

Required Report: Required - Public Distribution

Date: August 26, 2024

Report Number: TU2024-0038

Report Name: Stone Fruit Annual

Country: Turkiye

Post: Ankara

Report Category: Stone Fruit

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Report Highlights:

Turkiye's cherry production for marketing year (MY) 2024/25 is forecast down from last year's record, but is still the third largest on the books. Despite the contraction in production, cherry exports are forecast to hit an all-time high as growers prioritize sales abroad since it's more profitable than selling on the local market. The production and export of peaches and nectarines are set to reach record levels as larger growers continue to expand operations to capitalize on profit-generating exports. Amid this record-setting year, some smaller stone fruit growers, who are only able to sell to the domestic market, are struggling to make ends meet because the cost of on-farm inputs (e.g. labor, fuel, electricity, etc.) is growing at a faster clip than farm gate prices for their fruit.

Sweet and Sour Cherries

Planting Area

The MY 24/25 area planted in cherries – both sweet and sour – is forecast slightly higher from the previous year at 99,300 hectares. This forecasted area is made up of 80,000 ha of sweet cherries and 19,300 ha of sour cherries. For the last decade, the total area planted in cherries has hovered around 100,000 ha.

Although the area planted has remained fairly constant during this ten-year period, the numbers of sweet cherry bearing trees have increased (i.e., densification) as growers have modernized their operations. According to Turkish statistics, the number of sweet cherry bearing trees increased from 21.0 million to about 27.0 million from 2019 to 2024, while the number of sour cherry bearing trees has stayed relatively flat.

Türkiye is home to more than 100 varieties of sweet cherries. The most popular variety is the Napolean sweet cherry, known locally as the *0900 Ziraat*. It is a large, juicy, heart-shaped cherry that has a longer shelf life than other varieties, making it the ideal cherry for shipping long distances in-country and abroad. Over the last decade, Turkish scientists have developed higher yielding and better-quality Napolean cherries. Growers have gradually replaced the older Napolean variety with newer and improved versions. In addition to the Napolean cherry, growers have also started experimenting with other high yielding sweet cherry varieties, such as Sweetheart, Celeste, Early Lory, Kordia, Regina, Sam, and Sunburst.

Production

For MY 2024/25, Post forecasts total cherry production at 900,000 MT, which is down about 5 percent from last year's record because growing conditions this season weren't as ideal. Even though production is projected to decline, it will still be the third largest on record. The total forecasted amount is made up of 700,000 MT of sweet cherries and 200,000 MT of sour cherries. Post's forecast is based on fieldtrips and conversations with cherry growers which revealed that the timing and amount of rainfall was adequate, and that there hadn't been any frost damage in the spring.

The Turkish statistical agency (TurkStat) projected MY 2024/25 total cherry production at 988,000 MT, of which 771,000 MT is sweet cherries and the remaining 217,000 MT is sour cherries.¹ One reason the TurkStat forecast is different than Post's number is because TurkStat made its projection in early May just as the harvest season was beginning.

Cherry production is mainly concentrated in the western side of Türkiye. The coastal province of Izmir and the inland province of Afyonkarahisar are the two leading provinces for sweet and sour cherry production, respectively (Figures 1, 2). The marketing year for cherries in Türkiye begins in May and lasts through early August. The exact timing of the cherry season can vary depending on the region and

¹<https://data.tuik.gov.tr/Bulten/Index?p=Bitkisel-Uretim-1,Tahmini-2024-53449>

weather conditions, but generally, the peak harvest period for cherries begins in June. The cherry harvest first starts in Izmir, located on the Aegean coast in late May and later moves to the inland provinces like Afyonkarahisar and Konya in June and July.



