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Report Highlights:

The total cherry production forecast in Turkey in Marketing Year (MY) 2021/22 is 860,000 metric tons (MT), which is 54,000 MT less than MY 2020/2021, due to frost damage that occurred in Izmir and Konya in the late spring. The peach and nectarine production forecast for MY 2021/22 is 830,000 MT, 60,000 MT less than MY 2020/21, again due to frost damage in the late spring. Stone fruit exports are forecast to decrease slightly in MY 2021/22 due to the lower production. Turkey aims to improve its exports of fresh sweet cherries to China. This report covers cherries, peaches, and nectarines.

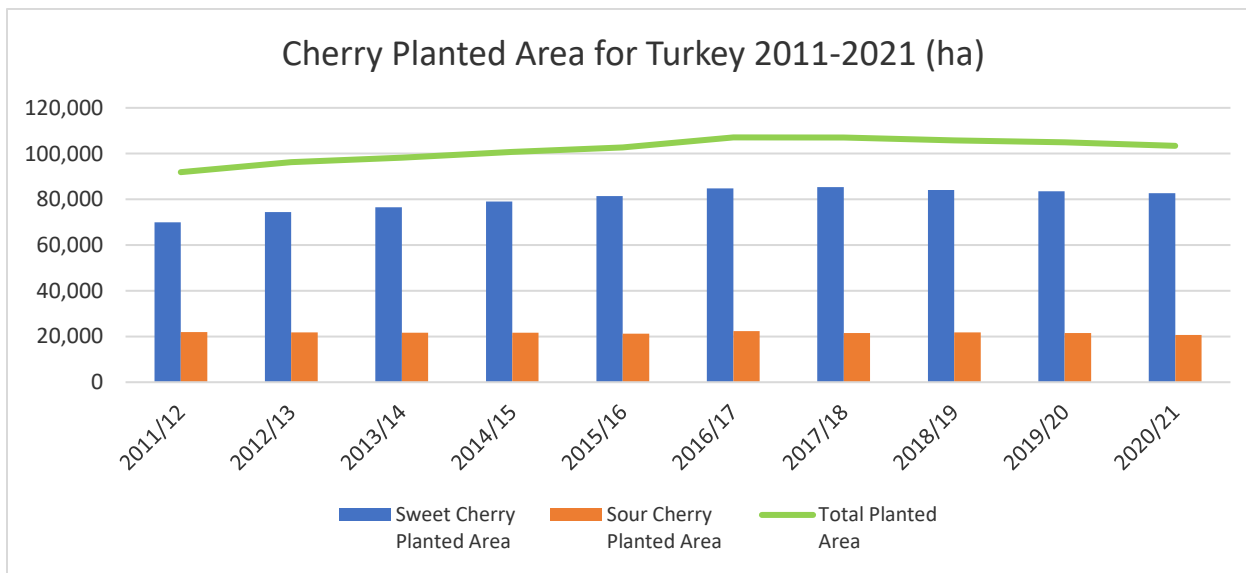
CROP AREA

Sweet and Sour Cherries

Enjoying increasing demand in recent years, Turkish farmers have invested in new orchards, uprooted non-commercial varieties, and replanted trees suitable for the export markets. There are also new private sector companies investing in juice production and fruit exports.

Turkish sweet cherry planted area grew around 18 percent from MY 2011/12 to MY 2020/21. Post estimates sweet cherry planted area at around 82,700 hectares (ha) in MY 2021/22. Post expects sour cherries planted area to stay at 20,600 ha in MY 2021/22. Total cherry planting area in MY 2020/21 is expected to be about 103,000 hectares, similarly to MY 2019/20.

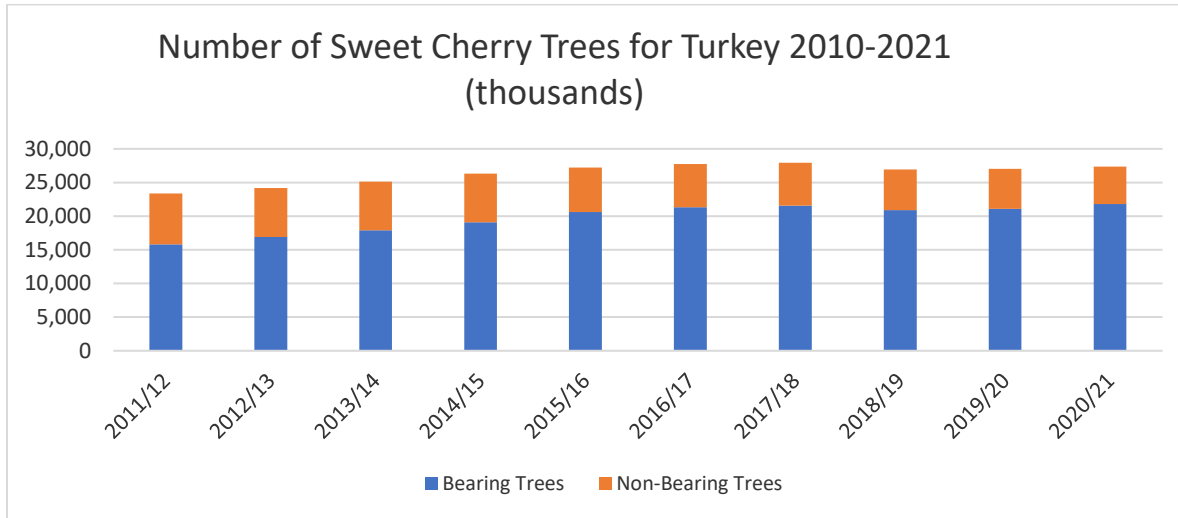
Figure 1. Turkey's Planted Area of Sweet and Sour Cherries 2011-2021 (ha)



