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Report Name: Fresh Deciduous Fruit Annual

Country: Turkiye

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Report Category: Fresh Deciduous Fruit

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Report Highlights:

The late arrival of spring caused a decrease in Türkiye's production and export of apples, pears, and table grapes in MY 2023/24. Table grape producers are having a difficult time fighting mildew disease, which was caused by delayed rainfall. Commercial growers continue to make on-farm investments to capitalize on growing opportunities in the domestic and export markets. Last marketing year, India was the leading destination for Turkish apples for the second straight year, while Russia held its position as the top market for Turkish pears and table grapes.

Note to Reader: Marketing Year (MY) 2023/24 numbers are Post forecasts, based on different information sources. Prior year figures are adjusted to align with Türkiye's official statistics.

PRODUCTION

Apples

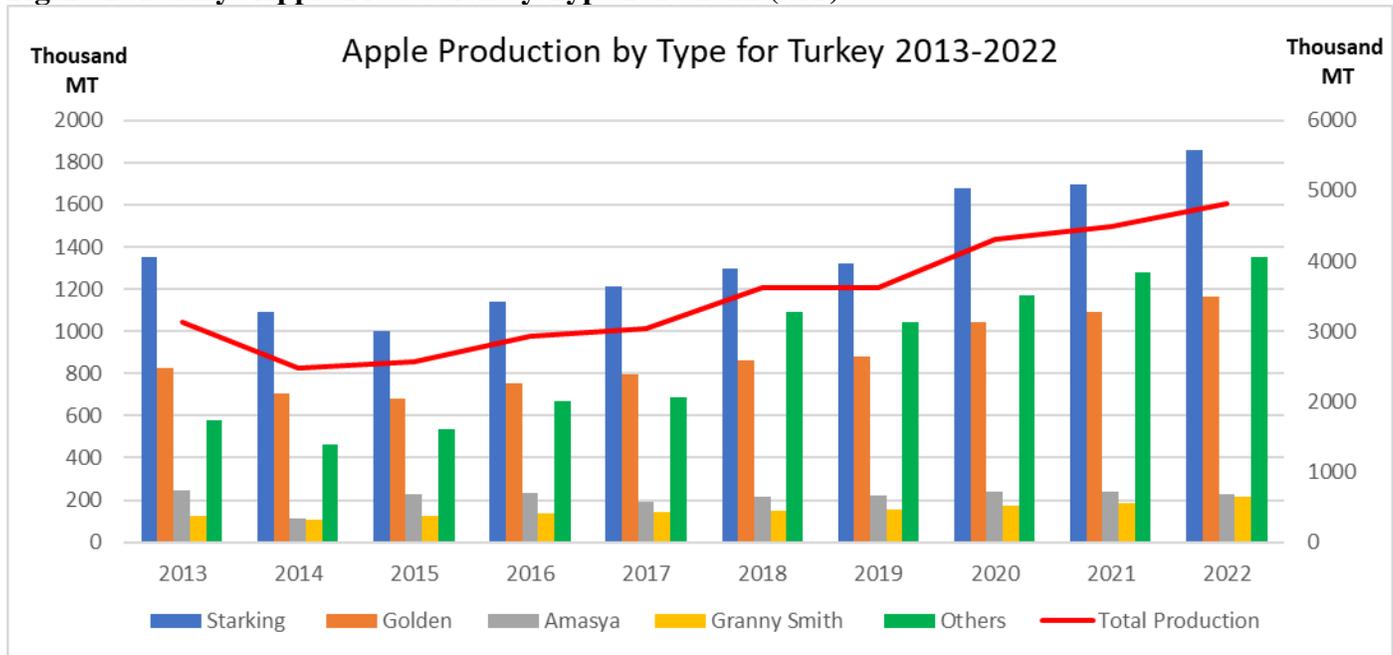
For the MY 2023/24 season, total apple production is forecast at 4.85 million metric tons (MMT), which is less than last season due to drought during the blooming season and late rainfall in the maturation period. Türkiye's apple production has steadily climbed higher for the last six years as farmers have planted higher-yielding apple trees and adopted modern growing techniques (Figure 1 and 2). In the last decade, the number of professional apple growers has increased, and they have invested in modern, two-dimensional apple orchards. Also, there are investments in new technological innovations, such as wind turbines, to protect blossoms from bursting in the blooming period, decreasing frost damage and increasing the quality and size of the apples. Other benefits of these investments are increasing efficiency of land usage, and use of harvesting machines which prevent bruising of apples during the harvesting, making it easier to be sold at the export market. According to market sources, climate change is delaying the seasons and causing trees to not get enough rain when needed and to get too much rain when not needed. As a result, lower yields and smaller apples are expected in MY 2023/24. The MY 2022/23 production figure is revised higher to 4.97 MMT, which is in line with the latest government estimates.

With its diverse geography and climate, Türkiye produces hundreds of varieties of apples, but only a few of these are marketed commercially. The main varieties are Starking, Golden, Amasya, and Granny Smith, which collectively accounted for nearly three-quarters of total production in MY 2022/2023. Starking (a cousin of the Red Delicious apple) is the most popular variety, making up about 38 percent of total production or about 1.86 MMT (Figure 1), with the Golden variety being the second most popular at almost 1.2 MMT. These two varieties have shown notable increases over the last decade, even though their planted area has declined. The main reason behind this trend is that many farmers are using better production practices to optimize yields.

In addition to the top apple varieties, the production of other apple varieties over the last five years, especially red and sweet apple varieties, has grown by 30 percent (Figure 1).¹ These other increasingly popular varieties include Starkrimson, Scarlet Spur, Pink Lady, and Red Chief. The main reason thought to be underlying this increase in production of other apple varieties is export demand from Middle Eastern countries.

