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Report Highlights:

It is expected that Türkiye will produce approximately 6.5 million metric tons (MMT) of citrus in MY 2023/24, 39 percent more than the previous season. However, yield increases have brought concurrent marketing and consumption issues. Due to the low profitability many farmers face, citrus fruits are being removed from many orchards. According to local contacts, new export markets and export subsidies are crucial for citrus producers and exporters to maintain their business. Turkish exporters believe that South Africa and Argentina have become competitors for the same marketing year due to climate change. For the first 4 months of MY 2023/24, Türkiye exported 25 percent more citrus when compared with the previous season, mostly to Russia ($148 million) and Iraq ($90 million).

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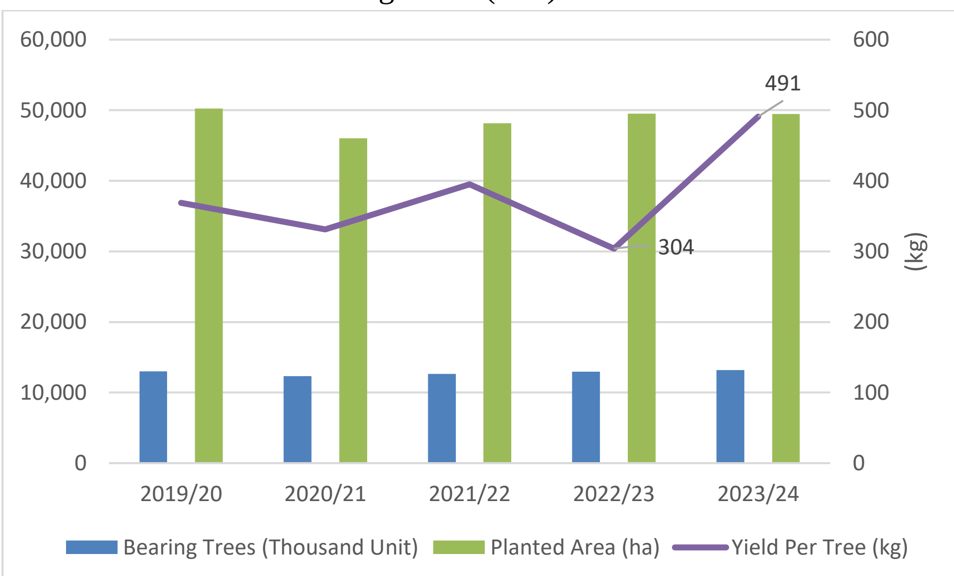
SENSITIVE BUT UNCLASSIFIED

Oranges, Fresh

Production:
In MY 2023/24 the orange yield is forecast to increase 31 percent to 1.73 MMT due to favorable weather conditions in spring 2023. The *Washington* and *Yapha* variety, which account for 70 percent of total orange production in Turkiye, are the main driver behind the overall yield increase. The yield per tree has increased 71 percent in the *Yapha* variety, and 38 percent in the *Washington* variety. The yield increase is mostly going to be seen in the Aegean region. In MY 2022/23, Türkiye produced 1.32 MMT of oranges, which was 24.5 percent less than MY 2021/22 (1.75 MMT).

Farmgate prices have fallen 20 percent from the previous season and have been 8-10 Turkish Lira (TL)/kg ($0.2-0.3), though retail prices remain high at 20-25 TL/kg ($0.7-0.9).

Figure 1. Turkiye Orange Orchard Area(ha), Bearing and Non-bearing Trees and Yield Per Tree (kg), Marketing Years (MY) 2019-2024



Source: TurkSTAT, 2024

The Mediterranean fruit fly remains a major concern, causing quality and quantity losses. To combat the pest, the Ministry of Agriculture and Forestry (MinAF) distributes pheromone traps for fruit flies to farmers free of charge through provincial offices and member associations. However, greening disease in citrus fruits seen in the Turkish Republic of Northern Cyprus (TRNC) has become a serious concern among Turkish citrus producers due to imports of citrus from TRNC.

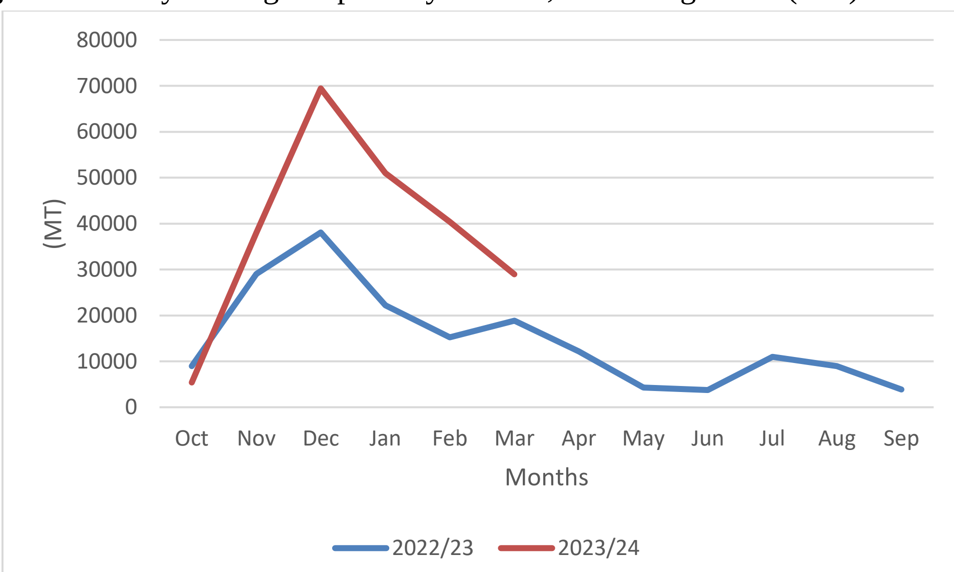
Over the past marketing year Turkish farmers have complained that labor costs have risen to unsustainable levels, Turkish farm workers contend that wages are too low to live comfortably. As a result, Turkish citrus farmers have shifted their attention to Afghan and Syrian refugees, who can be paid less.