Source: TurkStat, 2021

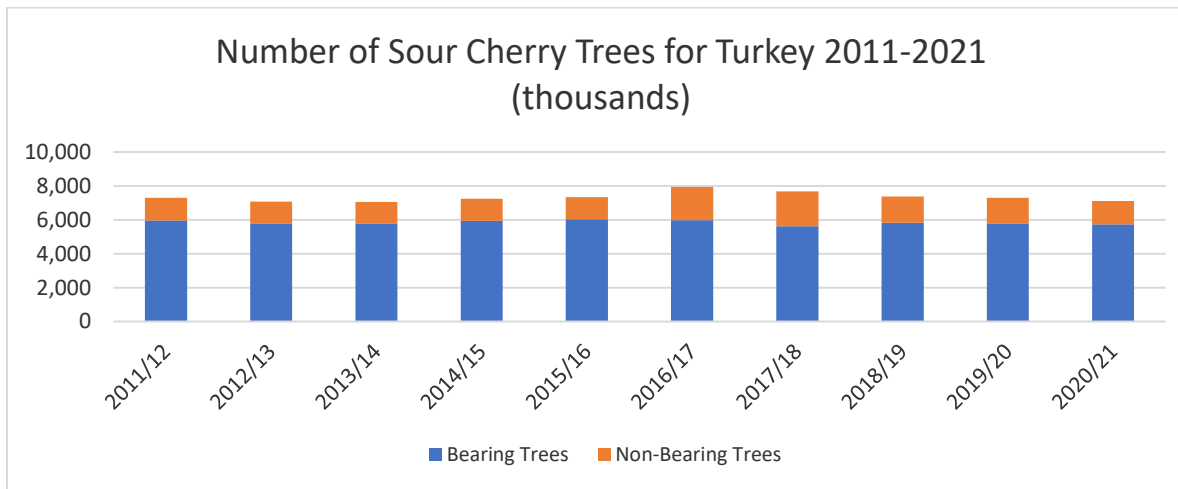
Farmers have been replacing their older varieties of sweet and sour cherry trees with higher yield varieties. According to Turkish official data, the total estimated number of all cherry trees was about 34.5 million in 2020. The total number of bearing trees for sweet cherries increased from 14.7 million to 21.1 million in ten years. The total number of sour cherry trees stayed at similar levels over the last 10 years (Figures 2 and 3).

Figure 2. Number of Sweet Cherry Trees for Turkey 2011-2021 (thousands)



Source: TurkStat, 2021

Figure 3. Number of Sour Cherry Trees for Turkey 2011-2021 (thousands)



