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Report Highlights:

The total cherry production forecast in Türkiye in Marketing Year (MY) 2023/24 is 900,000 metric tons (MT), which is 8 percent higher than MY 2022/23, due to favorable weather and soil conditions. As of early August 2023, cherry exports have reached 75,000 MT, and are on track to surpass the previous MY. The peach and nectarine production forecast for MY 2023/24 is 1 million metric tons (MMT), similar to MY 2022/23, due to no frost damage and sufficient rainfall. Stone fruit exports are forecast to increase in parallel with higher production in MY 2023/24.

EXECUTIVE SUMMARY

Türkiye has historically been among the top cherry producing countries in the world, often finding itself among the top four exporting countries. Sweet cherries are grown mainly in the Central Anatolia, Aegean, Marmara, and Mediterranean regions. Konya, Izmir, Manisa and Denizli are the top cherry-producing provinces within these regions. The marketing year for cherries begins in late April. For the MY 2023/24 season, Post forecasts total cherry production to be up year to year at 900,000 MT, of which 720,000 MT are sweet cherries and 180,000 MT are sour cherries. This increase is due to favorable weather and growing conditions.

Türkiye continues to be among the top ten exporters in the world for peaches and nectarines. Bursa, Canakkale, Izmir, and Mersin are the top provinces for peach and nectarine production. Typically, they are harvested between May and early October. The marketing year for peaches and nectarines starts in April. Post forecasts total peach and nectarine production to be 1 MMT for MY 2023/24 due to favorable weather conditions and high fruit yields.

Türkiye is one of the largest exporters of stone fruit in the world, exporting more than 250,000 MT annually, with the majority going to the EU and Russia. In recent years, Turkish exporters have also been looking for opportunities for stone fruits (such as cherries) in the Far East, particularly South Korea.

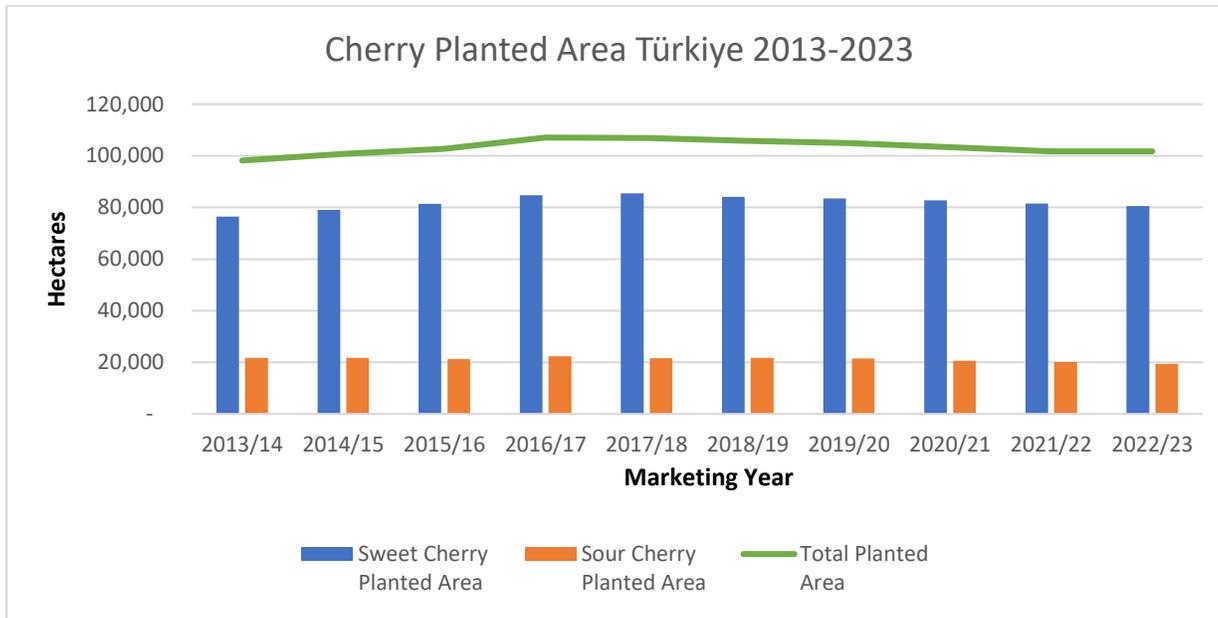
PLANTING AREA

Sweet and Sour Cherries

Türkiye is the world's leading sweet cherry producer. Enjoying increasing demand from export markets in recent years, Turkish farmers have invested in new orchards, uprooted non-commercial varieties, and replanted tree varieties that are more competitive. There are also new investments being made in juice production.

Turkish sweet cherry planted area was on the rise a decade ago, however in recent years it has seen a slight decline (Figure 1). Post estimates the sweet cherry planted area at around 82,000 hectares (ha) and sour cherry planted area to stay around 20,000 ha in MY 2023/24. Total cherry planted area in MY 2023/24 is expected to be about 100,000 hectares, slightly less than MY 2022/2023. Overall, total planted area for cherries has decreased slightly since the record in MY 2017/18 (Figure 1).