¹ <http://www.turktarim.gov.tr/Haber/368/en-cok-starking-ve-golden-uretiyoruz>

Figure 1. Türkiye Apple Production by Type 2013-2022 (MT)



Source: TurkStat, 2023

Commercial apple orchards are largely concentrated in the central Anatolia and Mediterranean regions in the southwestern part of Türkiye. As shown in Figure 4, approximately 45 percent of all commercial apple production comes from three provinces: Isparta, Karaman, and Nigde. Isparta is the largest apple producing province with about 730,000 metric tons (MT) of apples annually. Karaman, a major source of export production, is the second largest apple producing province with 500,000 MT of production. In response to growing domestic and export opportunities, growers in apple-producing areas in Türkiye have switched to growing more profitable and higher-yielding apple varieties.

Figure 2. Two Dimension Orchard Planted Apples in Turkey



Source: FAS, Istanbul, 2023

Apples have traditionally been the most economically significant deciduous crop in Türkiye, followed by table grapes and pears. While investments have been made to modernize Türkiye's apple production industry, traditional low-yielding orchards are still common. These low-yielding varieties take more space in the plantation, and they need more space between the plantations. This results in inefficient land usage and smaller fruit compared to the product of new, higher-yielded apple tree varieties. Smaller sized apples are not favorable in the export market. Some of the farmers we spoke with mentioned that they are willing to change their orchards to more modern two-dimensional orchards, but the higher costs associated with the changes prevent them from converting their orchards from traditional to modern plantation. Türkiye is the one of the largest producers of apples in Europe.

Figure 3. Traditional Apple Orchards in Türkiye



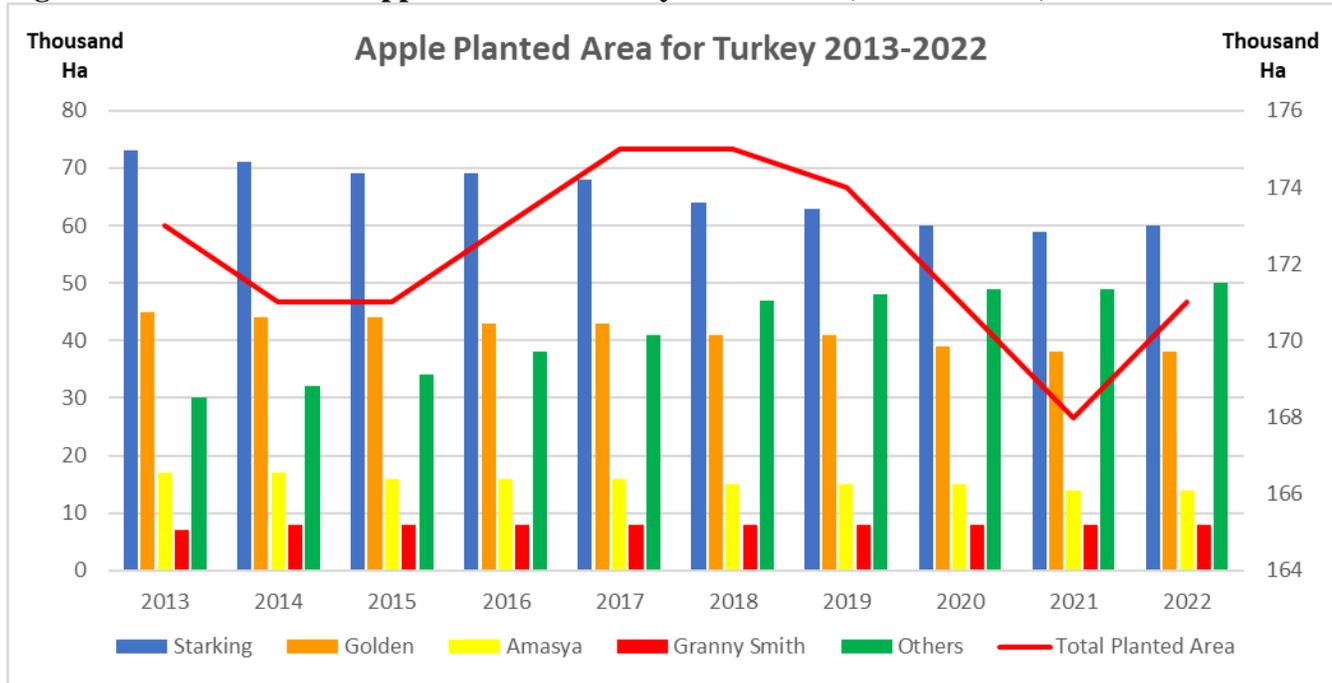
Source: FAS, Istanbul, 2023

Figure 4. Top Apple Producing Provinces in Türkiye



Source: Türkiye Ministry of Agriculture and Forestry, 2023

Figure 5. Planted Area of Apple Trees for Türkiye 2013-2022 (Thousand Ha)



