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Report Name: Fresh Deciduous Fruit Annual

Country: Turkey

Post: Ankara

Report Category: Fresh Deciduous Fruit

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Report Highlights:

Owing to favorable growing conditions and ongoing investments to improve on-farm yields, Turkey's production and export of apples, pears, and table grapes is forecast at or near record levels in MY 2022/23. At least 80 percent of the projected production of these deciduous fruits will be consumed in Turkey, mainly as fresh fruit. Meantime, commercial growers continue to make on-farm investments to capitalize on growing opportunities in the domestic and export markets. Last marketing year, India was the leading destination for Turkish apples for the second straight year, while Russia held its top spot as the top market for Turkish pears and table grapes.

Note to Reader: MY 2022/23 numbers are Post forecasts, based on different information sources. Prior year figures are adjusted to align with Turkey's official statistics.

PRODUCTION

Apples

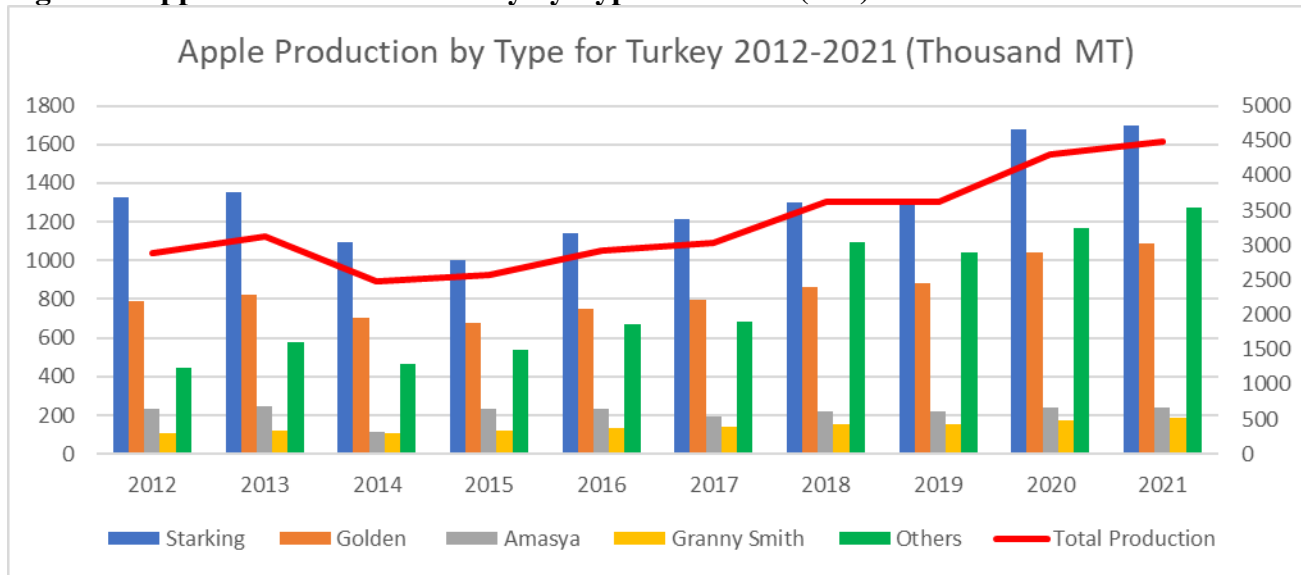
For the MY 2022/23 season, total apple production is forecasted at a record of 4.77 million metric tons (MMT) due to favorable growing conditions and an increase in the number of bearing trees. Turkey's apple production has steadily climbed higher for the last half dozen years as farmers have planted more higher-yielding apple trees and adopted modern growing techniques (Figure 1). According to market sources, growers are pleased with the higher yields and quality of this year's crop, which is harvested from September through November. The MY 2021/22 production figure is revised higher to 4.49 MMT, which is in line with the latest government estimates.

With its diverse geography and climate, Turkey produces hundreds of varieties of apples, but only a few of these are marketed commercially. The main varieties are Starking, Golden, Amasya, and Granny Smith, which collectively accounted for nearly three-quarters of total production in MY 2020/2021. Starking (a cousin of the Red Delicious apple) is the most popular variety, making up about 38 percent of total production or about 1.7 MMT (Figure 1). The production the two most popular apple varieties, Starking and Golden, have shown notable increases over the last decade even though the planted area for these varieties has declined. The main reason behind this trend is more farmers are using better production practices to optimize yields.

In addition to the top apple varieties, the production of other apple varieties over the last five years, especially red and sweet apple varieties, has grown by 30 percent (Figure 1).¹ These other increasingly popular varieties include Starkrimson, Scarlet Spur, and Red Chief. The main reason thought to be underlying this increase in production of other apple varieties is export demand from Middle Eastern countries.

