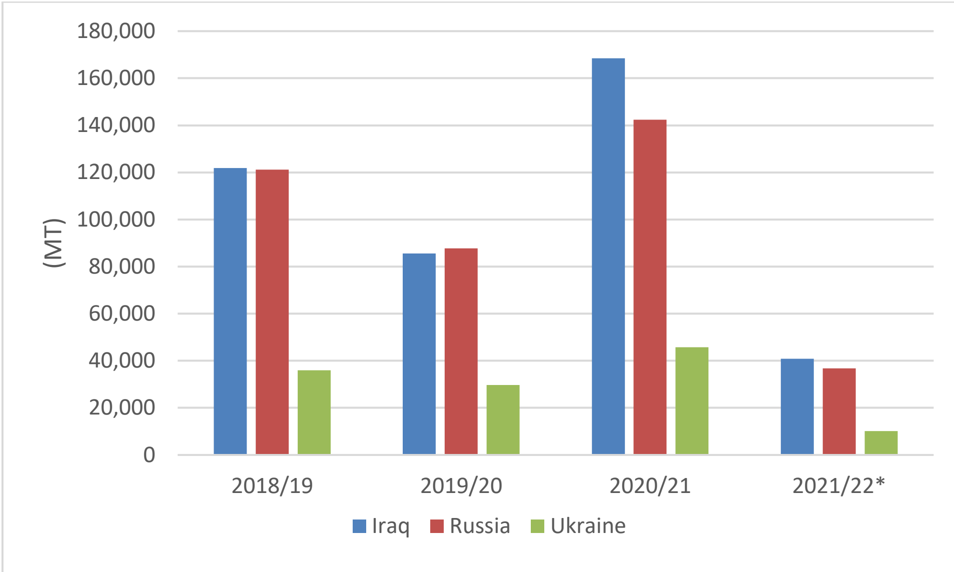
In MY 2019/20, lemon exports decreased 33 percent to 381,970 MT (a value of $225 million) as a result of low yields and the Turkish government's export restriction in April 2020 to combat an increase in prices as a result of high demand from the domestic market during the initial COVID-19 outbreak. The biggest concerns for lemon exporters are the low unit export prices and the residues of products used to extend longevity in storage. The European Union has already increased its control frequency for pesticides residue from 5 percent to 20 percent.

Figure 15. Turkey Lemon Export Comparison in MT for MY 2019/20- MY 2020/21- MY 2021/22.



Source: Trade Data Monitor, LLC

Figure 16. Turkish Lemons Top Export Markets, Comparison in MT from MY 2018/19 to MY 2021/22.



Source: Trade Data Monitor, LLC. *MY 2021/22 includes data only for September and October 2021.

Turkey imported a very low quantity of lemons, mostly from Northern Cyprus and Brazil. Turkey imports lemons from Northern Cyprus to economically support its close political ally, depending on the level of production there.

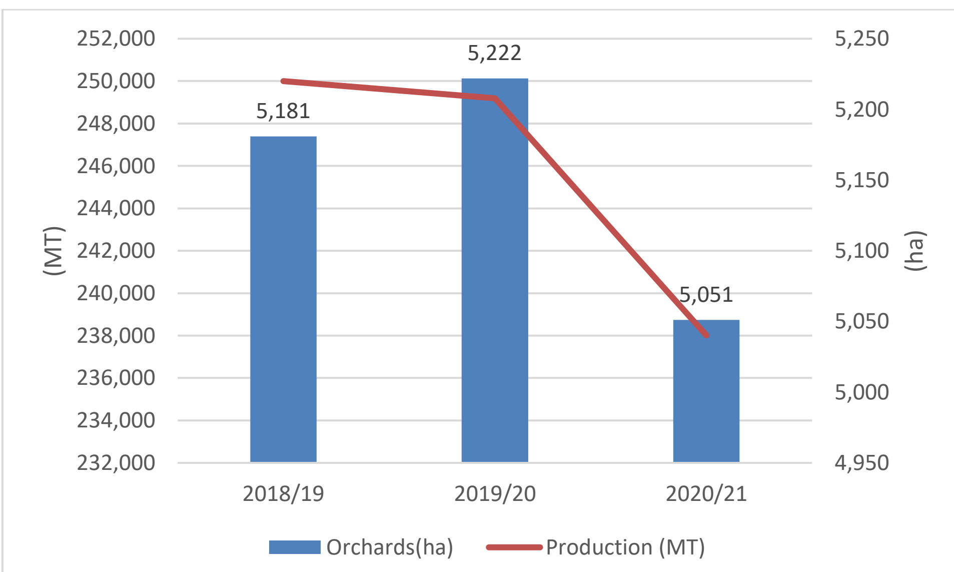
Table 3: PSD Lemons/Limes, Fresh
Production, Supply and Distribution Statistics

