

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Turkey

### Oilseeds and Products Update

#### Turkey Oilseed and Products Update September 2011

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**Report Highlights:**

MY 2011 sunflower seed production is now estimated at about 925,000 MT despite a slight increase in the area harvested to 490,000 hectares, as a lack of rain adversely affected Turkish sunflower seed yields in the Thrace region. Demand for imported sunflower seed, meal and oil will increase during MY 2011 due to an increase in both domestic consumption and exports of sunflower seed oil.

Sunflower seed and meal imports were slightly higher than last year and sunflower seed oil imports doubled due to increasing exports.

**Post:**  
Ankara

**Commodities:**  
Oil, Sunflowerseed

Meal, Sunflowerseed

### **Executive Summary:**

MY 2011 sunflower seed area and production are now estimated at 490,000 hectares and 925,000 MT, respectively. While planting in the Thrace region had decline somewhat it is reported to have increased in other regions, particularly in Cukurova and Central Anatolia. Even though total planting area has increased dry weather conditions during the season particularly in the Thrace region had adversely affected the yield.

Despite the lower domestic seed production, increased seed imports will keep local sun meal production at about 930,000 MT. MY 2010 sun seed oil production is expected to remain at about 700,000 MT.

### **Production**

MY 2011 sunflower seed area and production are now estimated at 490,000 hectares and 925,000 MT, respectively. While planting in the Thrace region had decline somewhat it is reported to have increased in other regions, particularly in Cukurova and Central Anatolia. Even though total planting area has increased dry weather conditions during the season particularly in the Thrace region had adversely affected the yield.

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### **Consumption**

Consumption of sunflower meal and oil both increased in MY 2010. Sun meal consumption went up in response to stronger demand from the animal feed sector, caused by the lack of corn supplies after the Biosafety Law went into effect and banned all corn imports. Consumption in MY 2011 for sun meal will be about the same but sun oil consumption is expected to increase further from 775,000 MT to 820,000 MT due to a combination of domestic market growth and a decline in the production of other liquid oils such as corn and canola.

### **Trade**

Total imports of sunflower seed for crushing reached 685,700 MT during the first eleven months of MY2010. Neighboring Black Sea countries continued to be the main source of these imports. Ukraine (222,000 MT), Bulgaria (226,000 MT), Moldova (136,000 MT) and Romania (98,000 MT) were the leading suppliers.

Due to import restrictions place on other meals, Turkey's sunflower seed meal imports increased to 472,000 MT during the first eleven months of MY 2010 compared to 432,000 MT in MY 2009.

Turkey continued to source its sunflower seed meal from Ukraine (266,000 MT) and Russia (106,000 MT). These countries have high crushing capacities and are located close to Turkey. Neighboring Black Sea countries such as Romania (22,000 MT), Bulgaria (10,000 MT) and Moldova (2,000 MT) were other sources.

Turkish imports of sunflower seed oil went up significantly, reaching 347,000 MT during the first eleven months of MY 2010 in order to meet export demand. Ukraine was the main supplier with 301,000 MT followed by Argentina (24,000 MT), Russia (15,000 MT) and Moldova (6,000 MT).

Turkish exports of sunflower seed oil have increased about one hundred percent since MY 2009, reaching 287,000MT in the first 11 months of MY 2010. Iraq was the main market with 231,000 MT. Pakistan (3,000 MT) and neighboring Middle Eastern countries such as Syria (17,800 MT), Israel (4,000 MT) were the other significant export destinations for Turkish sunflower seed oil.