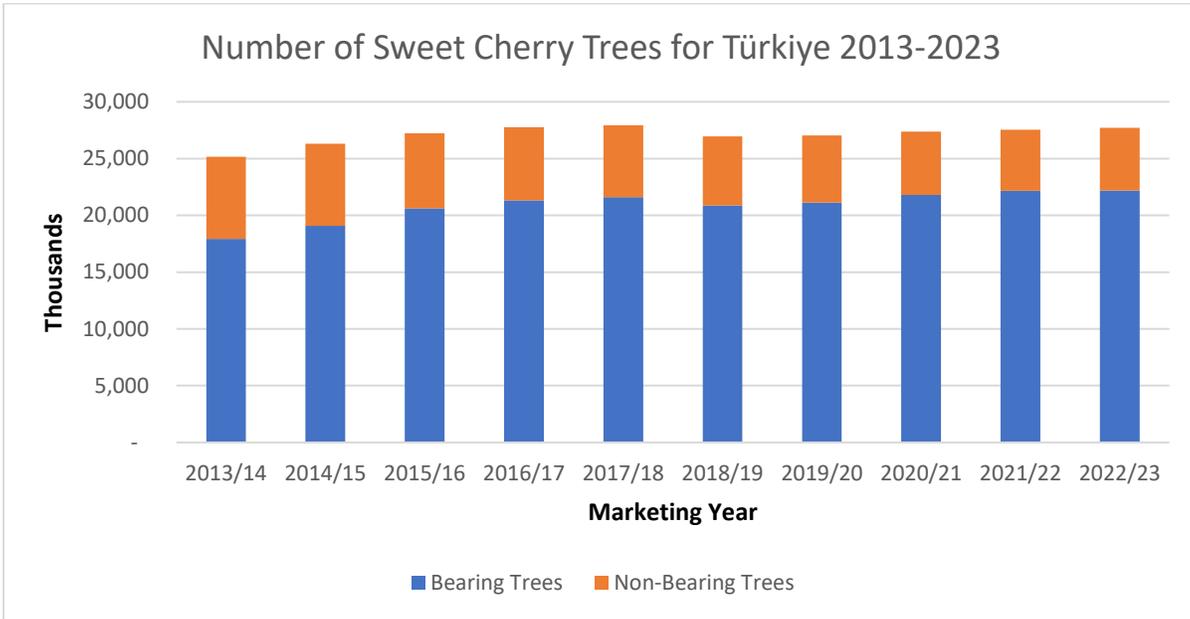
Figure 1. Türkiye’s Planted Area of Sweet and Sour Cherries 2013-2023



Source: The Turkish Statistical Institute (TurkStat), 2023

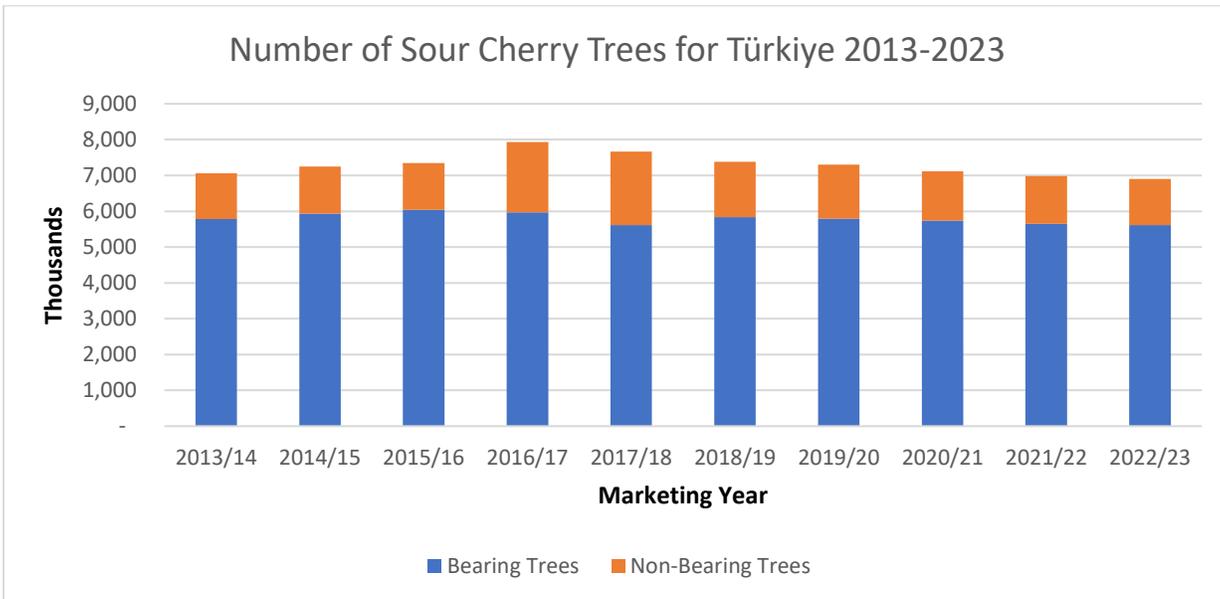
In the last ten years, scientists have been trying to increase yields and quality of the native Napoleon Cherry. A scientist from Suleyman Demirel University has developed three, higher yielding Turkish Napoleon types. ([News link](#)) Following these improvements, farmers have been replacing their older varieties of Turkish Napoleon sweet cherry trees with the enhanced versions, leading to Türkiye’s increased production compared to decreasing planted area (Figures 1, 8). According to Turkish official data, the total estimated number of cherry trees in the country was about 27.8 million in 2022. The total number of bearing trees for sweet cherries increased from 18 million to 22 million in ten years. The total number of bearing trees for sour cherries has remained stagnant (Figures 2, 3).

