

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Voluntary    Public

**Date:** 2/3/2016

**GAIN Report Number:** TR6008

## Turkey

**Post:** Ankara

### Turkish Pulses Market Overview

**Report Categories:**

Policy and Program Announcements

Grain and Feed

**Approved By:**

Kimberly Sawatzki

**Prepared By:**

Kubilay Karabina

**Report Highlights:**

Pulses production and planting area in Turkey have been declining for many years, especially in the last decade. However, the Government of Turkey increased supports for lentil production which led to an increase in lentil planting area in MY 2016. Post estimates Turkey's marketing year (MY) 2015 production of lentils at 350,000 MT and forecasts MY 2016 production at 360,000 MT. Strong domestic demand and re-exports are the driving force for Turkish lentil imports. Turkish lentil importers suffered rejections of shipments due to detections of low level presence of biotech dust from other crops, such as canola.

## Production

### Pulse Production Overview

Pulses are the edible seeds of plants in the legume family. Dried peas, chickpeas, dried beans, lentil, and cowpeas are all types of pulses, with lentils and chickpeas being the most popular in Turkey. Pulses, especially lentils, are commonly used in Turkish traditional dishes. Pulses production and planting area in Turkey have been declining for many years, especially between 2004 and 2014. The largest drop was in red lentil production with a 67 percent decrease, green lentil with 32 percent and chickpea with 27 percent. Total pulses production was 1.4 million metric tons (MMT) in 2004, down from about 2 MMT in the 1990s. Total pulses production in 2014 was about 1 MMT, down 40 percent from 2004. The planting area normally changes depending on the availability of seeds, prices and premiums of the previous year's harvest, weather conditions, fertilizer prices, plant diseases, etc. Competition from other crops in pulses growing areas has led to declining pulses planting area. Another reason for declining pulses planting area is farmers switching to less labor-intensive products with the improvement of irrigation such as corn, cotton and sugar beet.

Chickpea is the most common pulse produced in Turkey, making up 44 percent of total Turkish pulses production. Chickpeas can be planted in almost all of Anatolia. The main areas for chickpea planting are Konya, Karaman, Corum and Yozgat in Central Anatolia, and Mersin, Antalya, Kutahya and Usak in South and West Anatolia.

Lentils make up around 33 percent of Turkish pulses production. Total production of lentil was about 345,000 MT in 2014, 95 percent of which is red lentil and the remaining five percent is green lentil. The GAP region, which is in South Eastern Anatolia, traditionally grows red lentils. Corum, Yozgat, Ankara, Kirsehir and Konya in Central Anatolia supply more than 50 percent of total Turkish green lentil production.

Product	2004		2014	
	Area (ha)	Production (ton)	Area (ha)	Production (ton)
Pea	1,350	3,500	1,149	2,987
Chickpea	604,290	620,000	388,169	450,000
Beans	154,730	250,000	90,450	215,000
Lentil (Green)	379,000	480,000	226,336	325,000
Lentil (Red)	59,990	60,000	17,034	20,000
Cowpea	2,900	2,300	1,941	2,006
Horsebean	9,930	20,000	3,227	6,971
<b>Total</b>	<b>1,212,190</b>	<b>1,435,800</b>	<b>728,306</b>	<b>1,021,964</b>

Source: Turkish Statistical Institute

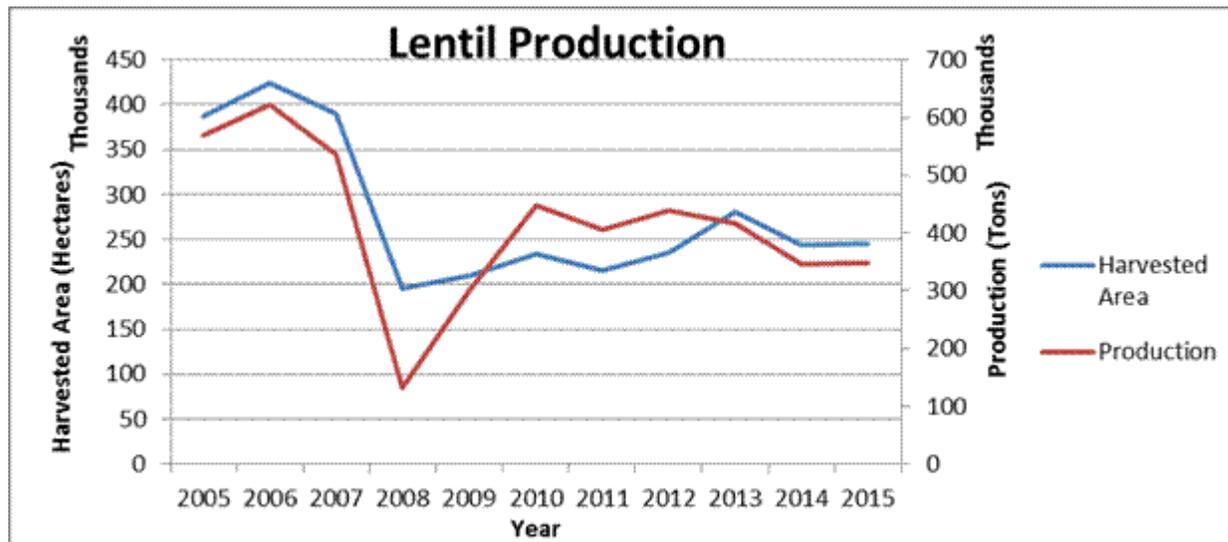
Post estimates MY 2015 lentil production at 350,000 MT and forecasts MY 2016 production at 360,000 MT. Despite a considerable increase in planting areas, heavy winter conditions might lead to a decrease

in yields for MY2016. Late March and April rain will be a critical factor for determining lentil production.