Photos from Post's field trip to Izmir province in 2024

Figure 1. Top Sweet Cherry Producing Provinces in Türkiye



Source: TurkStat, 2024

Figure 2. Top Sour Cherry Producing Provinces in Türkiye

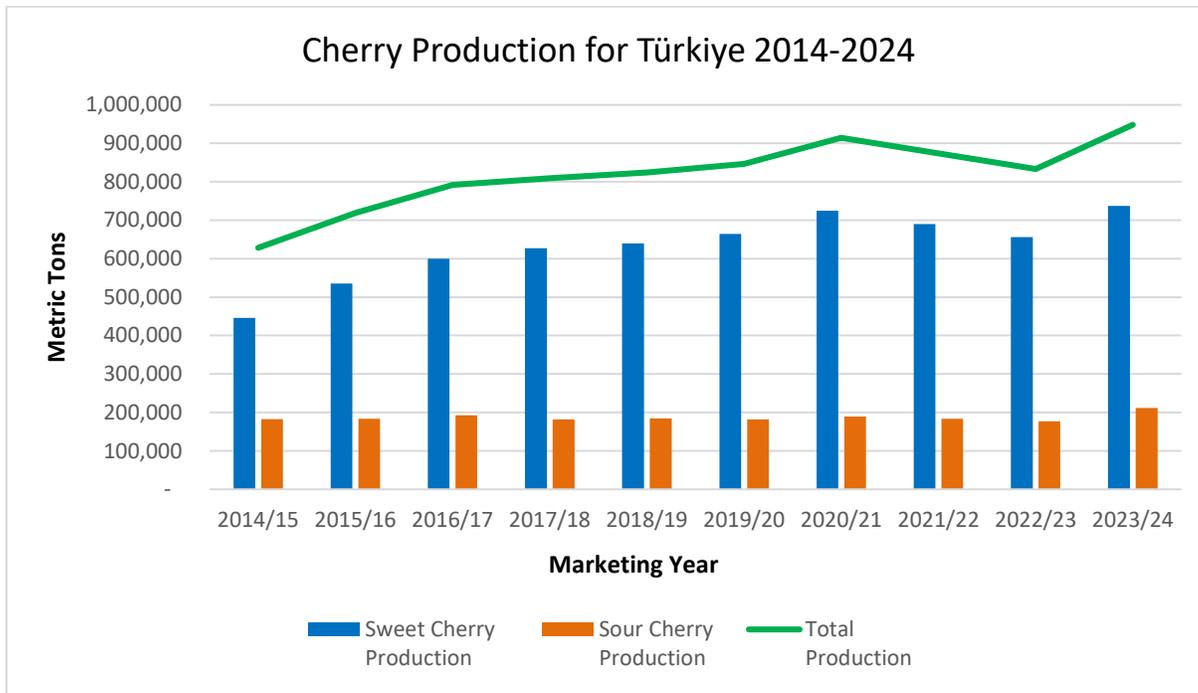


Source: TurkStat, 2024

The price of on-farm inputs, such as labor, energy, and fertilizer, continues to increase because of persistent inflationary conditions in Türkiye. Labor accounts for the biggest share of overall input prices, costing around 1000 TL (\$29.71) per day. Amid these higher costs, some growers, especially smaller operations, are struggling to stay profitable.

Some growers report that it cost them 57 TL to produce one kilogram of sweet cherries, but they could only sell it for a loss at 50 TL/kg. As a result of these losses, some smaller growers are considering switching to farming more profitable agricultural products. By comparison, larger producers that can export are reportedly better off since they can sell their cherries above the cost of production for a profit.

Figure 3. Cherry Production of Türkiye 2014-2024



Source: TurkStat, 2024

Strong export demand in recent years has been the driving force behind increased cherry production, which has increased 65 percent over the last decade (Figure 4). This increase is mostly coming from expanded sweet cherry production, a sizeable share of which is exported. The production of sour cherries, however, remains steady, as the fruit is used primarily in the juice and jam industries in Türkiye.

Türkiye has been slowly transitioning from traditional to modern cherry production, including the development of modern, high-density orchards that plant the latest high-yielding varieties and use the latest technologies. However, even with these continuous advancements, most cherry production is still carried out using traditional methods on family-owned farms.

Consumption

In MY 2024/25, domestic cherry consumption is forecast at 810,000 MT, which is down from last year's record by about 55,000 MT. This decline is partially attributed to the expected drop in production and record exports this season. The MY 2023/24 consumption estimate is revised higher to about 865,000 MT to account for the adjustment to production volumes for that year.