Source: TurkStat, 2023

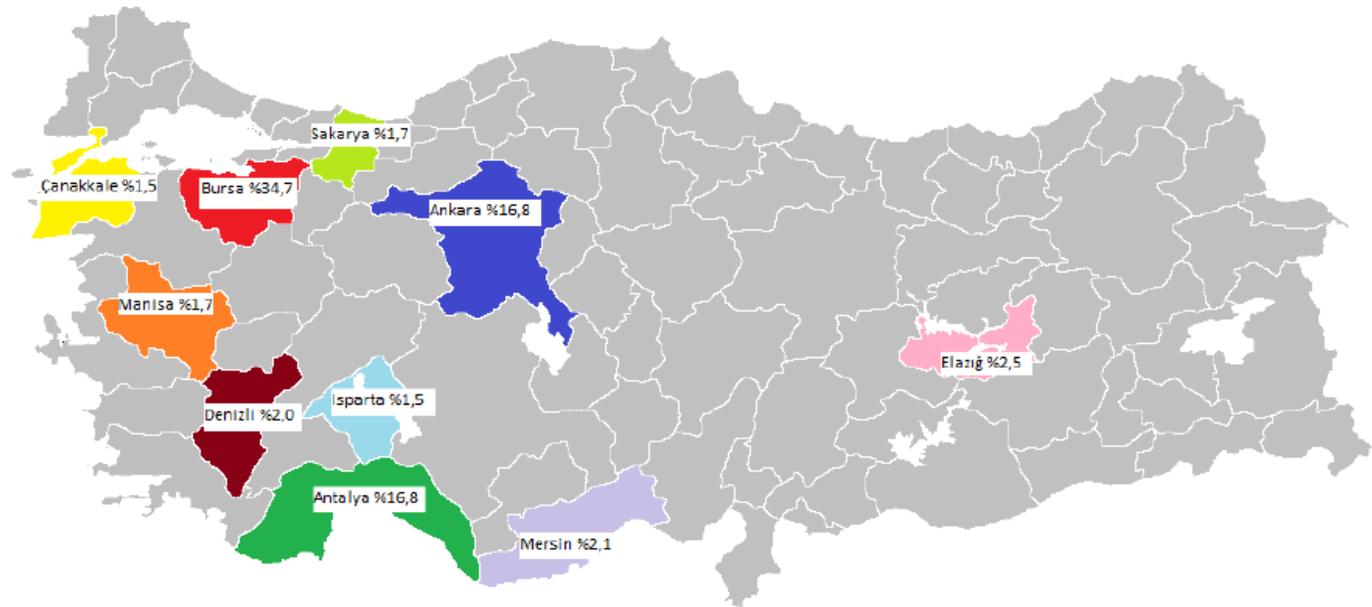
Pears

For the MY 2023/24 season, total pear production is forecast at a 560,000 MT, down about 2 percent from last year's newly revised figure. This decrease is mostly attributed to spring and summer weather patterns arriving outside the normal timeframes. Turkey's pear harvest generally starts around July and continues through October. The late arrival of spring caused less blossom for the pear trees. Overall, though, pear production has increased by 15 percent over the last five years, which is mostly due to increasing demand from foreign export markets, especially Russia, Iraq, and Romania.

In response to strong demand, Turkish pear growers have invested in new orchards and uprooted non-commercial varieties, replanting those areas with fruit suitable for export markets in recent years. The area planted in pears has increased around three percent over the last decade (Figure 7).

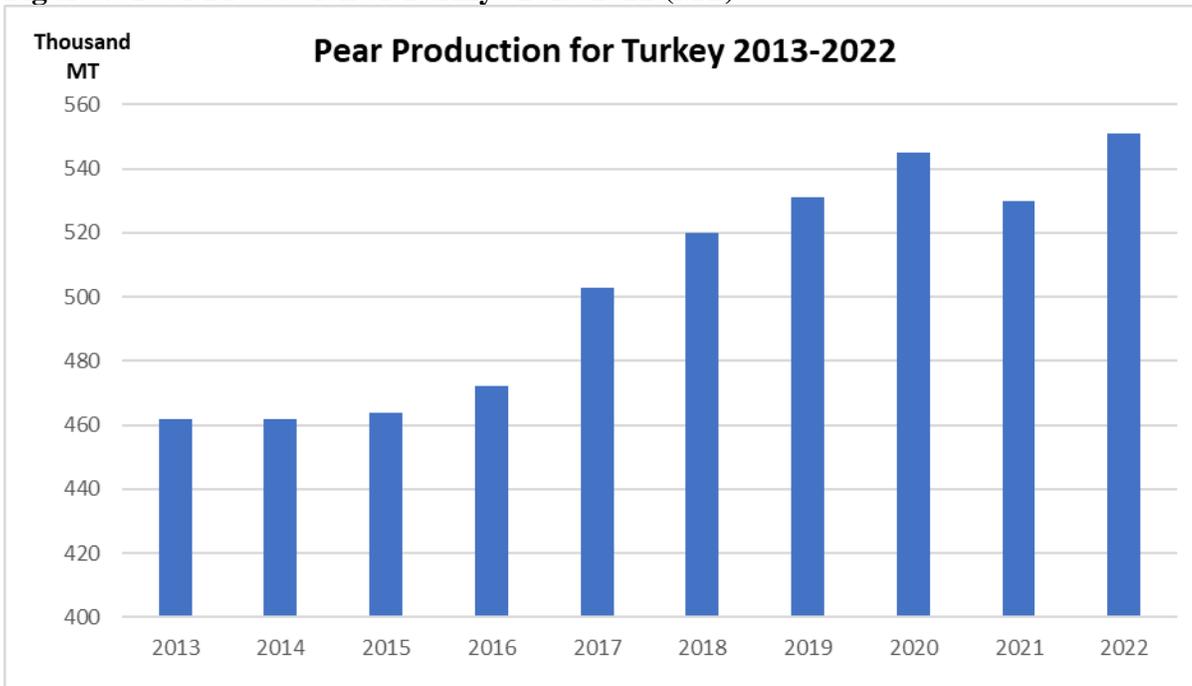
There are many different pear varieties grown in Türkiye. The major varieties of pears grown in Türkiye are Santa Maria, Akca, Mustafabey, Cassia, Williams, Ankara, and Deveci. Almost 50 percent of the production is concentrated in the southern and western coastal areas of Türkiye, especially the Marmara, Aegean, and Mediterranean regions. (Figure 6).