Source: TurkStat, 2021

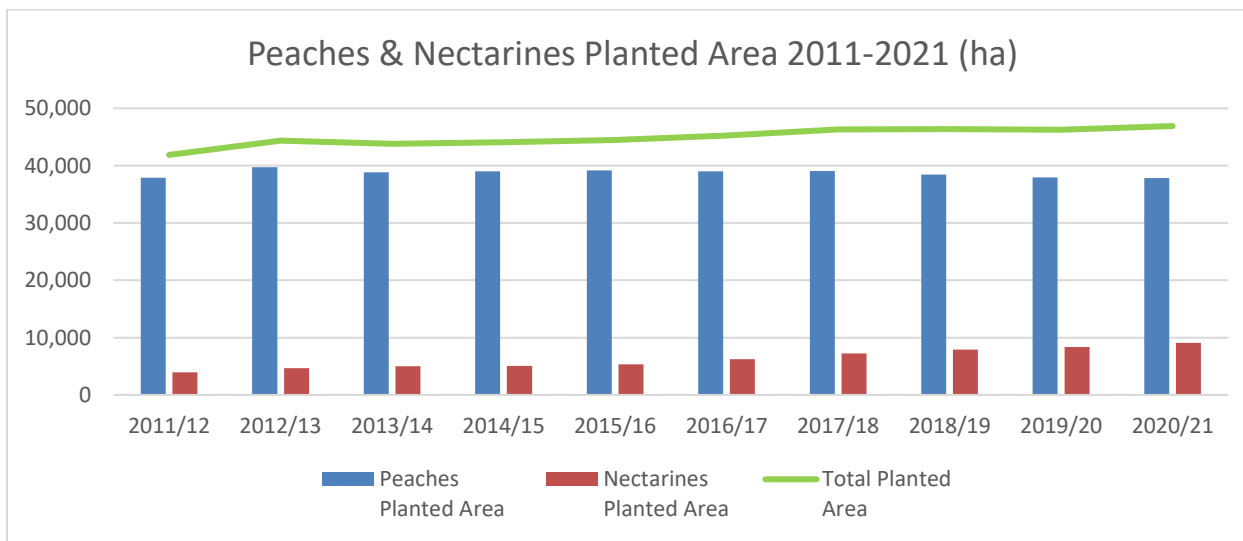
Turkey has a lot of valuable cherry genetic resources because northern Anatolia is a center of the fruit's origin. There are more than one hundred varieties of sweet cherries produced in Turkey. The 0900 *Ziraat* variety, also known as a Turkish Napoleon, was developed in Turkey and is the most popular variety in Turkey because it meets the higher quality characteristics demanded by export markets. However, producers have started to try new cherry varieties such as *Sweet Heart*, *Celeste*, *Early Lory*,

Kordia, Regina, Sam, and Sunburst for higher quality products, later harvest (to capture higher prices later in the season), and higher yields.

Fresh Peaches and Nectarines

Farmers have been replacing their older varieties of peach and nectarine trees with higher yield varieties. Also, modern high-density orchards have been established using new cultivars, rootstocks, training systems, and growing techniques. Using modern technologies and altering to higher yield variety trees has caused an increase in the quality and production of peaches over the years even while planting the same hectares of land, as can be seen in Figure 4. Over the last 10 years, planted area of peaches declined slightly to 38,000 ha whereas planted area of nectarine increased by more than 100 percent to 9,100 ha. The number of nectarine orchards is increasing in Turkey to meet the changing consumer preference from peaches to nectarines in both domestic and foreign markets (Figure 4).

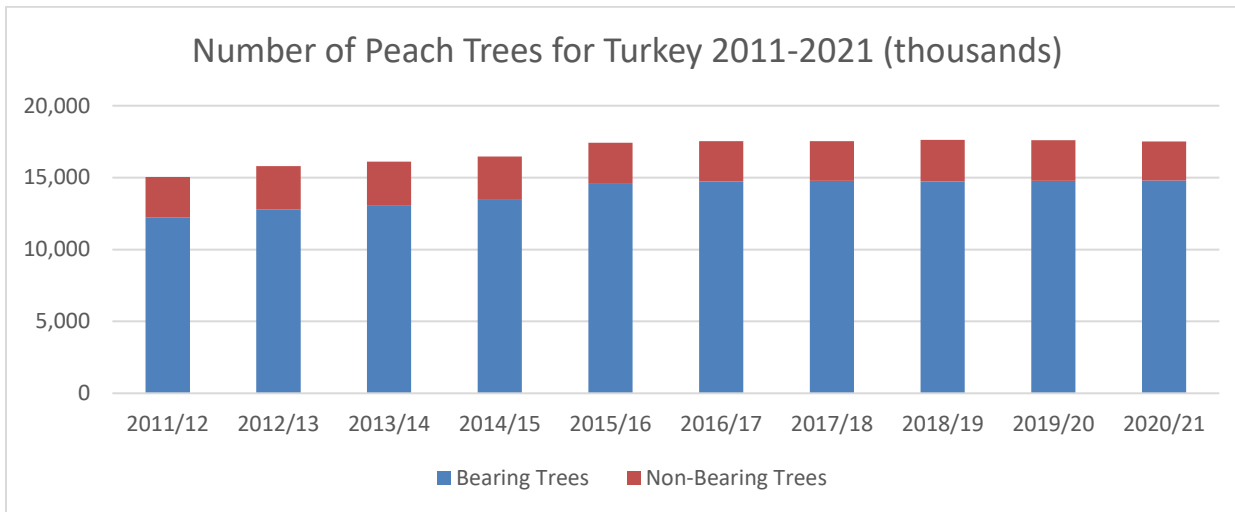
Figure 4. Turkey’s Planted Area of Peaches and Nectarines 2011-2021 (ha)