Consumption:
In MY 2023/24 orange consumption is expected to increase to 1.36 MMT due to higher production, however retail market prices are still high due to rising transportation and market costs such as electricity and packaging. Marketing Year 2022/23 orange consumption was realized at 1 MMT, 23 percent less than MY 2021/22 (1.3 MMT). According to the latest data published by TurkSTAT in 2022, orange consumption per capita was 9.7 kg.

The average retail price for oranges is up to three times more than the farm gate price. This price difference is attributed to traders and transportation and logistics companies marking up the prices as the product makes its way to retail shelves. Other citrus products also face large price differences between the farmgate and retail stores for the same reason.

Trade:
Orange exports in MY 2023/24 are expected to increase 39.7 percent to 246,000 MT when compared with the previous season, in correlation with increased yield and foreign demand. Despite these increases, though, Turkish exporters have concerns about competitor countries` high yields and their lower export prices. Turkish exporters continue to lobby for export subsidies from the MinAF, and consider subsidies crucial in order to cope with rising export costs and competition.

Figure 2. Türkiye Orange Exports by Months, Marketing Years (MY) 2022-2024

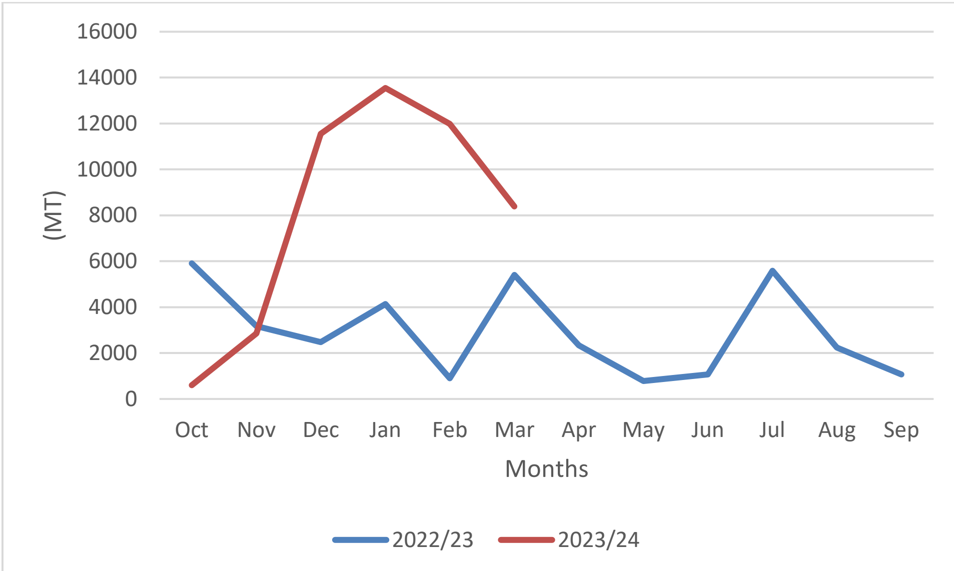


Sources: Trade Data Monitor, LLC

For the first six months of MY 2023/24, Türkiye exported 233,217 MT of oranges, mostly to Iraq, Russia, Syria, and Ukraine, which is 76.2 percent more than the total amount exported during the same period of the previous year. Oranges became the record-holder for export growth among citrus products for the first six months of MY 2023/24 with a value of $129 million, 85 percent higher than the previous year.

Despite this, there was a significant decrease in orange exports to Iraq in MY 2022/23 due to falling prices and the Iraq's domestic supports to its producers. However, for the first six months of MY 2023/24 Turkish orange exports to Iraq were 918 percent higher than the same period of the previous season due to high demand, with a value of $32.3 million. In the first 6 months of 2024, Iraq became the top country for Turkish orange exports, surpassing Russia.

Figure 3. Türkiye Orange Exports to Iraq by Months, Comparison of Marketing Years (MY) 2022-2024



Sources: Trade Data Monitor, LLC

Turkish exporters believe that Egypt and Greece are their main competitors based on their adventitious low input costs.

In MY 2022/23 Türkiye exported 176,377 MT of oranges, which was 54 percent less than in MY 2021/22 (389,000 MT). This decrease was based on lower production following freezing weather conditions during the orange blossoming period in March 2022, despite increased planting area and bearing trees. Additionally, the February 2023 earthquakes also affected citrus exports, as 70 percent of Turkish production is in the Mediterranean region.

As of January 2022, to address MRL concerns, the EU and UK started requiring a conformity certificate for Turkish oranges. To qualify for a conformity certificate, shipments must be tested for certain residues prior to export, adding costs for exporters. Turkish orange exports to the UK are still subject to increased testing for pesticides on arrival. The rate of testing by shipment is 50 percent.

Imports:

Post revises the forecast of Turkish orange imports in MY 2023/24 to 2,000 MT from 30,000 MT due to surplus of domestic production and restriction of imports from Turkish Republic of Northern Cyprus (TRNC) because of greening disease seen in citrus orchards in TRNC. In MY 2022/23 Türkiye imported

31,000 MT of orange from the Turkish Republic of Northern Cyprus (TRNC). Türkiye's orange imports depend on domestic production, but the imports from TRNC are also a way for Türkiye to economically and politically support TRNC.