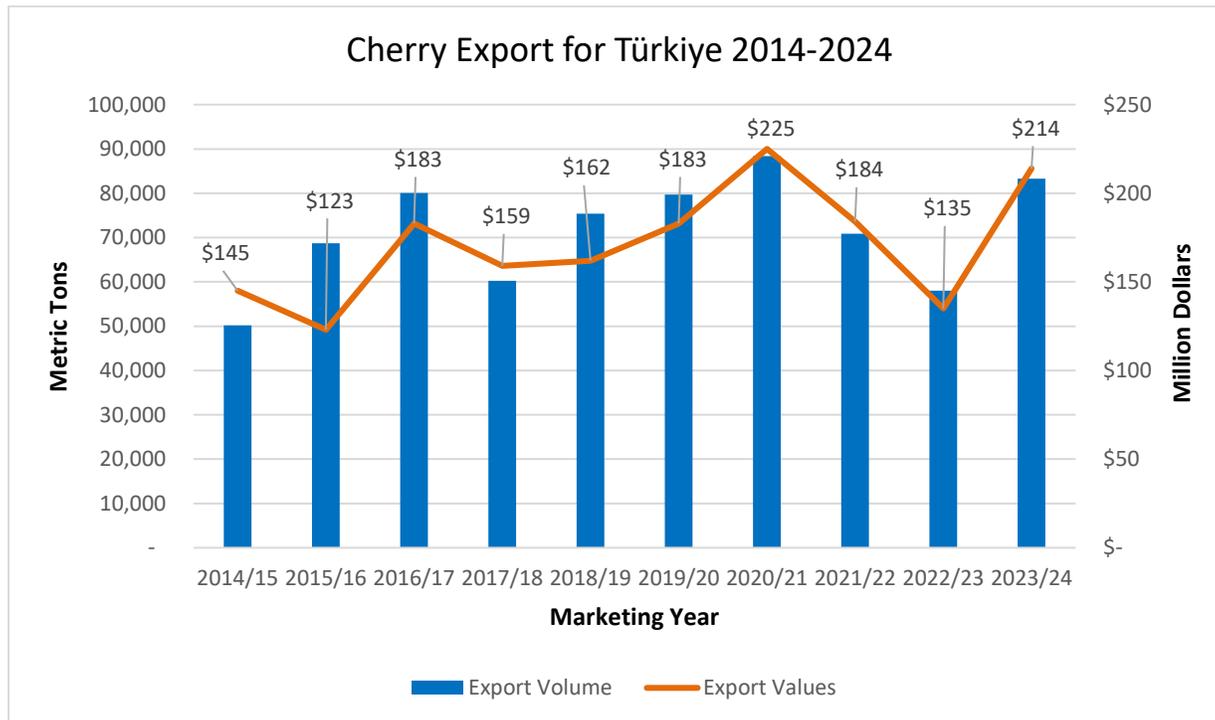
There are over one hundred different varieties of cherries that are grown and consumed in Turkiye. Most sweet cherries are eaten fresh whereas 90 percent of sour cherry production is used to make canned products, marmalades, frozen fruits, and juice.

In MY 2024/25, the farmgate price for sweet cherries was around 50 TL Turkish Lira (TL) per kilogram (kg) (\$1.49/kg), while the retail price ranged from 80-150 TL per kg (\$2.38-\$4.46/kg). Retail prices for sour cherries were between 90-150 TL per kg (\$2.59-\$4.46).

Trade

Despite a projected contraction in production, Post is forecasting MY 2024/25 fresh cherry exports to notch a record of 90,000 MT as export demand, especially in EU markets, remains strong and more profitable than selling locally. The top three export destinations for Turkish cherries in MY 2023/24 was Germany, Russia, and Iraq (Table 1).

Figure 4. Türkiye’s Cherry Export Volume and Value 2014-2024



Source: Trade Data Monitor, LLC, 2024

Table 1. Fresh Cherry Exports of Türkiye 2019-2024

Türkiye's Cherry Exports to World 2019-2024 (MT)					
Partner	2019/20	2020/21	2021/22	2022/23	2023/24
Germany	27,180	25,894	24,558	15,343	26,673
Russia	25,412	29,788	23,116	25,169	22,638
Iraq	10,280	7,243	7,128	7,813	10,131
Austria	1,961	3,877	2,194	407	3,583
Bulgaria	0	216	536	246	3,103
Italy	1,165	2,754	1,154	20	2,443
Netherlands	2,546	2,142	2,241	1,117	2,028
Poland	59	449	912	220	1,638
Romania	18	127	31	86	1,247
United Kingdom	685	1,373	833	122	1,133
Others	11,234	13,649	8,246	7,372	8,835
World	80,541	87,512	70,949	57,915	83,452

Source: Trade Data Monitor, LLC, 2024

Marketing

According to the Aegean Exporters Association, Türkiye's goal is to export \$300 million worth of sweet cherries in the near future.² Exports totaled about \$214 million in 2023.

In recent years, there has been a considerable increase in the amount of domestic and international marketing for Turkish sweet cherries. To complement these expanded marketing efforts, Turkish businesses have made new investments in cold storage and packaging operations to get fresher cherries and cherry-containing products into the hands of consumers. At the same time, farmers are producing sweet cherry varieties demanded by export markets and a greater number of Turkish companies are more familiar with exporting cherries than in the past.