Source: TurkStat, 2021

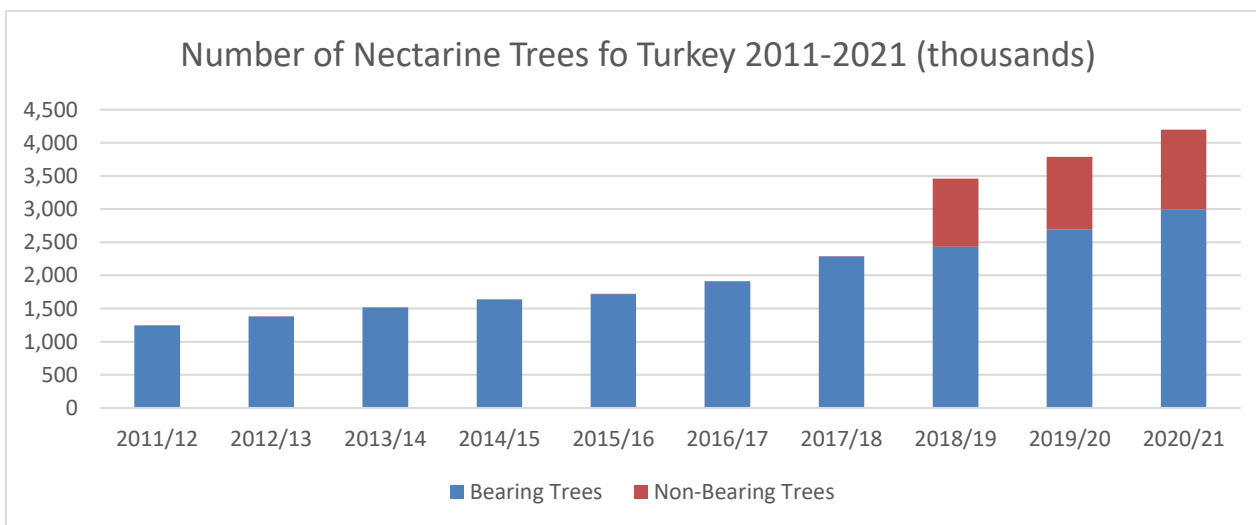
According to Turkish official data, the total estimated number of all peach and nectarine trees was about 21.7 million in MY 2020/21. The total number of bearing trees increased from 13.4 million in 2011 to 17.8 million in 2021. The number of peach trees increased by 16 percent over the last 10 years whereas the number of nectarine trees increased by 237 percent (Figures 5 and 6). Production and consumption of nectarine is increasing over the last 10 years compared to peaches. Demand of nectarine increased sharply in both domestic and international markets. Nectarines are considered easier to consume compared to peaches since they are less juicy. Also, nectarines are easier to store and distribute, since they are less likely to bruise during the harvest and transportation process.

Figure 5. Number of Peach Trees for Turkey 2011-2021 (thousands)



Source: TurkStat, 2021

Figure 6. Number of Nectarine Trees for Turkey 2011-2021 (thousands)