Lemons/Limes, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Sep 2019		Sep 2020		Sep 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	40154	40154	41000	46935	0	48000
Area Harvested (HECTARES)	38000	38000	38500	45000	0	46000
Bearing Trees (1000 TREES)	9798	9798	11139	11139	0	12000
Non-Bearing Trees (1000 TREES)	3238	3238	4391	4391	0	4300
Total No. Of Trees (1000 TREES)	13036	13036	15530	15530	0	16300
Production (1000 MT)	950	950	1100	1100	0	1400
Imports (1000 MT)	4	3	4	3	0	3

Total Supply (1000 MT)	954	953	1104	1103	0	1403
Exports (1000 MT)	382	382	570	620	0	775
Fresh Dom. Consumption (1000 MT)	522	520	484	433	0	578
For Processing (1000 MT)	50	51	50	50	0	50
Total Distribution (1000 MT)	954	953	1104	1103	0	1403
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Commodities:
Grapefruit, Fresh
Production and Consumption:
In 2021/22, grapefruit production is expected to increase 5 percent over the previous season, totaling 250,000 MT due to favorable weather conditions in Mediterranean region. In MY 2020/21, grapefruit production reached 238,000 MT, which was 4 percent lower than MY 2019/20, due to low foreign demands. In MY 2020/21, grapefruit production was only 5 percent of total citrus production. Since production costs are high, as is the case with other citrus products, producers are not satisfied with low consumption and the low sales prices at orchards and wholesale markets. Additionally, orchards areas and bearing trees have decreased in Turkey in MY 2020/21.

Figure 17. Turkey Grapefruit Production and Orchards Comparison, from MY 2018/19 to MY 2020/21



Source: TurkSTAT, 2021

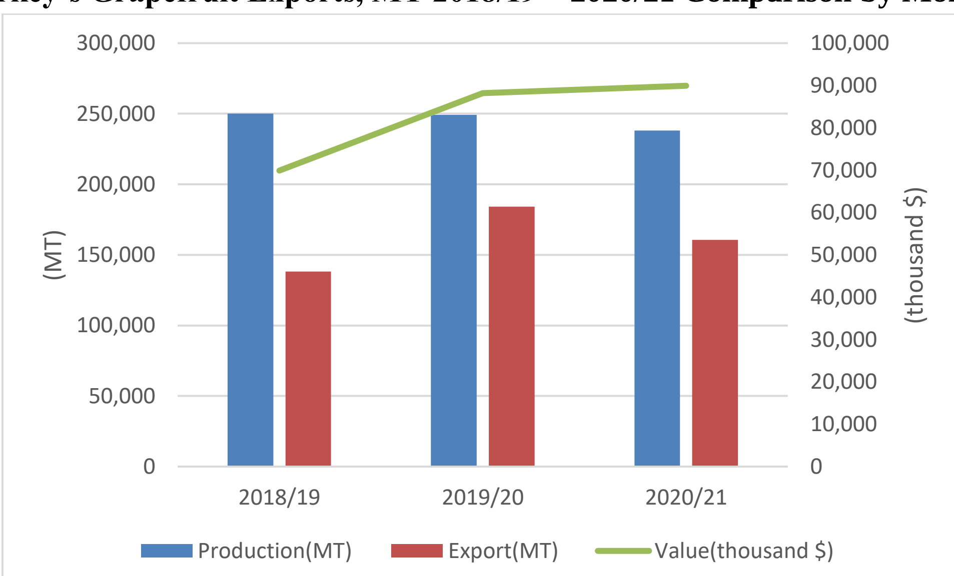
In 2021/22, grapefruit consumption is expected to increase to 98,000 MT due to high production. However, exporters believe that the consumption number includes fruit losses. Domestic demand for grapefruit is very small in Turkey, and the fruit is mostly consumed as fresh-squeezed juice. In 2020/21, grapefruit was only 3 percent of the total domestic citrus consumption at 77,000 MT.