Production, Supply and Distribution Statistics:
Table 1: PSD Oranges, Fresh

Oranges, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	48176	48176	49535	49535	51000	51000
Area Harvested (HECTARES)	48176	48176	50000	50000	51000	51000
Bearing Trees (1000 TREES)	12620	12620	12966	12966	14000	14000
Non-Bearing Trees (1000 TREES)	1210	1210	1786	1786	1700	1700
Total No. Of Trees (1000 TREES)	13830	13830	14752	14752	15700	15700
Production (1000 MT)	1750	1750	1320	1320	1731	1731
Imports (1000 MT)	45	45	31	31	30	2
Total Supply (1000 MT)	1795	1795	1351	1351	1761	1733
Exports (1000 MT)	389	389	176	176	246	246
Fresh Dom. Consumption (1000 MT)	1284	1284	1083	1083	1394	1366
For Processing (1000 MT)	122	122	92	92	121	121
Total Distribution (1000 MT)	1795	1795	1351	1351	1761	1733
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Tangerines/Mandarins, Fresh

Production:
MY 2023/24, overall tangerine production is forecast to increase 55 percent to 2.88 MMT due to favorable spring rains and temperature conditions during blossoming in March 2023. Farmgate prices have been 7-8 TL/kg ($0.2), and producers are still not able to compensate for their high production costs. On the other hand, consumer prices are also high at 20-30 TL/kg ($0.70- $1), which is double the previous year. Turkish producers have concerns about harvest period labor shortages, while workers

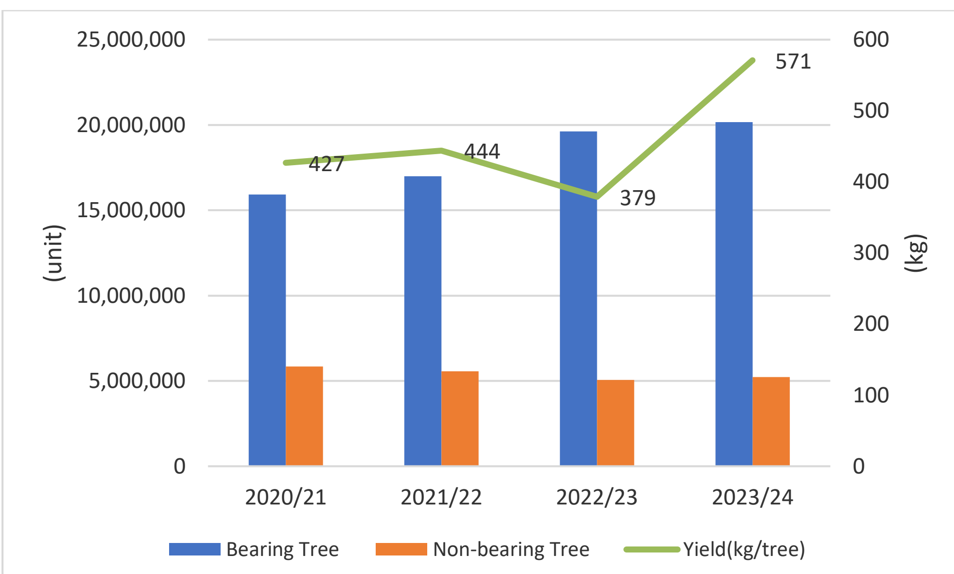
complain about low daily wages. On the other hand, producers struggled with selling their fruit due to low farm-gate prices, which were not compensating for their high production costs and low export subsidies, forcing them to leave fruit on the trees.

Tangerines are the most produced citrus fruit in Türkiye, with 84 percent of tangerines being produced in the Mediterranean region. The *Satsuma* variety is the most widely produced in the region and is crucial for both domestic consumption and exports. Eighty percent of total *Satsuma* production is for export. According to producers, the *W.Murkott* variety has been excessively planted due to its preferability by consumers, however producers have concerns about over production next year and decreasing profitability.

Future production volume in the region is also uncertain because of increasing construction and tourism investments on what was traditionally agricultural land close to the Aegean. Local contacts noted that the Turkish government's push to modernize and promote investment in construction in this region has turned what was once a fertile, agricultural stronghold into a concrete jungle, threatening the livelihood of local farmers.

Marketing year 2022/23 mandarin production was 1.86 MMT, resulting from favorable weather conditions in the Mediterranean region. In MY 2021/22 Türkiye produced 1.81 MMT of tangerines.

Figure 4. Türkiye Tangerine Bearing and Non-bearing Trees and Yield per tree Comparison, MY 2020/21- MY 2023/24



Source: TurkSTAT, 2024

Another problem facing tangerines producers is the effect of climate change, which has had a noticeable impact on the quality and quantity of fruit. Some producers are also turning to other crops which are better suited to more tropical environments, like mango, kiwi, and dragonfruit. While these tropical fruits are equally unprofitable, farmers have converted orchards to try to pressure MinAF into providing more supports for the citrus industry.

