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Turkey

Tree Nuts Annual

Turkey Tree Nuts Annual Report

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Report Highlights:

In 2015, weather conditions were better than the previous year despite a spring frost which occurred in late April 2015. Continuous rainfall during the spring and early summer throughout most of the country led to an increase in production of tree nuts, especially in pistachio and hazelnut production. Pistachio was the least affected by the April 2015 frost and production reached the highest level in recent years during marketing year (MY) 2015. Post forecasts pistachio production at 130,000 metric tons (MT) in MY 2015. Walnut production, depending on the region, was partly affected from the weather conditions in 2015. Post forecasts walnut production at 58,000 MT in MY 2015. Similarly, Post forecasts a slight increase in almond production of 9 percent to 14,200 MT in MY 2015.

Executive Summary:

Turkey experienced adverse weather conditions such as an abnormally bad drought and spring frosts in 2014 that resulted in considerably low tree nut production in MY 2014. Despite the frost occurred in late April 2015, continuous rainfall during the spring and early summer throughout much of the country led to the considerable increase in production in MY 2015, especially of pistachio and hazelnut.

MY 2013 was an “off-year” and MY 2014 was “on-year” in the pistachio production cycle. Although it was “on-year”, due to the bad weather conditions, pistachio production was quite below expectations in MY 2014. Pistachio is the least affected tree nut from the weather conditions in 2015 and reached a recent high production level in MY 2015. Post forecasts pistachio production at 130,000 MT in MY 2015, up from 85,000 MT last year.

Almonds are grown in most parts of the country. Many almonds were affected from the late April frost depending on the location of orchards and region. Post forecasts a slight increase of 9 percent to 14,200 MT in MY 2015. Post forecasts that almond imports will continue due to high quality almond demand in the Turkish market.

Walnuts are grown almost throughout the country. Similarly, depending on the location of orchards and region, walnut production was also partly affected from the late spring frost in 2015. Post forecasts an increase in walnut production of 45 percent to 58,000 MT, up from 40,000 MT last year. However, this amount is still far behind to meet the walnut needs of Turkey. Post forecasts that walnut imports will also continue due to the insufficient production and high quality walnut demand in the Turkish market.

Commodities:

Almonds, Shelled Basis

Walnuts, Inshell Basis

Pistachios, Inshell Basis

PISTACHIO

Production

Pistachio production is highly cyclical and yields vary dramatically from year to year and between regions and orchards. MY 2013 was “off-year” in the natural production cycle of pistachio. Farmers and traders expected significant increase in the pistachio production in MY 2014 as it was an “on year”. However, because of the frost and an abnormal drought in the main pistachio production areas such as Gaziantep, Sanliurfa and Siirt during the winter and the spring of 2014, most of the trees could not come into blossom. As a result, natural production cycle was broken and resulted in consecutive two “off - year” in 2013 and 2014. Then, MY 2015 became “on-year” in the production cycle.

In 2015, despite the late spring frost which occurred in late April, weather conditions were better than the previous year. Pistachio is the least affected tree nut from the frost. Moreover, being “on-year” and continuous rainfall during the spring and early summer almost throughout the country led to the increase in the production of pistachio. Post forecasts pistachio production at 130,000 MT in MY 2015, up from 85,000 MT last year.

Although pistachios are grown in more than 44 provinces in Turkey, it is a traditional product of the Southeastern Anatolia Region. The cities Gaziantep, Sanliurfa, Siirt, Kilis, Adiyaman, Mardin and Diyarbakir are the most significant locations for commercial pistachio production and 90 percent of the total production comes from these provinces. Gaziantep and Sanliurfa pistachio varieties are similar, but Siirt has a distinct pistachio variety. In an "on-year", the Gaziantep region produces 40,000-45,000 MT, the Sanliurfa region produces 35,000-45,000 MT, and Siirt region produces 10,000-15,000 MT.

Most Turkish pistachios are the Gaziantep variety - thinner and smaller than the Iranian variety. Siirt pistachios, which account for about 15 percent of the total production, are somewhere between Gaziantep and Iranian pistachios. The Siirt type yields are not only higher, but fluctuate less than the Gaziantep type. In Turkey, quality is directly related to size: 90 nuts or fewer per 100 grams is considered first quality, 90-100 nuts are second quality, 100-120 nuts are third quality, and more than 120 nuts are fourth quality.