Figure 2. Number of Sweet Cherry Trees for Türkiye 2013-2023



Source: TurkStat, 2023

Figure 3. Number of Sour Cherry Trees for Türkiye 2013-2023



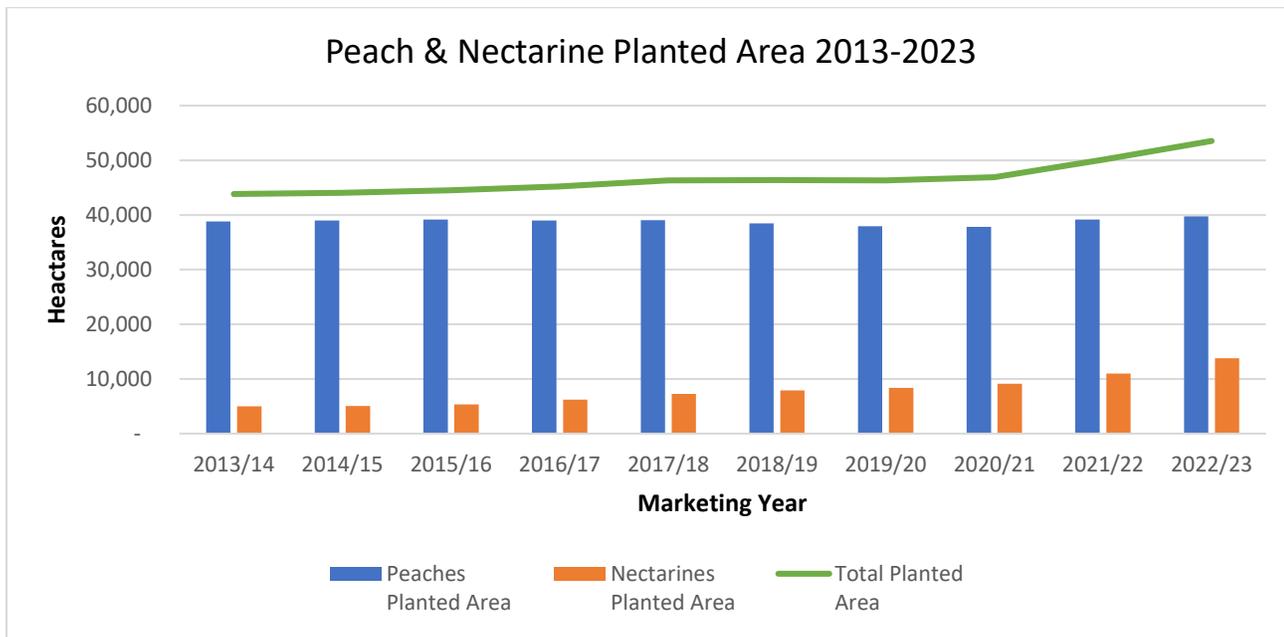
Source: TurkStat, 2023

Türkiye is the location of many valuable cherry genetic resources because of the fruit’s origin in northern Anatolia¹. There are more than 100 varieties of sweet cherries produced in Türkiye. The *0900 Ziraat* variety, also known as the Turkish Napoleon, was developed in Türkiye and is the most popular because it meets the higher quality characteristics demanded by export markets. It is heart shaped, with pink and red fruit flesh, bright, firm, juicy, very large, suitable for transportation and has a long shelf life. However, producers have started to try new cherry varieties such as Sweetheart, Celeste, Early Lory, Kordia, Regina, Sam, and Sunburst for higher quality products, later harvests (to capture higher prices later in the season), and higher yields.

Fresh Peaches and Nectarines

Farmers have been replacing older varieties of peach and nectarine trees with newer, higher yield varieties. Also, modern high-density orchards have been established using new cultivars, rootstocks, training systems, and growing techniques. Using modern technologies and changing to higher yielding trees has increased the quality and production of peaches over the last 5 years, while planted area has remained largely the same (Figure 4). The planted area of nectarines, however, has increased by almost 100 percent to 13,800 ha. The number of nectarine orchards is increasing in Türkiye to meet changing consumer preferences in both domestic and foreign markets (Figure 4). Most of the peach varieties planted in Türkiye are Early Amber, Spring Crest, May Crest, Red Haven, and Early Red.

Figure 4. Türkiye’s Planted Area of Peaches and Nectarines 2012-2023



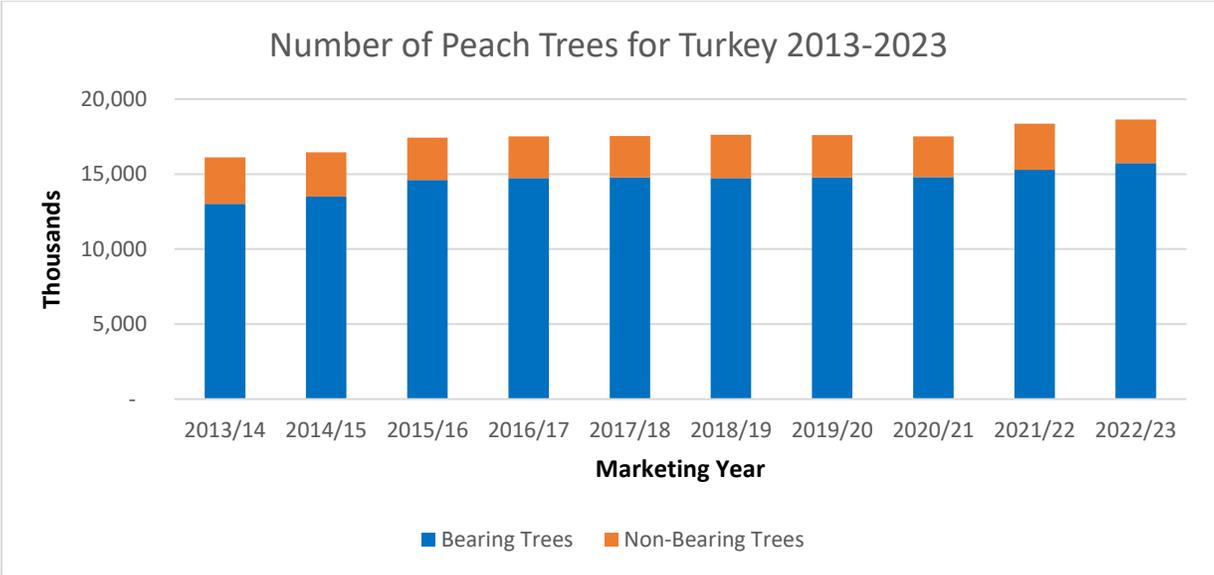
Source: TurkStat, 2023

¹

https://adana.tarimorman.gov.tr/Belgeler/SUBELER/bitkisel_uretim_ve_bitki_sagligi_sube_mudurlugu/meyve_yetistiriciligi_ve_mucadelesi/Kiraz.pdf