Consumption:

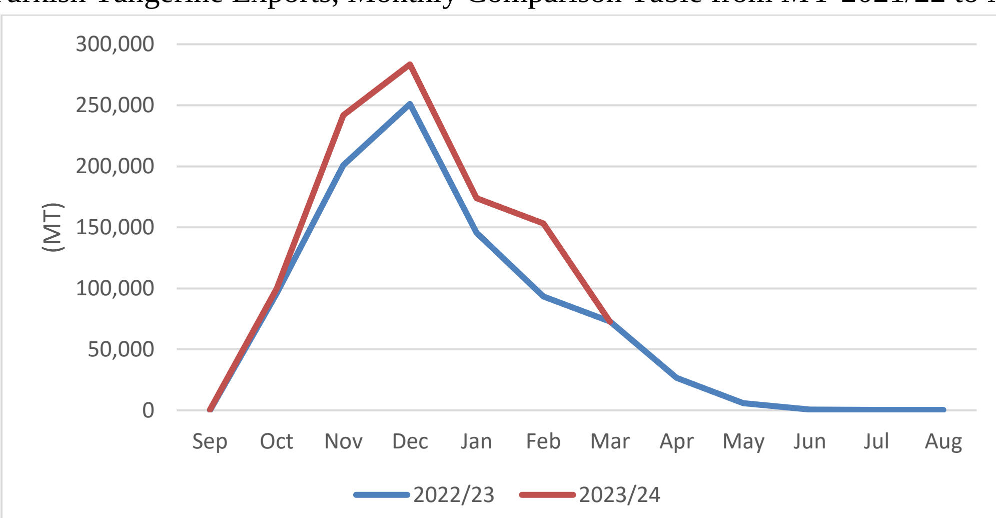
In MY 2023/24, Türkiye's domestic consumption of tangerines is estimated to increase to 1.78 MMT in line with the rise in production. This is despite high market prices and ongoing efforts to increase exports, as well as the later onset of winter (when Turks tend to eat more tangerines). The mandarin consumption figure for MY 2022/23 was at 1.02 MT due to adequate domestic production and unexpected decreases in exports. In MY 2021/22, Türkiye's domestic consumption of tangerines was 872,000 MT.

Citrus producer representatives are calling on municipalities to buy fruits from farmers slightly above their cost and to deliver to the public at an affordable price. It is their hope that by doing so, they will increase domestic demand and reduce crop losses. The alternative is that tangerines will be sold at a much higher price in the coming seasons if producers continue to uproot citrus trees due to a lack of demand.

Trade:

Post slightly revises the tangerine export estimate for MY 2023/24 downward to 1.1 MMT from 1.3 MMT. In MY 2023/24 the yield is 18 percent higher than MY 2022/23 due to both high yield and increased quality. However, exporters continue to seek supports from the GoT for packaging materials and transportation costs against high exchange rates. They also require the Support Price Stabilization Fund (DFIF), which should be set at $80/ton, but which has been applied as 1,500 TL ($52.5)/ton, in order to realize profits from this year's production.

Figure 5. Turkish Tangerine Exports, Monthly Comparison Table from MY 2021/22 to MY 2023/24

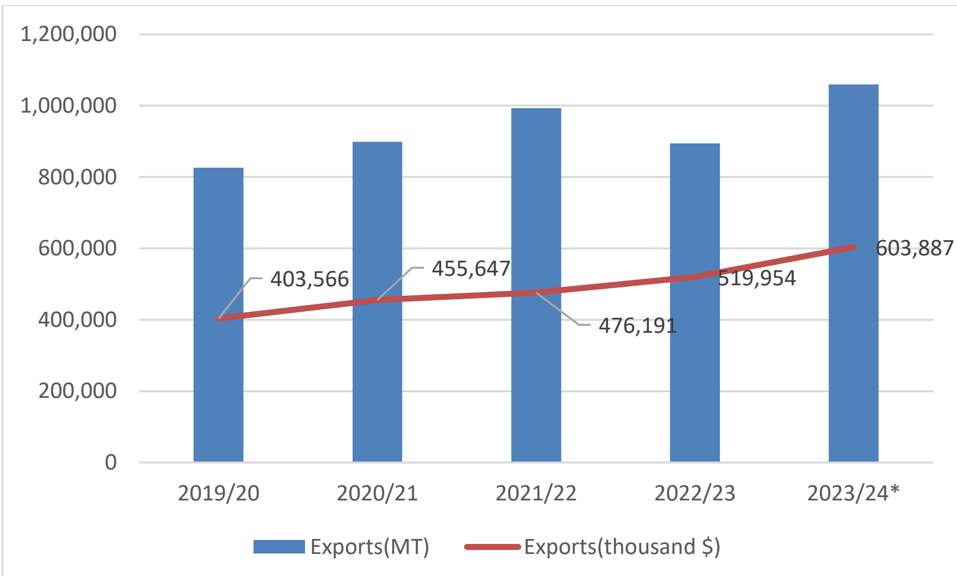


Source: Trade Data Monitor, LLC

Most *Satsuma* tangerines are being exported to Russia, Ukraine, and Serbia. Exports to Iraq decreased last year, following the Iraqi government's decision to slow imports of fruits and vegetables to support domestic production. This also contributed to fluctuating export prices last year for Turkish exporters.

Tangerine exports in MY 2022/23 were realized at 894,065 MT, valued at $520 million, due to lower yields, decreasing exports to Iraq, the Russia-Ukraine war, and recession in Europe. However, export revenue was stable at $520 million. Türkiye exported 993,000 MT of tangerines ($476 million) in MY 2021/22.

Figure 6. Turkiye Tangerine Export Comparison in MT vs USD



Source: Trade Data Monitor, LLC. MY 2023/24 is the Post estimation.

