

USDA Foreign Agricultural Service

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Global Agricultural Information Network

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Turkey

Stone Fruit Annual

Turkey Stone Fruit Annual 2019

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Report Highlights:

The total cherry production forecast in Turkey in Marketing Year (MY) 2019/20 is 865,000 metric tons (MT), which is 41,000 MT more than MY 2018/19. The peach and nectarine production forecast for MY 2019/20 is 830,000 MT, 40,000 MT more than MY 2018/19. Stone fruit exports are increasing due to abundant production and strong demand from the Russian and EU markets. Turkey has begun exporting fresh sweet cherries to China for the first time. This report covers cherries, peaches, and nectarines.

Commodities:

Fresh Cherries (Sweet & Sour) **PRODUCTION**
Fresh Peaches & Nectarines

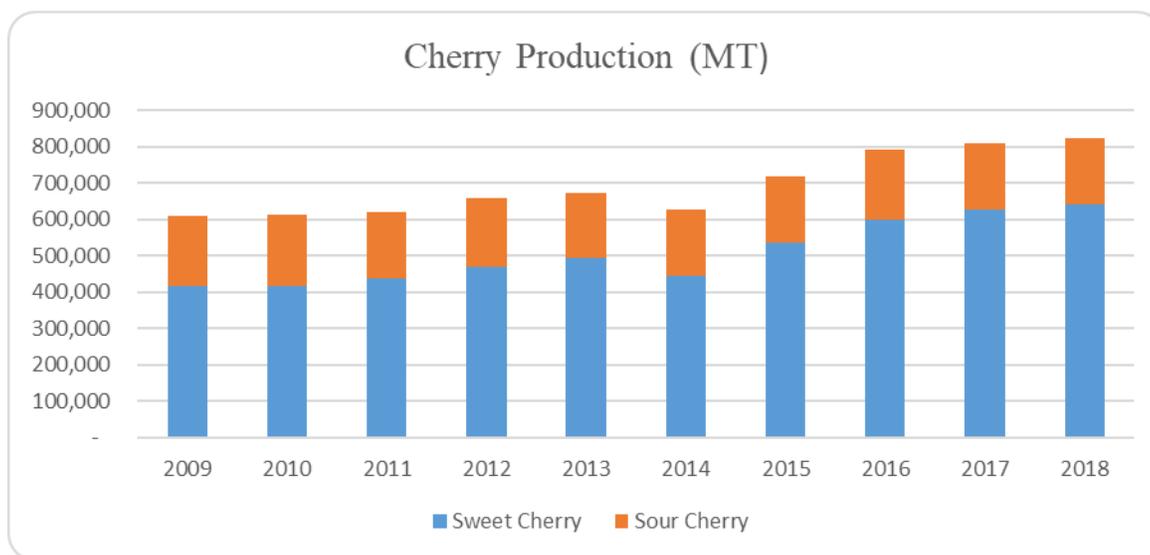
Due to increasing export opportunities, Turkish farmers have invested in new orchards, uprooted non-commercial varieties, and replanted with trees suitable for export markets in recent years. There are also new private sector entities with investments in juice production and fruit exports. Over time, commercial production of stone fruit has accounted for a larger portion of overall production. For this reason, while former post estimates were based on post’s field travel observation of commercial orchards, production data in this report has been prepared based on Turkey’s official data reflecting total production.

Sweet and Sour Cherries

Turkey has been among the top cherry producing countries in the world and is usually a top four exporter. Sweet cherries are grown mainly in the Aegean, Central Anatolia, Marmara, and Mediterranean Regions in Turkey. Izmir, Konya, Manisa and Denizli are the top cherry-producing provinces within these regions. The marketing year for cherries begins in April.

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2019/20 season, total sweet and sour cherry production are forecast to increase to 865,000 MT, of which 678,000 MT are sweet cherry and 187,000 MT are sour cherry. Farmers in major growing areas are generally satisfied with yields and quality in MY 2019/20 compared to the previous year. Because of the weather conditions, harvest took place one or two weeks later than the normal harvest time in almost all regions.