¹ <http://www.turktarim.gov.tr/Haber/368/en-cok-starking-ve-golden-uretiyoruz>

Figure 1. Apple Production of Turkey by Type 2012-2021 (MT)

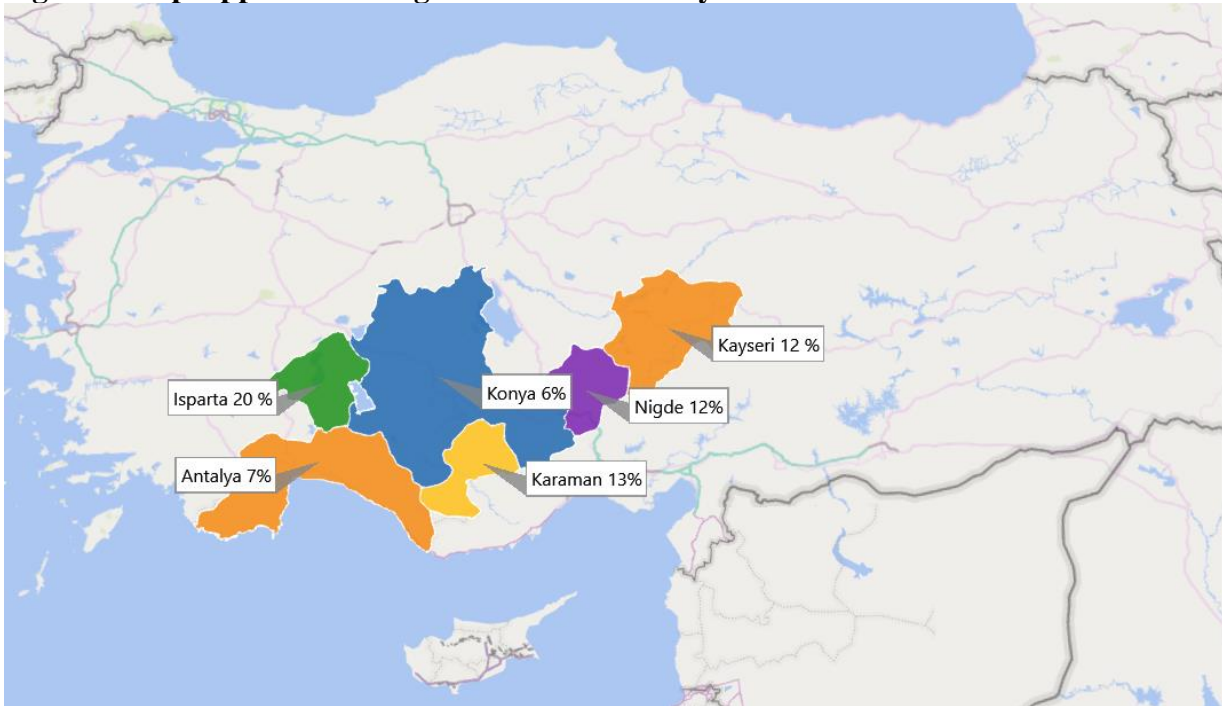


Source: TurkStat, 2022

Commercial apple orchards are largely concentrated in central Anatolia and Mediterranean regions located in the southwestern part of Turkey. As shown in Figure 2, approximately 45 percent of all commercial apple production comes from three provinces: Isparta, Karaman, and Nigde. Isparta is the largest apple producing province with about 730,000 metric tons (MT) of apples annually. Karaman, a major source of export production, is the second largest apple producing province with 500,000 MT of production. In response to growing domestic and export opportunities, growers in apple-producing areas in Turkey have switched to growing more profitable and higher-yielding apple varieties.

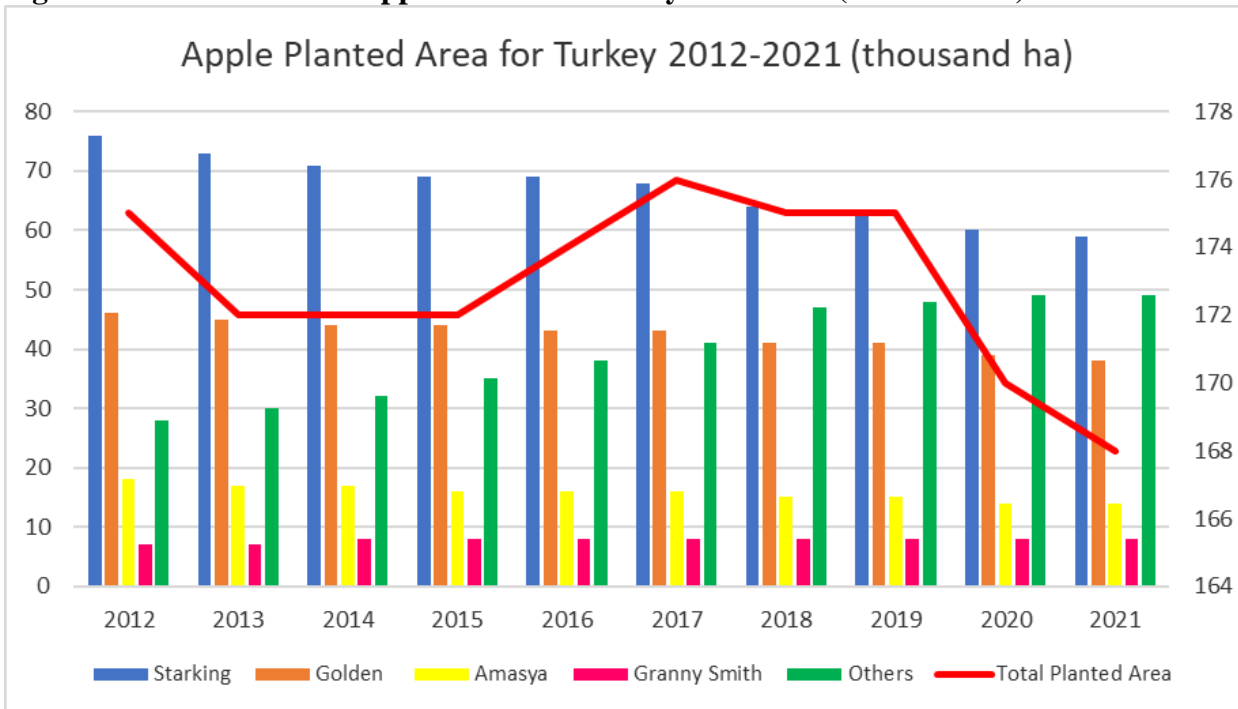
Apples have traditionally been the most economically significant deciduous crop in Turkey, followed by table grapes and pears. While investments have been made to modernize Turkey’s apple production industry, traditional low-yielding orchards are still common. Turkey is the one of the largest producers of apples in Europe.