Tangerines are the most exported products among citrus fruits in Turkiye, and it is expected to reach $650 million in MY 2023/24. In fact, tangerine exports to Iraq for the first 8 months of MY 2023/24 increased 68 percent when compared with the same period of MY 2022/23 due to high demands.

Like oranges, tangerine exports to EU countries require a conformity certificate. In addition, as of January 2022 Turkish tangerine exports to the UK are now subject to increased testing for pesticides on arrival. The rate of testing by shipment is now 50 percent.

Imports:

Tangerine imports in MY 2023/24 are expected to decrease sharply to 6,000 MT due to a surplus of domestic production and import restriction from Turkish Republic of Northern Cyprus (TRNC) because of greening disease seen in citrus orchards.

In MY 2022/23 Turkiye imported 56,277 MT of tangerines, mostly from the Turkish Republic of Northern Cyprus (TRNC). In MY 2021/22, tangerine imports were realized at 56,000 MT. Turkiye's tangerine imports depend on domestic production, but the imports from TRNC are also a way for Turkiye to economically and politically support TRNC.

Production, Supply and Distribution Statistics:

Table 2: PSD Tangerines, Fresh

Tangerines/Mandarins, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Sep 2021		Sep 2022		Sep 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	60719	0	67853	67853	69000	69000
Area Harvested (HECTARES)	60719	0	67853	67853	69000	69000
Bearing Trees (1000 TREES)	16987	0	19620	19620	21000	21000
Non-Bearing Trees (1000 TREES)	5571	0	5053	5053	5000	5000
Total No. Of Trees (1000 TREES)	22558	0	24673	24673	26000	26000
Production (1000 MT)	1810	1810	1860	1860	2642	2883
Imports (1000 MT)	53	56	52	56	50	6
Total Supply (1000 MT)	1863	1866	1912	1916	2692	2889
Exports (1000 MT)	994	993	894	894	1100	1100
Fresh Dom. Consumption (1000 MT)	868	872	1017	1021	1591	1788
For Processing (1000 MT)	1	1	1	1	1	1
Total Distribution (1000 MT)	1863	1866	1912	1916	2692	2889
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Lemons, Fresh

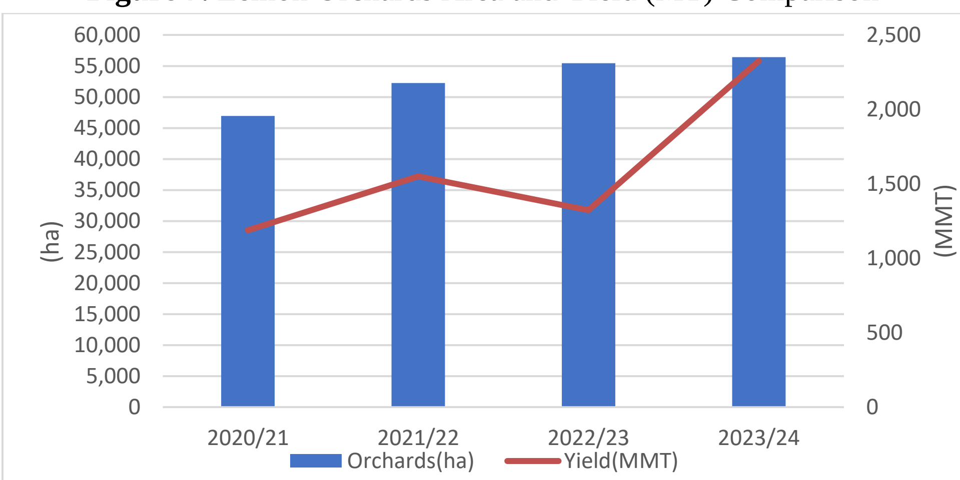
Production:

Post revises our lemon production estimate for MY 2023/24 from 1.58 MMT to 2.3 MMT due to unexpected high yield following favorable weather conditions during spring 2023. Yield per tree in MY 2023/24 increased from 90 to 151 kg when compared with the previous season. According to producers, although yields are expected to be higher than the previous season, quality concerns and disease and pest issues have arisen due to climate change and uncontrolled tree planting. Producers believe that enterdonat varieties are in danger, and there increased risk of extinction in the region due to climate change. The enterdonat variety is important for Turkish citrus producers due to its early mature traits that allows for an adventitious export window.

Lemon producers are disappointed by price decreases resulting from higher yields, following export restrictions in 2021 and frost damage last year. For more information about the export restriction please see the last [GAIN- Citrus Semi-annual Report]. On the other hand, the early lemon varieties in the Mediterranean region are much smaller and of lower quality due to higher temperature conditions and lower humidity in August and July. In MY 2023/24, farmgate prices decreased 40 percent when compared to MY 2022/23. For the same period, the biggest cost for production, fuel, increased 56 percent.

Turkish lemon producers continue to request "purchase supports" from the GoT to use lemons in food industry, since there are excessive yields and most of the fruit is being left on the trees. Since the beginning of MY 2023/24 farmgate prices have fallen to 5-6 TL/kg ($0.2), below the previous season, and are still not enough to compensate their production costs due to high input costs. Due to economic difficulties in production and exports, lemon trees have been cut down and converted to other fruit-bearing trees to increase profitability.

Figure 7. Lemon Orchards Area and Yield (MT) Comparison



Source: TurkSTAT, 2024.

Marketing year 2022/23 lemon production reached 1.32 MMT, lower than the previous season due to freezing temperature conditions during blossoming in March 2022. In MY 2021/22 lemon production was 1.5 MMT.