Figure 1: Cherry Production in Turkey by year (MT)



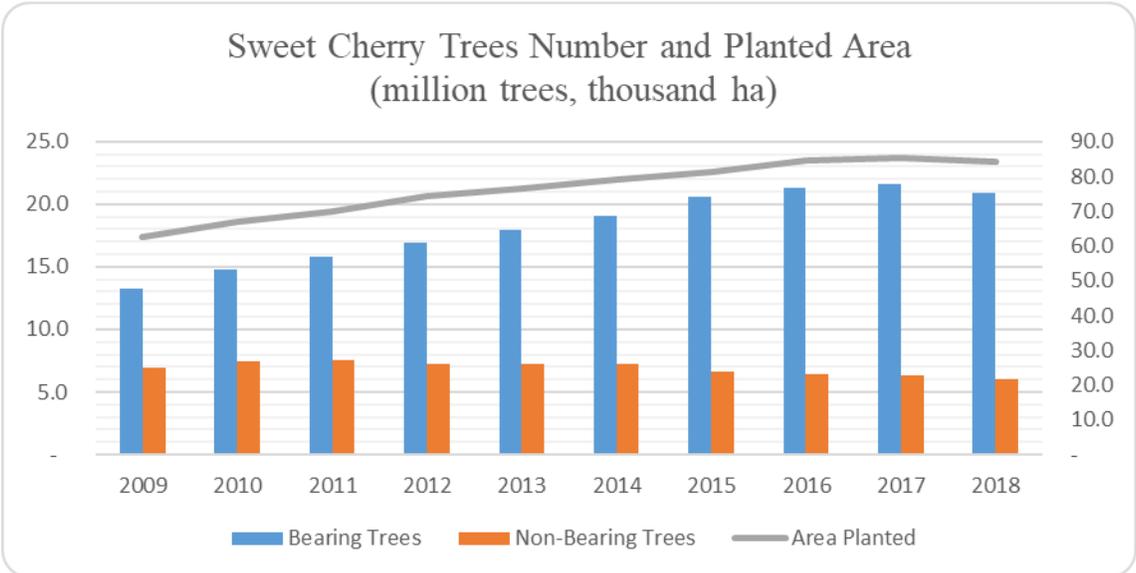
Source:TurkSTAT

Cherry trees are cultivated in different parts of Turkey with a variety of different physical and climatic conditions. Because of this, harvest time can differ 45-55 days according to the region of planting. Harvest starts in Izmir in late May and continues in Afyon, Burdur, Salihli and Konya in June and July. Farmers harvest the cherries in Kahramanmaras and Andirin in August.

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

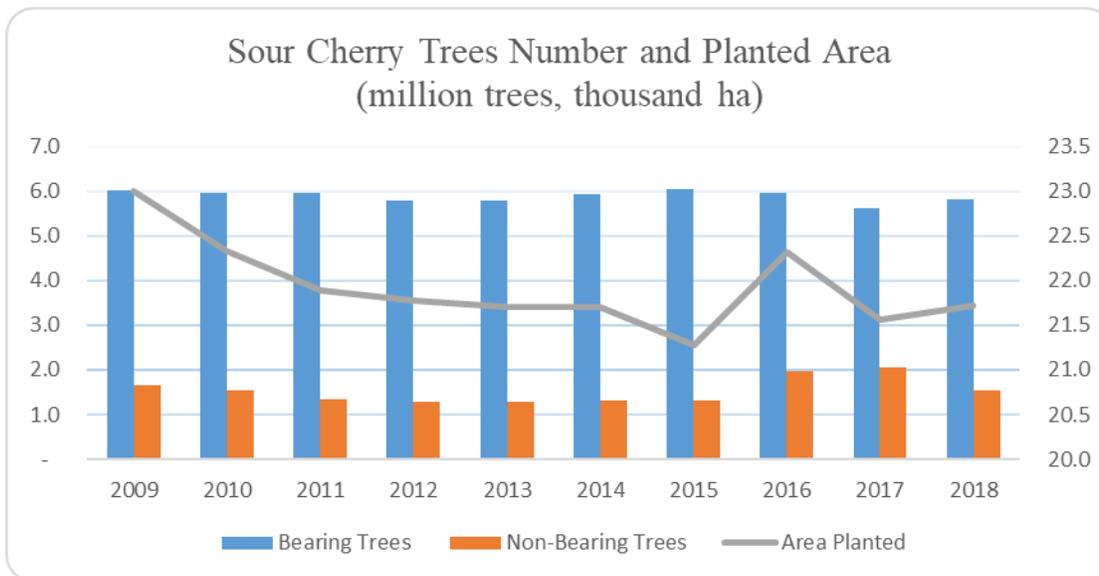
MY 2019/20 total cherry planting area is expected to remain at about 106,000 hectares, similar to last year. The crop area for sweet cherry production in Turkey continues to gradually increase due to new investment, which has been stimulated by demand for Turkish cherries in export markets. Farmers have been replacing their older variety sweet and sour cherry trees with higher yield varieties. According to Turkish official data, the total estimated number of all cherry trees was about 34.3 million in 2018. The total number of bearing trees for sweet cherries increased from 13 million in 2009 to 21 million in 2018. However, sour cherry production area has not been increasing during the same period. The total number of bearing trees for sour cherries decreased from seven million in 2009 to six million in 2018 while the production number is almost same over this period. The increase in production of better quality cherries to meet specifications of export markets also helps to increase quality of cherries for the domestic market.