Figure 2. Top Apple Producing Provinces in Turkey



Source: TurkStat,2022

Figure 3. Planted Area of Apple Trees for Turkey 2012-2021 (thousand ha)



Source: TurkStat, 2022

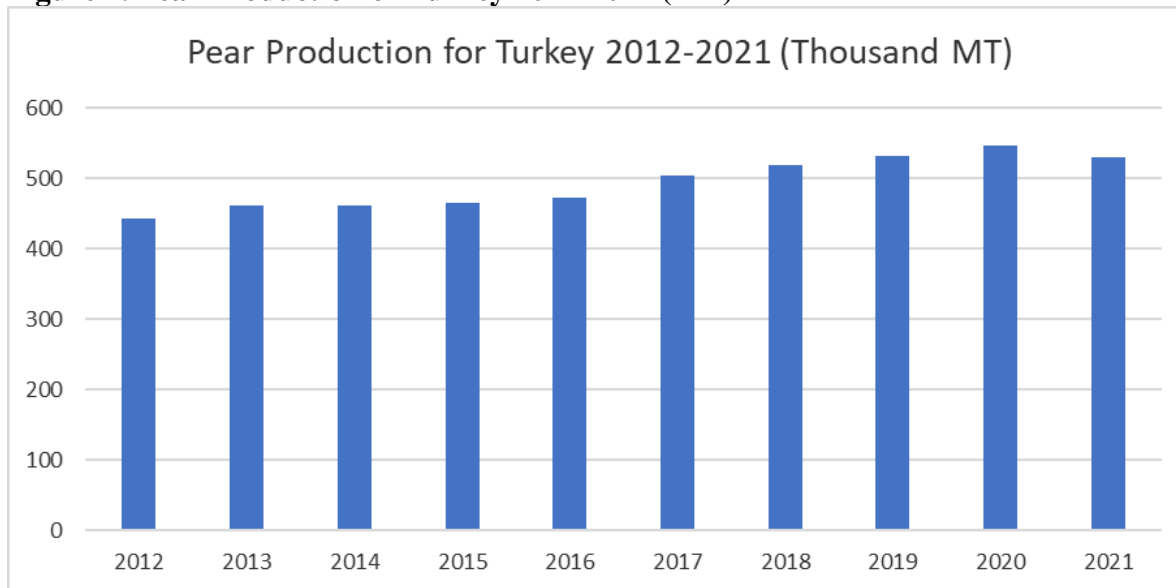
Pears

For the MY 2022/23 season, total pear production is forecasted at a record 560,000 MT, up about 6 percent from last year's newly revised figure. This increase is mostly attributed to favorable growing conditions. Turkey's pear harvest generally starts around July and continues through October. Turkish pear producers expect higher production volumes this season and relatively better prices compared to last year. Pear production has increased by 15 percent over the last five years, which is mostly due to increasing demand from foreign export markets, especially Russia, Iraq, and Romania.

In response to strong demand, Turkish pear growers have invested in new orchards, uprooted non-commercial varieties, and replanted with trees suitable for export markets in recent years. The area planted in pears has increased around three percent over the last decade (Figure 5). The major varieties of pears grown in Turkey are Santa Maria, Akca, Mustafabey, Cassia, Williams, Ankara, and Deveci.