With the increasing number of new saplings planted in the Sanliurfa and Siirt regions, the production of high quality pistachios is predicted to increase in the future since pistachios are replacing olive trees in the rain-fed areas. Currently, Sanliurfa province has more trees than its neighboring province Gaziantep. Producers and researchers predict that, as a result of better variety selection, the problem of “cycling” will not be seen in the future. Currently, the average pistachio yield is around 4 kilograms (kg)/tree.

Consumption

Most of the Turkey's crop is consumed domestically and consumption varies from year to year according to availability of pistachio on the market. Traditionally, the Turkish people consume 35 percent of total production as a snack food and the rest are used in the production of confectionery, chocolate products, especially in desserts and bakery products.

Packaging of tree nuts, including pistachios, has doubled over the last few years throughout the country, especially in the coastal regions (Aegean, Mediterranean and Marmara). Packaging mitigates food safety and quality concerns related to high humidity in these regions. Currently, 35 percent of total tree nuts are being packaged, while it was 15 percent few years ago. Post forecasts that the packaging of tree nuts, including pistachios, increases consumption. Current per capita consumption is 0.6 kg/year in Turkey. However, higher prices, because of the low production in the last two years have slowed down the increase in consumption. Since the production is considerably higher than the past two years in MY 2015, Post forecasts that pistachio prices will decrease and consumption will increase and reach to 115,000 MT.

Pistachio stocks vary considerably from year to year in line with cyclical production. Moreover, pistachio production, trade and stock amounts have not been registered neither by the Government of Turkey (GOT) or related unions in the sector. This situation creates artificial price fluctuations which result in price increases especially in low production years. These fluctuations have a negative impact on consumption and food industry usages.

When pistachio prices reached 70-80 Turkish Lira (TL)/kilogram (kg), or US\$30–35 at 2.3 TL to US\$1 in 2014, some baklava and chocolate producers opted to use walnut, almond or hazelnut temporarily. Because of the high production of pistachio in MY 2015, pistachio prices have been decreasing at the beginning of the harvest period. Currently retail prices of Antep pistachio is 65-70 TL/kg (US\$19.90-23.25/kg at 3.0107 TL to US\$ in September 2015) and Siirt pistachio is 45-55 TL/kg (US\$ 14.95-18.26/kg at 3.0107 TL to US\$ in September 2015). Traders think that prices will continue to decrease up to level of 50 TL/kg (16.60 US\$/kg) for Antep pistachio.

Trade

Turkey is self-sufficient in pistachios and only a minor amount of total production goes to exports. Although there is no legal barrier to pistachio imports, there are always fewer imports than the market requires, especially during the “off year” production periods. However, due to the consecutive past two year’s bad weather conditions, pistachio production was considerably less than expected in both MY 2013 and MY 2014. Mainly for this reason, pistachio import increased in MY 2014 to 20,000 MT which is the record import level of the recent years. There was minor export to Germany and Italy. According to contacts, considerable amount of Iranian pistachios enter Turkey illegally and are consumed domestically and some are exported as a Turkish product.

In MY 2015 pistachio production reached the highest level of recent years. Pistachio Promotion Council is increasing its activities to promote the pistachio export. Post forecasts 2,000 MT in pistachio import and 13,500 MT in pistachio export in MY 2015 due to the increase in the production and stocks.

Stocks

Pistachio stocks vary considerably from year to year in line with cyclical production. Moreover, pistachio production, trade and stock amounts have not been registered neither by the GOT or related unions in the sector. The “Gaziantep Pistachio Industry Association” was established in 2014. The principle objective of this association is to establish a system for the registration of pistachio production and stocks. There is no active registration system in place yet.

Since past consecutive two years were “off -year” for pistachios, it is estimated that there are around 5,000 MT of stocks at the beginning of MY 2015.

Policy

The GOT stopped providing direct supports to pistachio farmers several years ago but supports the pistachio farmers who are registered in the “Farmers Registration System” and offers these farmers the following supports for the year 2015:

(1 US\$ =3.0107 TL, on September 6, 2015)

100 TL/decar (da) (US\$ 33.21/da) and 280 TL/da (US\$93.00/da) respectively for the establishment of new pistachio orchards that are planted with standard seedlings and certified seedlings;

70 TL/da (US\$ 23.25/da) for organic agriculture;

50 TL/da (US\$ 16.61/da) for Good Agricultural Practices;

350TL/da (US\$116.25/da) for biological control;

110 TL/da (US\$ 36.54/da) biotechnical control;

2.5 TL/da (US\$ 0.83/da) for soil analysis;

4.85 TL/da (US\$ 1.61/da) for fuel;

6.6 TL/da (US\$ 2.19) for fertilizer;

375/year (US\$ 124.56/year) for the farmers who are registered in the “Farm Account Database”.

There are no subsidies, taxes or other restrictions on pistachio exports. There is no legal barrier to pistachio imports, but there are generally minor imports throughout years.

Marketing

The Antep Pistachio Promotion Group was established in January 2006. The Aegean, Southeast Anatolian and Istanbul Exporters Unions each have two members on the Board of Directors. Also, the Ministry of Economy names one member. The goal of the group is to organize and manage research and marketing activities to increase the consumption and exportation of Antep pistachios.

GUNEYDOGUBIRLIK, which is located in Gaziantep Province, is the only sales cooperative union for pistachios. This sales cooperative follows domestic and foreign trade issues, provides information, conducts market research, and sponsors promotional events together with Pistachio Promotion Council.

ALMOND

Production

Depending on the location of the orchards and the regions, almond production was partly affected by the frost occurred in late April 2015 since the blossoming period for the almond trees occurs during that time in Turkey. Production in the Aegean, West Marmara and Mediterranean regions are higher than the previous year due to continuous rainfall during the spring and early summer in 2015. However, the heavy rainfall, during these periods created some problems for the almond trees in some locations which led the quality problems and lower production than expected. Post forecasts a slight increase of 9 percent to 14,200 MT in pistachio production in MY 2015.

Although almonds are grown in most parts of the country, they have been accepted as marginal trees, considered a minor crop and not cultivated commercially in Turkey for many years. Commercial production has started in recent years and concentrated in the Aegean, West Marmara, Southeastern Anatolia and Mediterranean Regions. Most of the almond production is from unstandardized seed, which results in inconsistent yields and qualities. The current the average yield for almonds is 11-17 kg/tree.

Turkey is currently a net importer of almonds. Since the import and prices rise continuously, the GOT has taken action to decrease imports and increase domestic production. As a result, the “Almond Action Plan” was prepared by the Ministry of Forestry and Water Affairs (MINFWA) for the period 2013-2017.

In the scope of this Plan, 8 million almond seedlings were planned to be planted within 5 years. MINFWA’s implementation of the Plan focuses on increasing forest area rather than agricultural production. The areas selected for these seedlings have some deficiencies such as high soil PH, shallow soil depth, and increased risk of root disease. Therefore, Post forecasts that the increased number of trees will not contribute significantly to almond production. The Plan itself has not been implemented successfully because of mainly bad weather conditions in MY 2013 and MY 2014.

The GOT also encourages producers to establish new orchards by allocating free land for 49 years and some interest-free financial support. As a result of these incentives the establishment of almond orchards has become popular in Turkey and the private sector has concentrated on establishing new almond orchards, especially in Izmir, Manisa, Mugla, Denizli, Urfa, and Adiyaman Provinces. It is believed that these incentives will increase the production of almonds in the future.

Consumption

The packaging of tree nuts, including almonds, has doubled over the last few years throughout the country especially in the coastal regions (Aegean, Mediterranean and Marmara). Packaging mitigates food safety and quality concerns related to high humidity in these regions. Currently, 35 percent of total tree nuts are being packaged, while it was 15 percent years ago. Post forecasts that the packaging and perceived health benefits of tree nuts, including almonds, affect the consumption positively.

Almonds are mainly consumed as snack food and limited amounts are used in the confectionary and cosmetics industries in Turkey. Per capita almond consumption is around 0.9 kg/year. Consumption of almonds, especially as a snack, has been affected negatively by the rise in market prices in MY 2014. Due to low production and the high exchange rate of the US\$ against the TL, almond consumption decreased in MY 2014 to 20,000 MT, down from 33,200 MT.