Producers believe that Turkish citrus exporters should be supported by the GoT in terms of export subsidies. They think that the GoT supports to citrus exporters would benefit citrus producers, and they would sell their fruit at a more reasonable price. In contrast to the low producer prices, supermarket prices are noticeably higher due to an increase in costs such as packaging, transport, and labor during the marketing process. Turks usually consume lemons fresh.

Consumption:

In MY 2023/24, lemon consumption is estimated to increase 16 percent to 835,000MT due to high yields, however, lemon prices at domestic markets have been continuing to increase. Post included the number of fruits loss potentially unsold into consumption section. Consumer prices increased 60 percent in November 2023 when compared with the same month of the previous year, despite decreasing farmgate prices. The biggest price gap between supermarkets and orchards was seen in lemons in October 2023 at 650 percent.

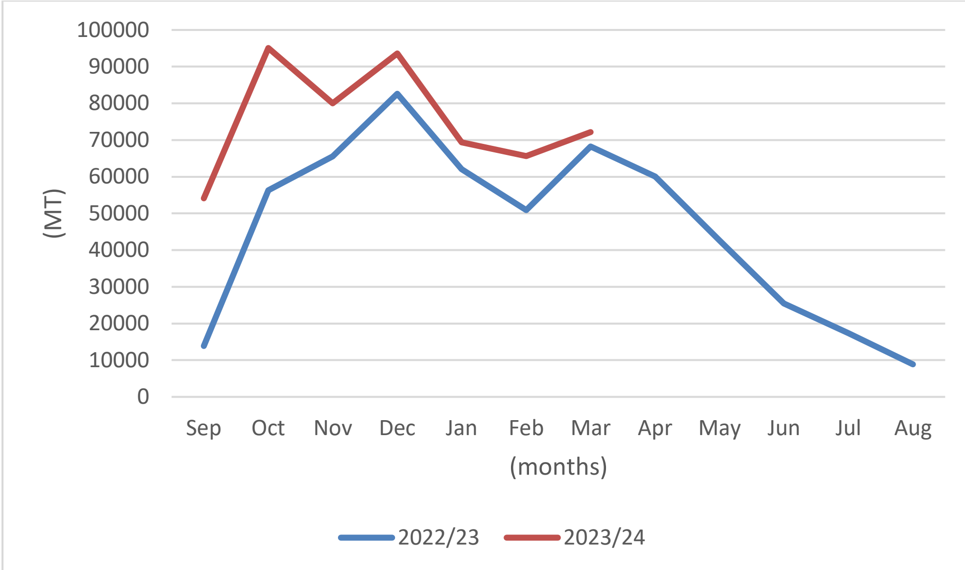
In MY 2022/23 lemon consumption was 720,000 MT due to decreasing domestic lemon demands. High input and processing costs are increasing lemon prices at domestic markets. Also, the earthquake in February 2023 negatively affected lemon consumption by reducing transportation options from the orchards to cities and reducing labor power. In MY 2021/22, lemon consumption was 761,000 MT due to high production and decreasing lemon prices at markets.

Trade:

In MY 2023/24 lemon exports are expected to increase 26 percent to 700,000 MT due to supply. However, exporters have concern about lower demand from Russia and Ukraine due to decreasing purchasing power, increasing logistic costs, high yields in competitor exporting countries, and excessive planting of Mayer variety lemon trees without planning, causing quality issues. Sixty percent of total lemon exports were made to Russia. However, in MY 2023/24 Turkish lemon exports to Iraq have increased 454 percent due to high demand.

According to exporters, the government’s ban on lemon exports in 2021 to prevent domestic shortfalls amid the pandemic hampered Turkish lemon exports and caused export markets to loosen. Lemon producers are now requesting subsidies from the GoT to convert their excessive production into lemon sauce or juice to make them more valuable.

Figure 8. Türkiye Lemon Export Comparison in MT for MY 2022/23- MY 2023/24.



Source: Trade Data Monitor, LLC

In MY 2022/23 lemon exports were 554,000 MT, 20 percent lower than the previous year due to the decreased harvest and demand from foreign markets following rising global lemon production and logistics costs. However, the total value was $284 million, like the previous year, due to higher export prices, especially for exports to Russia. Iraq and Russia are the main export markets for Turkish lemons. In 2021/22, Türkiye exported nearly 693,000 MT of lemons, valued at $287 million. Türkiye generally exports half of its total lemon production. As of January 2022, Turkish lemon exports to the EU and the UK are subject to increased testing for pesticides. The rate of testing by shipment has now been raised to 50 percent.

The Mediterranean fruit fly remains the biggest concern among producers and exporters, as the pest is the reason for many of the rejections of Turkish lemons at EU and Russian ports. Excessively high MRLs account for the rest of the rejections. Türkiye has started to implement biological methods and traps supported by MinAF to combat the Mediterranean fruit fly. Additional concerns are the low unit export prices and the residues of products used to extend longevity in storage.

Imports:
Lemon imports in MY 2023/24 are expected to decrease sharply to 1,000 MT due to a surplus of domestic production and import restriction from Turkish Republic of Northern Cyprus (TRNC) because of greening disease seen in citrus orchards.

In MY 2022/23 Turkiye imported 3,954 MT of lemons, mostly from Brazil. In MY 2021/22, lemon imports were realized at 3,967 MT.