Source: TurkStat, 2021

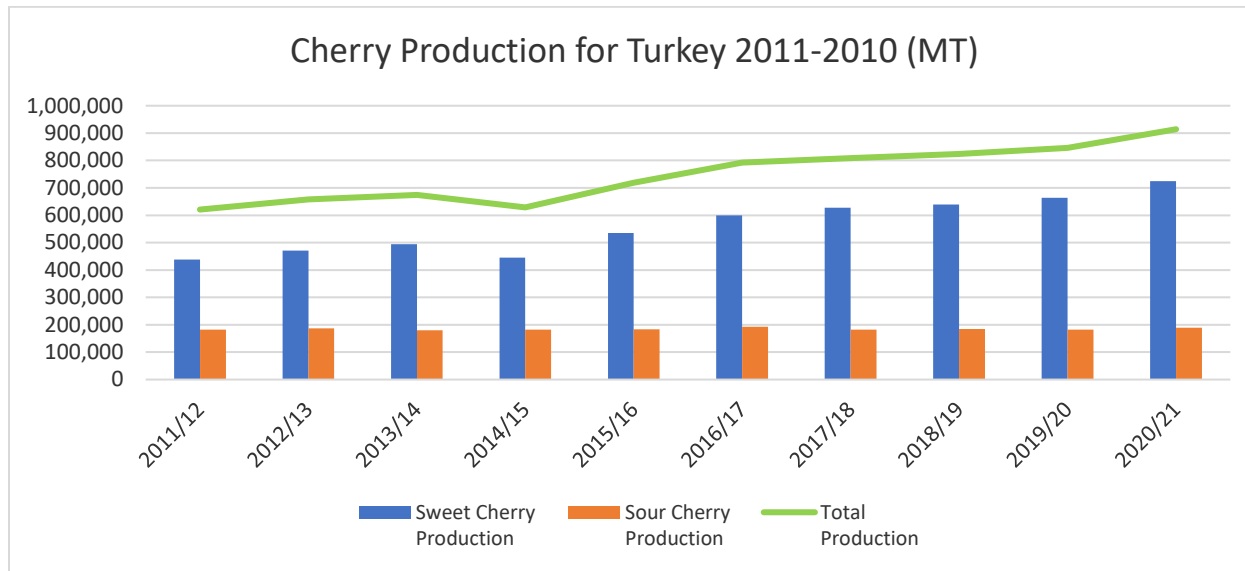
PRODUCTION

Sweet and Sour Cherries

Turkey has historically been among the top cherry producing countries in the world and is usually a top four exporter. Sweet cherries are grown mainly in the Central Anatolia, Aegean, Marmara, and Mediterranean Regions in Turkey. Konya, Izmir, Manisa and Denizli are the top cherry producing provinces within these regions. The marketing year for cherries begins in April. The Covid-19 pandemic did not affect the agricultural production and exports of Turkey, because the agricultural sector was exempted from the lockdowns and restrictions by government policy. During the lockdowns, Ministry of Agriculture and Forestry employees, farmers, seasonal workers, producers, distributors all maintained normal hours to keep the production at regular levels. According to Turkish exporters, there were minor issues in the exporting process during to the COVID-19 pandemic, but the Turkish government solved these problems very quickly and efficiently.

Even though TurkSTAT estimated an increase in cherry production, Post is expecting a decrease in production in MY 2021/22. TurkSTAT makes its production estimations in late April. According to local sources, for MY 2021/22 the above-average temperatures during this year's Turkish winter have led to early sprouting in some cherry trees, raising concerns about potential frost damage. Indeed, some key grape growing areas of Turkey experienced sub-zero temperatures in early May that led to decreased yields. Farmers suffered frost and freeze damage in some regions of the Kemalpaşa town of Izmir, where 12 percent of the cherry production comes from. After the frost damage a 20 percent decrease in production is expected in Kemalpaşa. Cherry producers of Manisa also reported a decrease in production from a frost and freeze damage occurred in early May. TurkSTAT will update their numbers in late October. Farmers in major growing areas are generally satisfied with the higher marketing prices for cherries in MY 2021/22 compared to the previous year due to the lower production.

Figure 7. Cherry Production of Turkey 2011-2021 (MT)



Source: TurkStat, 2021

Cherry trees are cultivated in different parts of Turkey with a variety of different physical and climatic conditions. Because of this, the harvest time can differ by 45-55 days according to the region of planting. While the cherry harvest starts on the Aegean coast in Izmir in late May, it continues further inland in Afyon, Burdur, Salihli and Konya in June and July. In Kahramanmaras, farmers harvest the cherries in August.

Strong export demand in recent years is the driving force behind an increase in cherry production. Turkey has been slowly transitioning from traditional to modern cherry production. Recently, modern high-density orchards have been established, using new cultivars, rootstocks, training systems, and growing techniques. However, most cherry production is still carried out using predominantly traditional methods among agricultural holdings operated by family-owned farmers. A relatively cheap labor force of seasonal workers and family-owned farms provides the advantage of a stable, affordable labor supply.

Because of the growth in the export market, production of Turkish sweet cherries increased by 65 percent from MY 2011/12 to MY 2020/21 (Figure 7). The increase in production of better-quality cherries to meet the specifications of export markets also helps to increase the quality of cherries for the domestic market. Production of sour cherries, however, is staying at steady levels as the fruit is used primarily in the juice and jam industries in Turkey.