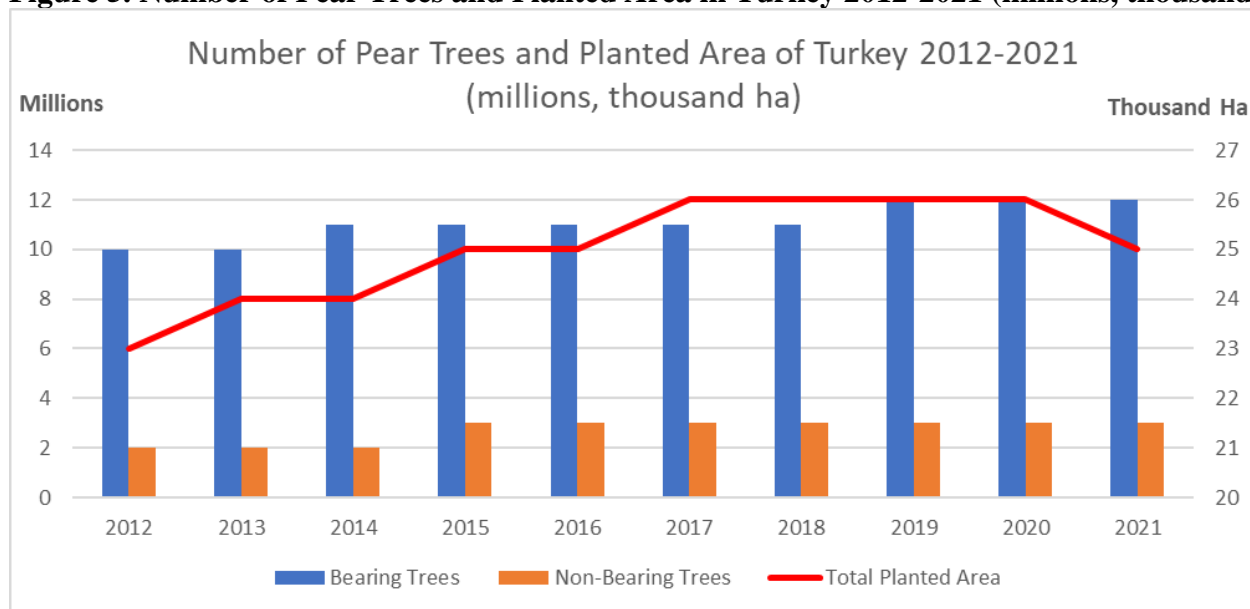
There are many different pear varieties grown in Turkey. Almost 50 percent of the production is concentrated in the south and western coastal areas of Turkey, especially the Marmara, Aegean and Mediterranean regions.

Figure 4. Pear Production of Turkey 2012-2021 (MT)



Source: TurkStat, 2022

Figure 5. Number of Pear Trees and Planted Area in Turkey 2012-2021 (millions, thousand ha)



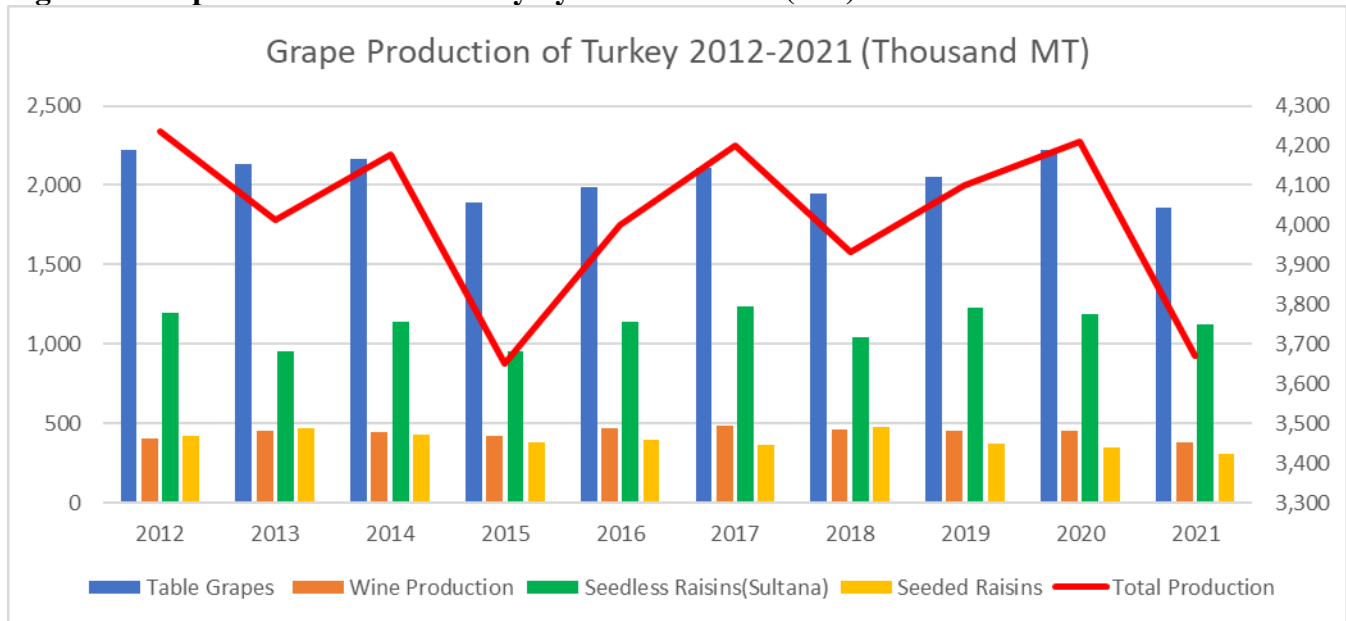
Source: TurkStat, 2022

Table Grapes

Table grape production for MY 2022/23 is forecast at a near record of 2.2 MMT, up 13 percent from last year’s newly revised estimate due to favorable weather conditions. The MY 2021/22 production estimate is revised slightly downward based on the latest government data. For reference, Turkey produced approximately 3.7 million MT of fresh grapes for all purposes in MY 2021/22, of which table grapes accounted for 51 percent of the total.