Production, Supply and Distribution Statistics:
Table 3: PSD Lemons/Limes, Fresh

Lemons/Limes, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Sep 2021		Sep 2022		Sep 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	52233	52233	55426	55426	56500	56500
Area Harvested (HECTARES)	52233	52233	55426	55426	56500	56500
Bearing Trees (1000 TREES)	13539	13539	14699	14699	15500	15500
Non-Bearing Trees (1000 TREES)	4112	4112	4676	4676	4600	4600
Total No. Of Trees (1000 TREES)	17651	17651	19375	19375	20100	20100
Production (1000 MT)	1500	1500	1320	1320	1584	1584
Imports (1000 MT)	3	3	4	4	3	1
Total Supply (1000 MT)	1503	1503	1324	1324	1587	1585
Exports (1000 MT)	693	693	554	554	637	700
Fresh Dom. Consumption (1000 MT)	760	760	720	720	900	835
For Processing (1000 MT)	50	50	50	50	50	50
Total Distribution (1000 MT)	1503	1503	1324	1324	1587	1585
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Grapefruit, Fresh

Production and Consumption:

In MY 2023/24, grapefruit production is expected to increase 9.5 percent to 217,000 MT due to favorable weather conditions during spring 2023. In MY 2022/23, grapefruit production was 198,000 MT, 20 percent lower than the previous year due to freezing temperatures in March 2022. Orchard areas and bearing tree decreased in MY 2022/23. Most of the grapefruit in Türkiye is produced in the southeastern Adana province. In MY 2021/22 grapefruit production reached 249,000 MT. Since production costs are high, as is the case with other citrus products, producers are not satisfied with the lower consumption and the low sales prices at farmgate and in wholesale markets.

In MY 2023/24, grapefruit consumption is expected to increase 14.7 percent to 117,000 MT due to sufficient supply. However, exporters believe that the consumption number also includes fruit losses since domestic demand for grapefruit is very small in Turkiye, and the fruit is mostly consumed as fresh-squeezed juice. Grapefruit consumption for MY 2022/23 was 102,000 MT, which is almost the same as MY 2021/22 (103,000 MT).

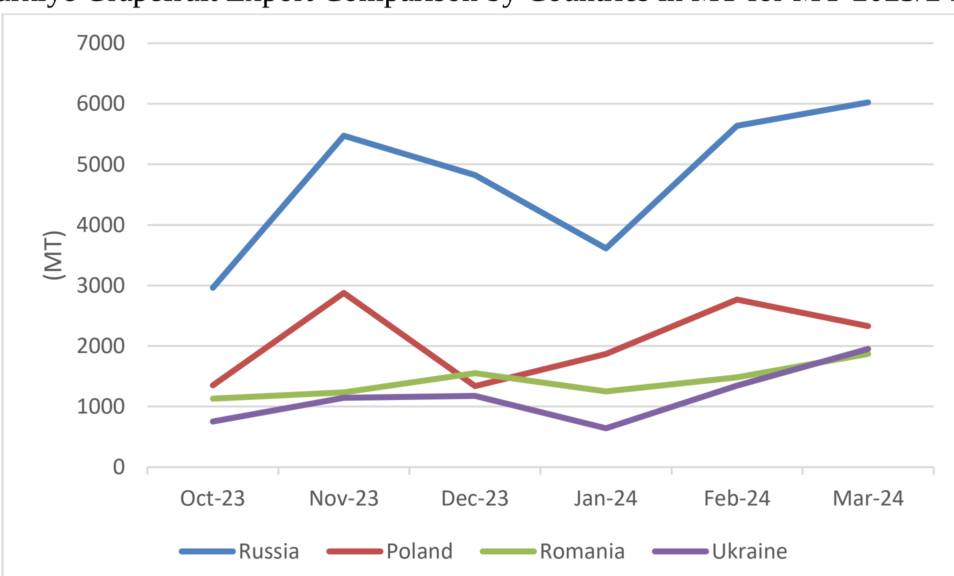
The gap between lower farmer wholesale prices and higher retail market prices remains a concern for farmers. In October 2023 retail prices were 169 percent higher than producer prices. Although grapefruit is not widely consumed in Türkiye, retail prices are still three times more expensive than farmgate prices.

Trade:
In MY 2023/24, grapefruit exports are expected to be 100,000 MT, 4 percent higher than MY 2022/23, due to expected higher export demand. The main export destinations are Russia, Poland, and Ukraine. Twenty percent of total grapefruit exports are sent to Russia.

In MY 2022/23 grapefruit exports were 96,300 MT, valued at $65 million, 35.5 percent lower than MY 2021/22. In MY 2021/22, grapefruit exports were 149,359 MT and valued at $71 million.

Russia is always a promising export market for Turkish grapefruit. Turkish exporters believe that exports to Russia recovers losses since Russia has discontinued the import ban for Turkish grapefruits due to MRL and labelling concerns.

Figure 9. Türkiye Grapefruit Export Comparison by Countries in MT for MY 2023/24 (Oct.- Mar.)



Source: Trade Data Monitor, LLC

Due to climate change, especially extreme temperatures, Türkiye is struggling to maintain sweetness in its grapefruit, and most grapefruits are sour and bitter. For this reason, Türkiye is not a stable supply market, but is a backup if the other large exporting countries are not able to produce enough grapefruits each year. Türkiye also has a geographic advantage for exports of citrus fruit to Iraq; however, grapefruit exports to Iraq are very low due to a lack of traditional grapefruit consumption in Iraq.

According to Turkish exporters, exports of citrus to geographically distant countries are becoming more difficult and expensive due to costs to meet technical requirements such as cold chain storage and rising transport costs.