² <https://www.aa.com.tr/tr/ekonomi/kirazda-300-milyon-dolarlik-ihracat-hedefi/3204953>

Fresh Peaches and Nectarines

Planting Area

Peach and nectarine growers have gradually been replacing older varieties with new, higher yielding varieties. Growers have also invested in modern high-density orchards that use the latest technology, growing techniques, and new varieties. The use of modern technology and the switch to higher yielding trees has led to an increase in the production of higher quality fruit. In the case of peaches, these changes have made it possible over the last five years to expand production without significant increases to the planted area.

In contrast to peaches, the area and number of nectarine trees has expanded in response to growing demand from both domestic and foreign markets. In recent years, the number of nectarine orchards in the southern coastal province of Mersin have rapidly grown due to favorable growing conditions and because the province has the logistical advantage of being able to readily ship through the nearby Port of Mersin, a major Mediterranean port.

Peaches and nectarines are mainly grown in the coastal areas on the western and southern parts of the country. The top producing provinces are Mersin, Canakkale, Bursa, and Izmir on the Aegean and Mediterranean seas (Figures 5, 6). A significant share of the production of nectarines and peaches in Izmir are exported since the province, as already noted, is home to a major seaport that makes exporting logistically easier.

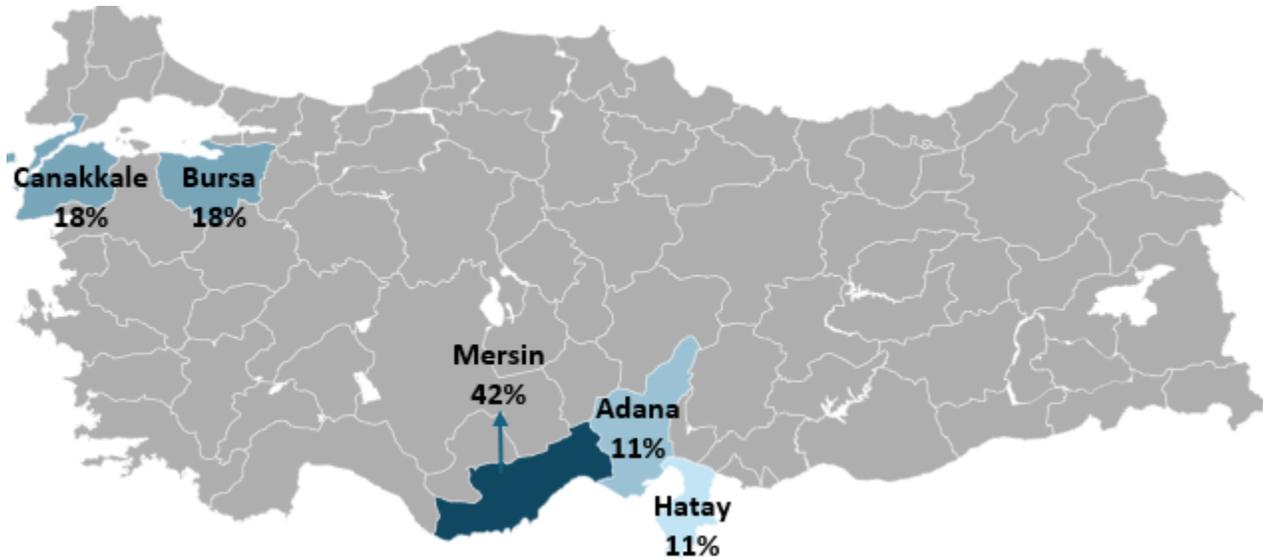
The marketing year for peaches and nectarines in Türkiye starts in April, with the harvest running from May to early October. Most of the peach varieties planted in Türkiye are Early Amber, Spring Crest, May Crest, Red Haven, and Early Red.