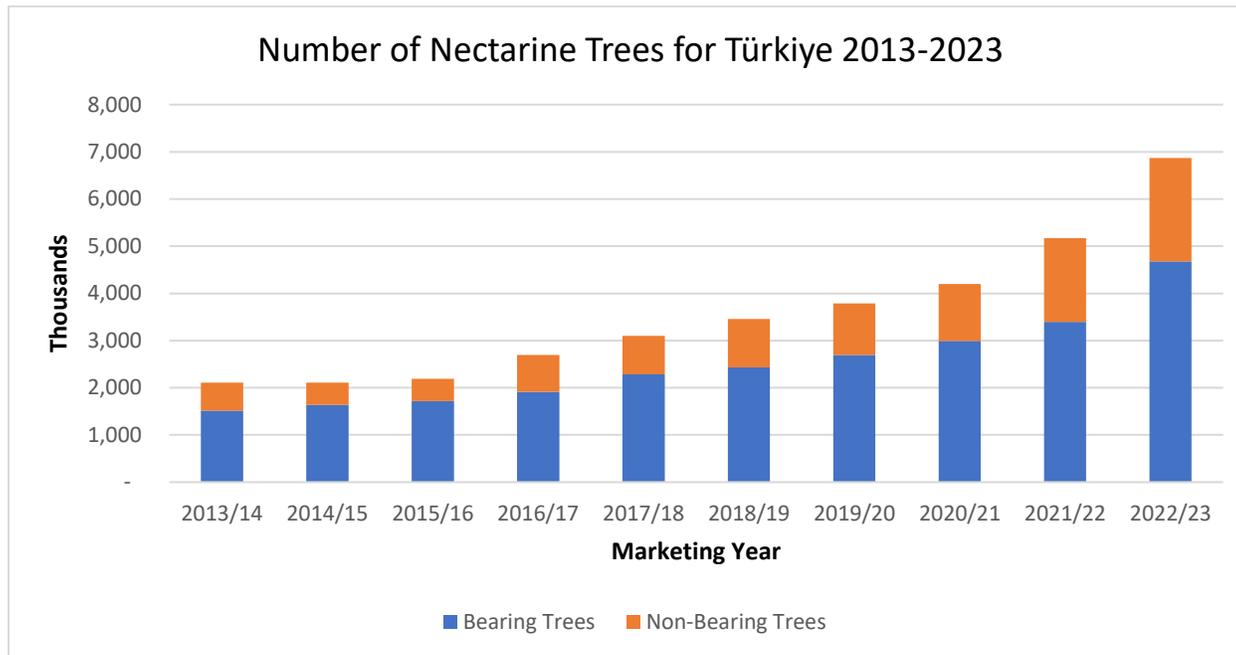
According to Turkish official data, the total estimated number of fruit bearing peach and nectarine trees was about 20.4 million in MY 2022/23. The total number of bearing trees increased from 14.5 million in 2013 to 20.4 million in 2023. The number of bearing peach trees increased 6 percent since MY 2019/20, whereas the number of bearing nectarine trees increased by almost 74 percent in the same period (Figures 5 and 6). The production and consumption of nectarines has increased over the last 10 years compared to peaches, although peach production still accounts for 77 percent of total production.

Figure 5. Number of Peach Trees for Türkiye 2013-2023



Source: TurkStat, 2023

Figure 6. Number of Nectarine Trees for Türkiye 2013-2023



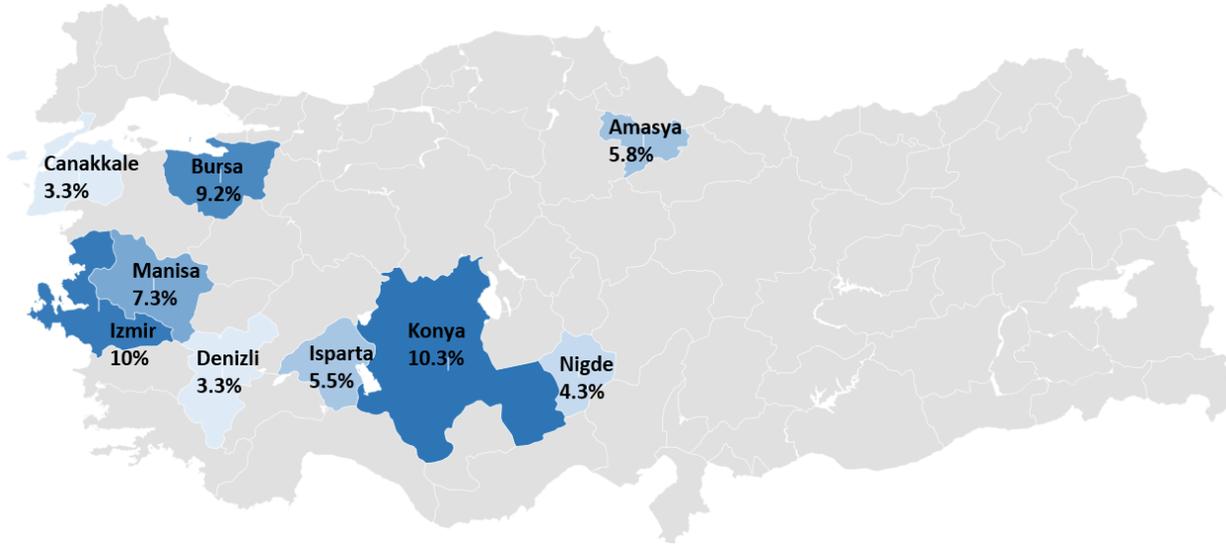
Source: TurkStat, 2023

PRODUCTION

Sweet and Sour Cherries

Sweet cherries are grown mainly in the Central Anatolia, Aegean, Marmara, and Mediterranean regions in Türkiye. Konya (10.3 percent), Izmir (10 percent), Bursa (9.2 percent), Manisa (7.3 percent), and Amasya (5.8 percent) are the top cherry producing provinces within these regions (Figure 7). The marketing year for cherries in Türkiye begins in late May and lasts through early August. The exact timing of the cherry season can vary depending on the region and weather conditions, but generally, the peak harvest period for cherries in Türkiye is in June. While the cherry harvest starts on the Aegean coast in Izmir in late May, it begins in June or July further inland in Afyon, Burdur, Salihli and Konya. Farmers harvest cherries in Kahramanmaras in August.