Production, Supply and Distribution Statistics:

Table 4: PSD Grapefruit, Fresh

Grapefruit, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	5039	5039	4982	4982	5000	5000
Area Harvested (HECTARES)	4900	4900	4700	4700	4800	4800
Bearing Trees (1000 TREES)	1189	1189	1073	1073	1200	1200
Non-Bearing Trees (1000 TREES)	27	27	68	68	40	40
Total No. Of Trees (1000 TREES)	1216	1216	1141	1141	1240	1240
Production (1000 MT)	249	249	198	198	217	217
Imports (1000 MT)	4	4	1	1	1	1
Total Supply (1000 MT)	253	253	199	199	218	218
Exports (1000 MT)	149	149	96	96	100	100
Fresh Dom. Consumption (1000 MT)	103	103	102	102	117	117
For Processing (1000 MT)	1	1	1	1	1	1
Total Distribution (1000 MT)	253	253	199	199	218	218
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Orange Juice

Production and consumption:
In MY 2023/24, orange juice production is forecast at 12,100 MT due to increasing oranges sent to processing. In MY 2023/24 it is expected that 121,000 MT of oranges will be sent to processing, which is 30 percent higher than the previous year. In MY 2022/23 Türkiye produced 9,240 MT of orange juice, 24 percent less than the previous year due to the decreased number of oranges sent to processing because of low yield.

The Turkish fruit processing industry is still under development and is seeking government support to develop the industry to reach potential export markets. According to fruit juice exporters, the juicing rates for orange varieties in Türkiye do not always meet the ideal industry standards. To achieve those standards, Turkish producers expect the GoT to support them to establish a citrus policy plan to improve the standards for juicing fruit.

The most popular fruits in Türkiye for juice production are apples, apricots, cherries, oranges, and pomegranates. Five to 10 percent of the total citrus production is processed in the fruit juice industry.

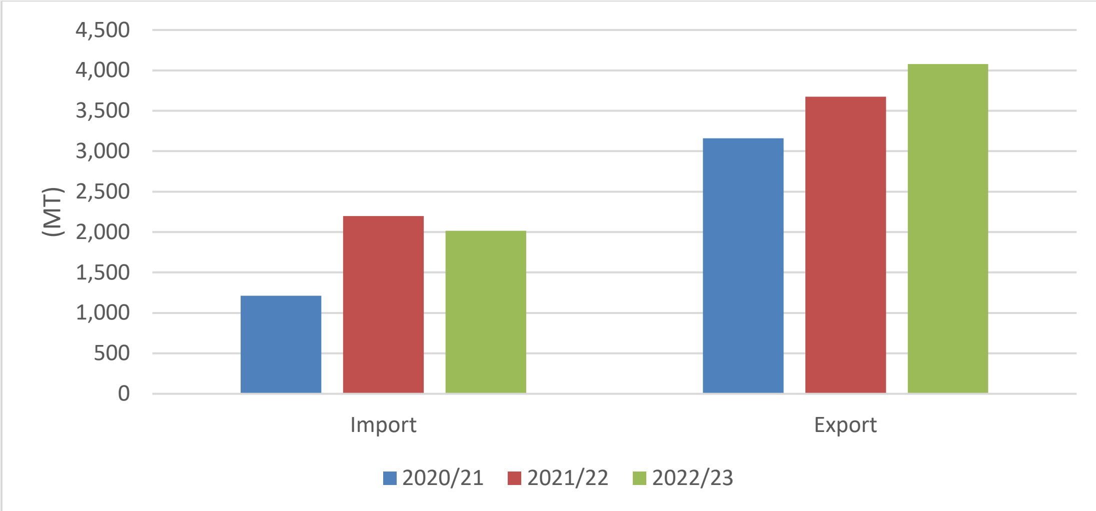
In domestic markets, an increase in retail prices is expected in correlation with the country`s high inflation. However, orange juice consumption is expected to increase to 8,900 MT in MY 2023/24. After the COVID-19 pandemic began, demand for orange juice had increased. However, total fruit juice consumption in Türkiye is estimated at 11 liters per year, which is quite low compared to European countries.

Trade:
Exports: Orange juice exports are forecast at 5,000 MT for MY 2023/24 due to expected demand increases from importing countries in concert with China’s decrease in production, according to fruit juice producers. Moreover, fruit juice exporters believe that they will have more export revenue in MY 2023/24 due to a global supply shortage.

Türkiye exported 4,078 MT of orange juice valued at $8.8 million in MY 2022/23, mainly to Germany, Italy, and the Netherlands, which was 10 percent higher than MY 2021/22 with 3,675 MT of exports valued at $5.7 million.

Imports: In MY 2023/24, orange juice imports are estimated to decrease to 1,800 MT due to stable demand from the domestic market. Türkiye imported 2,018 MT of orange juice in MY 2022/23, mostly from Cyprus and Brazil. Türkiye mostly imports sweetened and unsweetened orange juice frozen.

Figure 10. Turkish Orange Juice Exports and Imports, Comparison



Source: Trade Data Monitor, LLC

Production, Supply and Distribution Statistics:

Table 5: PSD Orange Juice

Orange Juice	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	122000	122000	92400	92400	121000	121000
Beginning Stocks (MT)	150	150	150	150	150	150
Production (MT)	12200	12200	9240	9240	12100	12100
Imports (MT)	2200	2200	2000	2000	1800	1800
Total Supply (MT)	14550	14550	11390	11390	14050	14050
Exports (MT)	3675	3675	4078	4078	5000	5000
Domestic Consumption (MT)	10725	10725	7162	7162	8900	8900
Ending Stocks (MT)	150	150	150	150	150	150
Total Distribution (MT)	14550	14550	11390	11390	14050	14050
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments