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## **Turkey**

### **Fresh Deciduous Fruit Annual**

### **Fresh Deciduous Fruit Annual 2018**

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**Report Highlights:**

In marketing year (MY) 2018/19, Turkey's total apple crop is expected to increase to three million metric tons (MMT) and the pear crop to 450,000 MT due to favorable weather conditions during winter and flowering. The Turkey table grape production forecast for MY 2018/19 is 1,900,000 MT, down ten percent from last year due to heavy rains during August in some parts of Manisa in the Aegean Region. Due to strong demand from neighboring countries, Turkey's fresh deciduous fruit exports are increasing.

**Commodities:**

Apples, Fresh

Pears, Fresh

Grapes, Table, Fresh

**Production**

Even though there are many apple, grape and pear varieties grown in Turkey, most of these are not commercial varieties. However, with the help of increasing export opportunities and better price expectations from export markets in recent years, some large commercial orchards were established which grow commercial varieties with better quality seedlings and modern agriculture methods. Most of the production in large and commercial orchards is exported as they grow new varieties that are in high demand in export markets.

*Apples*

Apples have traditionally been the most economically significant deciduous fruit crop for Turkey, followed by table grapes and pears. Apple production in MY 2017/18 decreased five percent over the previous season to 2,750,000 metric tons (MT) due to some hail damage during June, despite a hopeful spring period during flowering.

Turkey's MY 2018/19 winter was mild and left orchards in good condition. Spring weather conditions during flowering and fruit setting were good. There was not any frost damage reported. For the 2018/19 marketing year, Post forecasts apple production will increase to 3,000,000 MT. Yields are expected to be high in the Central Anatolia and the Northern Mediterranean Regions.

Despite fluctuating apple production each year, Turkey has been among the top five apple producing countries in the world, with China, EU, India, and United States. Traditional low-yielding orchards are still a major part of Turkish apple production, so Turkey is not a prominent exporter of apples. Apple trees can be cultivated almost all parts of Turkey with a variety of different physical and climatic conditions. However, commercial orchards are generally located in the southern part of Central Anatolia and the Northern Mediterranean Regions. Harvest starts around July and continues till October. Turkey's diverse geographic regions allow for production of 460 varieties of apples, but only ten of these are marketed commercially.

Approximately 50 percent of all commercial apple production comes from three provinces: Isparta, Karaman and Nigde. Around 600,000 MT of apples, which is about 20 percent of the total production of Turkey, are produced in Isparta. Karaman is the other production center with 12 million trees and around 15 percent of total production of Turkey. It is becoming prominent in foreign trade with new investments where apple growers converted orchard area into other, more profitable types of apple production. With the help of two million new trees, Karaman region's commercial production is expected to increase in the coming years. Commercial apples are also grown in Antalya, Canakkale, Denizli and Amasya.

Despite changes in the varietal structure, *Starking* and *Golden* continue to be the most-cultivated apples. Almost forty percent of the apples grown in Turkey are *Red Delicious (Starking)* and about one fourth are *Golden Delicious*. *Granny Smith*, *Fuji*, *Gala*, *Amasya*, *Jonagold*, *Cripps Pink* and *Braeburn* varieties are also becoming more popular. The new varieties are becoming increasingly popular among growers due to their higher export potential.

According to Turkish official data just released this year, the estimate for the total number of all apple trees in Turkey as of 2017 is 74 million, up 57 percent from 2007 when the number planted was 47 million. Apple plantation areas are not increasing substantially but there is a notable switch from traditional apple trees to modern shrub-type varieties that yield more because they can be planted with much closer spacing. Today almost half of the total apple production is composed of modern varieties.

Despite the fact that total planting area has remained similar at 170,000 ha in recent years, farmers have gradually been replacing old trees with varieties which are more popular in export markets. The numbers are increasing regularly because of growing demand for Turkish fruits in export markets and government support to the sector.

### *Pears*

For MY 2018/19, Post forecasts pear production will increase to 450,000 MT due to good weather during flowering. Despite the area remain same, farmers have gradually been replacing old trees with better varieties. Pear production in MY 2017/18 decreased to 420,000 metric tons (MT) (from 440,000 MT in MY 2016/17) as there was some hail damage during June. Orchard conditions were favorable following mild winter and flowering was good.

Many different varieties of pears are grown in Turkey and are harvested throughout the year. Almost 50 percent of the production comes from the Marmara region, followed by the Aegean and North Mediterranean regions, concentrated in cities like Bursa, Yalova, Antalya, Ankara, Konya, and Burdur. Both domestic and foreign pear varieties are grown in Turkey. The major varieties are *Santa Maria*, *Akca*, *Mustafabey*, *Cassia*, *Williams*, *Ankara*, and *Deveci*.