Figure 2: Sweet Cherry Trees Number and Planted Area (million trees, thousand ha)



Source:TurkSTAT

Figure 3: Sour Cherry Trees Number and Planted Area (million trees, thousand ha)



Source:TurkSTAT

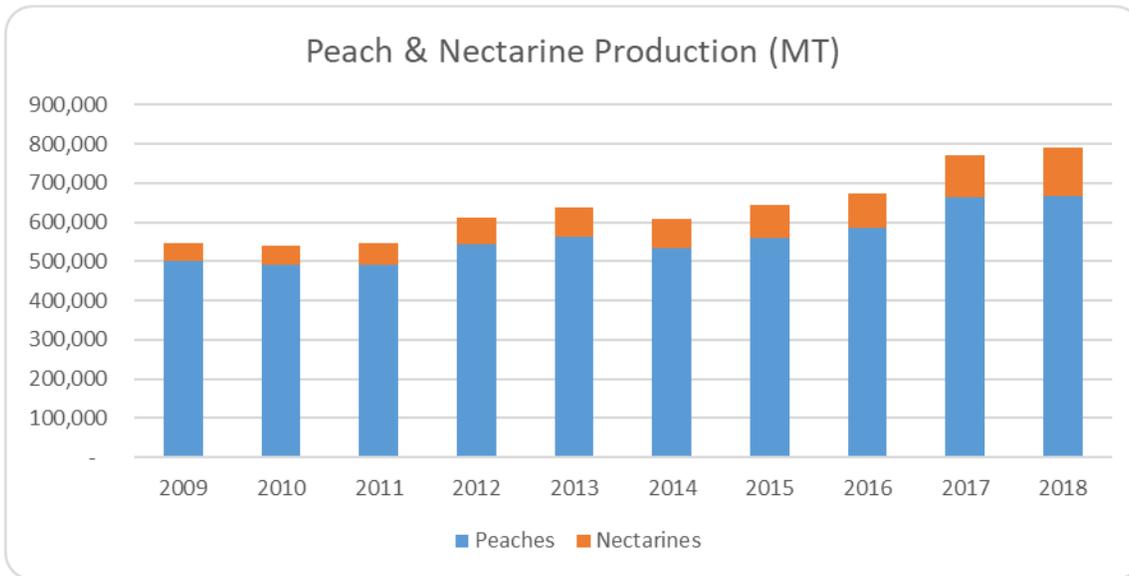
There are more than one hundred varieties of sweet cherries produced in Turkey. The *0900 Ziraat* variety, also known as a *Turkish Napoleon*, was developed in Turkey and is the most popular variety in Turkey because it meets the characteristics demanded by export markets. However, producers have started to try new cherry varieties such as *Sweet Heart*, *Celeste*, *Kordia*, *Regina* and *Sunburst* for higher quality products, later harvest (to capture higher prices later in the season) and higher yields.

Fresh Peaches and Nectarines

Turkey has been among the top ten exporters in the world for peaches and nectarines. Peach and nectarine trees are grown mainly in the Marmara, Aegean and Mediterranean Regions in Turkey. Central Anatolia, Bursa, Canakkale, Izmir and Mersin, are the top provinces where peaches and nectarines are produced. Typically, they are harvested between April and early October. The marketing year starts in April.

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2019/20 season, total peach and nectarine production will increase to 830,000 MT, compared to 790,000 MT in MY 2018/19. Farmers in major growing areas are generally satisfied with yields and quality in MY 2019/20 compared to the previous year due to favorable weather conditions during the blooming and harvest period. The majority of the peach varieties planted in Turkey are *Early Amber*, *Spring Crest*, *May Crest*, *Red Haven* and *Early Red*.

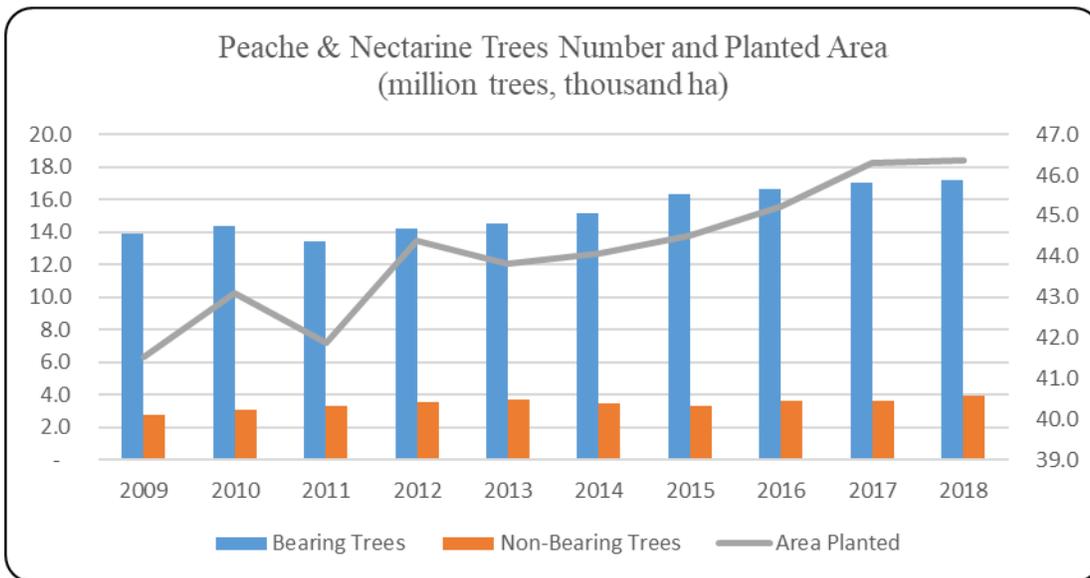
Figure 4: Peach and Nectarine Production in Turkey by year (MT)



Source:TurkSTAT

Planting area for peach production in Turkey continues to increase due to new investments for the export market and juice industry in last decade (see Figure 5). Planting is expected to increase to 46,400 hectares in MY 2019/2020, which slightly higher than the previous year. According to Turkish official data, the total estimated number of all peach and Nectarine trees was about 21 million in 2018. The total number of bearing trees increased from 14 million in 2009 to 17 million in 2018.

Figure 5: Peach & Nectarine Trees Number and Planted Area (million trees, thousand ha)



Source:TurkSTAT

CONSUMPTION

With one hundred different varieties, cherries are consumed in many forms in Turkey. More than half of the cherries produced in Turkey are consumed fresh domestically. Approximately 20 percent of all cherry production is used in the processing sector to make canned products, marmalades, frozen fruits, and fruit juice. Use of cherries for processing is forecast at 180,000 MT in MY2019/20. The majority of processed products are made from sour cherries.