The market price of grapefruits has increased this year due to higher demand from the domestic market for fruit with high Vitamin-C content after the spread of the COVID-19 pandemic.

Trade:

In 2021/22, grapefruit exports are expected to be 5 percent lower than MY 2020/21, at 152,000 MT, due to the lack of export demand. In 2020/21 grapefruit exports were realized at 160,554 MT and valued at $89 million mostly to Russia, Poland, and Ukraine. In 2019/20, Turkey exported 184,000 MT of grapefruit valued at $88 million. In 2020/21, the export quantity decreased since the EU countries and the UK increased border inspection control frequency for MRLs from 5 percent to 50 percent.

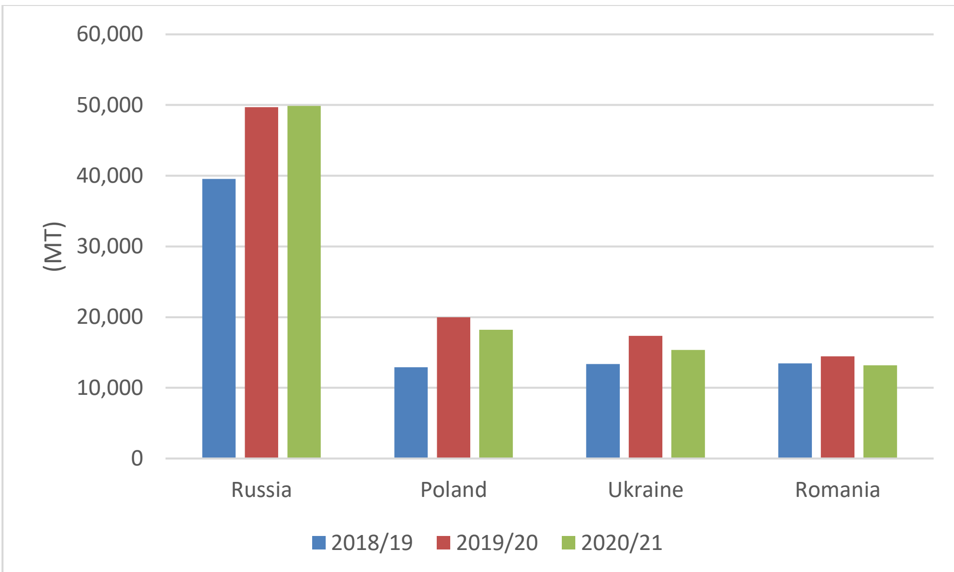
Figure 18. Turkey's Grapefruit Exports, MY 2018/19 – 2020/21 Comparison by Month



Source: Trade Data Monitor, LLC and TurkSTAT, 2021

Due to climate change, especially extreme temperatures, Turkey is struggling to maintain sweetness in grapefruits, and most of produced grapefruits are sour and bitter. For this reason, Turkey is not a stable supply market but is a backup possibility if the other large exporting countries are not able to produce enough grapefruits in a given year. Turkey has a geographic advantage for exports of citrus fruit to Iraq; however, grapefruit exports to Iraq is very small due to a lack of traditional grapefruit consumption in Iraq.

Figure 19. Turkey's Grapefruit Exports by Top Countries, from MY 2018/19 to MY 2020/21



Source: Trade Data Monitor, LLC

Recently, Turkey has been authorized to export grapefruits to Japan; however, many shipments have not met the cold chain treatment procedures during transport that are required by Japanese authorities and have been rejected upon arrival.