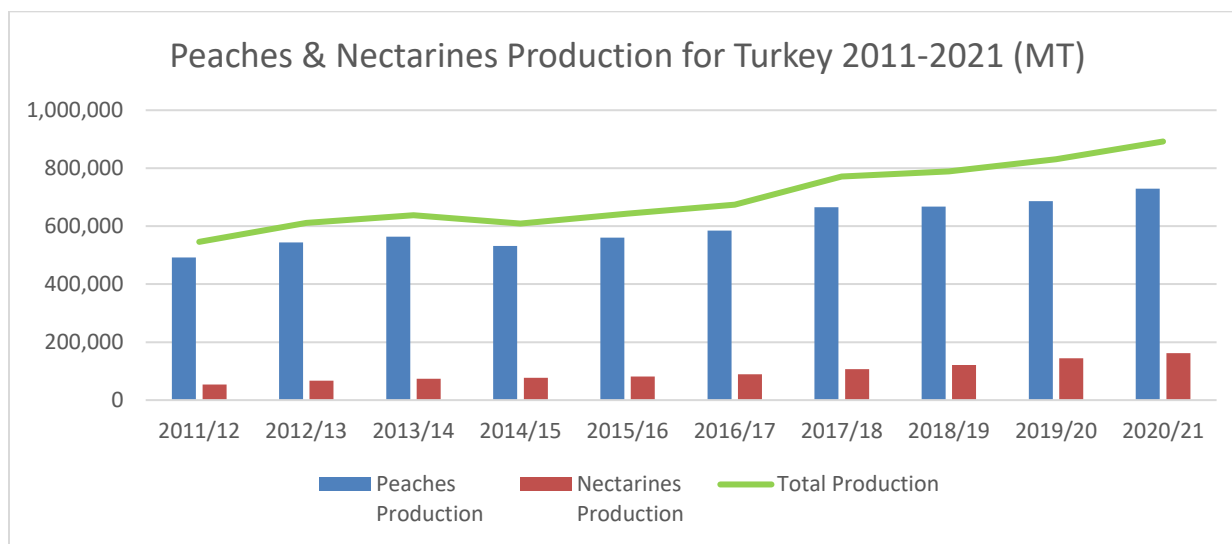
Fresh Peaches and Nectarines

Turkey continues to be among the top ten exporters in the world for peaches and nectarines. Bursa, Canakkale, Izmir, and Mersin, are the top provinces where peaches and nectarines are produced. Typically, they are harvested between April and early October. The marketing year starts in April.

According to the Turkish Statistics Institute (TurkSTAT) for the MY 2021/22 season, total peach and nectarine production are forecast to increase by 2.7 percent to 916,000 MT. However, Post's forecasts total peach and nectarine production will be 830,000 MT for MY 2021/22 due to the freeze and frost damage that occurred in the towns of Bursa and Izmir. Peach production has increased by around 60 percent from MY 2011/12 to MY 2020/21, even though, the production area stayed relatively stable (Figure 8). With technological improvements, Turkish farmers transitioned to plant better quality peach trees which return higher yield.

Even though production is expected to be lower, farmers in major growing areas are generally satisfied with the increased prices in MY 2021/22 compared to the previous years. There is an increase of 3-3.5 Turkish Lira (TL) for the peach price and 4-4.5 TL for the nectarine price (1 US dollar = 8.5 TL as of the date of this report). Most of the peach varieties planted in Turkey are *Early Amber*, *Spring Crest*, *May Crest*, *Red Haven* and *Early Red*.

Figure 8. Production of Peaches and Nectarines for Turkey 2011-2021 (MT)



Source: TurkStat, 2021

CONSUMPTION

Sweet and Sour Cherries

Over one hundred different varieties of cherries are consumed in many forms in Turkey. More than half of the cherries produced in Turkey are consumed fresh domestically. Approximately 20 percent of all cherry production is used in the processing sector to make canned products, marmalades, frozen fruits, and fruit juice. Most processed products are made from sour cherries. In MY 2021/22, domestic consumption is estimated to be approximately 781,500 MT, which is a decrease of 45,500 MT compared to the previous marketing year. Post estimates that lower production and higher prices will cause a decrease in domestic consumption of sweet and sour cherries.

Fresh Peaches and Nectarines

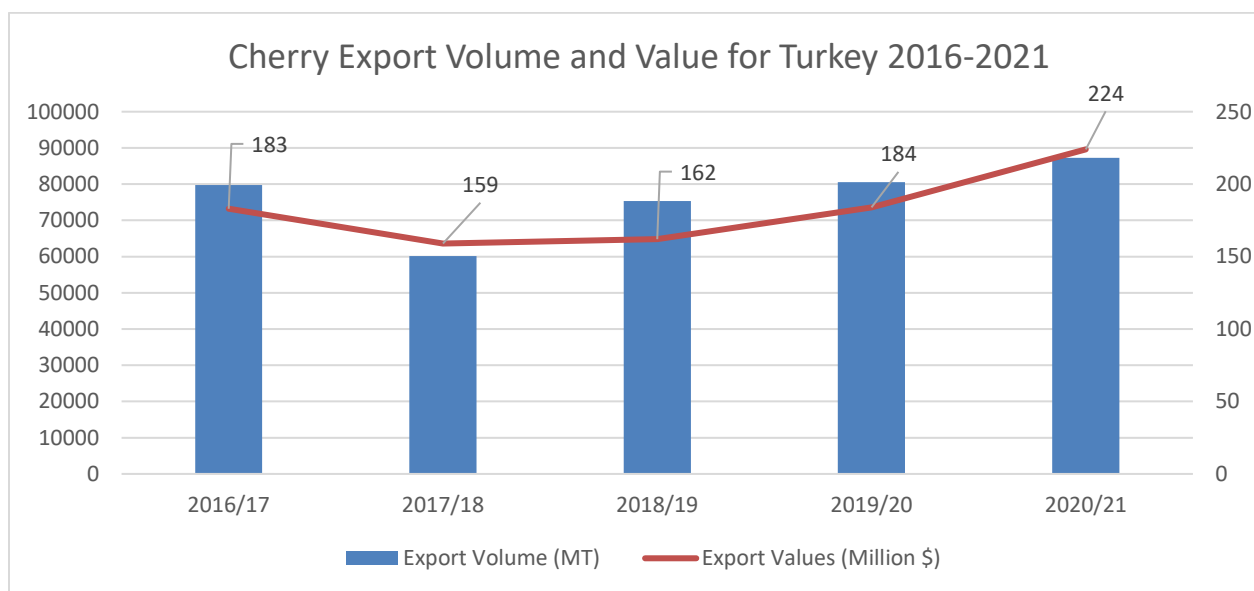
In MY 2021/22, domestic consumption of peaches and nectarines is expected to be around 690,300 MT, five percent less than MY 2020/21 due to the lower production. Approximately 15 percent of all peach production is used for juice. Turkish consumers prefer fruit juices of peach, cherry, and apricot in “nectar” form. Nectars are very popular, but there is also a growing trend for 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold as frozen fruit.