Grapes are a major commercial crop and grown throughout Turkey. About one third of all production is seedless grapes, which are mainly grown in the Aegean region located in the western part of the country. Wine and fresh table grapes are mostly grown in the Marmara region located in the northwest part of Turkey. Table grapes are primarily grown in Manisa, Mersin, and Denizli provinces in the central southeastern half of the country. Figure 6 shows grape production of Turkey by use over the last decade.

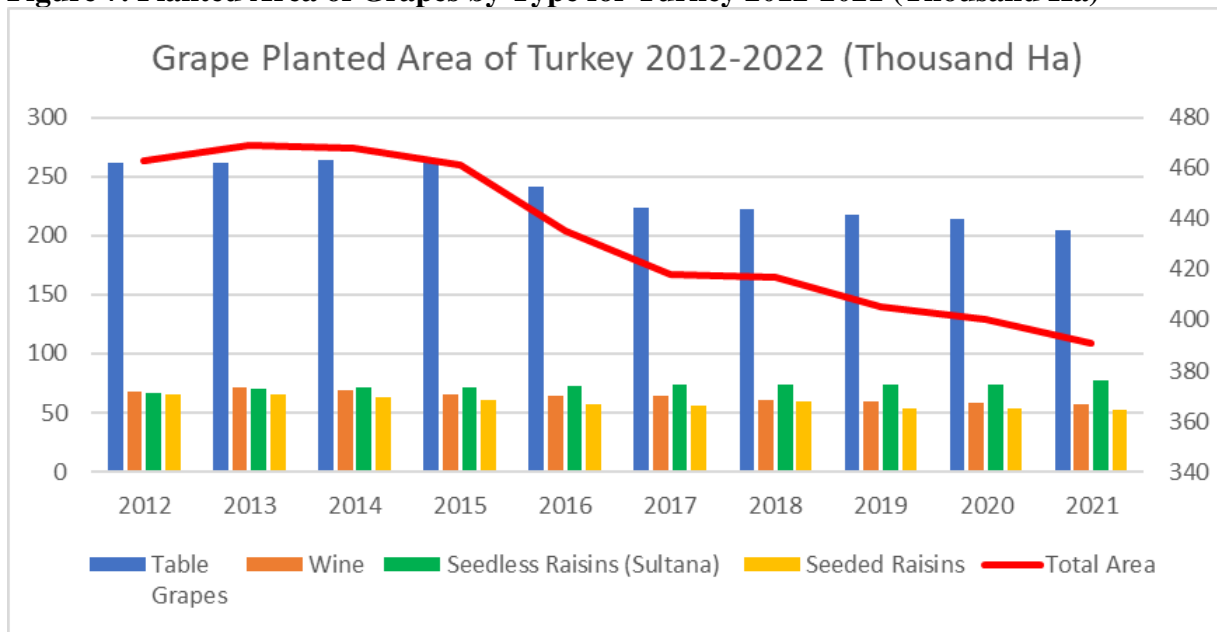
Figure 6. Grape Production in Turkey by Use 2012-2021 (MT)



Source: TurkStat, 2022

As shown in Figure 7, Turkey’s total grape production area is around 400,000 hectares (ha) with table grapes accounting for the largest percentage of the planted area. The table grape planted area has been trending downward for the last half dozen years.

Figure 7. Planted Area of Grapes by Type for Turkey 2012-2021 (Thousand Ha)



Source: TurkStat, 2022

CONSUMPTION

Apples

Apple consumption in MY 2022/23 is forecast higher year-over-year at 4.35 MMT due to a projected increase in production. The consumption estimate for MY 2021/22 was revised slightly higher to about 4.1 MMT in parallel with an upward revision to production.

Apples are one of the most preferred fresh fruits in Turkey due to their widespread availability, traditional use, and large number of varieties. Traditionally, about 70-75 percent of Turkey's apple production is consumed as fresh fruit. Consumers generally prefer eating Starking, Golden, Amasya, and Granny Smith varieties. About 20 percent of production is processed into juice, canned products, vinegar, or dried products, and about 5-10 percent is exported as fresh produce. Annual per capita consumption of apples is estimated at 30-35 kg.

With the use of modern, temperature-controlled storage facilities, apples can be stored and marketed throughout the year. Current cold storage capacity in Turkey is more than 1 million MT and increasing yearly with new investments. The Isparta province – the leading apple producing province in Turkey – is home to many cold storage facilities for apples and other fruits. Other apple and fruit-growing regions across Turkey are also investing to expand cold storage capacity.