### *Table Grapes*

Grapes are grown in many regions throughout Turkey and are a significant commercial crop. Seedless grapes are mainly grown in the Aegean Region (Western Turkey). The Marmara Region (Northwest Turkey) produces grapes for wine production and for fresh consumption. The earliest varieties come from the Mediterranean Region (Southern Turkey). Harvest season begins in May in the Mediterranean Region and continues until late October throughout Turkey. See Turkey **Raisin Annual Report (link)** for details.

Grape production forecast in Turkey for MY 2018/19 is lower than usual at 1,900,000 MT, down ten percent from MY 2017/18 due to heavy rains during August in some part of Manisa in the Aegean Region. In MY 2017/18, table grape production had decreased approximately ten percent compared to the previous year, reaching 2,120,000 MT. The decrease was mostly due to unfavorable weather conditions in grape production areas.

## **Consumption**

### *Apples*

Traditionally, about 90 percent of Turkey's apple production is consumed as fresh fruit. About five percent is processed into juice, canned products, vinegar or dried products, and about five percent is exported fresh. Apples are one of the most preferred fresh fruits in Turkey due to their widespread access, traditional use, and a large number of varieties. Through the use of controlled atmosphere storage facilities, apples can be marketed throughout most of the year. Current cold storage capacity is more than 1 million MT in Turkey and increasing with new investments.

There is a lack of consumer awareness in terms of varieties. Consumers recognize apples according to their colors (such as red, yellow and green) and taste. Turkish consumers prefer medium-sized apples, where six pieces weigh about a kilo. Starking, Golden, and Granny Smith are the most preferred varieties in Turkey. Turkish consumers usually prefer Red Delicious at the beginning of the season, and Golden Delicious after the New Year. This is because Red Delicious apples become softer a few months after they are harvested unless they are kept in cold storage properly.

As of October 2018, in the markets (average domestic prices in retail markets) apples are sold for about 4 TL per kilogram (3 TL last year), pears are sold for 6 TL (4 TL last year) and grapes are sold for 6 TL (3 TL last year). Price increases are in line with normal food inflation which is currently above 20 percent. Particularly for grapes this year though, according to grape producers, the Turkish currency depreciation in recent months opened up additional export opportunities and could be the reason for the additional retail price increase for grapes. Generally speaking, the price that farmers receive is about half or less the retail prices.

### *Pears*

Traditionally pears in Turkey are consumed fresh. However, three to five percent are exported, and the remainder are canned. The most preferred varieties are Santa Maria (constitutes 30 percent of total production), Deveci (20 percent), Ankara (10 percent), Williams (10 percent), Keiffer (5 percent) and Akca (5 percent). An increasing number of cold storage facilities helps to store and serve fruits until the spring.

### *Table Grapes*

Fresh grapes are seasonal and are available throughout summer until the middle of autumn. Consumption is high during the season. Grapes are mainly sold in loose format, which is preferred by consumers, but packaged grapes are also available in supermarkets and hypermarkets. A decrease in production and strong exports this year causes a considerable price increase in grapes on local market in October 2018.

## **Trade**

Although Turkey is among the top deciduous fruit producing countries, exports traditionally have not been high compared to production. Exports usually range between 5-15 percent of total production,

varying by product and year. The major reason for the low export volume has been the lack of new varieties which are preferred in many importing countries and also the large domestic market for fruit within Turkey. Recently, while Turkish exporters have been seeking new markets for Turkish fruits, farmers have gradually been replacing old trees with varieties which are more popular in export markets. The re-opened Russian market helped to improve Turkish exports starting from MY 2017/18.

### Apples

Turkey exported 189,000 MT of apples in MY 2017/18. Iraq, Russia, and Syria, were the top three export destinations for Turkish fresh apples in MY 2017/18, making up 75 percent of all Turkish apple exports. The largest export destination was Iraq with 60,485 MT of apples, followed by Russia with 47,316 MT. An increase in Turkish apple exports in recent years was mainly due to strong demand from the neighboring countries. Apple export forecast for MY 2018/19 is 220,000 MT, which is in parallel with production assuming continuing demand from neighboring countries.