| Oilseed, Sunflowerseed<br>Turkey | 2009/2010                   |          | 2010/2011                   |          | 2011/2012                   |          |
|----------------------------------|-----------------------------|----------|-----------------------------|----------|-----------------------------|----------|
|                                  | Market Year Begin: Sep 2009 |          | Market Year Begin: Sep 2010 |          | Market Year Begin: May 2011 |          |
|                                  | USDA Official               | New Post | USDA Official               | New Post | USDA Official               | New Post |
| Area Planted                     | 580                         |          | 580                         | 0        | 580                         | 0        |
| Area Harvested                   | 460                         | 460      | 485                         | 485      | 465                         | 490      |
| Beginning Stocks                 | 94                          | 94       | 130                         | 30       | 198                         | 45       |
| Production                       | 800                         | 800      | 1,000                       | 1,000    | 850                         | 925      |
| MY Imports                       | 733                         | 722      | 670                         | 725      | 800                         | 750      |
| MY Imp. from U.S.                | 0                           | 0        | 0                           | 0        | 0                           | 0        |
| MY Imp. from EU                  | 0                           | 427      | 0                           | 350      | 0                           | 0        |
| Total Supply                     | 1,627                       | 1,616    | 1,800                       | 1,755    | 1,848                       | 1,720    |
| MY Exports                       | 20                          | 0        | 25                          | 0        | 30                          | 0        |
| MY Exp. to EU                    | 0                           | 0        | 0                           | 0        | 0                           | 0        |
| Crush                            | 1,470                       | 1,580    | 1,570                       | 1,700    | 1,630                       | 1,690    |
| Food Use Dom. Cons.              | 4                           | 3        | 4                           | 5        | 4                           | 5        |
| Feed Waste Dom. Cons.            | 3                           | 3        | 3                           | 5        | 3                           | 5        |
| Total Dom. Cons.                 | 1,477                       | 1,586    | 1,577                       | 1,710    | 1,637                       | 1,700    |
| Ending Stocks                    | 130                         | 30       | 198                         | 45       | 181                         | 20       |
| Total Distribution               | 1,627                       | 1,616    | 1,800                       | 1,755    | 1,848                       | 1,720    |
| CY Imports                       | 575                         | 468      | 450                         | 648      | 500                         | 650      |
| CY Imp. from U.S.                | 0                           | 0        | 0                           | 0        | 0                           | 0        |
| CY Exports                       | 20                          | 0        | 15                          | 0        | 0                           | 0        |

| Meal, Sunflowerseed<br>Turkey | 2009/2010                   |          | 2010/2011                   |          | 2011/2012                   |          |
|-------------------------------|-----------------------------|----------|-----------------------------|----------|-----------------------------|----------|
|                               | Market Year Begin: Sep 2009 |          | Market Year Begin: Sep 2010 |          | Market Year Begin: May 2011 |          |
|                               | USDA Official               | New Post | USDA Official               | New Post | USDA Official               | New Post |
| Crush                         | 1,470                       | 1,580    | 1,570                       | 1,700    | 1,630                       | 1,690    |
| Extr. Rate, 999.9999          | 0.                          | 0.5506   | 0.                          | 0.55     | 0.                          | 0.5503   |
| Beginning Stocks              | 0                           | 0        | 0                           | 47       | 0                           | 72       |
| Production                    | 559                         | 870      | 597                         | 935      | 621                         | 930      |
| MY Imports                    | 432                         | 432      | 480                         | 500      | 450                         | 450      |
| MY Imp. from U.S.             | 0                           | 0        | 0                           | 0        | 0                           | 0        |
| MY Imp. from EU               | 0                           | 32       | 0                           | 0        | 0                           | 0        |
| Total Supply                  | 991                         | 1,302    | 1,077                       | 1,482    | 1,071                       | 1,452    |

|                       |     |       |       |       |       |       |
|-----------------------|-----|-------|-------|-------|-------|-------|
| MY Exports            | 5   | 5     | 5     | 0     | 5     | 0     |
| 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. | 986 | 1,250 | 1,072 | 1,410 | 1,066 | 1,400 |
| Total Dom. Cons.      | 986 | 1,250 | 1,072 | 1,410 | 1,066 | 1,400 |
| Ending Stocks         | 0   | 47    | 0     | 72    | 0     | 52    |
| Total Distribution    | 991 | 1,302 | 1,077 | 1,482 | 1,071 | 1,452 |
| CY Imports            | 480 | 322   | 450   | 480   | 450   | 490   |
| CY Imp. from U.S.     | 0   | 0     | 0     | 0     | 0     | 0     |
| CY Exports            | 0   | 8     | 0     | 3     | 0     | 0     |
| CY Exp. to U.S.       | 0   | 0     | 0     | 0     | 0     | 0     |
| SME                   | 931 | 1,180 | 1,012 | 1,331 | 1,007 | 1,322 |