As of November 2022, the average retail price for Golden apples was about 13 Turkish Lira (TL) (\$.070) while Amasya apples retailed a higher at 23 TL (\$1.24). Last year, these varieties retailed at about 6-9 TL per kilogram (\$0.62-\$0.93). The year-over-year price increase of apples in terms of TL was higher than in U.S. dollars (USD) because the Lira has depreciated against the USD and other major currencies. As of November 2022, the TL had lost about half of its value against the dollar compared to the same time last year. The exchange rate in November is \$1=18.62 TL, whereas last year it was \$1=9.5 TL.

Pears

Pear consumption in MY 2022/23 is forecast to go up year-over-year to 463,100 MT due to an increase in production. About 90 percent of pears are consumed fresh, 3-5 percent are exported, and the remainder are canned. The most preferred varieties are Santa Maria (30 percent), Deveci (20 percent), Ankara (10 percent), Williams (10 percent), Keiffer (5 percent), and Akca (5 percent). An increasing number of cold storage facilities in Turkey helps to provide pears and other fresh fruit throughout the winter. Annual pear consumption is 5 kg per capita.

As of November 2022, the average retail price for a kilogram of Santa Maria pears was 22 TL (\$1.18). Deveci pears are retailing for a little more at 25 TL (\$1.34) per kilogram. Last year, the retail price for a kilogram of pears was 9-10 TL (\$0.93-\$1.05).

Table Grapes

Table grape consumption for MY 2022/23 is forecast higher year-over-year at 1.95 MMT due to an increase in production. The MY 2021/22 consumption estimate is revised downward to 1.59 MMT based on adjusted production numbers.

In MY 2021/22, almost half of Turkey’s total grape production was consumed as fresh table grapes and about 38 percent was dried and sold as raisins, including seedless sultanas which are primarily exported. The remainder was processed, primarily for molasses and wine production. Fresh grapes are seasonal and are available throughout the summer until the middle of autumn. Annual consumption of all grapes is around 35 kg per capita.

As of November 2022, the average retail price for a kilogram of grapes was 23 TL (\$1.24), whereas last year a kilogram cost 9-10 TL (\$0.93-\$1.05).

TRADE

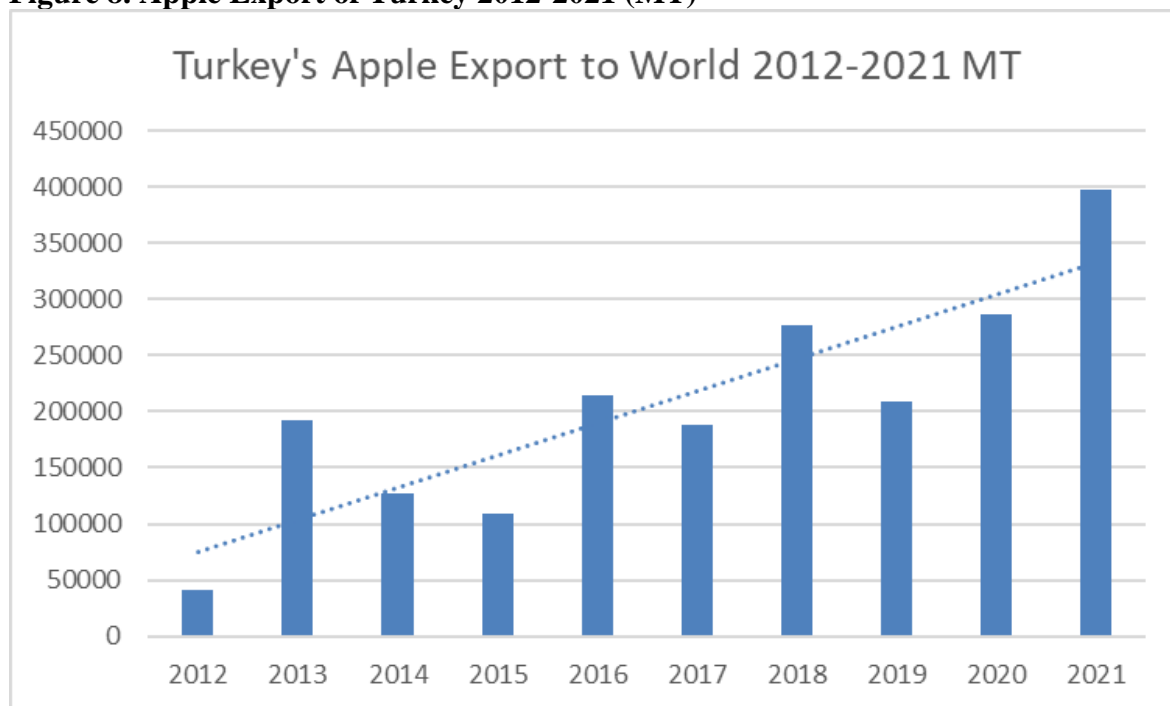
Apples

Apple exports for MY 2022/23 are forecast higher year-over-year at a record 420,000 MT due to an increase in production. This export forecast assumes steady demand from neighboring countries.