**Table 1: Turkey’s Major Export Destinations - Apples Fresh, USD and MT (year ending June) – HS 080810**

<b>Turkish Fresh Apple Exports</b> Commodity: 080810, Apples, Fresh						
Year Ending: June (Metric Ton)						
<b>Partner Country</b>	<b>2015/16</b>		<b>2016/17</b>		<b>2017/18</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
Iraq	13,214,555	54,921	36,882,119	168,755	13,342,697	60,485
Russia	2,499,353	3,056	331,351	461	36,703,018	47,316
Syria	4,254,171	22,313	2,573,179	11,307	12,559,515	32,997
India	730,560	1,123	2,709,358	4,114	7,555,799	10,475
Saudi Arabia	783,146	1,375	2,431,164	6,550	3,891,887	9,819
U.A. Emirates	441,601	743	1,544,316	2,608	1,948,967	2,621
Jordan	1,717,293	4,373	612,344	1,972	1,831,330	4,263
Libya	166,177	391	626,352	1,194	1,750,657	3,547
Turk. Rep. of N. Cyprus	1,116,752	2,373	1,233,308	3,232	1,429,589	3,638
Turkmenistan	1,071,807	1,620	1,495,138	3,014	1,261,059	2,326
Other	7,700,161	18,217	5,110,849	12,572	6,290,524	11,591
<b>World</b>	<b>33,695,576</b>	<b>110,505</b>	<b>55,549,478</b>	<b>215,779</b>	<b>88,565,042</b>	<b>189,078</b>

Source: Global Trade Atlas

Apple imports decreased to 600 MT from 1000 MT in MY 2017/18. Chile was the prominent supplier with 400 MT of apple. Israel, Cyprus, and Bulgaria were other suppliers in MY 2017/18. Post

forecasts apple imports will be at about 500 MT in MY 2017/18 due to abundant domestic apple production.

### *Pears*

Pear exports increased from about 16,000 MT in to about 43,700 MT in MY 2017/18 due to strong demand from neighboring countries. Iraq, Russia, and Romania have been the top export destinations for pears. Pear export forecast is 45,000 MT in MY 2018/19 assuming stable demand from the same markets. Imports are negligible at 19 MT and 86 MT in MY 2017/18 and MY2016/17, respectively.

**Table 2: Turkey’s Major Export Destinations - Pears Fresh, USD and MT (year ending June) – HS 080830**

Turkey Export Statistics						
Commodity: 080830, Pears, Fresh, Metric Ton						
Year Ending: June						
Partner Country	2015/16		2016/17		2017/18	
	USD	Quantity	USD	Quantity	USD	Quantity
Iraq	2,816,800	9,504	2,044,251	7,085	4,319,693	12,098
Russia	3,274,406	5,106	83,392	132	10,720,239	15,931
Romania	321,409	379	304,276	298	1,845,675	2,274
Turkmenistan	1,253,477	1,475	843,217	955	1,149,043	1,615
Saudi Arabia	1,409,036	2,195	961,100	1,657	742,301	1,627
Bulgaria	24,851	53	58,486	117	865,412	1,464
Turk. Rep. of N. Cyprus	582,134	1,134	493,034	968	525,949	1,214
Syria	537,967	1,081	516,420	1,301	420,617	1,260
Germany	540,722	432	529,462	438	889,078	804
Greece	147,003	216	222,527	312	415,600	567
Other	1,733,539	2,622	1,982,508	2,695	2,946,716	4,833
<b>Total</b>	<b>12,641,344</b>	<b>24,197</b>	<b>8,038,673</b>	<b>15,958</b>	<b>24,840,323</b>	<b>43,687</b>

Source: Global Trade Atlas

### *Table Grapes*

Table grape export forecast is 300,000 MT for MY 2018/19, assuming stable demand from Russia and other markets. Russia, Ukraine and Germany are the top destinations for Turkish table grape exports. In MY 2017/18, Turkey exported about 280,000 MT of fresh grapes, up 60 percent from 173,000 MT in MY 2016/17 due to the re-opened Russian market. In MY 2017/18, the main export destination was Russia with about 163,000 MT, which is 60 percent of all fresh grape exports. Due to depreciation of Turkish Lira against other currencies, products are preferred to export instead of selling in local markets. Imports into Turkey have been negligible at about 500 MT from Chile and South Africa in recent years.

**Table 3: Turkey’s Major Export Destinations - Grapes Fresh, USD and MT (year ending June) – HS 080610**

Turkey Export Statistics						
Commodity: 080610, Grapes, Fresh						
Year Ending: May						
Partner Country	2015/16		2016/17		2017/18	
	USD	Quantit y	USD	Quantit y	USD	Quantit y
Russia	97,158,278	119,447	-	-	121,168,425	162,696
Ukraine	4,461,338	7,519	10,969,440	23,211	12,503,643	27,577
Germany	9,459,091	9,898	9,925,308	11,422	10,159,595	11,006
Belarus	5,606,305	9,235	25,642,371	49,426	9,709,219	15,357
Poland	4,947,236	5,163	7,479,834	8,870	9,617,092	11,396
Saudi Arabia	6,187,501	8,797	12,001,301	17,768	7,486,882	13,421
Romania	769,881	758	1,548,496	1,738	4,070,351	4,158
Latvia	1,572,452	1,700	1,375,021	1,809	2,822,825	3,532
Other	10,582,603	12,106	35,519,087	58,991	19,652,572	30,531
Total	<b>\$140,744,685</b>	<b>174,623</b>	<b>\$104,460,858</b>	<b>173,235</b>	<b>\$197,190,604</b>	<b>279,674</b>

Source: Global Trade Atlas

## Policy

Fresh deciduous fruits are mostly sold domestically and a relatively smaller amount is exported through private traders and specialized marketing cooperatives. Stable export demand and government support have helped Turkish farmers to invest in new orchards. Recently, the number of cold storage facilities has been increasing through the help of government support which helps traders to supply fruits during the year.

There are payments for producers who are registered in the Ministry of Agriculture and Forestry (MinAF) farmer registration system. According to [an official announcement](#) in 2018, MinAF provides support of 140 Turkish Lira (TL)/Ha to help with fuel and fertilizer costs. To farmers who plant new orchards, MinAF provides 1,000 TL/Ha to help farmers buy standard dwarf fruit saplings and establish orchards, or they pay 4,000 TL/Ha for those who buy government-certified dwarf saplings to ensure higher quality trees are being planted in Turkey. They also support organic farming and good farming practices, which vary from 100TL/ha to 1000 TL/ha. The government has been implementing a crop insurance support program for orchards, subsidizing 50 percent of the cost of crop insurance.

The GOT allocated 25 Million TL (~\$4.5 Million) for certified sapling support for the entire fruit sector (including deciduous, stone fruits, and citrus trees) in 2018. (Note exchange rate \$1 US = 5.5 TL as of October 2018).

Duties for imports of fresh apples, pears, and table grapes are provided below.

**Table- 4: Import Duties for Fresh Apples, Pears, and Table Grapes**

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

**Production, Supply, and Distribution Tables**

Apples, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jul 2016		Jul 2017		Jul 2018	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Turkey						
Area Planted	107500	107500	107500	170000	0	170000
Area Harvested	170000	170000	170000	170000	0	170000
Bearing Trees	55000	55000	55000	55000	0	59000
Non-Bearing Trees	15000	15000	15000	15000	0	15000
Total Trees	70000	70000	70000	70000	0	74000
Commercial Production	2750000	2750000	2600000	2600000	0	2850000
Non-Comm. Production	150000	150000	150000	150000	0	150000
Production	2900000	2900000	2750000	2750000	0	3000000
Imports	1000	1000	1000	600	0	500
Total Supply	2901000	2901000	2751000	2750600	0	3000500
Fresh Dom. Consumption	2576000	2576000	2491000	2451600	0	2670500
Exports	215000	215000	150000	189000	0	220000
For Processing	110000	110000	110000	110000	0	110000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	2901000	2901000	2751000	2750600	0	3000500
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jul 2016		Jul 2017		Jul 2018	



Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	230000	230000	230000	230000	0	230000
Area Harvested	230000	230000	230000	230000	0	230000
Bearing Trees	20000	20000	20000	20000	0	20000
Non-Bearing Trees	20000	20000	20000	20000	0	20000
Total Trees	40000	40000	40000	40000	0	40000
Commercial Production	420000	420000	400000	400000	0	430000
Non-Comm. Production	20000	20000	20000	20000	0	20000
Production	440000	440000	420000	420000	0	450000
Imports	100	100	100	20	0	20
Total Supply	440100	440100	420100	420020	0	450020
Fresh Dom. Consumption	414100	414100	370100	366020	0	395020
Exports For Processing	16000	16000	40000	44000	0	45000
Withdrawal From Market	10000	10000	10000	10000	0	10000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	440100	440100	420100	420020	0	450020

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

Grapes, Fresh Table Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jun 2016		Jun 2017		Jun 2018	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Turkey						
Area Planted	300000	300000	300000	300000	0	300000
Area Harvested	300000	300000	300000	300000	0	300000
Commercial Production	2200000	2200000	2000000	2000000	0	1780000
Non-Comm. Production	150000	150000	120000	120000	0	120000
Production	2350000	2350000	2120000	2120000	0	1900000
Imports	500	500	500	500	0	500
Total Supply	2350500	2350500	2120500	2120500	0	1900500
Fresh Dom. Consumption	2177500	2177500	1840500	1840500	0	1600500
Exports	173000	173000	280000	280000	0	300000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	2350500	2350500	2120500	2120500	0	1900500

(HA) ,(MT)