Use of peaches/nectarines for processing is forecast at 135,000 MT in MY2019/20. Approximately 15 percent of all peach production is used for juice. Turkish consumers prefer fruit juices of peach, cherry and apricot in “nectar” form. Nectars are very popular, but there is also a growing trend to prefer 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold as frozen fruits.

According to the Turkish juice industry, the juice sector is growing at about six percent annually (for all fruit juices). According to industry sources, juice/nectar consumption per capita is 10 liters annually in 2018.

TRADE

Turkey is one of the largest exporters of stone fruit in the world. Turkey exports more than 250,000 MT of stone fruits annually, with the majority going to EU countries and Russia. Turkish exporters are also looking for opportunities for stone fruits such as cherries in Far East countries, particularly China in recent years.

Turkey only exported 178,893 MT of stone fruit during the first six months of 2019, compared to 206,000 MT in same period last year due to late harvest in 2019. However, full year exports are expected to be higher in MY 2019/20 due to the increase in production and the depreciation of the Turkish Lira against other currencies, which has helped to make Turkish products more attractive in the global market. Though not included in this report, Turkey is the top exporter of dried apricots in the world.

Table 1: Turkey’s Fresh Stone Fruit Exports

Turkey's Fresh Stone Fruit Exports
Commodity: 0809, Apricots, Cherries, Peaches (Including Nectarines), Plums (Including Prune Plums) And Sloes, Fresh

Metric Ton, Thousand dollar

Commodity	Description	2017		2018		2019* (6 months)	
		USD	Quantity	USD	Quantity	USD	Quantity
0809	Apricots, Cherries, Peaches, Plums & Sloes, Fresh	297,508	258,256	312,251	341,071	218,111	178,893
080929	Cherries, Fresh, Nesoi	159,460	60,121	161,881	75,304	127,447	50,924
080930	Peaches, Including Nectarines, Fresh	69,865	88,811	87,198	126,814	53,335	58,179
080910	Apricots, Fresh	44,274	63,538	41,022	70,734	27,308	49,063
080940	Plums, Prune Plums And Sloes, Fresh	23,779	45,700	22,125	68,146	10,021	20,726
080921	Sour Cherries, Fresh	131	87	25	73	1	1

Source: Global Trade Atlas (GTA) and 1000 USD

Turkey is one of the largest exporters of cherries in the world, representing about 15 percent of total global cherry exports. Chile, the United States and Hong Kong are the other leading global exporters. In 2018, the main destinations for Turkish cherries were Germany (23,651 MT), Russia (24,012 MT) and Iraq (13,171 MT).

Table 2: Turkey's Fresh Sweet Cherry Exports

Turkey Export Statistics						
Commodity: 080929, Cherries, Fresh, Other Than Sour						
Metric Ton, Thousand dollar						
Partner Country	2016		2017		2018	
	USD	Quantity	USD	Quantity	USD	Quantity
Germany	82,079	25,392	84,230	22,964	84,548	23,651
Russia	26,787	17,290	21,729	14,376	31,397	24,012
Iraq	4,086	14,422	3,776	9,479	3,775	13,171
Norway	7,754	1,761	7,097	1,520	8,443	1,887
Netherlands	16,301	3,772	12,122	2,558	6,204	1,298
Denmark	3,604	1,129	2,839	885	4,328	1,380
Sweden	10,022	3,403	5,408	1,788	4,268	1,289
Italy	8,924	3,498	3,508	1,303	3,867	1,583
United Kingdom	3,166	1,338	1,574	473	3,433	1,087
Austria	10,601	3,517	7,103	1,756	2,305	785
Hong Kong	301	58	2,092	439	2,135	582
Other	9,098	4,209	7,982	2,580	7,178	4,579
Total	182,723	79,789	159,460	60,121	161,881	75,304

Source: Global Trade Atlas (GTA) and 1000 USD

Due to a late harvest in MY 2019/20, total exports are only 50,924 MT in the first 6 six month of 2019. However, for MY 2019/20, Turkey's total cherry export forecast is 78,000 MT due to an increase in quality and yields. Although Turkey managed to export only 20 MT of fresh sweet cherries to China in