Figure 7. Top Cherry Producer Cities of Türkiye



For the MY 2023/24 season, Post forecasts total cherry production to be 900,000 MT, of which 718,000 MT are sweet cherries and 182,000 MT are sour cherries, due to favorable weather and growing conditions. TurkStat's first yearly estimation reports an 18.6 percent increase in sweet cherry production for MY 2023/24 to 778,065 MT, compared to the total production of 656,041 MT in MY 2022/23 on May 2023². Generally, the soil in major production areas received enough rain to achieve higher yields, and there was no frost damage this year. The only challenge this season for farmers was a delayed harvest due to the late arrival of warmer spring temperatures. Sour cherry production remained at similar levels to previous years, which has averaged around 183,000 MT over the last 10 years.

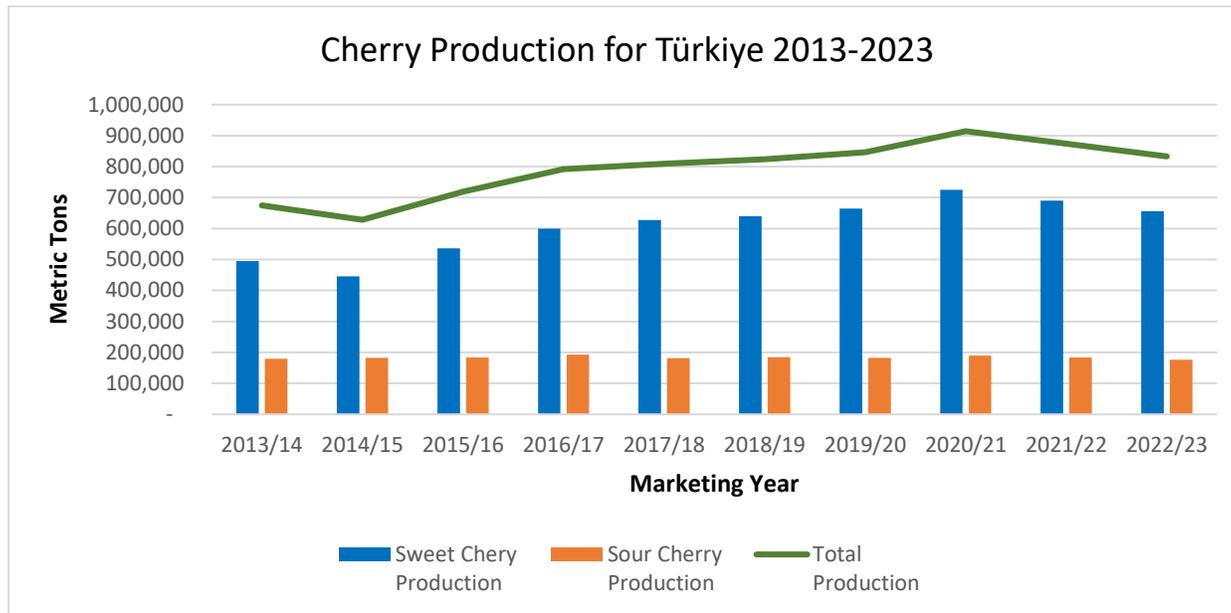
Higher yields caused sweet cherry prices remain stagnant this year in TL, even though severe food inflation rocked the Turkish economy. At the time of this report, the retail cost of sweet cherries is in the range of 50-90 Turkish Lira (TL) per kilogram (kg) (\$1.85-\$3.33). Sour cherry prices are around 70-90 TL per kg (\$2.59- \$3.33) in retail stores. In U.S. dollars, both sweet and sour cherry prices are lower compared to last year, since today the U.S. dollar exchange rate is 50 percent higher than last year around this time.

Input prices are increasing sharply due to the weak TL against foreign currencies and hyperinflation in Türkiye. From March 2022 to March 2023 fertilizer prices have increased around 20 percent, pesticides prices around 35 percent, and energy prices around 11.5 percent³. From March 2023 to August 2023 fertilizer prices increased another 42 percent and fuel prices increased around 50 percent because of sudden increases in the exchange rate. Farmers are struggling to keep up with the rapidly increasing input prices.

²<https://data.tuik.gov.tr/Bulten/Index?p=Crop-Production-1st-Estimation-2023-49534>

³ <https://data.tuik.gov.tr/Bulten/Index?p=Tar%C4%B1msal-Girdi-Fiyat-Endeksi-Mart-2023-49563&dil=1>

Figure 8. Cherry Production of Türkiye 2013-2023



Source: TurkStat, 2023

Strong export demand in recent years has been the driving force behind increased cherry production. Türkiye has been slowly transitioning from traditional to modern cherry production, including the development of modern, high-density orchards, using new cultivars, rootstocks, training systems, and growing techniques. However, most cherry production is still carried out using predominantly traditional methods among agricultural holdings operated by family-owned farms. A relatively cheap labor force of seasonal workers and family-owned farms provides the advantage of a stable, affordable labor supply.

Because of the growth in the export market, the production of Turkish sweet cherries increased by 24 percent from MY 2013/14 to MY 2022/23 (Figure 8). The increase in production of better-quality cherries to meet the specifications of export markets has also helped increase the quality of cherries for the domestic market. Production of sour cherries, however, remains steady, as the fruit is used primarily in the juice and jam industries in Türkiye.