### Policy

Contrary to its considerable involvement in the grain market, the Turkish Grain Board, a state enterprise, is not active in the pulses market. The Ministry of Food, Agriculture and Livestock (MinFAL), which was criticized over insufficient production and high prices, doubled pulse premiums in early 2015 in order to encourage pulses farming. MinFAL introduced a 100TL/MT pulse premium in 2009 and increased it to 200TL/MT in 2015. This high pulse premium led to an increase in lentil planting area in MY 2016.

The line graph illustrates the amount of lentil production and harvested area in Turkey between 2005 and 2015. According to the last ten years of data, lentil production has dropped from 650,000 MT to 350,000 MT, parallel to decreasing harvested area.



### Trade

Turkey primarily imports lentils from Canada and exports them to the Middle East and Africa. Iraq, Sudan, Egypt and Saudi Arabia are respectively the main export markets for Turkey. More than half of total pulses exports consist of the exports to these four countries. Pulses exports for the first five months of MY 2015 were 92,761 MT, up from 60,092 MT on the same period in MY 2014. Turkish exporters are also a supplier of international humanitarian aid, which largely consists of wheat flour but also occasionally includes pulses.. Due to high domestic yields and strong regional demands, lentil exports increased in MY2014 and are expected to be high in MY2015.

<b>Turkey Lentil Foreign Trade</b>	
------------------------------------	--

	2012 (MT)	2013 (MT)	2014 (MT)	2012 (MT)	2013 (MT)	2014 (MT)	
July	3,396	15,467	19,772	20,991	20,726	14,519	
August	1,595	5,353	14,997	17,245	10,344	8,033	
September	6,605	4,961	20,771	16,206	11,226	10,003	
October	17,341	17,566	17,491	14,311	11,140	13,138	
November	9,791	31,546	33,048	14,300	21,175	14,399	
December	9,290	42,769	49,262	12,339	18,273	22,267	
January	13,712	20,778	50,354	15,630	13,507	22,998	
February	8,973	26,210	42,084	11,407	13,510	20,020	
March	8,544	19,919	17,403	11,869	17,492	14,537	
April	22,457	49,786	31,864	8,440	24,100	13,002	
May	18,773	17,779	13,005	12,426	17,668	15,306	
June	9,355	13,341	15,270	25,887	14,779	19,117	
<b>TOTAL</b>	<b>129,832</b>	<b>265,475</b>	<b>325,321</b>	<b>181,051</b>	<b>193,940</b>	<b>187,340</b>	

Source: GTA

Turkey Lentil Import				
Countries	MY 2012 (MT)	MY 2013 (MT)	MY 2014 (MT)	MY 2015 (MT)*
Canada	114,995	255,119	308,950	99,838
Australia	1,063	2,196	5,729	1,963
Russia	8,069	1,385	3,445	629
United States	2,833	2,802	3,018	1,450
Others	2,903	3,840	4,220	1,837
<b>Total</b>	<b>129,832</b>	<b>265,475</b>	<b>325,323</b>	<b>105,717</b>
*July-November 2015				

Source: GTA

Turkey imported 325,323 MT of lentils in MY 2014. From July to November 2015, Turkey imported 105,717 MT of lentils, roughly equal with the same period in MY 2014 (106,079 MT from July to November 2014). Roughly 75 percent of total imports in MY2014 were conducted through the inward processing regime (IPR). A number of Turkish agricultural exporters benefit from the IPR. The IPR allows Turkish exporters to import lentils with zero tariff in order to re-export. In other words, Turkey re-exported 75 percent of lentils which it imported in MY2014.

Turkey has yet to approve any genetically engineered (GE) traits for food use. Any GE detections in a lentil shipment would, therefore, violate the Biosafety Law. The Law specifies severe prison terms and fines for the detection of any unapproved trait. This includes even low level presence, literally dust, from other crops, such as corn or canola. In 2015, due to detection of unapproved biotech events in shipments, traders suffered rejection of shipments and faced heavy financial losses.

## Consumption

Lentil consumption in Turkey is about 5 kg per capita annually. The bulk price for red lentil was 2.6 TL/kg in early January 2015 and around 4.5 TL/kg in January 2016. According to market sources, devaluation of the Turkish lira, and to a lesser extent inconsistent implementation of import regulations, contributed to the price increase.

The 68th UN General Assembly declared 2016 the International Year of Pulses (IYP). The IYP 2016 aims to increase public awareness of the nutritional benefits of pulses and their role in sustainable food production. As part of IYP 2016, special events will be held around the world to promote pulses. Several of these events will take place in Turkey, including the 15th International Cereal and Bread Congress (15th ICBC), the World Pulses Convention, and the FAO Regional Conference for Europe (ERC). For a full list of worldwide events for IYP 2016, please visit: <http://www.fao.org/pulses-2016/events/en/>