TRADE

Sweet and Sour Cherries

Turkey is one of the largest exporters of stone fruit in the world. Turkey exports more than 250,000 MT of stone fruits annually, with the majority going to EU countries and Russia. Turkey is one of the largest exporters of cherries in the world, representing 15 percent of total global cherry exports. Chile, the United States, and Hong Kong are the other leading global exporters. Turkish exporters have also looked for opportunities for stone fruits such as cherries in the Far East, particularly China, in recent years. Turkey’s export of fresh cherry increased in the last two years due to new markets for exports (Figure 9). In MY 2021/22 post estimates Turkey’s fresh cherry export to decrease slightly compared to the last year to 78,500 MT due to the decrease in production.

Figure 9. Turkey's Cherry Export Volume and Value (2016-2021)



Source: Trade Data Monitor, 2021

Turkey has increased its export markets in Russia and EU countries in recent years. Germany (25,894 MT), Russia (29,599 MT), and Iraq (7,243 MT) are the main destinations for Turkish cherries in MY 2020/21 (Table 1). After years of negotiations, Turkey achieved the removal of obstacles for cherry exports to China and in MY 2019/20. Turkey exported 884 MT of fresh sweet cherries to China in MY 2019/20 and increased sweet cherry exports in MY 2020/21 to 1,384 MT (Table 1). However, due to the Covid-19 pandemic restriction policies of China in MY 2021/22 there is an expectation of a decrease in Turkey's exports of fresh cherries to China.

Table 1. Fresh Cherry Export of Turkey 2016-2021

Turkey's Sweet Cherry Exports to World 2016-2021 (MT)					
Partner	Marketing Year				
	2016/17	2017/18	2018/19	2019/20	2020/21
Germany	25,392	22,964	23,651	27,180	25,894
Russia	17,290	14,376	24,012	25,387	29,599
Iraq	14,422	9,479	13,171	10,281	7,243
Netherlands	3,772	2,558	1,298	2,546	2,142
Austria	3,517	1,756	785	1,961	3,876
Norway	1,761	1,520	1,887	1,392	1,523
Belarus	1,124	259	548	1,284	1,081
Denmark	1,129	885	1,380	1,243	1,129

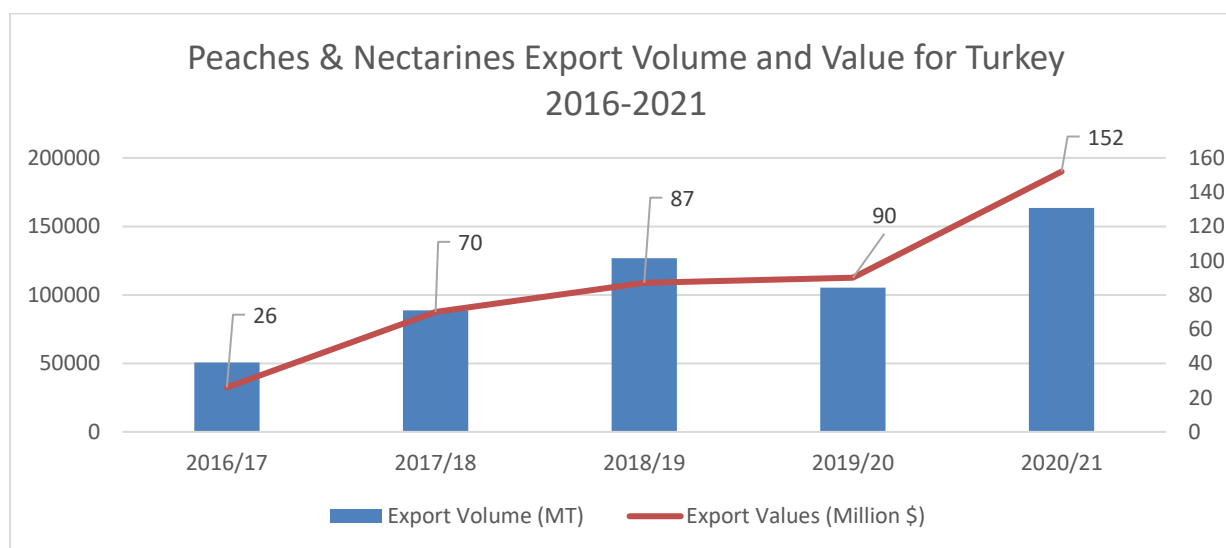
Italy	3,498	1,303	1,583	1,166	2,754
Sweden	3,403	1,788	1,289	1,151	1,361
China	--	--	--	884	1,384
Other	4,481	3,231	5,695	6,032	9,267
World	79,789	60,121	75,304	80507	87,253

