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Turkey

Stone Fruit Annual

Stone Fruit Annual 2012

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Report Highlights:
Stone fruit production increased 2012 following a devastating year in 2011. The weather conditions were favorable during blooming and harvest. Exports also picked up in 2012 compared to 2011. Cherry exports are predicted to be 57,000 MT in 2012. The production and export of peaches and nectarines are predicted to increase in 2012 and reach 550,000 MT and 45,000 MT respectively.

Executive Summary:

Turkey continues to be one of the world's major producers of fresh fruit and vegetables. Stone fruit accounts for 14 percent of fruit production in Turkey, the third most significant after deciduous and citrus fruits. Most stone fruit is consumed fresh in the domestic market.

Cherry production picked up quickly in 2012 after a devastating year in 2011. Production reached 500,000 MT in 2012. As a result of higher production, cherry exports are also predicted to increase in 2012 and reach 57,000 MT. Germany and Russia continued to be the top markets for Turkish cherries.

Peach production is also predicted to increase in 2012 compared to the previous year and reach 550,000 MT. Exports of peaches and nectarines are also expected to increase and reach 45,000 MT in 2012. Russia will continue to be the top export destination for peaches.

One interesting change observed in the destinations of 2012 exports is Syria, as peach exports increased from 490 MT in 2011 to 3,120 MT in 2012.

There are no major policy changes that are predicted to affect production, marketing or export of stone fruit.

Commodities:

Fresh Cherries,(Sweet&Sour)

Fresh Peaches & Nectarines

Production:

Cherries

Turkey has been among the top cherry producing and exporting countries in the world, especially in the past 15 years. Despite devastated production, Turkey continued to be a significant cherry producer and exporter in 2011.

Turkey's cherry product was reduced significantly in the spring of 2011due to wetter and colder conditions than average. Although cherry production was slightly higher than initial predictions, production in 2011 (400,000 MT) was down 35 percent from 2010 (613,000 MT).

Things were much better for stone fruit producers in 2012 as weather conditions were favorable. Industry contacts estimate that production is going to increase about 25 percent in 2012 compared to the previous year. Total sweet and sour cherry production is predicted to be 500,000 MT. Weather conditions were also favorable during the blooming season and frost did not hit the crop in most growing areas, as had been the case almost every year for the past few years.

There are more than one hundred varieties of sweet cherries produced in Turkey. The 0900 Ziraat variety (also known as Turkish Napoleon), which was developed by Turkish scientists, is the most popular type produced for export. About 90 percent of sweet cherry exports are Napoleon.

Processed cherries account for 25 percent of total sweet and sour cherry production. Turkish sour cherries are well known for their high quality juice. According to industry sources, approximately 85 percent of sour cherry production is used in the processing sector to make canned products, marmalades, frozen fruits and fruit juices. The rest is usually sold fresh on the domestic market.

Table-1: Production, Supply and Demand of Cherry (Sweet& Sour)

Fresh Cherries,(Sweet&Sour) Turkey	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	37,000	37,000	37,000	37,000		37,000
Area Harvested	0	0	0	0		0
Bearing Trees	20,000	20,000	20,000	20,000		20,000
Non-Bearing Trees	9,000	9,000	9,000	9,000		9,000
Total Trees	29,000	29,000	29,000	29,000		29,000
Commercial Production	613,000	613,000	370,000	400,000		500,000
Non-Comm. Production	0	0	0	0		0
Production	613,000	613,000	370,000	400,000		500,000
Imports	0	0	0	0		0
Total Supply	613,000	613,000	370,000	400,000		500,000
Fresh Dom. Consumption	368,000	368,000	180,000	210,000		288,000
Exports	65,000	65,000	46,000	46,000		57,000
For Processing	180,000	180,000	144,000	144,000		155,000
Withdrawal From Market	0	0	0	0		0
Total Distribution	613,000	613,000	370,000	400,000		500,000
HA, 1000 TREES, MT						

Peach

Peach production did not change significantly in 2011. The production of peaches and nectarines were 520,000 MT in 2011, a 4 percent decrease compared to the previous year, due to unfavorable weather conditions during the blooming season in the spring.

Weather conditions were favorable in 2012 and production is predicted to increase 6 percent. Peach and nectarine production is estimated to reach 550,000 MT in 2012.

Marmara, Aegean and Mediterranean regions continued to be the major peach growing parts of Turkey. Peaches are supplied to the domestic market from May to September. Turkey accounts for approximately 3 percent of total world peach production. There is, however, no industry association dealing specifically with peaches or nectarines in Turkey. The Mediterranean Region produces the early varieties, and late varieties usually come from the Marmara and Aegean regions. Although changing slowly, peach orchards in Turkey are traditionally rather small.

Nectarine production is primarily exported.

Table-2: Production, Supply and Demand of Peach (including nectarines)

Fresh Peaches & Nectarines Turkey	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	27,500	27,500	27,500	27,500		27,500
Area Harvested	0	0	0	0		0
Bearing Trees	14,500	14,500	14,500	14,500		14,500
Non-Bearing Trees	3,000	3,000	3,000	3,000		3,000
Total Trees	17,500	17,500	17,500	17,500		17,500
Commercial Production	540,000	540,000	500,000	520,000		550,000
Non-Comm. Production	0	0	0	0		0
Production	540,000	540,000	500,000	520,000		550,000
Imports	0	0	0	0		0
Total Supply	540,000	540,000	500,000	520,000		550,000
Fresh Dom. Consumption	379,000	379,000	350,000	367,000		385,000
Exports	41,000	41,000	30,000	33,000		45,000
For Processing	120,000	120,000	120,000	120,000		120,000
Withdrawal From Market	0	0	0	0		0
Total Distribution	540,000	540,000	500,000	520,000		550,000
HA, 1000 TREES, MT						

Consumption:

Cherry

Consumption of cherries has increased in 2012 due to higher level of production compared to the previous year. Health conscious consumers have driven an increasing interest in cherries.

Approximately 85 percent of all sour cherry production is processed; a very small percentage is exported, and the rest is consumed in the domestic market. The fruit juice sector is growing rapidly and sour cherry juice is quite popular among Turkish people.

The major export markets for cherries are the EU and Russia. These markets prefer bigger sized cherries. Therefore, Turkish producers that target the export markets use different techniques and varieties in order to meet the demands of the international markets.

Peach

Peach consumption is not predicted to change significantly in 2012 compared to 2011. In Turkey, about 80 percent of peach production is consumed fresh and the rest is processed for juice, jam and dried products. Most fresh peaches and juice are consumed domestically.

Nectarines are not as popular as peaches domestically. Nectarines are rather new to the Turkish market and prices are usually higher than peaches. As a result, domestic nectarine consumption is not very high.

Trade:

Cherry
Traditionally, cherries are among the top exported fruits grown in Turkey. Sweet cherries comprise the bulk of Turkish cherry exports.

In 2011, Turkish cherry exports declined slightly less than the reduced level of production. Cherry exports declined 30 percent compared to 2010, and were recorded to be around 46,000 MT in 2011.
Since 2012 is estimated to be a good production year, exports are also predicted to increase by 24 percent and reach 57,000 MT.

The trend in export destinations did not change in 2012. Germany, Russia and Bulgaria continued to be the top three export destinations for Turkish cherries in both 2011 and 2012.

Peach
In 2012 peach exports are estimated to bounce back to average and are expected to be 45,000 MT. This accounts for a 36 percent increase over the previous year. Exports in 2011 are decreased, mostly due to lower production levels.

In 2011 Russia, Saudi Arabia and Iraq were the top three export destinations with exports of 7,850 MT, 9,626 MT and 8,000 MT respectively.

Peach exports to Ukraine are predicted to increase significantly in 2012 and reach 4,600 MT. Russia is expected to be the top importer with 11,000 MT followed by Ukraine (4,600 MT) and Iraq (4,489 MT).
One interesting change observed in 2012 export destinations is Syria as peach exports increased from 490 MT in 2011 to 3,120 MT in 2012.

Stocks:
There are no official stocks of stone fruit.

Policy:

The government does not take an active role in the production and export of stone fruit. However, the Ministry of Food, Agriculture and Livestock (MINFAL) has implemented a frost damage insurance program that applies the same conditions throughout Turkey. As a result, the program fails to take into account different blooming and bearing periods in the different regions and fruit producers from Central Anatolia found it unsuitable for the production period in their region.