

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Turkey

Oilseeds and Products Update

Turkish Sunflowerseed Update

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Report Highlights:

MY 2015 sunflowerseed area and production are now estimated at 505,000 hectares and 1 MMT, respectively. Despite a good start due to rainy spring, lack of rains and extreme heat in the summer months adversely affected yields. While sunflowerseed imports are projected to increase about 30 percent in MY 2015 to meet the local demand, sun meal imports are expected to increase about only six percent due to possible increases in imports of alternative products such as DDGS. Sun oil imports continued to be strong in MY 2014 due to mostly increasing exports to neighboring countries despite the political turmoil in the export destinations.

Post:

Ankara

Production

MY 2015 sunflower seed area and production are now estimated 505,000 hectares and 1 MMT, respectively, compared to 530,000 hectares and 1.2MMT of last year. Low returns of last season caused a decline in planting this year, particularly in the Central Anatolian region. Despite the rainy beginning in spring, extreme heat during the summer months adversely affected yields. Average oil content is also reported to be lower compared to last year, about 41.5 percent. Turkey has a net deficit in sunflowerseed production.

Consumption

Overall production of livestock and poultry meat went up during MY 2014, while egg production fluctuated due to an avian influenza epidemic. An Iraqi import ban on Turkish poultry meat, poultry meat products and eggs had been lifted in August and exports are continuing despite the interruptions on logistics due to political problems in the area.

Sun meal consumption in MY 2014 declined to 1.7 MMT due to the increasing utilization of alternatives items such as DDGS. Sun meal consumption is expected to be affected by DDGS and other meals in MY 2015 as well and remains about 1.66 MMT.

In 2014, sun oil consumption continued to increase, benefiting from the overall decline in corn oil consumption caused by concerns with biotech products. Lower sunflower seed production in MY 2015 and the recent devaluation of the Turkish Lira against the major currencies along with high import taxes are pushing local sunflowerseed oils prices to higher levels. Accordingly, local crude sun oil prices increased about ten percent to TL 3,600 during last ten days. (As of 11 September US\$ 1 = TL 3.03)

Trade

The GOT, in an effort to protect local farmers from the inflow of cheaper imports, issues minimum import prices for sunflower seed and oil. Accordingly, there is an observation price of US\$640 per MT for sun seed and US\$1,500 per MT for sun oil on imports.

Total imports of sunflower seed for crushing were 463,000 MT during the first eleven months of MY2014, about twenty percent less than the same period last year due to increasing crushing facilities in the exporting countries. Neighboring Black Sea countries Moldova (219,000 MT), Romania (134,000 MT) and Bulgaria (79,000 MT), and Russia (20,300 MT) continued to be the main sources.

Turkey's sunflower seed meal imports were 743,000 MT during first eleven months of MY 2014, slightly higher than last year. Turkey continued to source its sunflower seed meal imports mostly from Russia (408,000 MT) and Ukraine (250,000 MT).

Turkish imports of crude sunflower seed oil also remained high to meet the export demand, reaching 768,000 MT during the first eleven months of MY 2014. Russia and Ukraine were the main suppliers with 656,000 MT and 161,000 MT respectively.

Turkey's refined sunflower seed oil exports were up about ten percent compared to the same period last year, reaching 593,000 MT during the first eleven months of the MY 2014. Iraq continues to be the leading importer (368,000 MT), followed by Syria (130,000 MT) and Lebanon (20,000 MT).

Oilseed, Sunflowerseed	2013/2014		2014/2015		2015/2016	
Market Begin Year	Sep 2013		Sep 2014		Sep 2015	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	700	690	550	530	510	505
Area Harvested	690	690	530	530	510	505
Beginning Stocks	177	75	139	78	103	70
Production	1400	1400	1200	1200	1150	1000
MY Imports	581	570	500	500	550	650
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	259	300	300	250	350	300
Total Supply	2158	2045	1839	1778	1803	1720
MY Exports	33	2	30	3	20	4
MY Exp. to EU	9	0	10	0	10	0
Crush	1980	1960	1700	1700	1730	1660
Food Use Dom. Cons.	4	3	4	3	4	4
Feed Waste Dom. Cons.	2	2	2	2	2	2
Total Dom. Cons.	1986	1965	1706	1705	1736	1666
Ending Stocks	139	78	103	70	47	50
Total Distribution	2158	2045	1839	1778	1803	1720
CY Imports	557	545	500	500	550	550
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	33	1	40	3	40	3
CY Exp. to U.S.	0	0	0	0	0	0

Meal, Sunflowerseed	2013/2014		2014/2015		2015/2016	
Market Begin Year	Sep 2013		Sep 2014		Sep 2015	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	1980	1960	1700	1700	1730	1660
Extr. Rate, 999.9999	0.3803	0.55	0.3806	0.55	0.3815	0.55
Beginning Stocks	0	99	20	151	2	53
Production	753	1095	647	935	660	917
MY Imports	757	757	750	800	850	850
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	40	0	75	0	80
Total Supply	1510	1951	1417	1886	1512	1820
MY Exports	0	0	0	7	0	5
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	1490	1800	1415	1826	1510	1775
Total Dom. Cons.	1490	1800	1415	1833	1510	1780
Ending Stocks	20	151	2	53	2	40
Total Distribution	1510	1951	1417	1986	1512	1820
CY Imports	773	773	750	800	750	830
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	0	0	0	8	0	5
CY Exp. to U.S.	0	0	0	0	0	0

Oil, Sunflowerseed	2013/2014		2014/2015		2015/2016	
Market Begin Year	Sep 2013		Sep 2014		Sep 2015	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	1980	1960	1700	1700	1730	1660
Extr. Rate, 999.9999	0.4268	0.42	0.4265	0.42	0.4277	0.42
Beginning Stocks	355	140	342	187	182	110
Production	845	825	725	713	740	700
MY Imports	776	776	750	800	830	850
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	34	0	0
Total Supply	1976	1731	1817	1700	1752	1660
MY Exports	584	584	550	650	600	675
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	30	30	25	20	25	20
Food Use Dom. Cons.	1000	900	1040	910	1050	910
Feed Waste Dom. Cons.	20	30	20	10	20	10
Total Dom. Cons.	1050	960	1085	940	1095	940
Ending Stocks	342	187	182	110	57	55
Total Distribution	1976	1731	1817	1700	1752	1660
CY Imports	750	812	700	750	800	825
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	550	665	550	550	550	600
CY Exp. to U.S.	0	0	0	0	0	0