	54,26 2	55,907	66,63 3	72,673	41,90 9	41,202	46,00 9	40,277
Iraq	4,727	13,842	5,524	22,230	3,746	11,754	2,751	9,473
Romania	1,694	1,620	4,032	4,267	2,443	1,964	410	280
Saudi Arabia	4,384	7,780	2,573	6,685	1,079	2,490	461	890
Syria	1,052	3,546	1,772	9,104	578	2,402	441	2,500
Belarus	379	850	1,114	2,225	448	661	2,308	3,309
Georgia	84	159	836	1,938	104	252	60	195
Ukraine	594	1,195	817	1,773	294	531	249	394
Germany	302	278	658	602	211	130	47	32
Other	2,388	3,634	3,239	5,317	1,738	2,311	600	829
Total	69,86 5	88,811	87,19 8	126,814	52,55 1	63,697	53,33 5	58,179

Source: Global Trade Atlas (GTA)

STOCKS

There are no official stocks of fresh stone fruits in Turkey.

POLICY

Stable export demand and government support have helped Turkish farmers to invest in new orchards. There are payments for producers who are registered in the Ministry of Agriculture and Forestry's farmer registration system. Government supports have not yet been announced for farmers in 2019. In 2018, the Ministry provided supports of 140 Turkish Lira (TL)/ha for fuel and fertilizer. In 2018, the government allocated 25 million TL (~USD \$4 Million, USD=6.5TL as of August 2018) for certified sapling support for the entire fruit sector (including deciduous and citrus trees), slightly down from 2017 levels of 28 Million TL (~USD \$8 million, USD=3.5TL as of August 2017). This program is to support farmers' investments to buy government-certified dwarf saplings to ensure higher quality trees are being planted in Turkey. When broken down to the farmer level, this support amounts to approximately 4,000 TL/ha.

Turkey also subsidizes juice exporters through an export refund program, which allows a tax refund of 360 TL/MT on up to 15 percent of the exported quantity, not to exceed 12 percent of the total value of the exports. Turkey's export subsidy notifications to the World Trade Organization are only updated through 2009 and do not break down subsidy outlays for specific fruit juices.

Production, Supply, and Distribution

Cherries (Sweet&Sour), Fresh Market Begin Year Turkey	2017/2018		2018/2019		2019/2020	
	Apr 2017		Apr 2018		Apr 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	97000	107000	98000	106000	0	106000
Area Harvested	0	0	0	0	0	0
Bearing Trees	26500	27200	0	26700	0	26700
Non-Bearing Trees	8000	8300	0	7600	0	7500
Total Trees	34500	35500	0	34300	0	34200
Commercial Production	520000	809000	590000	824000	0	865000
Non-Comm. Production	0	0	0	0	0	0
Production	520000	809000	590000	824000	0	865000
Imports	32	32	0	0	0	0
Total Supply	520032	809032	590000	824000	0	865000
Fresh Dom. Consumption	294824	583824	330000	573696	0	607000
Exports	60208	60208	85000	75304	0	78000
For Processing	165000	165000	175000	175000	0	180000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	520032	809032	590000	824000	0	865000

(HA) ,(1000 TREES) ,(MT)

Peaches & Nectarines, Fresh Market Begin Year Turkey	2017/2018		2018/2019		2019/2020	
	Apr 2017		Apr 2018		Apr 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	42000	46300	44000	46360	0	46400
Area Harvested	0	0	0	0	0	0
Bearing Trees	15500	17000	16500	17150	0	17200
Non-Bearing Trees	3000	3575	3000	3900	0	3900
Total Trees	18500	20575	19500	21050	0	21100
Commercial Production	505000	771000	600000	790000	0	830000
Non-Comm. Production	0	0	0	0	0	0
Production	505000	771000	600000	790000	0	830000
Imports	150	0	100	224	0	150
Total Supply	505150	771000	600100	790224	0	830150
Fresh Dom. Consumption	291350	557200	370100	533410	0	565150
Exports	88800	88800	100000	126814	0	130000
For Processing	125000	125000	130000	130000	0	135000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	505150	771000	600100	790224	0	830150

(HA) ,(1000 TREES) ,(MT)