Almond retail prices are still considerably high in Ankara at the beginning of the harvest due to high exchange rate of the US\$ against the TL, (for shelled roasted almond ; 60-70 TL/kg or US\$19.92-23.25 /kg and for Datca variety (local variety); 85-90 TL/kg or US\$28.23-29.89/kg). Traders think that almond prices will slightly decrease after harvest completed. Post thinks that there will be slight increase in the almond consumption due to especially perceived health benefits and packaging of tree nuts, including almond and forecasts almond consumption at 24,400 MT in MY 2015.

Trade

Turkey is a net importer of almonds and the United States is the major almond supplier. Due to the quality, around 96 percent of almonds have been imported from the United States. Iran, Spain Chile and Australia are the other suppliers of almonds.

The rise in import prices and the high exchange rate of the US\$ against the TL resulted in a 35-40 percent increase in the market price of almonds and resulted in around 30 percent decrease in almond imports in MY 2014. Similarly, in MY 2015, due to the higher exchange rate of the USD against the TL (1 US\$=3.0107 TL, on 6 September, 2015), traders think that almond import will slightly decrease but Turkey will continue be net importer in almond because of the high quality demand of the Turkish market. Post forecasts that almond imports will decrease to 16,500 MT and exports will increase to 6,300 MT in MY 2015.

Importers pay 43.2 percent tax per ton on the cost, insurance and freight (CIF) value of the shipment. If the per ton CIF invoice value is at or below US\$3,000 the tariff will be applied at US\$3,000 per ton. If the per ton CIF invoice value is greater than US\$3,000 the tariff will applied at the actual CIF invoice value. The tariff for shelled almonds is based on a minimum CIF per ton value of US\$ 6,500, or greater. Traders prefer to import in-shell almonds as the reference value is less than half that of shelled almonds.

HS CODE	COMMODITY	REFERENCE VALUE ON CIF (US\$/TON*)
0802.11	In shell Almond	3,000
0802.12	Shelled Almond	6,500

*Ton: Gross Weight

Traders import in-shell and shelled almonds mainly from the United States, process and export them as shelled and packaged to Russia, Azerbaijan, Middle East and North African countries. It is claimed that there is illegal almond trade over Turkey's eastern border. According to contacts, Iranian almonds enter Turkey illegally and are registered in the country as produced domestically and then exported with

labels indicating Turkish origin. At the moment it is very difficult to guess the amount of illegal almond entering Turkey.

Policy

Turkey is currently a net importer of almonds. Since the import volumes and prices of almonds have risen continuously past few years, the GOT has taken action to increase domestic production. The “Almond Action Plan” (Plan) was prepared by the Ministry of Forestry and Water Affairs for the period 2013-2017. In the scope of this Plan, 8 million almond seedlings are foreseen to be planted during a 5 year period. The Action Plan has not been implemented successfully because of the bad weather conditions in MY 2014. Also, the GOT encourages producers to establish new orchards by allocating them the land for free for 49 years and some interest-free financial support.

The GOT supports almond farmers who are registered in the “Farmers Registration System” and offers these farmers the following supports for the year 2015:

(1 US\$ =3.0107 TL on September 6, 2015)

100 TL/decar (da) (US\$ 33.21/da) and 280 TL/da (US\$93.00/da) respectively for the establishment of new almond orchards that are planted with standard seedlings and certified seedlings;

70 TL/da (US\$ 23.25/da) for organic agriculture;

50 TL/da (US\$ 16.61/da) for Good Agricultural Practices;

350TL/da (US\$116.25/da) for biological control;

110 TL/da (US\$ 36.54/da) biotechnical control;

2.5 TL/da (US\$ 0.83/da) for soil analysis;

4.85 TL/da (US\$ 1.61/da) for fuel;

6.6 TL/da (US\$ 2.19) for fertilizer;

375/year (US\$ 124.56/year) for the farmers who are registered in the “Farm Account Database”.

Marketing

There is no specific organization to promote Turkish almonds. TUKSIAD (Turkey Dried Fruits and Nuts Traders and Businessman Association) actively promotes the establishment of almond orchards and the consumption of almonds in Turkey.

WALNUT

Production

Walnut production was also partly affected by the April 2015 frost, depending on the location of the orchards and the regions, since the blossoming period for the walnut trees continued that time in Turkey. Due to the frost, there is considerably low walnut production especially in the Central Anatolia. Production in the Aegean and the Marmara regions are less affected by the frost and walnut production

is slightly higher in these regions in MY 2015 compared with MY 2014. Continuous rainfall during the spring and the early summer period in 2015 was good for the walnut production but it also created problems for the walnut trees in some locations which resulted in low quality and yield losses.

Most of the walnut production is from domestic and unstandardized seed, which also results in inconsistent yields and qualities. Post forecasts an increase in walnut production of 45 percent to 58,000 MT, up from 40,000 MT last year. This amount is still far behind to meet the Turkey's walnut needs, especially for high quality walnuts.

Although walnuts are grown throughout the country, Turkey is currently a net importer of walnuts. Increased demand and high prices have encouraged walnut cultivation in recent years. Depending on the year, around 55 percent of total consumption is supplied through imports. Since imports and prices have risen continuously over the past few years, the GOT has taken action to decrease imports and increase domestic production. As a result, the "Walnut Action Plan" was prepared by the Ministry of Forestry and Water Affairs for the period 2012-2016.

In the scope of this Plan, 5 million walnut seedlings are planned to be planted during this 5 year period. As with the Almond Plan, MINFWA's implementation of the Walnut Plan focused on increasing forest area rather than agricultural production. The areas selected for these seedlings have the same deficiencies as the land dedicated to almonds, such as high soil PH, shallow soil depth, and increased risk of root disease. Post forecasts that the increased number of trees will not contribute to walnut production significantly either. The Action Plan has not been implemented successfully because of the bad weather conditions in both MY 2013 and MY 2014.

Until 1970, walnuts had been propagated only by seeds and therefore, until the last decade, it was very difficult to find established orchards of standard cultivars. However, the importance of propagation by grafting and budding is now understood and as a result orchards established of standard cultivars are becoming increasingly widespread. Currently, major producing provinces are Karaman, Kastamonu, Hakkari, Bursa and Tokat. As a result of the GOT incentives, such as allocating free land for 49 years and some interest-free financial support, the private sector has established new walnut orchards in Tekirdag, Denizli, Bitlis, Kirsehir, Canakkale, Gumushane and Bingol provinces. Chandler is becoming the most popular variety.

It is believed that these incentives will increase walnut production in the future. But currently, the major problem for walnut producers in Turkey is low yields. The average yield is around 34 kg/tree. There is great need for improved varieties. Yalova Horticulture Research Institute, which is located in Yalova in the Marmara Region, is Turkey's leading walnut research facility and the developer of new varieties. Commercial production of the improved varieties developed by the institute has begun in Balikesir, Denizli, Bursa and Kahramanmaras provinces.

Consumption

Walnuts are commonly used in desserts. Turkish desserts such as pestil and köme are made by combining walnuts with mulberries and grapes. Walnuts are also used in baklava, ice cream and halva

production and in the dried fruit industry as well. The leaves and green shells are used as a pigment in Turkey.

Walnut consumption has increased significantly in recent years due to perceived health benefits and the packaging of tree nuts, including walnuts. Per capita consumption, which was estimated earlier as 2 kg/year, is now estimated to be almost 3 kg/year. Despite the walnut preferences of baklava producers instead of pistachio due to high prices of pistachio; quite low walnut production of MY 2014 and high exchange rate of the US\$ against the TL resulted in a decrease in the consumption of walnut in MY 2014. Post thinks that there will be slight increase in the walnut consumption due to especially perceived health benefits and packaging of tree nuts, including walnut and higher production and forecasts walnut consumption at 95,000 MT in MY 2015.

Currently walnut retail prices are still high in Ankara at the beginning of the harvest due to high exchange rate of the US\$ against the TL, (for shelled walnut; 50-75 TL/kg or US\$16.60-24.91 /kg and for in shell walnut; 20-40 TL/kg or US\$6.65-13.28/kg). Traders think that walnut prices will slightly decrease after harvest completed.

Trade

Due to very high pistachio prices, the food industry and especially baklava producers temporarily tended to use walnut instead of pistachio in MY 2014. Also, low walnut production of MY 2014 led imports to continue of especially high quality walnut.

Turkey is a net importer for walnuts and the United States is the major in-shell walnut supplier to the Turkish market. After the United States, the main walnut suppliers are Chile, Uzbekistan, Ukraine, Iran, Kyrgyzstan, Uzbekistan and Moldova, largely due to price considerations. There is strong demand for high quality walnut imports. However, the rise in import prices recently and the high exchange rate of the US\$ against the TL has resulted in a 35-40 percent increase in the market price of walnuts, which resulted in a decrease in walnut imports in MY 2014.

Post forecasts an increase in the production of walnut of 45 percent to 58,000 MT in MY 2015 up from 40,000 MT last year; however, this amount is still far behind to meet the Turkish market's high quality walnut demand. Traders think that Turkey will continue to be net importer of walnuts. Because of the high prices and the high exchange rate of the US\$ against the TL, traders tend to prefer imports from less expensive sources such as Chile, Uzbekistan, Kyrgyzstan, Turkmenistan, Moldova, Bulgaria and Romania. Post forecasts walnut import at 45,000 MT in MY 2015.

Importers pay a 43.2 percent duty on CIF value for walnuts for all countries except Ukraine. The GOT has increased the tax on Ukrainian walnuts to 66.2 percent. The GOT decreased the tax on Ukrainian walnut to 58.4 in April 2014 and to 50.8 in April 2015. Also, according to a GOT decision, importers do not pay any tax for the walnut coming from Bosnia Herzegovina.

Importers pay 43.2 percent tax on per ton CIF value of the shipment. If the per ton CIF invoice value for in-shell walnuts is at or below US\$1,800 the tariff will be applied to US\$1,800 per ton. If the per ton CIF invoice value is greater than US\$1,800 the tariff will applied to the actual CIF invoice value per ton. The tariff for shelled walnuts is based on a minimum CIF per ton value of US\$5,400, or greater.

Traders prefer to import in-shell walnuts as the reference value as it is significantly less than that of shelled walnuts.

HS CODE	COMMODITY	REFERENCE VALUE ON CIF (US\$/TON*)
0802.31	In-shell Walnut	1.800
0802.32	Shelled Walnut	5.400

*Ton: Gross Weight

Turkey's processing industry has grown in recent years. Imports of both in-shell and shelled walnuts, and exports of shelled walnuts have increased substantially. There are many claims of illegal walnut shipments entering across Turkey's eastern border. At the moment it is very difficult to guess the amount of illegal tree nuts entering Turkey.

Policy

Turkey is currently a net importer for walnuts. Since imports and prices have risen continuously, the GOT has taken action to increase domestic production. As a result, the "Walnut Action Plan" was prepared by the Ministry of Forestry and Water Affairs for the period 2012-2016. In the scope of this Plan, 5 million walnut seedlings are foreseen to be planted during a 5-year period. The Action Plan has not been implemented successfully because of the bad weather conditions in both MY 2013 and MY 2014.

The GOT supports walnut farmers who are registered in the "Farmers Registration System" and offers these farmers the following supports for the year 2015:
(1 \$ =3.0107 TL on September 6, 2015)

100 TL/decar (da) (US\$ 33.21/da) and 280 TL/da (US\$93.00/da) respectively for the establishment of new walnut orchards that are planted with standard seedlings and certified seedlings;

70 TL/da (US\$ 23.25/da) for organic agriculture;

50 TL/da (US\$ 16.61/da) for Good Agricultural Practices;

350TL/da (US\$116.25/da) for biological control;

110 TL/da (US\$ 36.54/da) biotechnical control;

2.5 TL/da (US\$ 0.83/da) for soil analysis;

4.85 TL/da (US\$ 1.61/da) for fuel;

6.6 TL/da (US\$ 2.19) for fertilizer;

375/year (US\$ 124.56/year) for the farmers who are registered in the "Farm Account Database".

Marketing

There is no specific organization to promote Turkish walnut. TUKSIAD (Turkey Dried Fruits and Nuts Traders and Businessman Association) actively promotes the establishment of walnut orchards and the consumption of walnut in Turkey.

HAZELNUT

Turkey accounts for 75 percent of world production of hazelnuts and 70-75 percent of world exports. In MY 2014, frost in late March and early April and an abnormal drought resulted in a roughly 35-percent drop in hazelnut production and prices increased dramatically.

