

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Turkey

Oilseeds and Products Update

September 2014 Oilseeds Update

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Report Highlights:

Marketing year (MY) 2014 sunflowerseed area and production is now estimated at 530,000 hectares and 1.2 million metric tons (MMT). Despite a significant decline in planting, the rainy season contributed to an increase in yields.

Sunflowerseed meal imports almost doubled to 800,000 MT during MY 2013, and Post expects imports to continue at this level in MY 2014 due to abundant supplies in the region, increased domestic consumption, and the decline in alternative feed product imports such as distillers dried grains and solubles (DDGS) and corn gluten feed pellets (CGFP). Sun oil imports continued to be strong as well due to an increase in domestic consumption and strong exports to neighboring countries that Post expects to continue in MY 2014 as well.

Post:
Ankara

Commodities:
Oilseed, Sunflowerseed

Meal, Sunflowerseed

Oilseed, Sunflowerseed

Production

Post estimates MY 2014 sunflower seed area and production at 530,000 hectares and 1.2 MMT. Low returns last season caused a decline in plating this year, particularly in the central Anatolian region. Despite the significant decline in area, down from 690,000 hectares, rain in the summer helped yields to increase. Along with the high yields this year, oil content is reported to be higher as well for sunflower seed and estimated at 42 percent.

Turkey has a net deficit in sunflowerseed production. The sustainability of larger production will depend on farmer satisfaction with income this year. Large production in the Black Sea region continues to suppress world prices for sun seed and oil.

The Government of Turkey (GOT), in an effort to protect local farmers from an inflow of cheaper imports, has increased the minimum import price for sunflower seed from US\$ 675/MT to US\$ 800/MT.

Consumption

Turkey increased its production of livestock, poultry meat and eggs during MY 2013, pushing sun meal consumption up to 1.8 MMT. Utilization of sun meal in livestock and poultry rations had increased in MY 2013 due to abundant supplies and significant decline in DDGS and CGFP imports and consumption.

Sun oil consumption is continuing to increase as well, benefiting from the decline in corn oil consumption caused by concerns with biotech products.

Trade

Total imports of sunflower seed for crushing were 568,000 MT during the first eleven months of MY2013. Neighboring Black Sea countries Moldova (217,000 MT), Bulgaria (140,000 MT), Romania (117,000 MT) and Russia (73,000 MT) continued to be the main suppliers.

Turkey's sunflower seed meal imports went up to 726,000 MT during first eleven months of MY 2013 compared to 430,000 MT in the last marketing year. The increase is due to large supplies in the region and lower prices. Turkey continued to source most of its sunflower seed meal from Russia (460,000 MT) and Ukraine (162,000 MT).

Turkish imports of crude sunflower seed oil also remained high to meet export demand, reaching 731,000 MT during the first eleven months of MY 2013. Russia and Ukraine were the main

suppliers with 583,000 MT and 130,000 MT respectively.

Turkey's refined sunflower seed oil exports were up about fifty-two percent reaching 539,000 MT during the first eleven months of the MY 2013. Iraq continues to be the leading importer (332,000 MT) followed by Syria (103,000 MT) and Lebanon (22,000 MT).

Turkey's low cost mixed vegetable oil exports, however, decline about fifty-four percent during the same period to 99,000 MT; of which about ninety percent is estimated to be sun oil and the rest are combination of other vegetable oils such as cotton oil and canola oil. Iraq is the main buyer of Turkish mixed oil with 86,000 MT, followed by Russia with 3,000 MT. Turkey's total refined sunflowerseed oil exports, the two categories combined, is estimated at 620,000 MT during the first eleven months of MY 2013. Turkey is expected to continue the trend to export in MY 2014 as well.

Important note: PSD export figures for sun oil reflects total sun oil exports, refined and sun oil in mixed vegetable oil combined to reflect the real number of exports. While the 151219 sunflowerseed oil category is taken as it is, ninety percent of the 151220 category of vegetable oil is added to the 1512119 figure to reach the total sunflowerseed oil number on PSD.

Oilseed, Sunflowerseed Turkey	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Sep 2012		Market Year Begin: Sep 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	600	600	700	690	700	530
Area Harvested	600	600	690	690	600	530
Beginning Stocks	269	80	177	75	175	80
Production	1,125	1,125	1,400	1,400	1,150	1,200
MY Imports	628	620	620	600	850	700
MY Imp. from U.S.	2	0	0	0	0	0
MY Imp. from EU	337	330	350	300	350	350
Total Supply	2,022	1,825	2,197	2,075	2,175	1,980
MY Exports	38	5	35	5	40	5
MY Exp. to EU	10	0	0	0	0	0
Crush	1,800	1,740	1,980	1,985	2,000	1,890
Food Use Dom. Cons.	4	3	4	3	5	3
Feed Waste Dom. Cons.	3	2	3	2	3	2
Total Dom. Cons.	1,807	1,745	1,987	1,990	2,008	1,895
Ending Stocks	177	75	175	80	127	80
Total Distribution	2,022	1,825	2,197	2,075	2,175	1,980
CY Imports	711	701	700	750	800	700
CY Imp. from U.S.	2	0	0	0	0	0
CY Exports	32	4	30	5	40	5
CY Exp. to U.S.	0	0	0	0	0	0

Meal, Sunflowerseed Turkey	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Sep 2012		Market Year Begin: Sep 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	1,800	1,740	1,980	1,985	2,000	1,890
Extr. Rate, 999.9999	0.	0.5517	0.	0.5516	0.	0.5529
Beginning Stocks	92	80	0	99	21	193
Production	685	960	753	1,095	762	1,045
MY Imports	432	430	720	800	650	800
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	9	0	40	0	50
Total Supply	1,209	1,470	1,473	1,994	1,433	2,038
MY Exports	1	1	0	1	0	1
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.	1,208	1,370	1,452	1,800	1,433	1,850
Total Dom. Cons.	1,208	1,370	1,452	1,800	1,433	1,850
Ending Stocks	0	99	21	193	0	187
Total Distribution	1,209	1,470	1,473	1,994	1,433	2,038
CY Imports	462	462	600	750	700	800
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	1	5	0	5	0	5
CY Exp. to U.S.	0	0	0	0	0	0
SME	1,141	1,294	1,371	1,700	1,353	1,747

Oil, Sunflowerseed	2012/2013	2013/2014	2014/2015
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Turkey						
	Market Year Begin: Sep 2012		Market Year Begin: Sep 2013		Market Year Begin: May 2014	
	USDA Officia l	New Post	USDA Officia l	New Post	USDA Officia l	New Post
Crush	1,800	1,740	1,980	1,985	2,000	1,890
Extr. Rate, 999.9999	0.	0.431	0.	0.4131	0.	0.4206
Beginning Stocks	237	160	380	140	395	130
Production	769	750	845	820	854	795
MY Imports	657	650	800	780	680	750
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	1	0	0	0	0
Total Supply	1,663	1,560	2,025	1,740	1,929	1,675
MY Exports	289	496	500	700	400	640
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	25	38	25	25	25	25
Food Use Dom. Cons.	944	860	1,075	865	1,185	870
Feed Waste Dom. Cons.	25	26	30	20	30	20
Total Dom. Cons.	994	924	1,130	910	1,240	915
Ending Stocks	380	140	395	130	289	120
Total Distribution	1,663	1,560	2,025	1,740	1,929	1,675
CY Imports	632	626	750	800	700	750
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	355	530	450	680	350	640
CY Exp. to U.S.	0	0	0	0	0	0