Table 4: PSD Grapefruit, Fresh
Production, Supply and Distribution Statistics

Grapefruit, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	5222	5222	5100	5051	0	52000
Area Harvested (HECTARES)	4900	4900	4900	4800	0	4900
Bearing Trees (1000 TREES)	1228	1229	1184	1184	0	1200

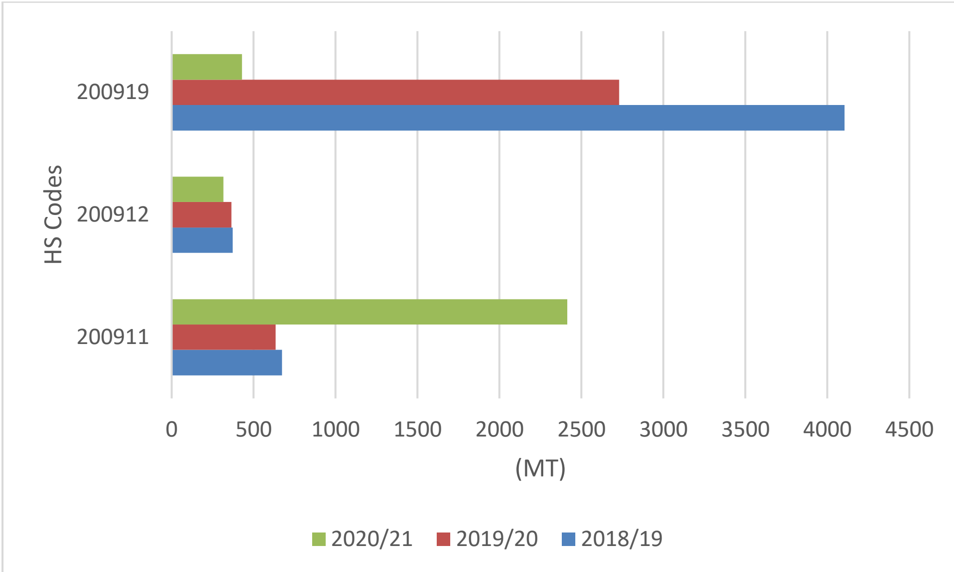
Non-Bearing Trees (1000 TREES)	42	42	44	44	0	45
Total No. Of Trees (1000 TREES)	1270	1271	1228	1228	0	1245
Production (1000 MT)	270	249	251	238	0	250
Imports (1000 MT)	2	1	2	1	0	1
Total Supply (1000 MT)	272	250	253	239	0	251
Exports (1000 MT)	184	184	161	161	0	152
Fresh Dom. Consumption (1000 MT)	87	65	91	77	0	98
For Processing (1000 MT)	1	1	1	1	0	1
Total Distribution (1000 MT)	272	250	253	239	0	251
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Commodities:
Orange Juice

Production and consumption:
In MY 2021/22, orange juice production is forecast at 10,000 MT, which is higher than the MY 2020/21 9,500 MT total, in correlation with high production and increasing domestic demands. The amount of oranges sent to processing plants increased to 110,000 MT. The Turkish fruit processing industry is still under development and is seeking government support to develop the industry to reach out to potential export markets.
Turkey produced 16 MMT of fruit in 2020/21 and only 1.3 million MT of those were processed by the industry as raw materials for fruit juice. The most produced juices are apple, pomegranate, and orange. After the COVID-19 pandemic began, demand for orange juice increased. However, total fruit juice consumption in Turkey is estimated at 8-9 liters per year which is considered very low when compared with European countries.

Trade:
Exports: Orange juice exports are forecast at 3,250 MT for MY 2021/22 in correlation with increasing foreign market demand and high production. Turkey exported 3,159 MT of orange juice in MY 2020/21 valued at $4 million, mainly to Italy, the Netherlands, and China. Exports in MY 2019/20 were 3,730 MT.