In 2015, despite the spring frost occurred in late April 2015, weather conditions were better than the previous year. Continuous rainfall during the spring and early summer throughout most of the country led to an increase in production of tree nuts, especially pistachios and hazelnuts. Hazelnut, like pistachio, was the least affected tree nut from the frost that occurred in late April 2015. Black Sea Hazelnut and Products Exporter Union and Hazelnut Promotion Group estimate the hazelnut production at around 733,000MT, Chamber of Agriculture estimates at 590,000 MT and the Ministry of Food, Agriculture, and Livestock estimates production at 676,000 MT.

Although hazelnuts are grown in more than 48 provinces around Turkey, production is primarily concentrated along Turkey's Black Sea coast. Hazelnut orchards are typically located within 30 km of the coast, and inland. In the western Black Sea area, the growing region starts from Zonguldak (east of Istanbul) and extends east along the entire Black Sea and the mountains until close to the Georgian border. There are approximately 4,000,000 people directly or indirectly employed by hazelnut production in Turkey, on an area of 600,000-650,000 hectares. The Black Sea region is divided into three distinct growing areas: (1) The hilly region from Ordu to Trabzon, centered around Giresun, which in a normal year produces about 55 percent of the crop, (2) The flatter, mixed farming region west of Ordu to Samsun, which produces about 15 percent of the crop, and (3) The area west of Samsun, which produces the remaining 30 percent. Hazelnuts require relatively little effort to cultivate and inputs are low. Turkish hazelnuts usually ripen between early and late August depending on the altitude of the orchard and climatic conditions. Hazelnuts are hand-picked from the trees and dried in the sun. Harvesting takes place during several weeks in August and September. Turkey produces around 650,000 MT of hazelnuts under normal climate conditions.

Production, Supply and Demand Data Statistics:

Pistachios, Inshell Basis	2013/2014		2014/2015		2015/2016	
	Market Begin Year		Market Begin Year		Market Begin Year	
	Sep 2013	Sep 2013	Sep 2014	Sep 2014	Sep 2015	Sep 2015
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	29000	0	29100	0	29150
Non-Bearing Trees	0	14000	0	14000	0	14000
Total Trees	0	43000	0	43100	0	43150
Beginning Stocks	39420	39420	9320	9320	0	5000
Production	50000	50000	85000	85000	0	130000
Imports	13550	13550	20000	20000	0	2000

Total Supply	102970	102970	114320	114320	0	137000
Exports	2000	2000	2000	2000	0	13500
Domestic Consumption	91650	91650	107320	107320	0	115000
Ending Stocks	9320	9320	5000	5000	0	8500
Total Distribution	102970	102970	114320	114320	0	137000
(HA) ,(1000 TREES) ,(MT)						

Almonds, Shelled Basis	2013/2014		2014/2015		2015/2016	
Market Begin Year	Aug 2013		Aug 2014		Aug 2015	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	3900	0	3900	0	3950
Non-Bearing Trees	0	1300	0	1300	0	1350
Total Trees	0	5200	0	5200	0	5300
Beginning Stocks	500	500	500	500	0	500
Production	18000	18000	13000	13000	0	14200
Imports	23500	23500	17000	17000	0	16500
Total Supply	42000	42000	30500	30500	0	31200
Exports	8300	8300	6000	6000	0	6300
Domestic Consumption	33200	33200	24000	24000	0	24400
Ending Stocks	500	500	500	500	0	500
Total Distribution	42000	42000	30500	30500	0	31200
(HA) ,(1000 TREES) ,(MT)						

Walnuts, Inshell Basis	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	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	5100	0	5200	0	5300
Non-Bearing Trees	0	2800	0	2800	0	2900
Total Trees	0	7900	0	8000	0	8200
Beginning Stocks	5000	5000	5000	5000	0	4000
Production	75000	75000	40000	40000	0	58000
Imports	51400	51400	50000	50000	0	45000
Total Supply	131400	131400	95000	95000	0	107000
Exports	12000	12000	5000	5000	0	6300
Domestic Consumption	114400	114400	86000	86000	0	95000
Ending Stocks	5000	5000	4000	4000	0	5700
Total Distribution	131400	131400	95000	95000	0	107000
(HA) ,(1000 TREES) ,(MT)						