Fresh Peaches and Nectarines

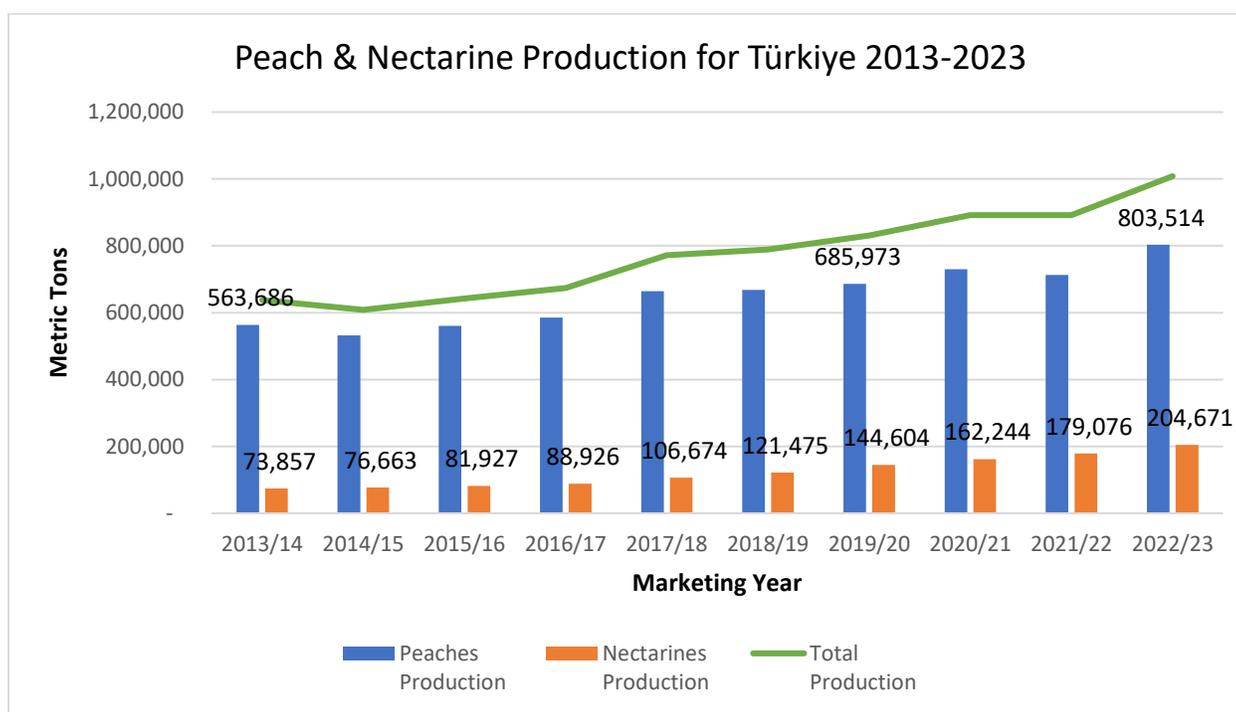
Türkiye continues to be among the top ten exporters in the world for fresh peaches and nectarines. Bursa, Canakkale, Izmir, and Mersin on the Aegean and Mediterranean are the top provinces where peaches and nectarines are produced. Typically, they are harvested between May and early October. The marketing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

Post forecasts total peach and nectarine production to be 1 MMT for MY 2023/24 due to favorable weather conditions. According to MY 2023/24 estimates by TurkStat, total peach and nectarine production is expected to increase by 7.8 percent. Peach production has increased by 17 percent since MY 2019/20, even though the production area stayed relatively stable (Figures 4, 9). With technological

improvements, Turkish farmers transitioned to better quality peach trees which return higher yields. Nectarine production has increased by around 42 percent since MY 2019/20, due in part to the expansion of nectarine orchards (Figures 6, 9). The global nectarine market has been growing along with demand in recent years. This is due in part to the growing popularity of healthy eating and the trend towards plant-based diets. Nectarines are a rich source of vitamins, minerals, and fiber, and are low in calories, making them a great choice for health-conscious consumers.

Despite higher yields, peach prices range from 30-40 TL per kg (\$1.11-\$1.48) in retail stores and 16-24 TL per kg (\$0.59-\$0.89) wholesale. Nectarine prices are around 40-60 TL per kg (\$1.48-\$2.22) in retail stores and 20-25 TL per kg (\$0.74-\$0.92) wholesale, primarily due to high inflation rates in Türkiye.

Figure 9. Production of Peaches and Nectarines for Türkiye 2013-2023



Source: TurkStat, 2023

CONSUMPTION

Sweet and Sour Cherries

Over one hundred different varieties of cherries are consumed in many forms in Türkiye. Domestically, more than half of the sweet cherries produced in Türkiye are consumed fresh. Approximately 20 percent of all cherry production is used in the processing sector to make canned products, marmalades, frozen fruits, and juice. Most processed products are made from sour cherries. In MY 2023/24, domestic consumption is estimated to be approximately 823,000 MT, which is an increase of 48,100 MT compared to the previous marketing year.

Fresh Peaches and Nectarines

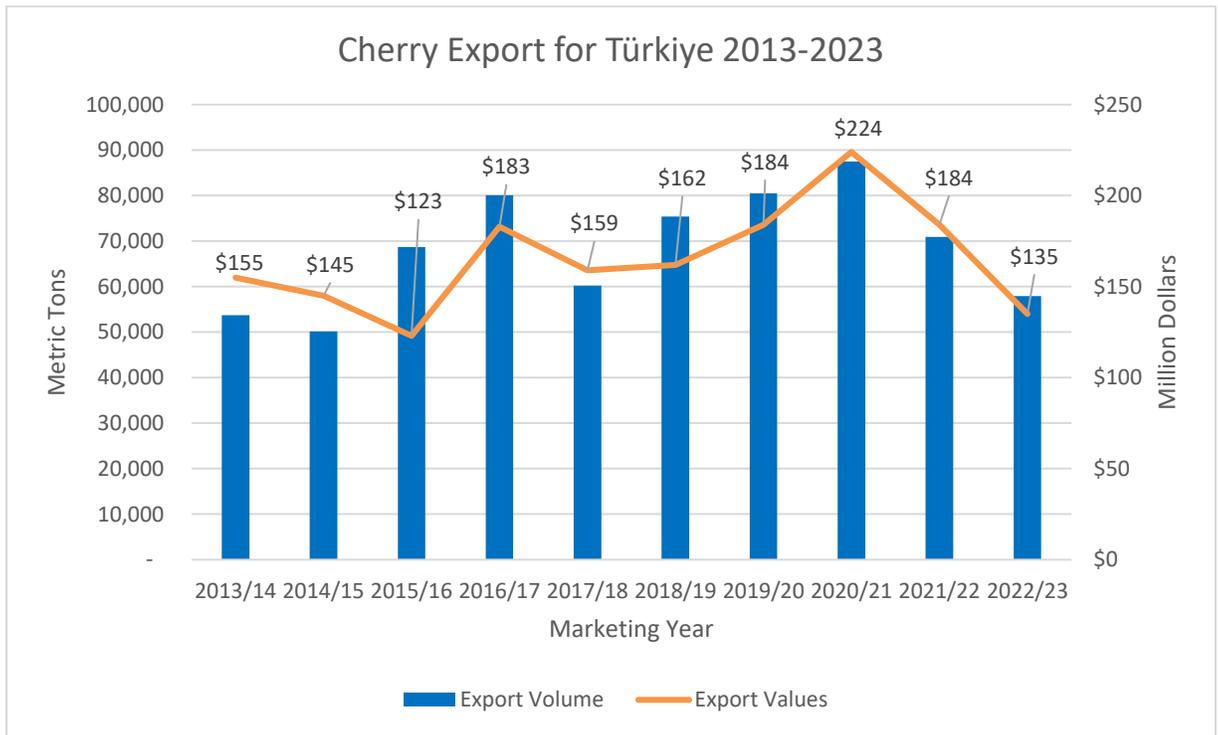
In MY 2023/24, domestic consumption of peaches and nectarines is expected to be around 800,160 MT, around the same level of MY 2022/23. Approximately 15 percent of all peach production is used for juice. Turkish consumers prefer fruit juices of peach, cherry, and apricot in “nectar” form. A nectar is a beverage with 25-99 percent fruit concentrate. Nectar can be sweetened with sugar, honey, or artificial sweeteners, but it cannot contain preservatives or colorants. Nectars are very popular, but there is also a growing trend for 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold frozen.

TRADE

Sweet and Sour Cherries

Türkiye exports more than 250,000 MT of stone fruit annually, with the majority going to the EU and Russia. Besides Türkiye, Chile, the United States, and Hong Kong are the other leading global exporters. Turkish exporters continue to seek expanded opportunities for stone fruit exports in South and East Asia. Türkiye’s exports of fresh cherries decreased in the last 2 years due to decreased production (Figure 10), however in MY 2023/24, Post estimates Türkiye’s fresh cherry exports to be 77,000 MT, an increase of around 33 percent compared to MY 2022/23’s export volume of 58,000 MT due to higher production and stable demand from EU countries.

Figure 10. Türkiye’s Cherry Export Volume and Value (2013-2023)



Source: Trade Data Monitor, LLC, 2023

Türkiye has also increased its exports to markets in Russia and the EU in recent years. Russia (25,169 MT), Germany (15,343 MT) and Iraq (7,813 MT) are the main destinations for Turkish cherries in MY 2022/23 (Table 1).

Table 1. Fresh Cherry Exports of Türkiye 2018-2023

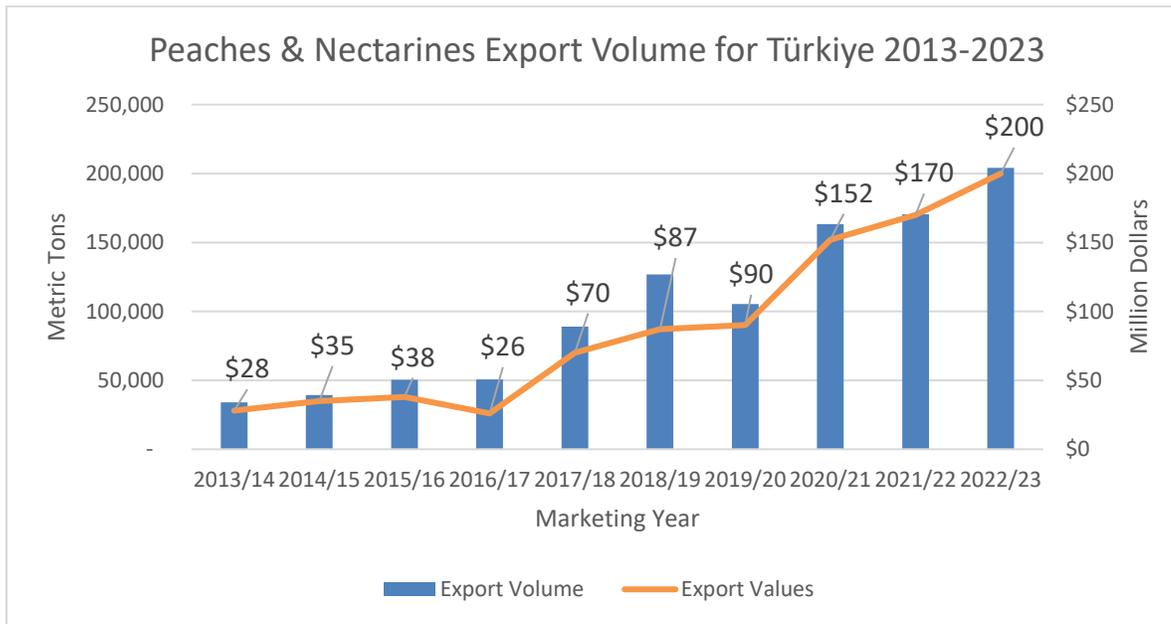
Türkiye's Cherry Exports to World 2018-2023 (MT)					
Partner	2018/19	2019/20	2020/21	2021/22	2022/23
Germany	23,651	27,180	25,894	24,558	15,343
Russia	24,019	25,414	29,788	23,117	25,169
Iraq	13,171	10,281	7,243	7,128	7,813
Netherlands	1,298	2,546	2,141	2,241	1,116
Austria	785	1,961	3,877	2,195	407
Italy	1,583	1,166	2,754	1,153	20
Sweden	1,289	1,151	1,363	1,311	833
Norway	1,887	1,392	1,522	1,519	1,157
Denmark	1,380	1,243	1,238	1,030	1,013
United Kingdom	1,087	686	1,373	832	122
World	75,377	80,542	87,511	70,948	57,915