Figure 5. Top Peach Producing Provinces in Türkiye



Source: TurkStat, 2024

Figure 6. Top Nectarine Producer Cities of Türkiye



Source: TurkStat, 2024



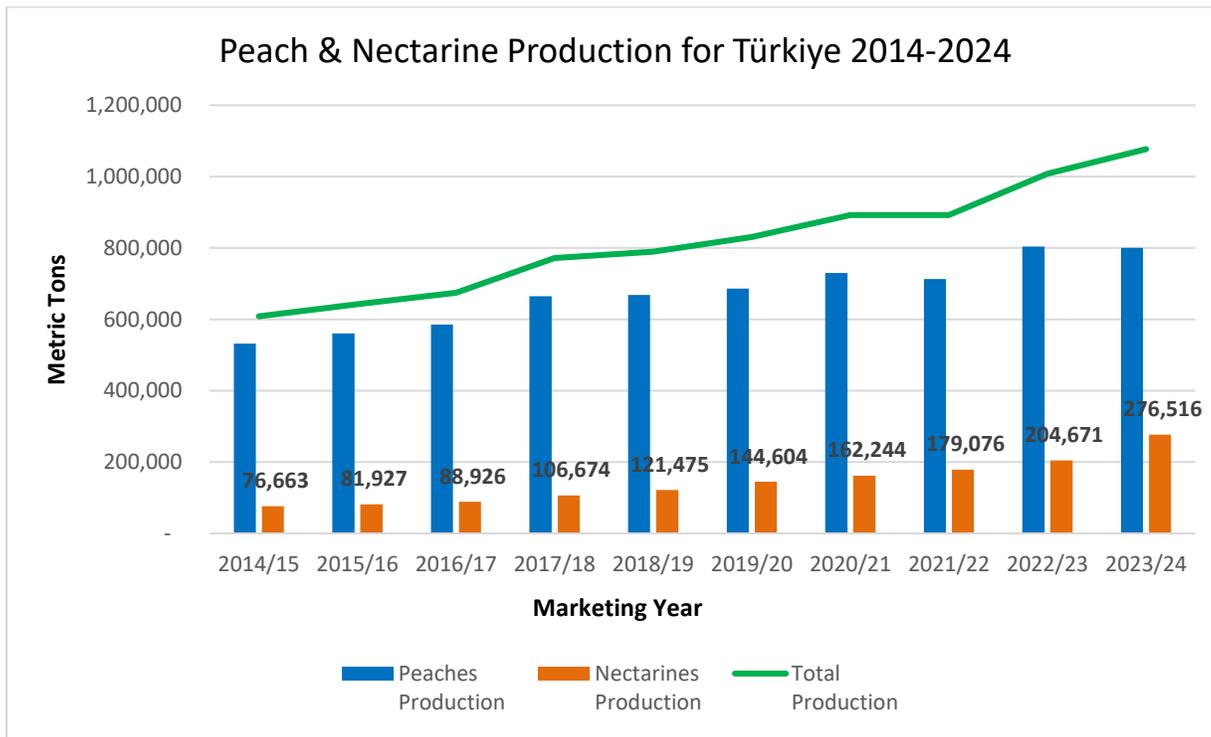
Photos from Post’s field trip to Izmir province in 2024

Production

For MY 2024/25, Post forecasts total peach and nectarine production up year-over-year by 11 percent to a record 1.2 million metric tons (MMT), due to favorable growing conditions. For reference, TurkStat’s production forecast is slightly higher at 1.245 MMT. Post raised its MY 2023/24 production to about 1.1 MMT to align with TurkStat’s official number.

Peach and nectarine production has been trending upward for the better part of the last decade as farmers have modernized their orchards and switched to newer, higher yielding trees. Nectarine production, however, has almost doubled in the last five years as Turkish growers expanded their operations in response to strong domestic and international demand for nectarines (Figure 7).

Figure 7. Production of Peaches and Nectarines for Türkiye 2014-2024



Source: TurkStat, 2024

Consumption

In MY 2024/25, domestic consumption of peaches and nectarines is forecast at 950,000 MT, which is up year-over-year by about 100,000 MT because of the projected increase in production. Post is revising the MY 2023/24 estimate to about 851,000 MT based on TurkStat’s most recent estimate.

In recent years, nectarine consumption has really grown as consumers are interested in eating new, fresh fruits and eating healthier. The majority of nectarines and peaches are consumed fresh. Approximately 15 percent of all peach production is used for juice. Turkish consumers prefer to drink peach, cherry, and apricot nectar, which is a beverage made with 25-99 percent fruit concentrate. While nectars are very popular, there is a growing trend towards 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold frozen.

In MY 2024/25, the farmgate price for peaches and nectarines ranges from 20-25 TL Turkish Lira (TL) per kilogram (kg) (\$0.59-0.74/kg). The retail price for peaches ranges from 40-60 TL per kg (\$1.19-\$1.78), while nectarines retail for 50-80 TL per kg (\$1.49-\$2.38/kg).