Figure 6. Top Pear Producing Provinces in Türkiye



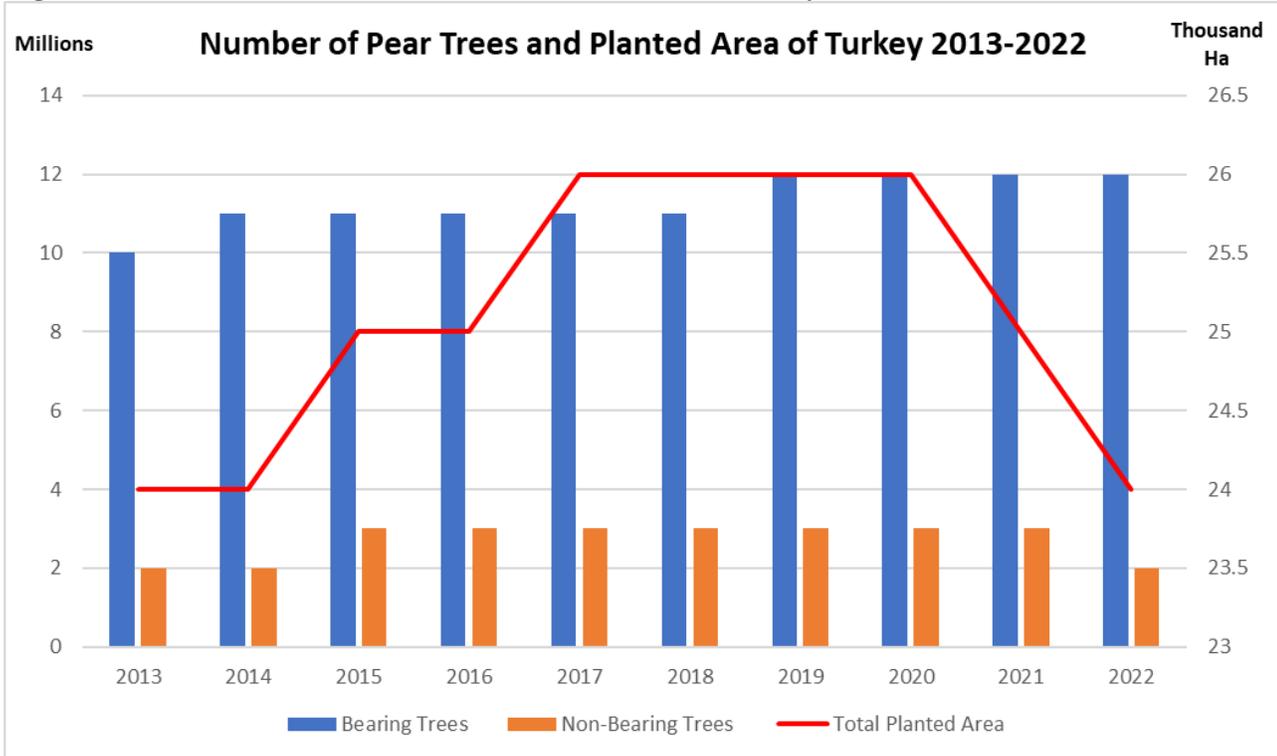
Source: Turkey Ministry of Agriculture and Forestry, 2023

Figure 7. Pear Production of Türkiye 2013-2022 (MT)



Source: TurkStat, 2023

Figure 8. Number of Pear Trees and Planted Area in Türkiye 2012-2022 (millions, thousand ha)



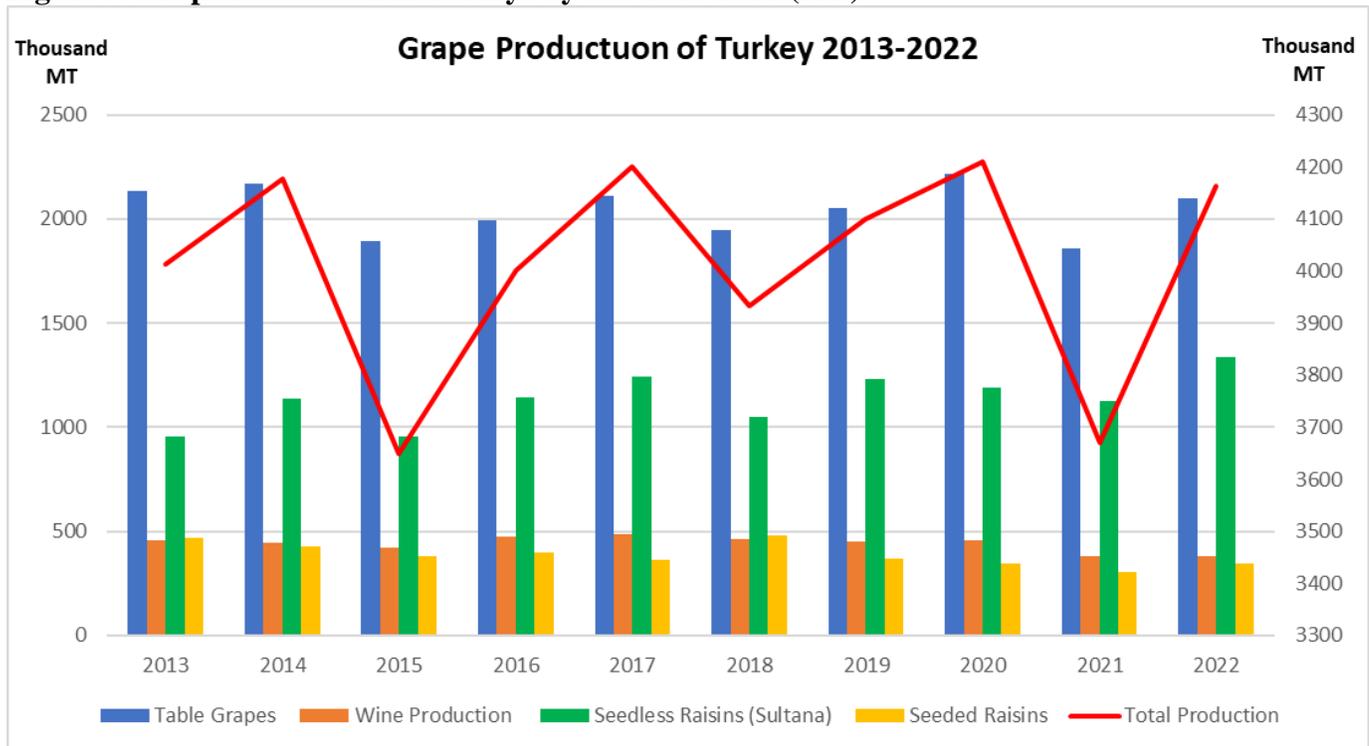
Source: TurkStat, 2023

Table Grapes

Table grape production for MY 2023/24 is forecast at 1.9 MMT, down 15 percent from last year's newly revised estimate due to mildew disease. Downy mildew is an extremely serious fungal disease that can result in severe crop loss. Necessary rains for the vineyards were delayed, which caused mildew diseased to spread very quickly. The MY 2022/23 production estimate is revised slightly downward based on the latest government data. For reference, Türkiye produced approximately 4.1 MMT of fresh grapes for all purposes in MY 2022/23, of which table grapes accounted for 54 percent of the total.

Grapes are a major commercial crop and grown throughout Türkiye. About one third of all production is seedless grapes, which are mainly grown in the Aegean region located in the western part of the country. The Marmara region in the northwest part of Turkey primarily grows wine and table grapes. Table grapes are primarily grown in Manisa, Mersin, and Denizli provinces in the central southeastern half of the country. Figure 9 shows grape production in Türkiye by use over the last decade. In MY 2023/24, production of Sultana raisins is expected to decrease by 30 to 35 percent due to previously mentioned mildew concerns. Mildew disease was mostly spread in the Aegean Sea area.

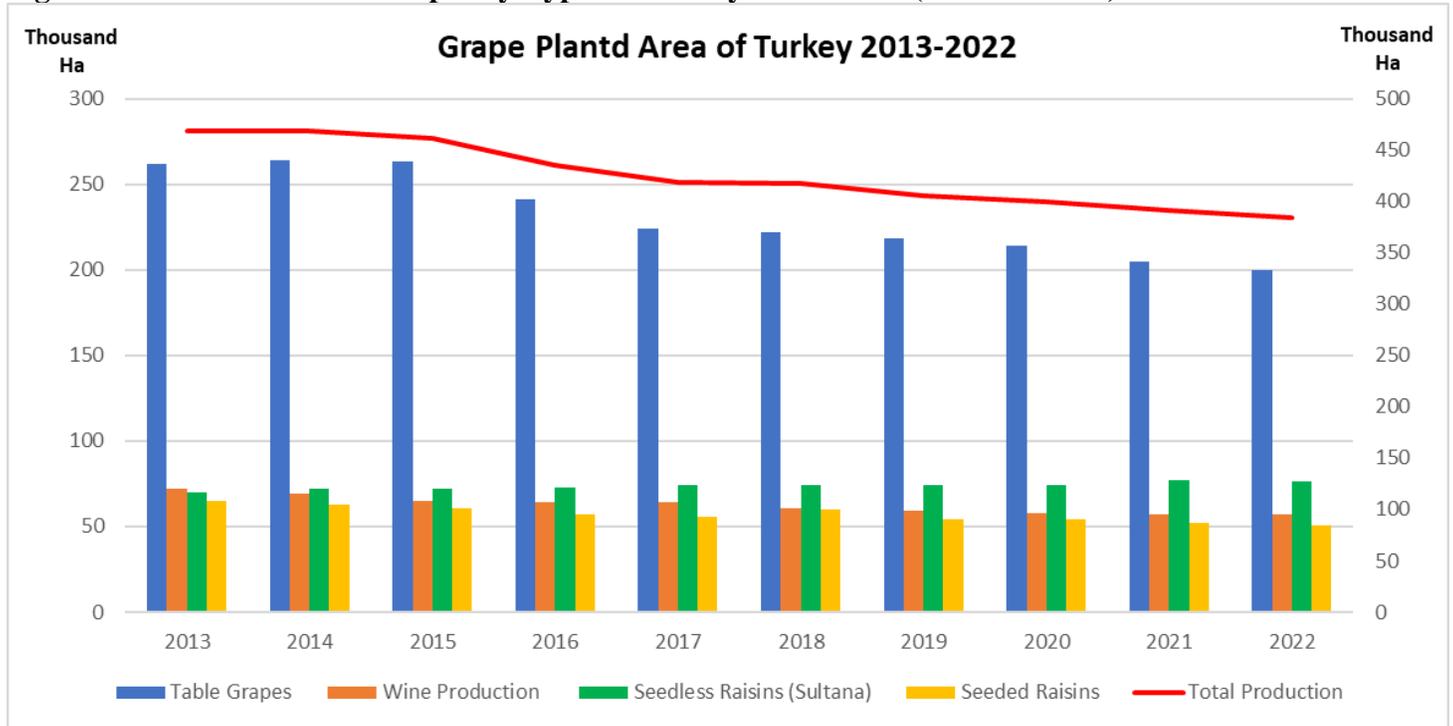
Figure 9. Grape Production in Türkiye by Use 2013-2022 (MT)



Source: TurkStat, 2023

As shown in Figure 10, Turkey's total grape production area is around 380,000 hectares (ha), with table grapes accounting for the largest percentage of the planted area. The table grape planted area has been trending downward for the last six years.

Figure 10. Planted Area of Grapes by Type for Türkiye 2013-2022 (Thousand Ha)



Source: TurkStat,2023

CONSUMPTION

Apples

Apple consumption in MY 2023/24 is forecast at 4.47 MMT due to a projected decrease in production. The consumption estimates for MY 2022/23 were revised slightly higher to about 4.57 MMT, in parallel with an upward revision to production.

Apples are one of the most preferred fresh fruits in Türkiye due to their widespread availability, traditional use, and large number of varieties. Traditionally, about 65-70 percent of Türkiye’s apple production is consumed as fresh fruit. Consumers generally prefer eating Starking, Golden, Amasya, and Granny Smith varieties. About 30-35 percent of production is processed into juice, canned products, vinegar, or dried products, and about 5-10 percent is exported as fresh produce. Annual per capita consumption of apples is estimated at 30-35 kg. The number of fruit juice factories has been increasing in recent years, which increases the percentage of apples going to the apple juice production.

With the use of modern, temperature-controlled storage facilities, apples can be stored and marketed throughout the year. Current cold storage capacity in Turkey is more than 1 MMT and increasing yearly with new investments. Isparta province – the leading apple producing province in Turkey – is home to many cold storage facilities for apples and other fruits. Other apple and fruit-growing regions across Türkiye are also investing to expand cold storage capacity.

As of November 2023, the average retail price for Golden apples was about 32 Turkish Lira (TL)/kg (\$1.13), Starking apples was about 35 TL/kg (\$1.24) while Amasya apples retailed a higher at 45 TL/kg (\$1.59). Last year, these varieties retailed at about 13-15 TL/kg (\$0.70-\$0.80). The year-over-year price increase of apples in terms of TL was higher than in U.S. dollars (USD) because the TL has depreciated against the USD and other major currencies. As of November 2023, the TL had lost about half of its value against the dollar compared to the same time last year. The exchange rate in November is \$1=28.33TL, whereas last year it was \$1=18.62 TL.

Pears

Pear consumption in MY 2023/24 is forecast down slightly year-over-year to 480,300 MT due to a slight decrease in production. About 90 percent of pears are consumed fresh, 3-5 percent are exported, and the remainder are canned. The preferred varieties are Santa Maria (30 percent), Deveci (20 percent), Ankara (10 percent), Williams (10 percent), Keiffer (5 percent), and Akca (5 percent). The rising number of cold storage facilities in Türkiye helps to provide pears and other fresh fruit to consumers throughout the winter. Annual pear consumption is 5 kg per capita.

As of November 2023, the average retail price for a kilogram of Santa Maria pears was 45 TL/kg (\$1.59). Deveci pears are retailing for a little more at 50 TL/kg (\$1.76). Last year, the retail price for a kilogram of pears was 22-25 TL (\$1.18-\$1.34).

Table Grapes

Table grape consumption for MY 2023/24 is forecast lower year-over-year at 1.69 MMT due to a decrease in production. The MY 2022/23 consumption estimate is revised downward to 1.99 MMT based on adjusted production numbers.

In MY 2022/23, almost half of Türkiye's total grape production was consumed as fresh table grapes and about 38 percent was dried and sold as raisins, including seedless Sultanas which are primarily exported. The remainder was processed, primarily for molasses and wine production. Fresh grapes are seasonal and are available throughout the summer until the middle of autumn. Annual consumption of all grapes is around 35 kg per capita.

As of November 2023, the average retail price for a kilogram of grapes was 48TL (\$1.69), whereas last year a kilogram cost 23 TL (\$1.24).

TRADE

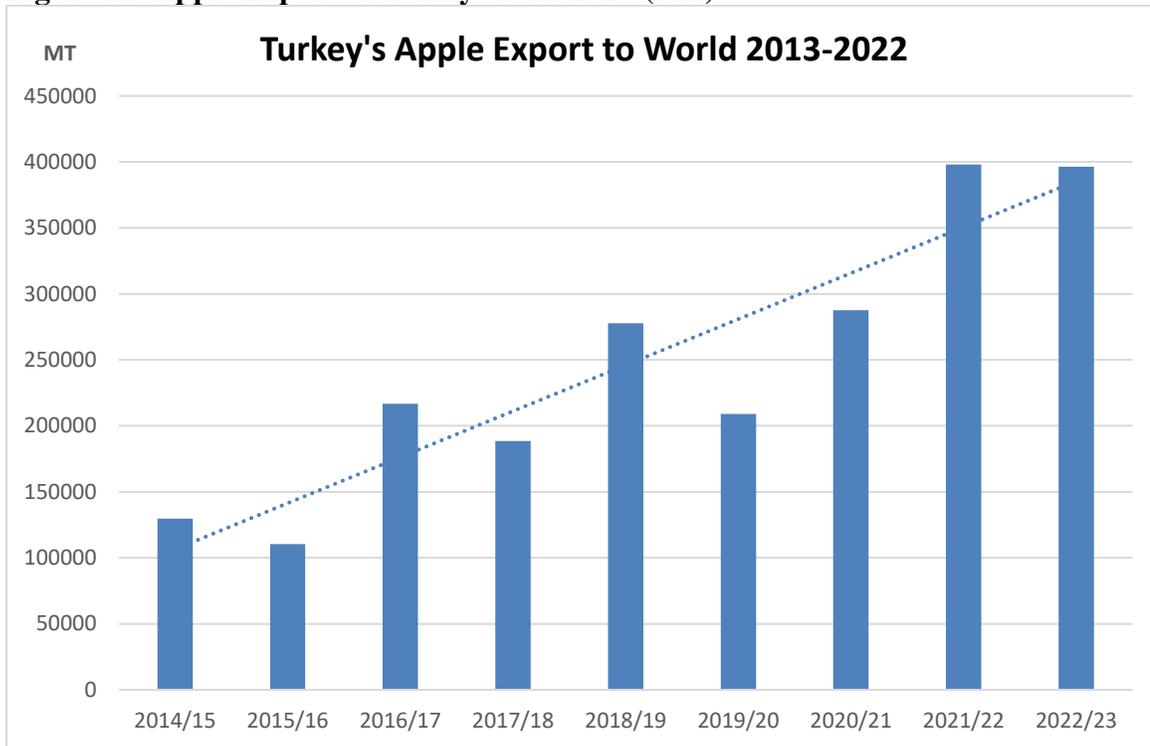
Apples

Apple exports for MY 2023/24 are forecast at 380,000 MT due to a slight decrease in production and the size of apples produced this year which are not suitable for the export market. This export forecast assumes steady demand from neighboring countries. Türkiye's apple export volumes have increased 10 times over the last decade as growers have adapted their operations to capitalize on growing export opportunities (Figure 11). Proximity to export markets and competitive prices have also helped fuel Turkish apple exports.

Turkey's top export destinations are India, Iraq, Russia, Syria, Libya, and Saudi Arabia (Table 1). In the last few years, Türkiye's apple exports to India have really taken off, climbing from about 20,892 MT in

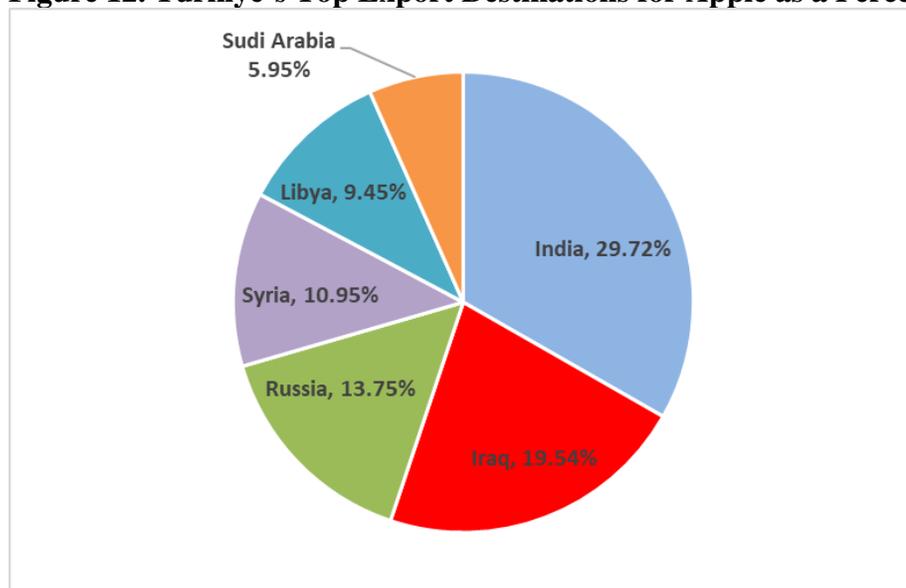
MY 2017/18 to more than 117,801 in MY 2022/23. India has been the top export destination for Turkish apples for two consecutive years. Red Delicious is the leading apple variety being exported from Turkey to India. With this increase in sales to India, Turkish apples are now competing head-to-head with U.S. apples in the Indian market (Figure 12). This year, India has removed the 20 percent import tax on U.S. fresh apples which was applied in 2017. With the removal of the import tax on U.S. apples, Turkish producers may lose some of their market share to U.S. producers. Before the import tax, the U.S. was selling around 150,000 MT of fresh apples to India yearly but after the tax that number decreased to the 21,000 MT in 2022.

Figure 11. Apple Export of Türkiye 2012-2023 (MT)



Source: Trade Data Monitor, LLC, 2023

Figure 12. Türkiye’s Top Export Destinations for Apple as a Percentage (2022-2023)



Source: Trade Data Monitor, LLC, 2023

Table 1. Turkey’s Top Fresh Apple Export Destinations 2018-2023 (MT, HS 080810)

Partner	Year Ending: June (Metric Ton)				
	2018/19	2019/20	2020/21	2021/22	2022/23
India	20,892	29,055	67,573	110,765	117,801
Iraq	133,216	37,196	34,039	53,625	77,429
Russia	8,510	40,132	60,707	73,081	54,492
Syria	48,416	31,639	45,770	61,758	43,386
Libya	4,037	15,741	30,534	49,650	37,450
Saudi Arabia	17,275	8,801	2,652	0	23,585
Total	277,834	209,072	287,602	397,963	396,347

Source: Trade Data Monitor, LLC, 2023

Pears

Pear exports for MY 2023/24 are forecast lower than last year at 80,000 MT due to a slight decrease in domestic production. In MY 2022/23, Türkiye exported 89,120 MT of pears, which is less than the previous year. Russia was the leading export destination, accounting for about one-third of total export volumes. Other leading export destinations for Turkish pears were Iraq and Romania (Table 2).

Table 2. Turkey's Top Fresh Pear Export Destinations 2018-2023 (MT, HS 080830)

Partner	Year Ending: June (Metric Ton)				
	2018/19	2019/20	2020/21	2021/22	2022/23
Russia	15,931	10,473	18,219	28,170	34,468
Iraq	12,096	14,656	12,770	17,100	17,573
Romania	2,273	2,436	5,745	7,579	7,252
Turkmenistan	17	826	1,693	2,461	7,326
Bulgaria	1,462	881	1,370	2,014	3,107
Germany	804	853	1,130	1,566	2,102
Total	43,716	41,870	73,317	94,258	89,120

Source: Trade Data Monitor, LLC, 2023

Table Grapes

For MY 2023/24, table grape exports are forecast lower at 204,000 MT based on decreased production due to the mildew disease. In 2022/23, table grape exports reached nearly 227,395 MT. Russia was the top export destination, followed by Ukraine and Belarus (Table 3).

Table 3. Turkey's Top Table Grape Export Destinations 2017-2022 (MT, HS 080610)

Partner	Year Ending: May (Metric Ton)				
	2018/19	2019/20	2020/21	2021/22	2022/23
Russia	88,067	101,910	116,591	129,588	145,463
Ukraine	20,478	31,018	35,830	50,543	22,123
Belarus	13,881	9,997	5,165	0	8,741
Saudi Arabia	6,106	1,635	2,426	8,977	7,143
Germany	11,695	10,612	7,712	20,265	6,703
Poland	1,897	2,684	6,041	8,488	6,640
Total	179,350	205,124	214,822	263,951	227,395

Source: Trade Data Monitor, LLC, 2023

POLICY

In recent years, Turkish farmers have invested in new deciduous fruit orchards thanks to stable export demand and government support payments. Producers registered with the Ministry of Agriculture and Forestry are eligible for government subsidies. In 2023, the government of Türkiye (GoT) allocated about \$2.26 billion in subsidy payments to support overall agricultural production.

However, with skyrocketing inflation in Türkiye, agricultural production costs have outpaced the increases in government support payments. The depreciation of the Turkish Lira is one of many reasons for the increase in inflation. According to GoT statistics, the current prices for fertilizer and fuel have jumped year-over-year by 36 and 70 percent, respectively, compared to last year. Meanwhile, farmgate

prices for deciduous fruits have also increased but are not keeping pace with inflation. Table 4 shows different subsidies given by GoT to apple producer over the years.

Table 4. Subsidies given by GoT to Apple Growers

Subsidies for Apple Growers					
	2018	2019	2020	2021	2022
Soil analysis (TL/da)	0.8 (\$0.16)	0.8 (\$0.14)	0.8 (\$0.11)	0.8 (\$0.09)	1 (\$0.06)
Fertilizer support (TL/da)	4 (\$0.83)	4 (\$0.70)	4 (\$0.57)	8 (\$0.9)	21 (\$1.26)
Fuel support (TL/da)	10 (\$2.09)	10 (\$1.76)	15 (\$2.14)	17 (\$1.92)	62 (\$3.73)
Exchange rates	1TL/\$4.81	1TL/\$5.68	1TL/\$7	1TL/\$8.86	1TL/\$16.58

Source: Turkey Ministry of Agriculture and Forestry,2023

Imports of fresh apples, pears, and table grapes are negligible given domestic production volumes and high import duties. Tariffs on these fruits are provided in Table 4. Turkey is also a major producer and exporter of juice. Juice exporters are supported through an export refund program.

Table 5. Import Duties for Fresh Apples, Pears, and Table Grapes, December 2021

Product	Tariff Code	Duty (percent)
Fresh Apples	0808.10	60.3
Fresh Pears	0808.30	60.3
Fresh Table Grapes	0806.10	54.9

Source: [Resmi Gazete \(Turkish Formal Newspaper\)](#)

Production, Supply, and Distribution (PS&D) Tables (MT)

Apples, Fresh Market Year Begins Turkey	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	16900	169000	170000	170000	0	171000
Area Harvested (HA)	16900	169000	170000	170000	0	171000
Bearing Trees (1000 TREES)	72300	72300	74000	75913	0	76000
Non-Bearing Trees (1000 TREES)	14300	14300	14000	14165	0	14200
Total Trees (1000 TREES)	86600	86600	88000	90078	0	90200
Commercial Production (MT)	4343000	4343000	4620000	4817500	0	4700000
Non-Comm. Production (MT)	150000	150000	150000	150000	0	150000
Production (MT)	4493000	4493000	4770000	4967500	0	4850000
Imports (MT)	1300	1336	600	1000	0	504
Total Supply (MT)	4494300	4494336	4770600	4968500	0	4850504
Domestic Consumption (MT)	4096300	4097347	4360600	4572153	0	4470504
Exports (MT)	398000	396989	410000	396347	0	380000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	4494300	4494336	4770600	4968500	0	4850504
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh Market Year Begins Turkey	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25100	25100	26000	23700	0	23000
Area Harvested (HA)	25100	25100	26000	23700	0	23000
Bearing Trees (1000 TREES)	11600	11600	11800	11554	0	11550
Non-Bearing Trees (1000 TREES)	2800	2800	2500	2480	0	2300
Total Trees (1000 TREES)	14400	14400	14300	14034	0	13850
Commercial Production (MT)	510000	510000	540000	551000	0	540000
Non-Comm. Production (MT)	20000	20000	20000	20000	0	20000
Production (MT)	530000	530000	560000	571000	0	560000
Imports (MT)	500	200	300	331	0	300
Total Supply (MT)	530500	530200	560300	571331	0	560300
Domestic Consumption (MT)	436200	436000	475300	482211	0	480300
Exports (MT)	94300	94200	85000	89120	0	80000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	530500	530200	560300	571331	0	560300
(HA) ,(1000 TREES) ,(MT)						

Grapes, Fresh Table Market Year Begins Turkey	2021/2022		2022/2023		2023/2024	
	Jun 2021		Jun 2022		Jun 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted ^(HA)	391000	391000	400000	384000	0	380000
Area Harvested ^(HA)	391000	391000	400000	384000	0	380000
Commercial Production ^(MT)	1737000	1737000	2116000	2099859	0	1780000
Non-Comm. Production ^(MT)	120000	120000	120000	120000	0	120000
Production ^(MT)	1857000	1857000	2236000	2219859	0	1900000
Imports ^(MT)	2100	300	2000	300	0	300
Total Supply ^(MT)	1859100	1857300	2238000	2220159	0	1900300
Fresh Dom. Consumption ^(MT)	1595100	1593300	2013000	1992764	0	1696300
Exports ^(MT)	264000	264000	225000	227395	0	204000
Withdrawal From Market ^(MT)	0	0	0	0	0	0
Total Distribution ^(MT)	1859100	1857300	2238000	2220159	0	1900300
(HA) ,(MT)						

Attachments:

No Attachments