Source: Trade Data Monitor, 2021

Fresh Peaches and Nectarines

In MY 2021/22, Post estimates fresh peach and nectarine exports to decrease slightly to 140,000 MT, in parallel to the decrease in production. Even though there is a decrease in production of peach and nectarine, it will not sharply decrease export volume or value. The reason for this is that exporters are selling at higher prices to stable markets. Therefore, a decrease in production is going to decrease domestic consumption more than exports. Turkey experienced highest volume of peach and nectarine exports last year. Turkey's fresh peach and nectarine exports increased by 57 percent to 163,00 MT in MY 2020/21, compared to 105,000 MT in MY 2019/20 (Figure 10). Russia (118,162 MT), Iraq (9,611 MT) and Belarus (1,658 MT) were the main destinations for Turkish peaches and nectarines in MY 2020/21 (Table 2).

Figure 10. Turkey's Peach and Nectarine Export Volume and Value (2016-2021)



Source: Trade Data Monitor, 2021

Table 2. Fresh Peaches and Nectarines Export of Turkey 2016-2021

Turkey's Fresh Peaches and Nectarines Export to World 2016-2021 (MT)					
Partner	Marketing Year				
	2016/17	2017/18	2018/19	2019/20	2020/21
Russia	--	55,907	72,672	73,061	118,162
Iraq	21,324	13,842	22,233	11,398	9,611
Belarus	4,679	850	2,226	6,249	1,658
Syria	770	3,546	9,104	5,927	3,056
Saudi Arabia	9,104	7,781	6,685	2,970	2,303
Ukraine	2,130	1,195	1,773	1,071	7,678
Cyprus	946	991	992	993	999
Georgia	4,691	160	1,938	704	1,671
Other	6,992	4,539	9,193	2,956	18,243
World	43,644	88,811	126,816	105,329	163,381

Source: Trade Data Monitor, 2021

STOCKS

There are no official stocks of fresh stone fruits in Turkey.

POLICY

Stable export demand and government support have helped Turkish farmers to invest in new stone fruit orchards. There are payments for producers who are registered in the Ministry of Agriculture and Forestry's farmer registration system.

The Ministry of Agriculture and Forestry announced a subsidy program for farmers who are returning to their villages to create orchards in 2021. According to the program, farmers can benefit from a 30,000 TL subsidy plus a 100,000 TL cash credit if they can fulfill the qualifications. As of August 2021, the exchange rate is 8.64TL/\$1. More information can be found at the [Ministry of Agriculture and Forestry Website](#). The Ministry also continues providing supports for fuel and fertilizer, standard and certified saplings, organic farming, and sample analyzing. This program is to support farmers' investments to buy government-certified dwarf saplings to ensure higher quality trees are being planted in Turkey. Turkey also subsidizes juice exporters through an export refund program, which allows a tax refund of 360 TL/MT on up to 15 percent of the exported quantity, not to exceed 12 percent of the total value of the exports.

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

Cherries (Sweet&Sour), Fresh Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Apr 2019		Apr 2020		Apr 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	104900	104900	106000	103000	0	104900
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	26900	26900	27000	27500	0	27500
Non-Bearing Trees (1000 TREES)	7500	7450	7500	7000	0	7000
Total Trees (1000 TREES)	34400	34350	34500	34500	0	34500
Commercial Production (MT)	846000	846000	918000	914000	0	860000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	846000	846000	918000	914000	0	860000
Imports (MT)	30	30	0	0	0	0
Total Supply (MT)	846030	846030	918000	914000	0	860000
Domestic Consumption (MT)	765530	765530	828000	827000	0	781500
Exports (MT)	80500	80500	90000	87000	0	78500
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	846030	846030	918000	914000	0	860000

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

Peaches & Nectarines, Fresh Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Apr 2019		Apr 2020		Apr 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	46290	46400	46300	46900	0	46500
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	17500	17200	17600	17800	0	17800
Non-Bearing Trees (1000 TREES)	3900	3900	3900	3900	0	3900
Total Trees (1000 TREES)	21400	21100	21500	21700	0	21700
Commercial Production (MT)	830000	830000	870000	890000	0	830000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	830000	830000	870000	890000	0	830000
Imports (MT)	300	300	300	134	0	300
Total Supply (MT)	830300	830300	870300	890134	0	830300
Domestic Consumption (MT)	724900	724900	730300	730134	0	690300
Exports (MT)	105400	105400	140000	160000	0	140000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	830300	830300	870300	890134	0	830300

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

Attachments:

No Attachments