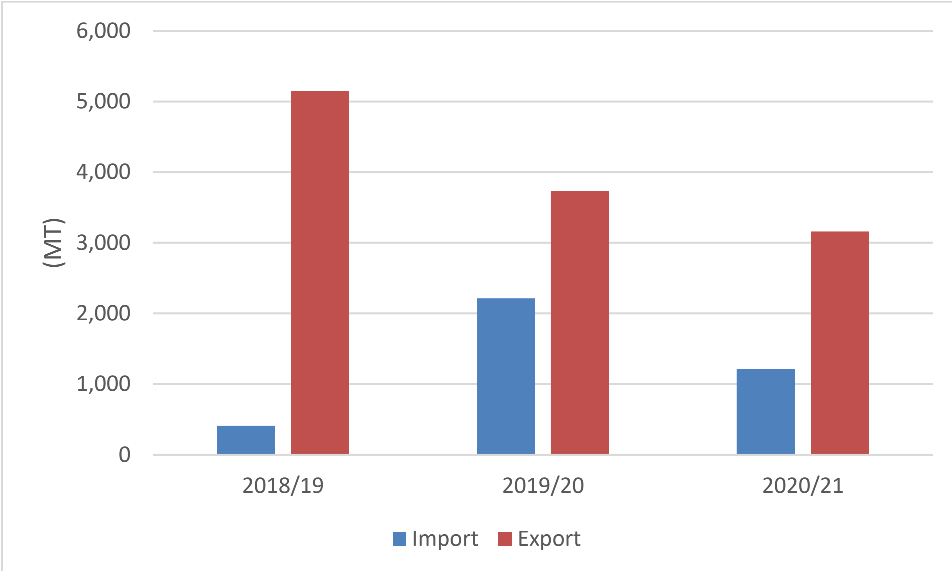
Figure 20. Turkish Orange Juice Exports by HS Codes, Comparison MY 2018/19 and MY 2019/20



Source: Trade Data Monitor, LLC. 200919: Orange Juice, Other Than Frozen, Whether Or Not Sweetened; 200912: Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20; 200911: Orange Juice, Frozen, Whether Or Not Sweetened; All categories are converted to 65 degree brix.

Imports: In MY 2021/22, orange juice imports are estimated to stagnate at the same level as MY 2020/21, 1,213 MT. Turkey imported 2,213 MT of orange juice in MY 2019/20. Turkey mostly imports orange juice, frozen, whether or not sweetened. Imports are mainly from Northern Cyprus and Brazil. According to the juice sector, orange juice imports from the Netherlands have been significantly increasing due to customer preference for higher quality imported orange juice.

Figure 21. Turkish Orange Juice Exports and Imports, Comparison MY 2018/19 and MY 2019/20



Source: Trade Data Monitor, LLC

Table 5: PSD Orange Juice
Production, Supply and Distribution Statistics

Orange Juice	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	110000	110000	105000	105000	0	110000
Beginning Stocks (MT)	150	150	150	150	0	150
Production (MT)	9500	9500	9500	9500	0	10000
Imports (MT)	2214	2213	2000	1213	0	1213
Total Supply (MT)	11864	11863	11650	10863	0	11363
Exports (MT)	3729	3730	3000	3159	0	3250
Domestic Consumption (MT)	7985	7983	8500	7554	0	7963
Ending Stocks (MT)	150	150	150	150	0	150
Total Distribution (MT)	11864	11863	11650	10863	0	11363
(MT)						

Policy:

Citrus Production Support Policies:
For farmers who are registered in the ‘Farmer Registration system’ run by the Turkish Ministry of Agriculture:

- 150 TL/hectare is given as fuel support,
- 40 TL/hectare is given as fertilizer support,
- 40 TL/per soil analysis sample. Soil analysis must be done by an authorized laboratory.
- 1000 TL/hectare for standard saplings, 4000 TL/hectare for certified saplings.
- 500/hectare is given for the biological controls of pests and 800 TL/hectare is given for biotechnical controls using pheromones to combat Mediterranean fruit flies.

Alternatively, some producers have chosen to receive subsidies from MinAF to compensate for losses due to excessively hot weather conditions which affected crops badly. Also, heat damage will be newly included within the scope of insurance policies from TARSIM (the Agriculture Insurances Directorate) (https://web.tarsim.gov.tr/havuz/homePageEng) for oranges, tangerines, lemons and grapefruit production.

Attachments:

No Attachments