Turkey’s apple export volumes have increased 10 times over the last decade as growers have adapted their operations to capitalize on growing export opportunities (Figure 9). Proximity to export markets and competitive prices have also helped fuel Turkish apple exports.

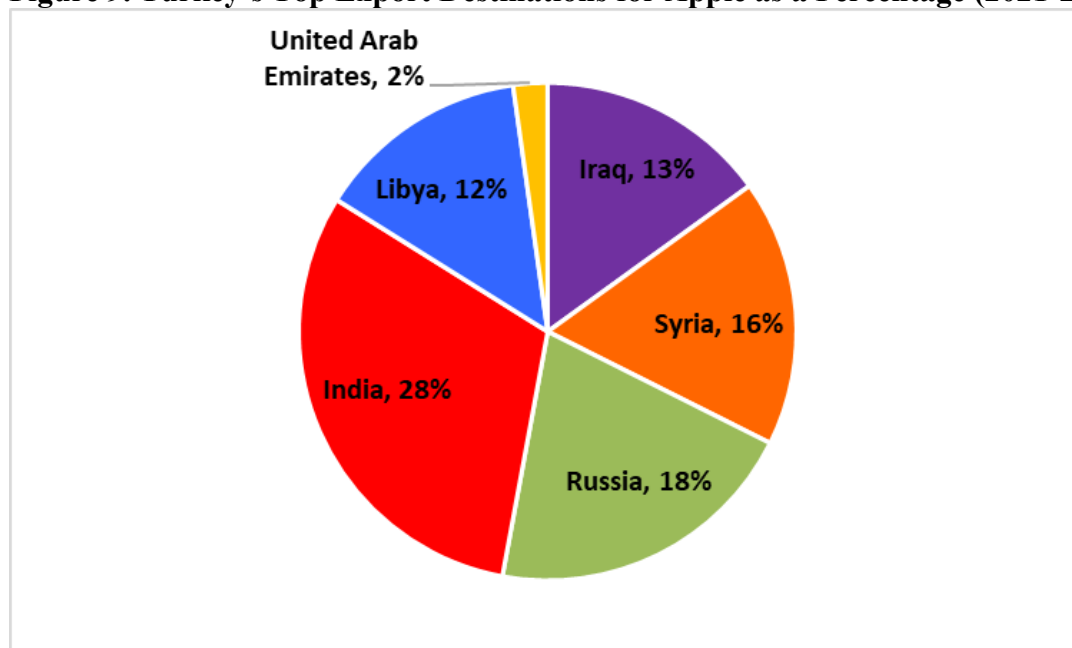
Turkey’s top export destinations are India, Iraq, Syria, Russia, Libya, and the United Arab Emirates (Figure 10). In the last few years, Turkey’s apple exports to India have really taken off, climbing from about 10,000 MT in MY 2017/18 to more than 110,000 MT in MY 2021/22. India has been the top export destination for Turkish apples for two consecutive years. Red Delicious is the leading apple variety being exported from Turkey to India. With this increase in sales to India, Turkish apples are now competing head-to-head with U.S. apples in the Indian market.

Figure 8. Apple Export of Turkey 2012-2021 (MT)



Source: Trade Data Monitor, LLC, 2022

Figure 9. Turkey’s Top Export Destinations for Apple as a Percentage (2021-2022)



Source: Trade Data Monitor, LLC, 2022

Table 1. Turkey’s Top Fresh Apple Export Destinations 2017-2022 (MT, HS 080810)

Partner	Year Ending: June (Metric Ton)				
	2017/18	2018/19	2019/20	2020/21	2021/22
Iraq	60,484	132,747	37,196	34,019	53,544
Syria	32,985	47,751	30,989	45,198	61,758
Russia	47,297	8,510	40,132	60,707	73,081
India	10,474	20,892	29,055	67,573	110,236
Libya	3,546	2,424	15,741	30,534	49,424
United Arab Emirates	2,621	17,275	8,339	6,968	7,928
Total	188,480	276,641	208,381	287,010	396,989

Source: Trade Data Monitor, LLC, 2022

Pears

Pear exports for MY 2022/23 are forecast slightly higher than last year at a record 97,000 MT due to an increase in domestic production. In MY 2021/22, Turkey exported 94,200 MT of pears, which is up about 20,000 MT from the previous year due to strong demand from Russia. Russia was the leading

export destination, accounting for about one-third of total export volumes. Other leading export destinations for Turkish pears were Iraq and Romania (Table 2).

Table 2. Turkey’s Top Fresh Pear Export Destinations 2017-2022 (MT, HS 080830)

Partner	Year Ending: June (Metric Ton)				
	2017/18	2018/19	2019/20	2020/21	2021/22
Russia	15,931	10,473	18,219	28,170	34,468
Iraq	12,096	14,656	12,770	17,100	17,593
Romania	2,273	2,436	5,745	7,579	7,252
Turkmenistan	1,608	3,086	882	1,144	1,073
Bulgaria	1,462	881	1,370	2,014	3,107
Germany	804	853	1,130	1,566	2,102
Total	43,680	41,870	50,865	73,317	94,278

Source: Trade Data Monitor, LLC, 2022

Table Grapes

For MY 2022/23, table grape exports are forecast higher year-over-year at a record 280,000 MT, based on an increase in production and assuming strong export demand. In 2021/22, table grape exports reached nearly 264,000 MT. Russia was the top export destination, followed by Ukraine and Belarus (Table 3).