Source: Trade Data Monitor, LLC, 2023

Fresh Peaches and Nectarines

In MY 2023/24, Post estimates fresh peach and nectarine exports to be 200,000 MT, due primarily to high production. Türkiye's fresh peach and nectarine exports increased by 94 percent from MY 2019/20 to 204,211 MT in MY 2022/23 (Figure 11). Adopting modern cultivation methods increased the quality of peaches and nectarines, leading to an increase in exports over the last ten years. Russia (153,352 MT), Iraq (14,841 MT), and Syria (6,944 MT) were the main destinations for Turkish peaches and nectarines in MY 2022/23 (Table 2).

Figure 11. Türkiye’s Peach and Nectarine Export Volume and Value (2013-2023)



Source: Trade Data Monitor, LLC, 2023

Table 2. Fresh Peaches and Nectarines Export of Türkiye 2018-2023

Türkiye's Fresh Peaches and Nectarines Exports to World 2018-2023 (MT)					
Partner	2018/19	2019/20	2020/21	2021/22	2022/23
Russia	72,673	73,061	118,163	118,409	153,352
Iraq	22,234	11,398	9,610	12,482	14,841
Syria	9,104	5,927	3,056	3,612	6,944
Ukraine	1,773	1,071	7,678	13,149	6,837
Romania	4,267	303	6,205	9,697	5,466
Saudi Arabia	6,685	2,971	2,304	0	2,537
Belarus	2,225	6,248	1,658	1,447	2,757
Cyprus	992	993	1,000	937	968
Georgia	1,938	704	1,671	147	126
Germany	602	370	1,447	1,712	1,006
World	126,817	105,328	163,382	170,417	204,211

Source: Trade Data Monitor, LLC, 2023

MARKETING

Sweet and Sour Cherries

In recent years there has been a considerable increase in terms of sweet cherry production and marketing. Türkiye has seen an increase in the number of marketing-savvy firms, more investments made in cold storage, and additional packaging factories. Farmers have been trained to produce sweet cherry varieties demanded by export markets. The number of market-conscious merchants who know the export markets and regulations has also increased. The Turkish government has been subsidizing farmers who rehabilitate their old sweet cherry orchards to produce higher quality sweet cherries for the export market. In terms of sweet cherries, domestic consumption and preferences have remained at similar levels over the years, whereas the export of sweet cherries continues to increase by utilizing the right marketing strategies.

Fresh Peaches and Nectarines

For MY 2023/24, Türkiye's goal is to export around \$200 million worth of peaches. To be able to increase the export market, the Aegean Exporters Association started a campaign called "We Know Which Pesticides We Use." Working with the University of the Aegean, Türkiye aims to control pesticides use on peaches to increase exports to Europe.

Demand for nectarines increased sharply in both domestic and international markets, as they are considered easier to consume compared to peaches since they are less juicy and messy. Also, nectarines are easier to store and distribute, since they are less likely to bruise during the harvest and transportation processes.

POLICY

Stable export demand and government supports have helped Turkish farmers to invest in new stone fruit orchards. There are payments for producers who are registered in the Ministry of Agriculture and Forestry's farmer registration system.

The Ministry of Agriculture and Forestry announced a subsidy program for farmers who are returning to their villages to establish orchards in 2023. According to the program, farmers can benefit from a 30,000 TL (\$1,667) subsidy plus a 100,000 TL (\$5,556) cash credit if they can fulfill the qualifications. More information can be found at the [Ministry of Agriculture and Forestry Website](#). The Ministry also continues providing supports for fuel and fertilizer, standard and certified saplings, organic farming, and sample analysis. This program supports farmers' investments to buy government-certified dwarf saplings, ensuring higher quality trees are being planted in Türkiye. Türkiye also subsidizes juice exporters through various export programs, such as giving subsidies for digital commerce, attendance at trade fairs, conducting market research, etc. More information can be found at the [Ministry of Trade](#) website.

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

Cherries (Sweet & Sour), Fresh Market Year Begins	2021/2022		2022/2023		2023/2024	
	Apr 2021		Apr 2022		Apr 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Türkiye						
Area Planted (HA)	101700	101691	101000	99168	0	102000
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	27800	27809	28000	27811	0	28200
Non-Bearing Trees (1000 TREES)	6700	6703	6500	6800	0	6700
Total Trees (1000 TREES)	34500	34512	34500	34611	0	34900
Commercial Production (MT)	873591	873591	980000	832811	0	900000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	873591	873591	980000	832811	0	900000
Imports (MT)	40	0	50	0	0	0
Total Supply (MT)	873631	873591	980050	832811	0	900000
Domestic Consumption (MT)	802731	802645	900050	774896	0	823000
Exports (MT)	70900	70946	80000	57915	0	77000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	873631	873591	980050	832811	0	900000
(HA),(1000 TREES) ,(MT)						

Peaches & Nectarines, Fresh Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jan 2021		Jan 2022		Jan 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Türkiye						
Area Planted (HA)	50100	50127	51000	53532	0	54000
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	18700	18687	19000	20416	0	22000
Non-Bearing Trees (1000 TREES)	4800	4849	4500	5097	0	5200
Total Trees (1000 TREES)	23500	23536	23500	25513	0	27200
Commercial Production (MT)	891857	891857	940000	1008185	0	1000000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	891857	891857	940000	1008185	0	1000000
Imports (MT)	300	300	200	152	0	160
Total Supply (MT)	892157	892157	940200	1008337	0	1000160
Domestic Consumption (MT)	721757	721560	775200	804126	0	800160
Exports (MT)	170400	170597	165000	204211	0	200000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	892157	892157	940200	1008337	0	1000160
(HA),(1000 TREES) ,(MT)						

Attachments:

No Attachments