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Turkey

Oilseeds and Products

Annual Oilseeds Report

2007

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Report Highlights:
Turkish MY 2007 oil seed production projected to reach 2.3 MMT in MY 2007 up about six percent from 2.18 MMT of MY 2006. Turkey continues to be a major importer of oilseeds and products to meet the demand of its large poultry and domestic crushing and refining industries. The recent interest to produce bio-diesel as a cheap source of renewable energy will also increase Turkish oilseed production and demand for oils when necessary regulations are done which will make production feasible. During MY 2006 imports of soybean and meal is expected to recover again fallowing a down turn in MY 2005 due to large carryovers and affects of AI's incidents on the poultry industry. U.S. soybean and meal continue to be the import market leaders. Availability of GSM-102 export credit program plays an important role for the US soybean and meal to protect its market share in the Turkish market.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Ankara [TU1]
[TU]

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Executive Summary

Total production of oilseeds subject to this report (soy, sunflower and cottonseed) is projected to reach 2.3 MMT in MY 2007, up six percent from 2.18 MMT in MY 2006 due to projected increases in both cottonseed and sunflower seed productions. Soybean production is not expected to increase due to farmers' dissatisfaction with returns. Cottonseed production is expected to increase due to the increase in use of mechanical harvesters that lower production costs. Sunflower seed production is also projected to grow due to increased use of higher-yielding certified seed. The government's continuing production bonus program for oilseeds has had positive effects on planting decisions of farmers.

MY 2006 total meal production is estimated to have increased about five percent due to increases in soybean meal and cottonseed meals. MY 2007 total meal production is also expected to rise eight percent to 1.6 MMT.

Following avian influenza (AI) outbreaks in late 2005 and early 2006, total poultry meat production declined to 1 MMT in 2006 compared to 1.06 MMT in 2005. A decline in the number of tourists visiting Turkey in 2006 also affected poultry meat demand. Successful education programs have rebuilt the confidence of consumers and the 2007 AI outbreak had no noticeable impact on consumption, although exports were reduced. Production is expected to reach 1.08 MMT. Despite fluctuations, the Turkish poultry industry ranks in the world's top fifteen producers.

Soybean and soy meal imports in MY 2005 declined 37 percent due to AI's impact on the poultry industry adversely and large year-end stocks a year prior caused by the rush of imports to avoid higher import taxes. Total soybean and soy meal imports in MY 2006 are forecast at 1.2 MMT due to increased use of full-fat soybeans in poultry rations and increased local crushing. The U.S. GSM-102 credit guarantee program will continue to protect U.S. market share in the bean and meal markets.

MY 2006 total oils production is expected to decline to 710,000 MT from 736,000 MT of MY 2005 due to decline in sunflower seed oil production, despite the increase in cotton and soy oil.

Following a few years of drastic decline due to increased crushing and refining capacities in its traditional export markets, Turkish **sunflower seed oil exports** showed a significant increase in MY 2005 due to increased exports to Iraq. Total exports of sunflower seed oil in MY 2005 reached 133,000 MT compared to 40,000 MT a year earlier. Reemergence of Iraq as a strong market, taking about 65 percent of total sun oil exports, was the main reason for the increase. Imports of sunflower seed oil also showed remarkable growth, reaching 349,000 MT in MY 2005 compared to 149,000 MT in MY 2004. Iraq's demand for refined oil and lack of domestic stocks for crushing were the reasons for the increase.

Increased utilization of vegetable oil for bio-diesel production in Europe may open new markets for Turkish vegetable oil producers if EU exports drop, particularly in the Middle East.

Rising income and population will sustain high demand for oils. Due to insufficient domestic production, demand for imported oilseeds and products to satisfy local feed, food and oil industries will continue to increase.

Biofuels: Both industrialists and agricultural groups are showing a great interest in bio-diesel production as an alternative renewable energy source. High local petroleum prices make bio-diesel a viable alternative fuel. Present specifications require bio-diesel to be produced using canola oil. There is a growing trend to increase production of canola in

Turkey. Companies and co-ops reportedly are signing production contracts with farmers. Canola imports also are reportedly increasing in MY 2005 to meet the demand. While some producers will use only canola oil, others are planning to blend canola with other oils; hence, production and imports are expected to increase in coming years. Despite the growing interest, there are many unanswered questions about bio-diesel that need to be addressed for production to grow, such as specifications, distribution and taxation. The parliament recently passed legislation that gives the Cabinet authority to impose a special consumption tax for bio-diesel of up to YTL 0.65 per kg. Producers are arguing that such a high tax would make bio-diesel uncompetitive with petroleum products and have asked the Cabinet to lower the tax. Rather than lowering the tax the government announced that bio-diesel produced from domestic oilseeds will not be subject to tax, but as local canola production is so insignificant this decision has not affected the industry positively. Nevertheless bio-diesel is anticipated to have a significant effect on production and consumption of oils in Turkey for years to come.

The government has made some adjustments for oilseeds and products in the 2007 import regime. Accordingly soybean and cottonseed imports are subject to 10 percent tariff. Sunflower seed imports from EU, EFTA and WTO member countries are subject to 27 percent tax. But sunflower seed imports from non-WTO member countries are subject to 45 percent tariff.

Sunflower seed meal and cottonseed meal imports duties are 11.5 percent for EU and EFTA countries and 13.5 percent for all other sources. The soybean meal import duty is zero percent from EU sources and Bosnia but 13.5 percent for the rest of the world.

Crude soy and cottonseed oil for food are subject to 31.2 percent import duty. Crude soybean oil is subject to 10 percent duty if it is for industrial use and 19.5 percent if it is for bio-diesel production purposes. Crude sunflower seed oil is subject to a 36 percent if from EU, EFTA and other countries that are member of WTO but crude sunflower oil imports from non-WTO member countries are subject to 60 percent customs tax.

Refined soybean oil and cottonseed oil for food are subject to 35 percent customs tax. Refined soybean and cottonseed oil however are subject to 10 percent customs tax if for industrial use and 19.5 percent if for bio-diesel. Refined sunflower seed oil is subject to fifty percent customs tax from all sources.

According to the Customs Union agreement with the EU, and bilateral agreements with Romania, Bulgaria and Hungary, Turkey allows importation of oils and oilseeds duty-free from member countries or at reduced tariff rates, as listed on last page of this report. But in 2006 Turkey did not utilize its TRQs for 60,000 MT of EU soybean oil and 18,000 MT of sun oil.

Turkey has ratified the Cartagena Biosafety Protocol and is in the process of establishing a regime to regulate biotechnology. A draft law has reportedly circulated within the government, but allegedly has been blocked so far as it potentially could impede imports of transgenic commodities. Although many Turkish officials state that they are not opposed to biotechnology, the situation remains uncertain.

Important Note on Data: *Starting from June 2006 the Turkish government has adopted a new policy on publishing import and export data. Accord to the policy, if a given item is traded by three or fewer companies in any month, trade figures are shown as zero and are not shown in the totals column either. Consequently it will be impossible to produce precise trade matrixes and trade figures on the PSD's will be estimates.*

OILSEEDS
Production
Sunflower seed

MY 2006 sunflower seed production is estimated to increase to 850,000 MT because of increased area resulting from the government continuing a production bonus program and farmers' disappointment with alternatives such as corn. Increased utilization of modern seeds also helped yields to increase despite subnormal precipitation.

The Thrace region, where seventy percent of sunflower is grown, faces an increase in industrial development and soil and water pollution that has caused a decline in sunflower area but increased use of higher-yielding certified seed. Planted area has increased, however, in other regions such as Cukurova and Central Anatolia where irrigation water is available. MY 2007 area and production are forecast to rise to about 500,000 hectares and 875,000 MT.

PSD, Sunflower seed

Turkey
Oilseed, Sunflowerseed
(1000 HA)(1000 MT)

	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Area Planted	430	0	430	420	0	480	0	0	500
Area Harvested	430	0	430	420	0	480	0	0	500
Beginning Stocks	29	0	29	18	0	22	14	0	15
Production	750	0	750	700	0	850	0	0	875
MY Imports	345	0	395	480	0	200	0	0	300
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	1124	0	1174	1198	0	1072	14	0	1190
MY Exports	3	0	0	5	0	0	0	0	0
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Crush	1097	0	1145	1170	0	1050	0	0	1165
Food Use Dom. Cons.	4	0	4	4	0	3	0	0	4
Feed Waste Dom. Cons.	2	0	3	5	0	4	0	0	5
Total Dom. Cons.	1103	0	1152	1179	0	1057	0	0	1174
Ending Stocks	18	0	22	14	0	15	0	0	16
Total Distribution	1124	0	1174	1198	0	1072	0	0	1190
CY Imports	350	0	462	480	0	372	0	0	250
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	4	0	0	4	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

Soybean

MY 2006 soybean production is estimated to remain at 25,000 MT due to farmers' disappointment with returns despite production bonus payments for the crop. In the Cukurova region, where eighty percent of domestic soybean is grown, farmers are reportedly planting soybean only for crop rotation purpose. Without major change in economic conditions of the crop MY 2007 production is forecast to remain about 25,000 MT. However, farmers in the region are utilizing advance growing techniques and yield per hectare is reportedly increasing as area decreases.

PSD, Soybean

Turkey
Oilseed, Soybean
(1000 HA)(1000 MT)

	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Area Planted	10	0	8	16	0	8	0	0	8
Area Harvested	10	0	8	16	0	8	0	0	8
Beginning Stocks	160	0	160	70	0	120	60	0	130
Production	25	0	25	40	0	25	0	0	25
MY Imports	800	0	890	950	0	1000	0	0	1100
MY Imp. from U.S.	0	0	500	0	0	600	0	0	650
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	985	0	1075	1060	0	1145	60	0	1255
MY Exports	0	0	0	0	0	0	0	0	0
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Crush	425	0	350	440	0	380	0	0	420
Food Use Dom. Cons.	20	0	20	35	0	15	0	0	15
Feed Waste Dom. Cons.	470	0	585	525	0	620	0	0	680
Total Dom. Cons.	915	0	955	1000	0	1015	0	0	1115
Ending Stocks	70	0	120	60	0	130	0	0	140
Total Distribution	985	0	1075	1060	0	1145	0	0	1255
CY Imports	1129	0	1129	0	0	1016	0	0	1200
CY Imp. from U.S.	542	0	542	0	0	500	0	0	600
CY Exports	0	0	0	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

Cottonseed

MY 2007 cottonseed production is projected to increase about seven percent to 1.4 MMT The number of mechanical harvesters has increased significantly during the last three years and reached 430 in 2006, reducing production cost significantly and making cotton more profitable. Any long-term increase in production of oilseeds will depend on completion of the Southeast Anatolia Project (GAP), which calls for irrigation of 1.7 million hectares of land and production of 1 MMT of cotton. But the project is developing very slowly due to lack of funds and so far about 300,000 hectares of land is under irrigation.

PSD, Cottonseed

Turkey
Oilseed, Cottonseed
(1000 HA)(RATIO)(1000 MT)

	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Area Planted (Cotton)	650	0	650	710	0	640	0	0	670
Area Harvested (Cotton)	600	0	600	700	0	640	0	0	670
Seed to Lint Ratio	0	0	0	0	0	0	0	0	0
Beginning Stocks	5	0	5	5	0	6	6	0	6
Production	1125	0	1125	1272	0	1310	0	0	1400
MY Imports	137	0	145	100	0	150	0	0	160
MY Imp. from U.S.	1	0	0	0	0	0	0	0	0
MY Imp. from EU	120	0	118	30	0	120	0	0	130
Total Supply	1267	0	1275	1377	0	1466	6	0	1566
MY Exports	0	0	2	1	0	2	0	0	2
MY Exp. to EU	5	0	0	1	0	0	0	0	0
Crush	1210	0	1215	1300	0	1408	0	0	1514
Food Use Dom. Cons.	0	0	0	0	0	0	0	0	0
Feed Waste Dom. Cons.	52	0	52	70	0	50	0	0	50
Total Dom. Cons.	1262	0	1267	1370	0	1458	0	0	1564
Ending Stocks	5	0	6	6	0	6	0	0	0
Total Distribution	1267	0	1275	1377	0	1466	0	0	1566
CY Imports	70	0	125	0	0	70	0	0	120
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	0	0	0	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

Other

Canola

There is growing interest in increasing canola production in Turkey, particularly following the recent investments in bio-diesel producing facilities. Additionally, relatively higher government production bonus allocations for canola also may affect planting decisions. MY 2007 planting is projected at 16,000 hectares and production at 40,000 MT compared to MY 2006 area and production estimates of 6,000 hectares and 15,000 MT. Almost all the large farmers coops, but particularly Cukobirlik and Antbirlik in southern Turkey, Karadeniz Birlik in the north, and Panko Birlik in Central Anatolia are promoting canola planting in their regions to be used in bio-diesel production to obtain a cheaper and renewable energy source which will eventually reduce the cost of farming.

Agricultural Sales Cooperative Unions

Trakya Birlik and Karadeniz Birlik, two of the leading Agricultural Sales Cooperative Unions (ASCUs) continue to play a very important role supporting sunflower seed production in Turkey. Other ASCUs includes Taris (cotton and olive oil), Cukobirlik (cotton and soybean) and Antbirlik (cotton and cottonseed). All of the ASCUs have thousands of members to whom they provide seeds, fertilizer and low-cost financing prior to planting. The ASCUs then offer attractive prices after the harvest. Trakya Birlik bought about 440,000 MT of 2006 crop of sunflower seed, and Karadeniz Birlik about 50,000 MT. The combined purchases represent about fifty-three percent of the total crop. In recent years almost all the ASCUs are investing in facilities to produce bio-diesel to distribute to their members to help them to reduce costs. ASCUs are also effective to guide and pressure the government to issue production bonuses and import tax protections for commodities that they handle. In line with IMF reforms, the government has applied some fiscal restraints on ASCUs so that they do not operate at a loss, i.e., they cannot purchase commodities above market values.

Production bonus

The production bonus program of GOT is continuing to attract farmers to plant oilseeds particularly sunflower seed and seed cotton. The GOT also included safflower in the bonus program in MY 2006. Accordingly, MY 2006 bonuses and increases in percentages compared to MY 2005 as follows: sunflower seed YTL 0.20 per kilogram (up 14 percent), soybean YTL 0.22 per kilogram (up 10 percent), canola YTL 0.20 per kilogram (up 10 percent), seed cotton TL 0.29 per kilogram (up 16 percent) safflower YTL 0.20 per kilogram. Soybean and seed cotton and producing farmers that use certified seeds are entitled to an additional twenty percent for their products. Despite serious delays in these payments, the program is still valued by farmers. (USD 1 = TL 1,450,000)

Consumption

The majority of oilseeds and products are utilized for meal and oil. In MY 2006 high grain prices encouraged feed millers and poultry operation to produce and use more full-fat soy in rations. With no major change in crushing margins expected, the trend to use full fat soy is expected to continue in MY 2007 as well.

In MY 2005 the Turkish poultry industry managed to survive a major Avian Influenza (AI) outbreak that included human casualties. Although the epidemic was only found among “back yard” free range poultry, and not in any modern integrated operations, the whole poultry sector suffered, as sales collapsed for several months. But in general the industry recovered quickly, and total production in CY 2006 was only about ten percent lower than in CY 2005. Thanks in large part to consumer and producer education campaigns, the outbreak of AI in February 2007 had a negligible effect on commercial poultry meat demand and production.

Every year a new crushing facility is added to the existing 180-odd firms and total capacity has reached about 4.7 MMT. The new high-capacity modern crushers lower the cost of crushing through economies of scale, forcing smaller crushers with older technology out of business. Low capacity utilization, about 60 percent, also remains to a problem for the industry due to lack of raw material. Turkey continues to be an exporter of oils and fats mainly to neighboring countries, particularly sunflower seed oil and margarine.

Trade

Import, Sunflower seed
Based on available information in MY 2005 imports of sunflower seed for crushing were significantly less than MY 2004 imports of 525,000 MT, but exceeded early season predictions and reached 395,000 TM. Bulgaria continued to be the leading supplier with 43 percent import share. In MY 2006 total imports are expected to decline further, to 200,000 MT, due to availability of local crop and large carryover of sunflower oil. Bulgaria is expected to remain the leading supplier due to import policies that favor EU members over countries that are not members of WTO, namely Russia and Ukraine. Sunflower seed imports are expected to continue to decline in the near future since sunflower seed availability in the region will be very limited due to increased domestic crushing in the producer countries.

Prices
Bulgarian sunflower seed prices were about USD 270 per ton C&F Turkey at the beginning of the season but went up to USD 280 in recent months.

Note: The country breakdown in the MY 2005 Trade matrix represents the first nine months. Detailed export figurers for the last quarter of the marketing year are not available and the total for this period is listed in the “others not listed” section of the trade matrixes.

Import Trade Matrix, Sunflower seed

Import Trade Matrix

Country Turkey

Commodity Oilseed, Sunflowerseed

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.		U.S.	
Others		Others	
Bulgaria	432457	Bulgaria	170402
Romania	33611	Russia	87046
Hungary	31989	Romania	57981
Moldova	13948	Ukraine	24320
Russia	7402	Moldova	18457
Ukraine	4859	Hungry	478
Kyrgyzstan	133	Argentina	70
Total for Others	524399		358754
Others not Listed			35713
Grand Total	524399		394467

Import, Soybean

Following the record imports of 1.13 MMT in MY 2004, Turkish soybean imports declined to 890,000 MT in MY 2005 as expected due to large year-end stocks and repeated outbreaks of avian influenza (AI) during the year. Imports for MY 2006 are projected to recover to about 1 MMT due to an increased use of full fat soybeans in poultry rations as an energy source and increased local crushing capacity. Mills reportedly prefer using full-fat soybeans in rations in place of grains due to cost advantages. Soybean imports in MY 2007 are expected to continue to increase and reach 1.1 MMT.

According to industry sources, the U.S. will continue to be the leading supplier to Turkey, providing about fifty percent of total soybean imports. Along with high U.S. quality, the availability of the GSM-102 export credit program will help U.S. soybeans maintain its market share in the Turkey. In addition to the U.S. and to South America, neighboring Black Sea countries, Ukraine and Romania, are the new soybean suppliers to Turkey.

Import Trade Matrix, Soybean

Import Trade Matrix

Country Turkey

Commodity Oilseed, Soybean

Time Period	Sept/May	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.	546633	U.S.	385193
Others		Others	
Argentina	277275	Ukraine	101246
Brazil	152861	Brazil	65338
Paraguay	80398	Romania	34186
Uruguay	32904	Argentina	19660
Romania	24950		
Ukraine	18322		
Total for Others	586710		220430
Others not Listed			283880
Grand Total	1133343		889503

Import, Cottonseed

MY 2005 cottonseed imports reached 145,000 MT compared to 59,000 MT in MY 2004. The lack of local supplies was the main reason for the increase in cottonseed imports. Greece and African countries continued to be the main suppliers of cottonseed to Turkey.

Import Trade Matrix, Cottonseed

Import Trade Matrix

Turkey

Oilseed, Cottonseed

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		MY 2005
U.S.	2713	U.S.	1014
Others		Others	
Greece	26170	Greece	117583
Togo	10587	Benin	12660
Ivory Coast	8026	Mali	9284
Syria	5750	Burkina Faso	5153
Mozambique	4111		
Burkina Faso	1263		
Total for Others	55907		144680
Others not Listed			
Grand Total	58620		145694

Other
According to official sources, canola imports showed a great increase in CY 2006, reaching 165,000 MT. Domestic production during the same period reached 15,000 MT, more than double the production in CY 2005, which was 6,000 MT. Canola oil utilization for bio-diesel is the main driving force for the increase in imports and in domestic production.

For the long-term, increasing demand for oil (for domestic and export markets and also for bio-diesel) as well as for meal (for the poultry, livestock and food industries), will keep Turkey's demand for imported oilseeds strong.

Stocks
High import taxes led private crushers to buy sunflower seed from Trakya Birlik. As of March 2007, Trakya Birlik's sunflower seed stock was estimated at 50,000 MT compared to 180,000 MT in March 2006. MY 2006 year-end stocks will remain at minimum levels due to increase domestic usage.

Since MY 2005, soybean stocks have been at normal levels, with importers accounting for about 1.5 months of domestic consumption. Poultry operations are still cautious about avian influenza and prefer to carry minimal stocks to avoid additional financial losses.

Policy
According to the 2007 import regime, soybean and cotton seed import taxes from all sources, except Bosnia, remain at 10 percent. There is no duty on soy and cotton seed imports Bosnia.

The tax on sunflower seed imports from the EU, EFTA and WTO member countries, including Macedonia, is still 27 percent, and 45 percent for imports from non-WTO member countries. There is no tax on sunflower seed imports from Bosnia.

According to bilateral trade agreements signed with Hungary and Bulgaria, Turkey agreed to import 1,000 MT and 25,000 MT of sunflower seed from these countries, respectively, with no duty.

Marketing

The American Soybean Association (ASA) continues to actively promote the use of soybean and soybean products, such as full-fat soy in poultry and livestock rations, in the region.

OIL MEALS

Production

MY 2006 total meal production is projected to increase about five percent to 1.5 MMT. An additional eight percent increase is also forecast for MY 2007 total meal production, reaching 1.6 MMT as a result of the expected increase in all seeds, but mostly cottonseed meal production.

Important Note: *In recent years, an increasing number of Turkish mills have not separated the hulls from the meals while producing sunflower seed meal. This practice actually increases the amount of meal produced but lowers the protein content and the quality of the meal. Due to the low protein content, the locally produced sunflower meal is not used in poultry rations but in livestock rations. As a result, farmers are required to use larger amounts of sunflower meal to obtain the protein amounts needed in their rations. Accordingly, Post is adjusting crushing rates to 50 percent, from 38 percent, to reflect the change in production.*

According to official figures, there are about 637 feed mills with an estimated total capacity of 15.5 MMT in Turkey. The local feed mill industry has been growing at a remarkable speed since 1998 with new mills with total average capacity of 0.5 MMT being added to the industry annually. New modern mills with large production capacities caused small ones to go out of business. However, the quick rise in the number of mills and in the total production capacity also lowered the capacity utilization to about 60 percent from 75 percent in early 1990's. According to the industry, mills with large capacities are enjoying the benefits of economies of scale and the top fifty mills are controlling eighty-five percent of the market and increasing their market shares. Over 170 small mills have reportedly been forced to close due to lack of business. Unregistered production and sales (in order to avoid taxes and other costs), even though gradually decreasing, continue to be major factors in the feed and, to a lesser degree, in oil industries.

PSD, Sunflower seed meal

Turkey Meal, Sunflowerseed (1000 MT)(PERCENT)	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Crush	1097	0	1145	1170	0	1050	0	0	1165
Extr. Rate, 999.9999	0,382862	0	0,504803	0,382051	0	0,504762	0	0	0,497854
Beginning Stocks	0	0	0	0	0	60	0	0	20
Production	420	0	578	447	0	530	0	0	580
MY Imports	315	0	383	320	0	360	0	0	380
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	735	0	961	767	0	950	0	0	980
MY Exports	1	0	1	0	0	0	0	0	0
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0
Food Use Dom. Cons.	0	0	0	0	0	0	0	0	0
Feed Waste Dom. Cons.	734	0	900	767	0	930	0	0	940
Total Dom. Cons.	734	0	900	767	0	930	0	0	940
Ending Stocks	0	0	60	0	0	20	0	0	40
Total Distribution	735	0	961	767	0	950	0	0	980
CY Imports	312	0	282	320	0	423	0	0	400
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	1	0	1	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0
SME	693,0428	0	849,78	724,2014	0	878,106	0	0	887,548

PSD, Soybean meal

Turkey Meal, Soybean (1000 MT)(PERCENT)									
	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Crush	425	0	350	440	0	380	0	0	420
Extr. Rate, 999.9999	0,792941	0	0,8	0,788636	0	0,789474	0	0	0,809524
Beginning Stocks	98	0	98	10	0	40	27	0	35
Production	337	0	280	347	0	300	0	0	340
MY Imports	200	0	232	400	0	250	0	0	270
MY Imp. from U.S.	150	0	130	200	0	150	0	0	170
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	635	0	610	757	0	590	27	0	645
MY Exports	5	0	15	15	0	15	0	0	15
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0
Food Use Dom. Cons.	22	0	15	25	0	10	0	0	10
Feed Waste Dom. Cons.	598	0	540	690	0	530	0	0	570
Total Dom. Cons.	620	0	555	715	0	540	0	0	580
Ending Stocks	10	0	40	27	0	35	0	0	50
Total Distribution	635	0	610	757	0	590	0	0	645
CY Imports	0	0	501	0	0	268	0	0	280
CY Imp. from U.S.	0	0	288	0	0	125	0	0	150
CY Exports	0	0	19	0	0	14	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0
SME	620		555	715	0	540	0	0	580

PSD, Cottonseed meal

Turkey Meal, Cottonseed (1000 MT)(PERCENT)									
	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Crush	1210	0	1215	1300	0	1408	0	0	1514
Extr. Rate, 999.9999	0,449587	0	0,5	0,45	0	0,5	0	0	0,5
Beginning Stocks	0	0	0	0	0	0	0	0	0
Production	544	0	610	585	0	705	0	0	755
MY Imports	0	0	0	4	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	1	0	1	0	0	0	0	0	0
Total Supply	544	0	610	589	0	705	0	0	755
MY Exports	2	0	6	5	0	5	0	0	5
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0
Food Use Dom. Cons.	0	0	0	0	0	0	0	0	0
Feed Waste Dom. Cons.	542	0	604	584	0	700	0	0	750
Total Dom. Cons.	542	0	604	584	0	700	0	0	750
Ending Stocks	0	0	0	0	0	0	0	0	0
Total Distribution	544	0	610	589	0	705	0	0	755
CY Imports	5	0	0	5	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	0	0	5	5	0	5	0	0	5
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0
SME	439,1826	0	489,4212	473,2152	0	567,21	0	0	607,725

Consumption

MY 2006 total meal consumption should rise about five percent from MY 2005 due to an increase in consumption by the poultry, dairy livestock and in fish sectors. As a result of the increase in world fishmeal prices, hatcheries use an increasing amount of soy meal in rations, estimated at about 25,000 MT per year. Turkish farmers are utilizing increasing amounts of soybean meal in dairy rations as well. The Turkish feed industry will also utilize about 100,000 MT of canola meal in MY 2006.

In general, total oilseed meal consumption is projected to move in line with the expanding domestic poultry, livestock and soy based food production. Overall, Turkish poultry meat production increased three times during the last ten years to reach 1 MMT in 2005 and another fifty percent increase is foreseen for the coming ten years. The layer industry is projected to expand in coming years too. The beef and dairy sectors are also forecast to grow in coming years but at a slower pace compared to poultry sector due to government import policies that currently forbid breeding cattle imports.

Consumption, Soy flour
Utilization of soy meal to produce pasteurized soy flour is fairly new in Turkey. Soy flour is utilized in bakery products to extend the shelf life and in confection industries to add flavor. Soy flour is also used in the meat industry as filler and as a low cost substitute for meat. Local consumption of pasteurized soy flour is gradually increasing despite the sensitivity of some producers over genetically modified products.

Other
Turkey consumed about 100,000 MT of canola meal in CY 2006.

Trade
Total meal imports declined about thirty-three percent to 672,000 MT in MY 2005 compared to 971,000 MT in MY 2004 as a result of the large carry over and lower demand from the poultry industry. Total imports are projected to continue to decline somewhat in MY 2006 due to increase in usage of full fat soybean in poultry rations and an increased availability of local sunflower seed meal in the season.

Import, Sunflower seed meal
Turkey's sunflower seed meal imports reached 383,000 MT in MY 2005 and continue to rise due to an increase in demand and lack of seeds. Turkey sources its sunflower seed meal from neighboring Black Sea countries due to increased availability as a result of increased crushing capacities. Average sunflower seed meal C&F Turkey prices for Black Sea countries reportedly increased to USD 138 per ton compared to USD 105 per ton in 2006 and USD 112 per ton in MY 2005.

Import Trade Matrix, Sunflower seed meal

Import Trade Matrix
Turkey
Meal, Sunflowerseed

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.		U.S.	
Others		Others	
Russia	98092	Russia	113460
Romania	82678	Ukraine	100502
Ukraine	66139	Romania	81812
Bulgaria	32797	Bulgaria	28678
Moldova	7968	Moldova	258
Total for Others	287674		324710
Others not Listed			58132
Grand Total	287674		382842

Import, Soybean meal
MY 2005 soybean meal imports decreased significantly to 231,000 MT compared to 685,000 MT in MY 2004 due to larger than usual year-end stocks and increased domestic crushing. Soybean meal imports are expected to increase only marginally due to expected significant increase in domestic crushing in MY 2007.

Import Trade Matrix, Soybean meal

Import Trade Matrix

Turkey

Meal, Soybean

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.	326168	U.S.	95926
Others		Others	
Argentina	283973	Argentina	35389
Brazil	73953	Netherlands	1000
Netherlands	926		
Germany	121		
Israel	67		
Total for Others	359040		36389
Others not Listed			99071
Grand Total	685208		231386

Import, Cottonseed meal
Turkey did not import any cottonseed meal in MY 2005 due to increased cottonseed imports for crushing and availability of locally produced seeds.

Other
Turkey imported about 10,000 MT of rapeseed meal in CY 2006.

Stocks
There is no reliable information on the level of commercial stocks. However, total meal stocks in MY 2006 are expected to return to normal levels since there is not large carry over of any single meal like the large soybean meal stocks of MY 2004.

Policy
According to the 2007 import regime, soybean meal imports from all countries except the EU and Bosnia, are subject to a 13.5 percent tax. The EU and Bosnia are subject to zero customs tax. Sunflower seed meal and cottonseed meal imports from the EU and EFTA countries are subject to 11.5 percent, zero percent from Romania and Bosnia, and 13.5 percent from all other sources.

Marketing
The American Soybean Association has been very effective in implementing activities to promote soybean meal utilization in poultry, ruminant and aquaculture feed.

OILS
Production
Total oil production is expected to decline to 710,000 MT in MY 2006 from 790,000 MT in MY 2005 due to lower imports of sunflower seed for crushing and lower than usual oil content of local seeds due to drought conditions during the growing season. Total production is expected to recover in MY 2007 and reach 787,000 MT due to projected increase in all oils but mostly sunflower seed oil.

Turkey has a large refining capacity, currently at about 3.5 MMT, of which about 2.4 MMT is used to produce liquid oils and the remaining 1.1 MMT is used to produce margarine.

PSD, Sunflowerseed oil

Turkey
Oil, Sunflowerseed
(1000 MT)(PERCENT)

	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Crush	1097	0	1145	1170	0	1050	0	0	1140
Extr. Rate, 999.9999	0,425706	0	0,419214	0,423932	0	0,4	0	0	0,412281
Beginning Stocks	30	0	30	62	0	127	45	0	37
Production	467	0	480	496	0	420	0	0	470
MY Imports	408	0	350	410	0	150	0	0	225
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	905	0	860	968	0	697	45	0	732
MY Exports	82	0	133	100	0	50	0	0	70
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Industrial Dom. Cons.	20	0	5	21	0	5	0	0	5
Food Use Dom. Cons.	721	0	590	780	0	600	0	0	610
Feed Waste Dom. Cons.	20	0	5	22	0	5	0	0	5
Total Dom. Cons.	761	0	600	823	0	610	0	0	620
Ending Stocks	62	0	127	45	0	37	0	0	42
Total Distribution	905	0	860	968	0	697	0	0	732
CY Imports	200	0	200	400	0	398	0	0	200
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	45	0	48	100	0	100	0	0	100
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

PSD, Soybean oil

Turkey Oil, Soybean (1000 MT)(PERCENT)									
	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		09.2005	09.2005		09.2006	09.2006		09.2007	09.2007
Crush	425	0	350	440	0	380	0	0	420
Extr. Rate, 999.9999	0,176471	0	0,171429	0,195455	0	0,171053	0	0	0,178571
Beginning Stocks	0	0	0	0	0	20	0	0	10
Production	75	0	60	86	0	65	0	0	75
MY Imports	155	0	190	200	0	120	0	0	140
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0	0	0	0
Total Supply	230	0	250	286	0	205	0	0	225
MY Exports	1	0	5	5	0	5	0	0	5
MY Exp. to EU	0	0	0	0	0	0	0	0	0
Industrial Dom. Cons.	144	0	165	216	0	125	0	0	145
Food Use Dom. Cons.	60	0	40	40	0	35	0	0	30
Feed Waste Dom. Cons.	25	0	20	25	0	30	0	0	35
Total Dom. Cons.	229	0	225	281	0	190	0	0	210
Ending Stocks	0	0	20	0	0	10	0	0	10
Total Distribution	230	0	250	286	0	205	0	0	225
CY Imports	132	0	188	0	0	213	0	0	200
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	0	0	2	0	0	2	0	0	5
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

PSD, Cottonseed oil

Turkey Oil, Cottonseed (1000 MT)(PERCENT)	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		10.2005	10.2005		10.2006	10.2006		10.2007	10.2007
Crush	1210	0	1215	1300	0	1408	0	0	1514
Extr. Rate, 999.9999	0,164463	0	0,161317	0,165385	0	0,159801	0	0	0,159841
Beginning Stocks	0	0	0	0	0	0	0	0	0
Production	199	0	196	215	0	225	0	0	242
MY Imports	7	0	6	2	0	4	0	0	5
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0
MY Imp. from EU	1	0	1	0	0	0	0	0	0
Total Supply	206	0	202	217	0	229	0	0	247
MY Exports	2	0	2	6	0	6	0	0	10
MY Exp. to EU	1	0	1	0	0	0	0	0	0
Industrial Dom. Cons.	41	0	35	32	0	43	0	0	52
Food Use Dom. Cons.	163	0	165	179	0	180	0	0	185
Feed Waste Dom. Cons.	0	0	0	0	0	0	0	0	0
Total Dom. Cons.	204	0	200	211	0	223	0	0	237
Ending Stocks	0	0	0	0	0	0	0	0	0
Total Distribution	206	0	202	217	0	229	0	0	247
CY Imports	5	0	5	4	0	10	0	0	10
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0
CY Exports	2	0	2	6	0	4	0	0	5
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0

Other

Turkey's CY 2006 rapeseed oil production is estimated to be about 72,000 MT, while imports were at about 3,000 MT. All of the rapeseed oil produced and imported was for use in bio-diesel production.

Margarine production declined in recent years but rebounded in CY 2005, reaching about 615,000 MT. Margarine production is projected to increase slightly in CY 2006 to 625,000 MT due to the increase in exports and domestic consumption, particularly by the food processing industry.

Consumption

Domestic oil consumption is estimated at about 18.5 kg per capita, of which 10.8 kg is liquid oil, 6.7 kg is margarine and 1 kg is olive oil. Sunflower seed oil remains the principal home cooking oil in Turkey followed by cotton, corn and olive oil. The great majority of the sunflower oil produced or refined in Turkey is consumed locally and the rest is exported to regional markets as refined oil.

Other

Consumption of blended oils (mostly soy and cotton oil) continuing to decline in MY 2006 due to the high cost of soy oil.

Bio-diesel

The interest to produce bio-diesel continues. However, the current government regulation does not make bio-diesel production economically possible. About 185 companies applied to get a license in February 2006, to produce bio-diesel with a total capacity of 1.5 million MT per year, placing Turkey as the second biggest world producer of bio-diesel. As of February 2007, less than 30 companies were officially granted a production license. While officially approved plants are not producing much bio-diesel, it is estimated that about 3,000 small size plants and production units are producing bio-diesel for personal use and also selling it illegally.

The main reason for the great enthusiasm to produce bio-diesel is the very high cost of petroleum products in the domestic market due to the increased world prices and high local taxes. The consumption tax on petroleum products is one of the most important sources of revenue for the Turkish government. Presently, the special consumption tax on petroleum products is equivalent to sixty percent, making Turkey one of the most expensive countries in the world in terms of cost of fuel.

Along with the private companies, almost all the agricultural co-ops are interested in investing in bio-diesel production plants in order to provide cheaper fuel to their members and lower the cost of production. While some co-ops plan to use canola oil, others will mix soy oil, cottonseed oil with canola oil to produce bio-diesel. Some producers are said to use palm oil for bio diesel production in summer months. Turkish specifications for bio-diesel are similar to the EU specifications, which defines canola oil as the most suitable raw material. The Turkish government sees this demand to produce bio-diesel as an opportunity to increase local production of oilseeds; therefore, the government is pushing bio-diesel producers to use locally produced oilseeds, namely canola. The government supports the production of canola with higher production bonus payments and is encouraging bio-diesel producers to sign production contracts with farmers to produce canola for bio-diesel. Even though producers have pressured the government to provide tax incentives for using recycled fats and oils in bio-diesel production, the government has not moved in that direction. It is estimated that 350,000 MT of used oils and fats are produced annually in Turkey.

The industry is insisting on a more liberal approach by the government in favor of other oils, such as soybean oil also for bio-diesel production. Presently, soy, cotton and palm oils are mixed with the canola oil to produce bio-diesel.

There are many issues related to bio-diesel such as specification, distribution and taxation that still need to be finalized for the industry to start production and sales legally. The cabinet announced YTL 0.65 per kg special consumption tax for bio-diesel. Producers argued that such a high tax would make bio-diesel uncompetitive with petroleum products and requested that the cabinet eventually issue a lower tax. The government issued a decree in December, long after the planting season, to exempt bio-diesel produced by locally produced canola oil from the consumption tax but not include recycled fats and oils in to the tax exemption. Bio-diesel producers are negotiating with the government to get a more liberal policy for the industry to utilize the large investments that they have made.

Trade

Import, Sunflower seed oil

MY 2005 imports of sunflower seed oil increased significantly and reached 350,000 MT compared to 150,000 MT in MY 2004. MY 2006 imports are expected to decline The increase in imports was predominantly due to projected refined oil in exports to Iraq; however, due to sudden drop in demand from Iraq towards to end of the marketing year Turkish processors were forced to carry large stocks to the next year. Increased crushing capacity in neighboring sunflower seed producing countries continues to force Turkey to import larger amounts of oil rather than oilseeds to meet its domestic and export demand.

Import Trade Matrix, Sunflowerseed oil

Import Trade Matrix

Turkey

Oil, Sunflowerseed

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.		U.S.	
Others		Others	
Russia	43968	Ukraine	119264
Ukraine	41752	Russia	86026
Romania	32485	Argentina	60066
Bulgaria	15549	Romania	9264
Hungary	4578	Bulgaria	3730
Argentina	4456	Paraguay	2982
Belarus	2301	Hungary	1450
Moldova	2000	Moldova	765
Spain	1275	France	186
Brazil	500	Germany	4
Total for Others	148864		283737
Others not Listed	173		65603
Grand Total	149037		349340

Import, Soybean oil

Turkey soybean oil imports continued to grow in MY 2005 and reached 190,000 MT compared to 104,000 MT in MY 2004. The increase in imports is attributed mostly to the attractive world soy oil prices during that year and to an increase in utilization of unauthorized production of bio-diesel. Imports are expected to decline in MY 2006 due to the increased world prices for soybean oil. Demand for soy oil will fluctuate in accordance with the developments in bio-diesel production in Turkey and world soy oil prices.

Import Trade Matrix, Soybean oil

Import Trade Matrix

Turkey

Oil, Soybean

Time Period	Sept/Aug	Units:	Metric tons
Imports for:	MY 2004		**MY 2005**
U.S.	8	U.S.	41
Others		Others	
Spain	43656	Argentina	84544
Argentina	22295	Brazil	29517
Portugal	15454	Spain	12483
Romania	8128	Portugal	8673
Italy	7906	Greece	6384
Greece	5994	Romania	1005
Brazil	300	Italy	893
Total for Others	103733		143499
Others not Listed			46069
Grand Total	103741		189609

Import, Canola oil

Turkey's canola oil imports increased in MY 2004 to 9,000 MT, sourced primarily from France (7,000 MT) and Germany (2,000 MT). In MY 2003, Turkey only imported 1,500 MT of canola oil. During the first four months of MY 2005 canola oil imports were only 500 MT, Ukraine was the supplier.

The current C&F import price for Black Sea sunflower oil is USD 660 per MT compared to USD 555 last year, while soy oil is about USD 680 per MT compared to USD 525 last year.

Export

Export, Sunflower seed oil

Turkish exports of sunflower seed oil reached 133,000 MT in MY 2005 compared 39,000 MT in MY 2004 due to increased exports to Iraq. Exports to Iraq continued at a great speed during the first three quarters of the marketing year but slowed down during the last quarter. Exporters attributed the decline to excessive imports from Iraq at the beginning of the year and also international competition. Exports are expected to pick up again in MY 2006 but not reach MY 2005 levels.

Note: *The trade matrix below shows country distribution for the first nine months of the marketing year. Exports of the last quarter of the marketing year (June, July, August 2006) are shown in the "others not listed" section since country breakdowns for this period are not available. Sources estimate that about 70 percent of exports in this section are to Iraq and 20 percent to Syria and the remaining 10 percent to other destinations.*

Export Trade Matrix, Sunflower seed oil

Export Trade Matrix

Turkey

Oil, Sunflowerseed

Time Period	Sept/Aug	Units:	Metric tons
Exports for:	MY 2004		**MY 2005**
U.S.	49	U.S.	49
Others		Others	
Iraq	16290	Iraq	76376
Syria	11656	Syria	23915
Israel	1780	Israel	1794
N. Cyprus	2340	N. Cyprus	1778
Lebanon	927	Lebanon	742
Yemen	674	Yemen	674
Bulgaria	399	Pakistan	623
Norway	306	S. Arabia	433
Japan	969	Japan	401
U.A.E.	567	U.A.E.	338
Total for Others	35908		107074
Others not Listed	3406		26119
Grand Total	39363		133242

Margarine

Following three years of consecutive growth, Turkish margarine exports declined in CY 2006 106,000 MT compared to 127,000 MT in CY 2005. Iraq, Syria and CIS countries were the leading export destinations for Turkish margarine.

Stocks

MY 2005 sunflower seed oil stocks were significantly higher than usual (about 100,000 MT) due to the increased imports of crude oil with the expectation of refined oil exports to Iraq during the year. However, the sudden disappearance of Iraqi demand created large year-end stocks. MY 2006 oil stocks are projected to go back to normal levels. In general, the Turkish oil industry operates with relatively low stocks to prevent foreign currency risks.

Policy

According to the 2007 tariff schedule, all liquid oil imports, crude and refined, except sunflower oil are subject to a 31.2 percent import duty. Crude sunflower seed oil is subject to higher duties, 36 percent, and 60 percent for non-WTO members. Refined sunflower seed oil is subject to a 50 percent customs tax from all sources except Bosnia. All oil imports from Bosnia are free of tax.

To comply with the Customs Union agreement with the EU and the free trade agreements signed with Bulgaria, Romania and Hungry, Turkey established tariff rate quotas (TRQs) as listed below. In spite of the availability, Turkey does not necessarily always utilize these quotas. Accordingly, the Turkish government preferred not to utilize 60,000 MT of soybean oil and 18,000 MT sunflower oil TRQ's from the EU in 2006 to prevent a decline in local oil prices.

Country	Commodity	Quantity	Duty
EU	Crude Sunflower Oil	18,000 MT	0
EU	Crude Soybean Oil	60,000 MT	0
EU	Refined Soybean Oil	2,000 MT	0
EU	Crude Canola Oil	10,000 MT	0
Romania	Crude Sunflower Oil	30,000 MT	0
Romania	Crude Soybean Oil	9,300 MT	0
Hungry	Crude Sunflower Oil	300 MT	0
Bulgaria	Crude Sunflower Oil	15,000 MT	50 percent reduced
Bulgaria	Crude Corn Oil	1,000 MT	50 percent reduced

Marketing

The American Soybean Association (ASA) continues its U.S. soy oil promotion activities at the consumer and production levels. ASA technical consultants regularly visit refiners to understand the various technical problems in refining and assist in improving quality.