Table 3. Turkey’s Top Table Grape Export Destinations 2017-2022 (MT, HS 080610)

Partner	Year Ending: May (Metric Ton)				
	2017/18	2018/19	2019/20	2020/21	2021/22
Russia	162,696	88,067	101,909	116,591	129,552
Ukraine	27,576	20,478	31,018	35,830	50,543
Belarus	15,357	11,695	10,612	7,712	20,265
Saudi Arabia	13,422	13,881	9,997	5,165	0
Germany	11,005	7,689	7,776	6,645	7,935
Poland	11,396	5,794	7,773	6,968	4,220
Total	279,674	179,299	205,102	214,822	263,915

Source: Trade Data Monitor, LLC, 2022

POLICY

In recent years, Turkish farmers have invested in new deciduous fruit orchards thanks to stable export demand and government support payments. Producers registered with the Ministry of Agriculture and Forestry are eligible for government subsidies. In 2022, the government of Turkey (GoT) allocated about \$2 billion in subsidy payments to support overall agricultural production.

However, with skyrocketing inflation in Turkey, agricultural production costs have outpaced the increases in government support payments. The depreciation of the Turkish Lira is one of many reasons for the increase in inflation. According to GoT statistics, the current prices for fertilizer and fuel have

jumped year-over-year by 36 and 70 percent, respectively compared to last year. Meantime, farmgate prices for deciduous fruits have also increased but are not keeping pace with inflation.

Imports of fresh apples, pears, and table grapes are negligible given domestic production volumes and high import duties. Tariffs on these fruits are provided in Table 4. Turkey is also a major producer and exporter of juice. Juice exporters are supported through an export refund program.

Table 4. Import Duties for Fresh Apples, Pears, and Table Grapes, December 2021

Product	Tariff Code	Duty (percent)
Fresh Apples	0808.10	60.3
Fresh Pears	0808.30	60.3
Fresh Table Grapes	0806.10	54.9

Source: [Resmi Gazete \(Turkish Formal Newspaper\)](#)

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

Apples, Fresh Market Year Begins Turkey	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	175000	175000	171000	169000	0	170000
Area Harvested (HA)	175000	175000	171000	169000	0	170000
Bearing Trees (1000 TREES)	65000	65000	66500	72300	0	74000
Non-Bearing Trees (1000 TREES)	15000	15000	14500	14300	0	14000
Total Trees (1000 TREES)	80000	80000	81000	86600	0	88000
Commercial Production (MT)	4150000	4150000	4136000	4343000	0	4620000
Non-Comm. Production (MT)	150000	150000	150000	150000	0	150000
Production (MT)	4300000	4300000	4286000	4493000	0	4770000
Imports (MT)	1000	350	1000	1336	0	1000
Total Supply (MT)	4301000	4300350	4287000	4494336	0	4771000
Domestic Consumption (MT)	4013400	4013350	3902000	4097347	0	4351000
Exports (MT)	287600	287000	385000	396989	0	420000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	4301000	4300350	4287000	4494336	0	4771000

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

Pears, Fresh Market Year Begins Turkey	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	26400	26400	26400	25100	0	26000
Area Harvested (HA)	26400	26400	26400	25100	0	26000
Bearing Trees (1000 TREES)	11600	11600	11800	11600	0	11800
Non-Bearing Trees (1000 TREES)	2800	2800	3000	2800	0	2500
Total Trees (1000 TREES)	14400	14400	14800	14400	0	14300
Commercial Production (MT)	530000	530000	515000	510000	0	540000
Non-Comm. Production (MT)	20000	20000	20000	20000	0	20000
Production (MT)	550000	550000	535000	530000	0	560000
Imports (MT)	200	200	200	200	0	100
Total Supply (MT)	550200	550200	535200	530200	0	560100
Domestic Consumption (MT)	476900	476900	440200	436000	0	463100
Exports (MT)	73300	73300	95000	94200	0	97000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	550200	550200	535200	530200	0	560100

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

Grapes, Fresh Table Market Year Begins Turkey	2020/2021		2021/2022		2022/2023	
	Jun 2020		Jun 2021		Jun 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	417000	417000	40000	391000	0	400000
Area Harvested (HA)	417000	417000	40000	391000	0	400000
Commercial Production (MT)	2100000	2100000	1820000	1737000	0	2116000
Non-Comm. Production (MT)	120000	120000	120000	120000	0	120000
Production (MT)	2220000	2220000	1940000	1857000	0	2236000
Imports (MT)	400	300	2000	300	0	300
Total Supply (MT)	2220400	2220300	1942000	1857300	0	2236300
Fresh Dom. Consumption (MT)	2005500	2005300	1677000	1593300	0	1956300
Exports (MT)	214900	215000	265000	264000	0	280000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	2220400	2220300	1942000	1857300	0	2236300

(HA), (MT)

Attachments:

No Attachments