Trade

In MY 2024/25, Post forecasts fresh peach and nectarine exports to increase year-over-year to 250,000 MT. This projected increase in exports is primarily due to the anticipated increase in production along with steady export demand.

For the past decade, Türkiye's exports of fresh peaches and nectarines have steadily climbed higher (Figure 8). In the last five years alone, exports have more than doubled as Turkish growers have expanded production to meet increased domestic and foreign demand. Russia, Iraq, and Romania were the main destinations for Turkish peaches and nectarines in MY 2023/24 (Table 2). Türkiye continues to be among the top ten exporters in the world for fresh peaches and nectarines.

Figure 8. Türkiye's Peach and Nectarine Export Volume and Value (2014-2024)



Source: Trade Data Monitor, LLC, 2024

Table 2. Fresh Peaches and Nectarines Export of Türkiye 2019-2024

Türkiye's Fresh Peaches and Nectarines Exports to World 2018-2023 (MT)					
Partner	2019/20	2020/21	2021/22	2022/23	2023/24
Russia	73,061	118,162	118,407	153,352	148,396
Iraq	11,398	9,611	12,484	14,841	20,725
Romania	303	6,204	9,697	5,466	14,110
Ukraine	1,071	7,678	13,149	6,837	13,394
Syria	5,927	3,057	3,611	6,946	5,260
Belarus	6,249	1,658	1,445	2,758	2,739
Saudi Arabia	2,970	2,303	-	2,537	1,923
Germany	370	1,445	1,712	1,007	1,668
Croatia	45	1,266	564	1,090	1,503
Bulgaria	61	586	992	301	1,428
Others	3,874	11,412	8,356	9,075	14,818
World	105,329	163,382	170,417	204,210	225,964

Source: Trade Data Monitor, LLC, 2024

Marketing

For MY 2024/25, Türkiye's goal is to export \$250 million worth of peaches and nectarines, which is about \$25 million more than the previous marketing year. According to the Vice President of the Aegean Exporters Association, exports of these fruits could reach as much as \$500 million if Türkiye gains market access to Asian markets.³ Increased marketing efforts will play an important role in reaching this export goal.

In recent years, demand for nectarines has 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 harvest and transportation.

Stone Fruit Policy

Over the last decade, larger growers producing stone fruit have gradually modernized and expanded their orchards due to stable demand for their fruit along with continued government support. The Ministry of Agriculture & Forestry (MinAF) provides support payments to farmers and growers who have signed up in an online registration system. Support payments help offset some of the costs of fuel and fertilizer, and also encourages growers to buy government-certified saplings to improve the quality of the fruit being grown in the country.

In 2023, MinAF announced a subsidy program to encourage people to return to their villages and plant new orchards. According to the program, a grower will receive a subsidy of 30,000 TL (\$1,667) plus a

³ https://www.eib.org.tr/Sayfa.Asp?SI_Id=5A02DF31AF&HID=6A131F98550A46FB825CC7334D34DF20

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](#). Despite this assistance, however, some growers complain that it isn't enough to make ends meet.

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

Cherries (Sweet&Sour), Fresh Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Apr 2022		Apr 2023		Apr 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	99200	99826	102000	99202	0	99300
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	27800	27711	28200	27431	0	28000
Non-Bearing Trees (1000 TREES)	6800	6800	6700	6623	0	6600
Total Trees (1000 TREES)	34600	34511	34900	34054	0	34600
Commercial Production (MT)	832811	832811	900000	948082	0	900000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	832811	832811	900000	948082	0	900000
Imports (MT)	0	0	20	0	0	0
Total Supply (MT)	832811	832811	900020	948082	0	900000
Domestic Consumption (MT)	774911	774814	825020	864804	0	810000
Exports (MT)	57900	57997	75000	83278	0	90000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	832811	832811	900020	948082	0	900000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Peaches & Nectarines, Fresh Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	53500	53532	54000	55928	0	56000
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	20400	20416	22000	21196	0	23000
Non-Bearing Trees (1000 TREES)	5100	5097	5200	5865	0	5000
Total Trees (1000 TREES)	25500	25513	27200	27061	0	28000
Commercial Production (MT)	1008185	1008185	1000000	1076852	0	1200000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1008185	1008185	1000000	1076852	0	1200000
Imports (MT)	200	152	160	160	0	0
Total Supply (MT)	1008385	1008337	1000160	1077012	0	1200000
Domestic Consumption (MT)	804175	804126	785160	851048	0	950000
Exports (MT)	204210	204211	215000	225964	0	250000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1008385	1008337	1000160	1077012	0	1200000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments