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Oilseeds and Products

Oilseeds annual

2005

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Report Highlights:

MY 2005 total oilseed production is projected at 2 MMT, about five percent lower than last year's production. 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. Increased crushing capacity in the sunflower seed producing Black Sea countries has reduced sunflower seed availability and will force Turkey to import meal and oil in coming years. Turkish imports of soybeans and meal declined in MY 2003 to 600,000 MT and 368,000 MT respectively due to large carryovers but are expected to rebound in MY 2004.

Includes PSD Changes: Yes
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Executive Summary

Post estimates MY 2004 total oilseed production at about 2.06 MMT, up three percent from MY 2003. However, a five percent decrease in total oilseed production is forecast for MY 2005. Soybean and cottonseed area are expected to decline due to relatively low returns. Sunflower seed area is expected to remain the same while production will depend on precipitation during the season. 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. Increased crushing capacity in the sunflower seed producing Black Sea countries has reduced sunflower seed availability and will force Turkey to import meal and oil in coming years. Lack of imported sunflower seed will increase imports of both meals (sun and soy) and oils (sun and soy) to meet the demand of local poultry and oil industries.

MY 2005 meal production will almost be the same as MY 2004 as the decline in sunflower seed meal production will be offset by minor increases in soy and cottonseed meal production.

After two years of consecutive increases in production, Turkish broiler production declined due to negative press regarding unfounded allegations of hormone use in feed rations. ~~AW~~ As a result of negative consumer reaction, the industry had to lower prices below cost to stop the decline in sales. However, the industry is expected to recover with the start of the tourism season and a minor increase is foreseen for the year. Despite the fluctuations in production, Turkey continues to be one of the largest poultry producers in the region and broiler meat production alone is expected to exceed 1 MMT in 2005.

Export prospects for Turkish liquid oil and margarine declined drastically during the last few years due to increased crushing and refining capacities in export markets, the over-valued Turkish Lira, and high local raw material prices. Iraq and Libya however, have reemerged as export markets for liquid oil and margarine. Turkey's large population will continue to keep demand for oils high. Due to lack of local production, demand for imported oilseeds and products to satisfy local feed, food and oil industries will continue to increase.

During MY 2003, the U.S. market share of soybean and meal imports declined to about forty-seven percent and forty-nine percent respectively due to relatively high U.S. prices. Even though Turkish millers value high quality U.S. soybeans and meal, price and availability of trade financing still play an important role in purchasing decisions. Presently U.S. soybean and meal quotes are approximately USD 304 and USD 272 per MT C&F Turkey verses South American soybeans and meals, which are USD 287 and USD 267 per MT, respectively. Due to narrow spread between the U.S. and South American prices, the United States is expected to gain its market share back in MY 2004.

Soybean meal utilization in the food industry is increasing rapidly. MY 2004 consumption is estimated at about 20,000 MT and is expected to increase to 50,000 MT within a few years.

According to the 2005 tariff regulations, customs duties for oilseeds and products remain the same as 2004; accordingly, sunflower seed is subject to twenty percent, soybean zero percent and cottonseed four percent customs duties. All meal from the EU is subject to zero customs duties while meals from other sources are subject to a two percent duty. All oil imports - crude and refined - are subject to 31.2 percent import duty with the exception of sunflower seed oil. Crude sunflower seed oil is subject to a 36 percent and refined sunflower seed oil to a 50 percent customs tax. According to the Customs Union agreement with the EU, and bilateral agreements with Romania and Bulgaria, Turkey allows importation of oils and seeds duty free or at reduced tariff rates as listed on page 10. According to industry sources, the GOT is under pressure from crushers to increase import duties for all meals to six percent to increase domestic crushing. Local feed producers, however, are against the

increase indicating that such a move will increase their production cost. If the GOT decides to increase the duty on meal, this will facilitate imports of more seeds, mostly soybeans from the US and South America.

Farmers and Agricultural Sales Cooperative Unions (ASCUs) are waiting for the government to pay production premiums for MY 2004 crops. The GOT announced production premiums for various oilseeds and grains (sunflower seed, soybean, seed cotton, corn and canola) and oil (olive oil) to support local production. The GOT announced, but has not paid, production premiums for the 2004 crop. The GOT also increased premium amounts substantially for some crops to prevent a decline in planting. Accordingly, MY 2004 premiums and increases in percentages compared to MY 2003 as follows: sunflower seed NTL 0.13 per kilogram up 23 percent, soybean NTL 0.14 per kilogram up 22 percent, olive oil NTL 0.25 per kilogram up 25 percent, canola NTL 0.13 per kilogram up 8 percent, and cotton NTL 0.19 per kilogram up 111 percent. Farmers using certified seeds for producing cotton and soybeans will also be paid an additional twenty percent for their products. (USD 1 = NTL 1.34)

Turkey has ratified the Cartagena Biosafety Protocol and is in the process of establishing a bio-safety system. Officials state that regulations should be in place by the end of 2005. While many Turkish officials state that they are not opposed to biotechnology, the effect of pending legislation on trade remains to be seen.

OILSEEDS

Production

Sunflower seed

Turkey's MY 2004 sunflower seed crop reached 650,000 MT, slightly higher than earlier season projections despite a decrease in planted area. Optimum weather conditions and timely rains during the season helped to increase yields while area declined due to increased planting of confectionery pumpkin seed and sorghum in the Thrace region where seventy percent of sunflower seeds are grown. MY 2005 production is expected to be about 600,000 MT with no acreage increase projected.

Soybean

Soybean production declined about fifty percent two years in a row to 25,000 MT in MY 2004. Farmers in the Cukurova region, where about eighty percent of local soybeans are grown, were not happy with their returns during the last two years and continue to shift to corn. A further decline is foreseen to 20,000 MT for the coming season. Soybean planting is now only done as a second crop following wheat to support the soil quality.

Cottonseed

Cottonseed production is expected to decline marginally in MY 2005 due to decreased acreage following an unsatisfactory return for cotton in MY 2004. While production in the Aegean and Cukurova regions continues to decline due to competition from other crops, the total production increase will depend on planted area in the Southeastern Anatolian Project (GAP) region, where the irrigation system is expanding very slowly.

Canola

Attempts to increase canola production in various regions and utilize a higher percentage of the existing crushing capacity are still in the experimental stage. Turkish MY 2004 production declined to 4,500 MT compared to 6,500 MT in MY 2003 due to decreased acreage. MY 2005 canola production is projected to be even lower, at about 2,500 MT due to the frost last November that will adversely effect yields.

Trakya Birlik and Karadeniz Birlik, two of the leading Agricultural Sales Cooperative Unions (ASCUs) play a very important role supporting sunflower seed production in Turkey. Other ASCUs include Taris, (cotton and olive oil), Cukobirlik, (cotton and soybeans) and Antbirlik, (cotton and cottonseed). All ASCUs have thousands of members to whom they provide seeds, fertilizer and low cost financing prior to planting. The ASCUs try to buy their

production with attractive prices after the harvest. Trakya Birlik bought about 426,000 MT of MY 2004 crop of sunflower seed and Karadeniz Birlik about 30,000 MT. The purchases represent about seventy percent of the total crop, which is about the same as last year's total purchase. Coops tend to buy large portions of the crop because they play a role of price setter in the market for sunflower seed and they also process large amounts of seeds to produce crude and refine oil and meal. ASCUs are also effective at advising and putting pressure on the government to issue production premiums and import protection for their commodities. In line with IMF reforms, the GOT has applied some fiscal restraints on ASCUs so that they do not operate at a loss, i.e., purchase commodities above market value.

Any production increase for oilseeds in Turkey will depend on an increase in cotton planted area in the GAP region, one of the largest irrigation projects in the world. In the GAP region there is a 1.7 million hectare area irrigation target, and potential to produce about 1.0 million tons of cotton when it is completed in the year 2010.

Consumption

The majority of oilseeds and products are utilized for meal and oil. In MY 2004 utilization of full-fat soya continues to be strong in poultry rations. However, improved crushing margins since MY 2002 continued to orient crushers to use soya for oil and meal in increasing amounts while feed mills continue to use full fat soybean.

There are about 180 crushing firms in Turkey with a total capacity of more than 4.5 MMT. Capacity utilization, which is estimated at only about 60%, is expected to decline further due to lack of seeds. Turkish exports of oils and fats are showing signs of improvement after declining in recent years, particularly for margarine. These exports still play an important role to keep the demand for imported seeds high.

The poultry industry continues to be the major consumer of soybeans and soybean meal in Turkey. After two years of consecutive growth, 17% in 2003 and 8% percent in 2004, the Turkish broiler industry presently is going through difficult days due to claims of utilization of hormones in rations. A sharp decline in poultry meat consumption took place following the negative press. The industry expects to recover with the start of the tourism season and year-end projections signal minor growth for 2005. Poultry meat producers had to decrease their prices to fight against the falling sales and keep their competitive position against the high red meat prices. Turkey continues to be one of the largest poultry producers in this region and projected 2005 total poultry meat production will exceed 1 MMT.

Consumption of soybean flour in food production (bakery additives) is fairly new in Turkey but increasing sharply. MY 2004 consumption is estimated at about 25,000 MT, up fifty percent from last year and growing.

Trade

MY 2004 sunflower seed imports are expected to collapse to 200,000 MT compared to 621,000 MT in MY 2003. Increased crushing capacity in the Black Sea region, the main region for Turkish sunflower seed imports, and seasonal (Sept/Dec 2004) sunflower seed import duty increase to 27 percent from 20 by the GOT were the reasons for the decline. MY 2005 sun seed imports are expected to be about the same but in the near future sunflower seed availability in the region will be very limited for seed hungry Turkish crushers.

Bulgaria was the main supplier during the first four months of the MY 2004 providing 90 percent of total imports (130,000 MT) due to its geographic proximity. Other neighboring Black Sea countries such as Ukraine and Russia lost their importance as sources since now they crush a larger portion of their seeds domestically. Bulgarian sunflower seed prices were

about USD 270 per ton C&F Turkey at the beginning of the season, but went up to USD 320 in recent months.

Due to the higher shipping costs and large local sunflower seed stocks in the hands of Trakya Birlik, imports from other sources, such as Argentina, during the second part of the marketing year seem unlikely.

Soybean imports during MY 2003 were down to 600,000 MT compared to 746,000 in MY 2002. The decline in imports was due to large carry over stocks in the market. Poultry producers prefer to work with lower stocks because of increased commodity prices and the relatively stronger Turkish Lira against the US dollar. The US market share fell below fifty percent in MY 2003 due to record US prices. In MY 2004 total imports are expected to increase to 700,000 MT due to increased crushing margins, and the reduced availability of sunflower seeds. The US market share is also expected to recover during the year due to lower US prices.

Cottonseed imports recovered in MY 2003 to 63,000 MT. Syria (20,000 MT) Togo (13,500 MT) and USA (13,500 MT) were the leading suppliers.

For the long-term, increasing demand for oil (mostly from the domestic and somewhat from export markets) as well as for meal (mostly from the poultry and lesser degree from livestock and food industries), with no increase in domestic production, will keep Turkey's demand for imported oilseeds strong.

Stocks

Official data are not available. MY 2004 year-end stocks are expected to be at normal levels due to high import taxes that will drive private crushers to buy sunflower seed from Trakya Birlik. As of March 2005, Trakya Birlik's highly priced local sunflower seed stocks are estimated at 180,000 MT. Soybean stocks in the hands of private companies are expected to decline somewhat due to the improved economy and decreased price risk of holding stocks.

Policy

According to Turkey's 2005 tariff schedule, import duties on oilseeds are as follows: Soybeans, 0 percent; cottonseed, 4 percent; and sunflower seed, 20 percent. According to bilateral trade agreements, Turkey will be importing 25,000 MT of sunflower seed from Bulgaria with no duty.

Marketing

The American Soybean Association (ASA) continues to actively promote the use of soybean and soybean products in the region. ASA's training programs in utilization of soy flour in bakeries has become very successful in Turkey. ASA also maintains training programs for better utilization of soybean products in the poultry and livestock sectors.

OIL MEALS

Production

Total oilseed meal production for MY 2004 is projected to decline about six percent to 1.19 MMT. An increase in cottonseed and soybean meal production was offset by the decrease in sunflower seed meal production. MY 2005 meal production is expected to increase only marginally due to an increase in soybean crushing.

There are about 540 feed mills with an estimated total capacity of 12 MMT established in Turkey. While some modern large mills and the ones belong to integrated poultry operations are reportedly increasing capacity, about 120 mills are reported to have ceased operation

due to a lack of business. Unregistered production and sales (in order to avoid taxes and other costs) continues to be a major factor in both the feed and oil industries.

Consumption

MY 2004 consumption of sunflower seed meal is expected to decline about twenty-five percent –a total of 180,000 MT- to 535,000 MT to due to lack of raw material. On the other hand, soy meal consumption is expected to increase about ten percent to 600,000 MT to compensate. Industry sources also indicate that increasing amounts of wheat bran are also used in poultry rations to fill the gap of sunflower seed meal supply.

In general, total oilseed meal consumption is projected to move in line with 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 2004 and another fifty percent increase is foreseen for the coming ten years. The layer industry is also expanding. Minor growth is also foreseen for the beef and dairy sector due to increasing local consumption.

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 of bread and in confection industries to add flavor and in the meat industry as fillers and as a low cost substitute for meat. Local consumption for pasteurized soy flour and products is expected to exceed 50,000 MT in a few years due to expending market and investments of leading industrial groups.

Trade

Total meal imports in MY 2003 reached 714,000 MT, up thirty-six percent. Decline in soy meal imports were offset by the increases in sunflower and cottonseed meals. A significant decline in domestic sunflower seed crushing in MY 2003 forced the poultry industry to import 312,000 MT of sunflower seed meal compared to 64,000 MT in MY 2002. Cottonseed meal imports also vital due to availability in neighboring countries, Syria and Greece. In the view of declining seed imports, total meal imports are expected to increase another fifteen percent in MY 2005 to meet local demand.

Overall, import demand for oil meals is forecast to increase in response to the growing demand for all meals from the poultry, livestock and bakery industries.

In addition to the other meals Turkey's imports of fishmeal doubled during MY 2003 and reached 40,600 MT to meet the increasing demand of local fish farms. Peru has been the leading supplier with average price of USD 680 per MT, C&F Turkey.

Stocks

There is no reliable information on the level of commercial stocks. Sunflower seed and cotton meal stocks that are being held by the cooperatives, crushers and feed millers will be utilized before the end of the season.

Policy

According to the 2005 import regime, EU oil meals are subject to zero duty and meals from other sources are subject to a two percent tariff. But according to the industry contact the GOT is getting ready to increase import duty on meals to six percent from all sources to help increase domestic crushing.

Marketing

The American Soybean Association has been very effective implementing activities to promote soybean meal utilization including expanded use of 48% HiPro meal in poultry

rations, and increased use of soy meal in dairy, ruminant and aquaculture feed. In recent years ASA has also promoted the food use of soy products -soy flour- via technical conferences and site visits by experts.

OILS

Production

MY 2004 total oils production is expected to decline to 639,000 MT from 775,500 MT of MY 2003, due to significant decline in sunflower seed oil production, which was the result of reduced sunflower seed imports. In MY 2004 sunflower seed oil production is expected to decline about thirty percent to 360,000 MT. Minor increases in both soybean oil and cottonseed oils will not be enough to off set the decline. MY 2005 production is expected to be about little less than MY 2004 due to decline in sunflower seed oil production.

Turkey has a large refining capacity, currently about 3.4 MMT, of which about 2.3 MMT is used to produce liquid oils and the remaining 1.1 MMT is used to produce margarine. Olive oil production in MY 2004 is expected to be about 155,000 MT since it was a high year of production. MY 2005 production is expected to decline to 90,000 MT. Olive oil production varies greatly year to year due to the nature in which olives are harvested. TARIS is investing in modern equipment to collect olives that will assist to produce larger crops in off years. Hazelnut oil production went down to 30,000 MT in MY 2004 due to lack of raw material. Turkey also produces about 15,000 MT of corn oil annually. Margarine production declined in recent years due to a decrease in exports and domestic consumption. Production is expected to rebound somewhat in MY 2004 and production is projected about 520,000 MT because of increased exports to Iraq.

Consumption

Domestic oil consumption is estimated at about 17 kg per capita, of which 10 kg is liquid oil, 6 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.

During MY 2004 consumption of blended oils (mostly soy and cotton oil), which declined last year are expected to rebound due to decreasing soy oil prices and increased local sunflower seed oil prices due to high cost of imports.

The consumption of hazelnut oil declined due to lack of raw material, old stock hazelnuts. A new blended oil of hazelnut and sunflower seed oil mix introduced to the market to fill the gap. MY 2004 hazelnut production suffered frost- induced losses that resulted in record high hazelnut prices. To meet world demand, most old-crop stocks were liquidated resulting in a reduced supply of hazelnuts for oil production. MY 2004 domestic hazelnut oil consumption is expected to decline to about 20,000 MT.

Consumption of olive oil fluctuates with the swings in domestic production since prices soften and consumption increases when the supply is abundant.

Trade

Starting MY 2004 Turkey will need to import larger amount of crude vegetable oils to meet the domestic and export demand due to increased crushing capacity and the resulting limited seed exports in neighboring sunflower seed producing countries. MY 2004 imports of sunflower seed oil will increase to 210,000 MT compared to 83,000 MT in 2004. Soy oil imports will also increase during the year due to competitive prices of the commodity.

Turkey imported 1,462 MT of rapeseed oil during MY 2003 but imports during the first four months of the MY 2004 went up to 3,000 MT with Germany and France being the main suppliers.

Turkish corn oil imports declined in CY 2004 to 90,025 MT compared to about 96,000 MT in 2003 due to the change in import taxes that adversely affected the advantageous situation of corn oil against sunflower seed oil. US corn oil exports to Turkey in CY 2004 also declined to 63,800 MT compared to 88,000 MT in the previous year. South American countries Brazil (19,000 MT) and Argentina (2,950 MT) emerged as new sources. Turkish refined corn oil exports increased in CY 2004 to 23,000 MT, compared to 14,500 MT in 2003. Libya was the leading export market with 16,000 MT. CY 2005 Turkish corn oil imports are expected to increase again to 110,000 MT due to the export contracts that Turkish companies are holding and low value of the US dollar making corn oil affordable for Turkish consumers.

Turkey continued to import large quantities of palm oil and palm kernel oil to meet the demand of the local margarine industry for domestic and export markets, particularly Iraq. CY 2004 palm oil imports reached 347,000 MT and palm kernel oil 101,000 MT. While palm oil imports were up slightly palm kernel oil imports were up in larger amounts. Malaysia and Indonesia are the main suppliers for both oils.

The current C&F import price for crude oils per MT are: U.S. corn oil USD 750, Black Sea sun oil USD 685, palm oil USD 520 per MT, while soy oil is about USD 610.

Turkey's refined sunflower seed oil exports declined dramatically in recent years. MY 2003 exports remained about 15,600 MT compared to 35,000 MY in MY 2002 and 120,000 MT in the late nineties. High local raw material prices and an increase in refining capacities at exports markets were the reasons for the decline. MY 2004 exports will go up to 30,000 MT due to increasing demand from Iraq.

In MY 2003 Turkish olive oil exports also declined to 46,000 MT due to limited availability. Italy continues to be the leading buyer for Turkish olive oil importing 23,000 MT. The current export price of bulk, refined olive oil is reported to be about USD 2,800 per MT FOB Turkey.

Margarine

Turkish margarine exports continue to increase in CY 2004 and reached 95,654 MT compared to 64,400 MT in 2003 and 61,000 MT in 2002. Even though CY 2004 margarine export is less than regular annual exports of 120,000 MT in late 90's, it continues to increase in last a few years due to increased exports to Iraq.

<u>Destination</u>	<u>MT</u>
Iraq	20,245
Syria	8,000
Romania	6,027
Kazakhstan	4,750
Turkmenistan	4,298
Uzbekistan	3,676
Iran	3,545
Azerbaijan	2,295
Georgia	2,132
*Domestic FTZ's	26,000 (Free Trade Zones)
Other	7,166

TOTAL 95,654

*Domestic Free Trade Zones: Mersin, Istanbul, Gaziantep

Stocks

Sudden devaluations during the last ten years forced Turkish firms to minimize foreign exchange risks. For this reason, the industry operates with relatively low stocks.

Policy

According to the 2005 tariff schedule, all liquid oil imports, crude and refined, except sunflower oil but including olive oil are subject to 31.2% import duty. Imports of crude and refined sunflower oils are subject to higher duties, 36 and 50% respectively.

To comply with the Customs Union agreement with the EU and free trade agreements signed with Bulgaria and Romania, Turkey established TRQs as listed below. In spite of the availability, Turkey does not necessarily always utilize these quotas.

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
Bulgaria	Crude Sunflower Oil	15,000 MT	50 percent reduced
Bulgaria	Crude Corn Oil	1,000 MT	50 percent reduced

To encourage olive oil exports, the GOT maintains an export subsidy of USD 150 per MT for consumer-packaged exports up to 5 kilograms. The export subsidy for up to 1 kilogram branded package is US\$ 300 per ton. The subsidy is not paid in cash but it is deductible from corporate income tax.

Marketing

The American Soybean Association (ASA) continues its U.S. soy oil promotion activities at the consumer and production levels. ASA undertakes promotional activities to increase awareness among local consumers of the cooking qualities of soybean oil. ASA technical consultants regularly visit refiners to overcome various technical problems in refining and improving quality.

Turkey Oilseed, Sunflower seed (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Area Planted	0	500	520	480	0	480
Area Harvested	500	500	520	480	0	480
Beginning Stocks	10	10	20	25	20	20
Production	600	600	650	650	0	600
MY Imports	670	621	480	200	0	200
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1280	1231	1150	875	20	820
MY Exports	6	0	6	0	0	0
MY Exp. to the EC	6	0	6	0	0	0
Crush Dom. Consumption	1247	1200	1117	850	0	800
Food Use Dom. Consump.	5	4	5	3	0	3
Feed,Seed,Waste Dm.Cn.	2	2	2	2	0	2
TOTAL Dom. Consumption	1254	1206	1124	855	0	805
Ending Stocks	20	25	20	20	0	15
TOTAL DISTRIBUTION	1280	1231	1150	875	0	820
Calendar Year Imports	300	513	550	462	0	200
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country Turkey

Commodity Oilseed, Sunflowerseed

Time Period	Jan/Dec	Units:	Metric tons
Imports for:	CY 2003		CY 2004
U.S.	117	U.S.	132
Others		Others	
Ukraine	169474	Bulgaria	222870
Bulgaria	151701	Ukraine	147860
Russia	83258	Russia	55699
Uruguay	67325	Moldova	22425
Romania	35230	Romania	11696
Macedonia	2071	Hungary	1236
Moldova	1739	Kyrgyzstan	244
Argentina	745	Kazakhstan	68
Kazakhstan	411	Israel	60
Canada	375	Uzbekistan	50
Total for Others	512329		462208
Others not Listed	294		40
Grand Total	512740		462380

Turkey Oilseed, Soybean (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Area Planted	0	0	0	0	0	0
Area Harvested	20	15	20	10	0	8
Beginning Stocks	65	127	60	81	60	85
Production	45	45	50	25	0	20
MY Imports	612	600	800	700	0	750
MY Imp. from U.S.	257	283	260	500	0	550
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	722	772	910	806	60	855
MY Exports	1	1	0	1	0	2
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	160	220	265	275	0	310
Food Use Dom. Consump.	0	20	0	25	0	30
Feed,Seed,Waste Dm.Cn.	501	450	585	420	0	425
TOTAL Dom. Consumption	661	690	850	720	0	765
Ending Stocks	60	81	60	85	0	88
TOTAL DISTRIBUTION	722	772	910	806	0	855
Calendar Year Imports	0	810	650	656	0	700
Calendar Yr Imp. U.S.	0	383	350	303	0	500
Calendar Year Exports	0	0	0	1	0	1
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country Turkey
Commodity Oilseed, Soybean

Time Period	Jan/Dec	Units:	Metric tons
Imports for:	CY 2003		CY 2004
U.S.	382824	U.S.	303240
Others		Others	
Argentina	336990	Argentina	238948
Brazil	56745	Paraguay	53620
Paraguay	13848	Ukraine	21550
Romania	12065	Brazil	18122
Ukraine	7610	Canada	10058
China	18	Romania	7808
		Uruguay	2348
Total for Others	427276		352454
Others not Listed			
Grand Total	810100		655694

Turkey Oilseed, Cottonseed (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Area Planted (COTTON)	720	710	720	715	0	700
Area Harvested(COTTON)	710	710	715	715	0	700
Seed to Lint Ratio	0	0	0	0	0	0
Beginning Stocks	5	5	5	5	5	5
Production	1332	1365	1350	1390	0	1350
MY Imports	64	63	100	70	0	90
MY Imp. from U.S.	0	13	0	10	0	10
MY Imp. from the EC	0	12	0	25	0	25
TOTAL SUPPLY	1401	1433	1455	1465	5	1445
MY Exports	1	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	1330	1358	1384	1390	0	1375
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cm.	65	70	66	70	0	65
TOTAL Dom. Consumption	1395	1428	1450	1460	0	1440
Ending Stocks	5	5	5	5	0	5
TOTAL DISTRIBUTION	1401	1433	1455	1465	0	1445
Calendar Year Imports	90	4	90	84	0	70
Calendar Yr Imp. U.S.	0	0	0	15	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Turkey Meal, Sunflower seed (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	1247	1200	1117	850	0	800
Extr. Rate, 999.9999	0.380914	0.383333	0.38496	0.388235	0	0.3875
Beginning Stocks	0	0	0	20	0	0
Production	475	460	430	330	0	310
MY Imports	310	312	200	225	0	275
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	785	772	630	575	0	585
MY Exports	5	0	12	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	780	752	618	575	0	585
TOTAL Dom. Consumption	780	752	618	575	0	585
Ending Stocks	0	20	0	0	0	0
TOTAL DISTRIBUTION	785	772	630	575	0	585
Calendar Year Imports	300	113	200	346	0	350
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	5	0	5	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country Turkey

Commodity Meal, Sunflower seed

Time Period Units:
 Imports for: **CY 2004**
 U.S. U.S.
 Others Others

Russia	45657	Russia	187799
Ukraine	37131	Ukraine	90572
Bulgaria	12929	Romania	31919
Moldova	8352	Bulgaria	19306
Romania	6642	Moldova	15973
Belarus	2829		

Total for Others 113540 345569
 Others not Listed
 Grand Total 113540 345569

Turkey Meal, Soybean (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	160	220	265	275	0	310
Extr. Rate, 999.9999	0.8	0.8	0.8	0.8	0	0.8
Beginning Stocks	55	93	45	60	82	80
Production	128	176	212	220	0	250
MY Imports	430	368	585	465	0	480
MY Imp. from U.S.	168	182	170	300	0	350
MY Imp. from the EC	0	1	0	0	0	0
TOTAL SUPPLY	613	637	842	745	82	810
MY Exports	18	20	22	25	0	30
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	7	0	20	0	30
Feed Waste Dom. Consum	550	550	738	600	0	660
TOTAL Dom. Consumption	550	557	738	620	0	690
Ending Stocks	45	60	82	80	0	90
TOTAL DISTRIBUTION	613	637	842	745	0	810
Calendar Year Imports	0	406	420	451	0	450
Calendar Yr Imp. U.S.	0	201	270	162	0	300
Calendar Year Exports	0	28	30	15	0	25
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country Turkey

Commodity Meal, Soybean

Time Period	Jan/Dec	Units:	Metric tons
Imports for:	CY 2003		CY 2004
U.S.	201152	U.S.	161813
Others		Others	
Argentina	105300	Argentina	211606
Brazil	89886	Brazil	76244
Canada	5848	Netherlands	1076
Greece	2000	Germany	121
Netherlands	1519	United Kingdom	100
United Kingdom	175	Israel	68
India	93		
Israel	26		
Total for Others	204847		289215
Others not Listed			
Grand Total	405999		451028

Turkey Meal, Cottonseed (1000 HA)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	1330	1358	1384	1390	0	1375
Extr. Rate, 999.9999	0.449624	0.463918	0.449422	0.464029	0	0.465455
Beginning Stocks	0	0	0	0	0	0
Production	598	630	622	645	0	640
MY Imports	35	34	30	35	0	50
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	3	0	0	0	0
TOTAL SUPPLY	633	664	652	680	0	690
MY Exports	19	18	19	20	0	20
MY Exp. to the EC	3	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	614	646	633	660	0	670
TOTAL Dom. Consumption	614	646	633	660	0	670
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	633	664	652	680	0	690
Calendar Year Imports	0	0	0	35	0	45
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	10	19	10	16	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Turkey Oil, Sunflower seed (1000 MT)(1000 HA)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	1247	1200	1117	850	0	800
Extr. Rate, 999.9999	0.424218	0.425	0.429722	0.423529	0	0.425
Beginning Stocks	25	25	25	30	22	30
Production	529	510	480	360	0	340
MY Imports	120	83	80	210	0	250
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	674	618	585	600	22	620
MY Exports	55	16	30	30	0	30
MY Exp. to the EC	5	0	6	0	0	0
Industrial Dom. Consum	10	10	14	10	0	10
Food Use Dom. Consump.	570	547	505	515	0	530
Feed Waste Dom. Consum	14	15	14	15	0	15
TOTAL Dom. Consumption	594	572	533	540	0	555
Ending Stocks	25	30	22	30	0	35
TOTAL DISTRIBUTION	674	618	585	600	0	620
Calendar Year Imports	150	92	150	78	0	100
Calendar Yr Imp. U.S.	10	0	10	0	0	0
Calendar Year Exports	75	36	75	15	0	30
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country	Turkey		
Commodity	Oil, Sunflower seed		
Time Period	CY 2003	Units:	CY 2004
Imports for:			1
U.S.		U.S.	
Others		Others	
Ukraine	66345	Ukraine	31083
Russia	10276	Romania	20845
Argentina	10132	Russia	14262
Romania	4962	Bulgaria	11787
		Argentina	254
		Iraq	24
		Germany	13
Total for Others	91715		78268
Others not Listed			
Grand Total	91715		78268

Export Trade Matrix

Country	Turkey		
Commodity	Oil, Sunflower seed		
Time Period	Jan/Dec	Units:	Metric tons
Exports for:	CY 2003		CY 2004
U.S.	42	U.S.	
Others		Others	
Northern Iraq	9,838	Syria	7788
Iraq	8,642	Iraq	4087
Libya	5,579	N. Cyprus	1223
Israel	3,617	Mardin FTZ	626
N. Cyprus	1,462	Bulgaria	567
Ethiopia	977	Lebanon	231
Lebanon	721	Aegean FTZ	161
Japan	644	Japan	97
Palestine	639	Australia	94
Georgia	610	Israel	80
Total for Others	32729		14954
Others not Listed	3,465		461
Grand Total	36236		15415

Turkey Oil, Soybean (1000 MT)(1000 HA)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	160	220	265	275	0	310
Extr. Rate, 999.9999	0.175	0.181818	0.173585	0.181818	0	0.180645
Beginning Stocks	5	19	7	10	7	12
Production	28	40	46	50	0	56
MY Imports	78	75	130	115	0	125
MY Imp. from U.S.	0	0	10	20	0	20
MY Imp. from the EC	50	63	55	60	0	60
TOTAL SUPPLY	111	134	183	175	7	193
MY Exports	2	4	2	6	0	8
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	13	20	21	25	0	30
Food Use Dom. Consump.	65	70	117	100	0	106
Feed Waste Dom. Consum	24	30	36	32	0	35
TOTAL Dom. Consumption	102	120	174	157	0	171
Ending Stocks	7	10	7	12	0	14
TOTAL DISTRIBUTION	111	134	183	175	0	193
Calendar Year Imports	200	120	220	76	0	100
Calendar Yr Imp. U.S.	140	30	140	0	0	20
Calendar Year Exports	5	10	0	4	0	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix

Country Turkey

Commodity Oil, Soybean

Time Period	Jan/Dec	Units:	Metric tons
Imports for:	CY 2003		CY 2004
U.S.	16438	U.S.	
Others		Others	
Spain	36153	Spain	39316
Argentina	22875	Portugal	10538
Portugal	18993	Greece	10416
France	17896	Italy	7243
Germany	6673	Romania	5125
Belgium	6603	Argentina	2359
Netherlands	3403	France	398
Greece	3275	Germany	3
Israel	2405		
Total for Others	118276		75398
Others not Listed			
Grand Total	134714		75398

Turkey Oil, Cottonseed (1000 MT)(1000 HA)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	1330	1358	1384	1390	0	1375
Extr. Rate, 999.9999	0.165414	0.165685	0.160405	0.164748	0	0.167273
Beginning Stocks	0	0	0	0	0	0
Production	220	225	222	229	0	230
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	220	225	222	229	0	230
MY Exports	1	2	5	4	0	4
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	15	15	15	15	0	15
Food Use Dom. Consump.	204	208	202	210	0	211
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	219	223	217	225	0	226
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	220	225	222	229	0	230
Calendar Year Imports	10	7	10	5	0	5
Calendar Yr Imp. U.S.	0	7	0	0	0	0
Calendar Year Exports	5	5	5	2	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Turkey Oil, Olive (1000 HA)(1000 TREES)(1000 MT)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		11/2003		11/2004		11/2005
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Trees	0	92500	0	95000	0	97500
Beginning Stocks	15	30	0	2	10	22
Production	65	80	175	155	0	90
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	80	110	175	157	10	112
MY Exports	50	46	60	65	0	40
MY Exp. to the EC	10	24	10	0	0	0
Industrial Dom. Consum	5	2	5	5	0	0
Food Use Dom. Consump.	25	60	100	65	0	70
Feed Waste Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	30	62	105	70	0	70
Ending Stocks	0	2	10	22	0	2
TOTAL DISTRIBUTION	80	110	175	157	0	112
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	28	0	45	0	40
Calndr Yr Exp. to U.S.	0	10	0	11	0	12

Export Trade Matrix

Country Turkey
Oil,
Commodity Olive

Time Period	Jan/Dec	Units:	Metric tons
Exports for:	CY 2003		CY 2004
U.S.	13516	U.S.	10500
Others		Others	
Italy	34055	Italy	19768
Spain	14466	Canada	3625
Canada	2442	Spain	3405
Morocco	1552	Ivory Coast	1552
Argentina	1133	S. Korea	1122
S. Arabia	1130	Australia	745
Ivory Coast	996	Japan	579
Colombia	760	Argentina	509
S. Korea	621	S. Arabia	511
Japan	552	Norway	271
Total for Others	57707		32087
Others not Listed	2890		2157
Grand Total	74113		44744

Turkey Oil, Rapeseed (1000 MT)(1000 HA)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2003		09/2004		09/2005
Crush	0	7	0	5	0	3
Extr. Rate, 999.9999	0	0.428571	0	0.4	0	0.333333
Beginning Stocks	0	0	0	0	0	0
Production	0	3	0	2	0	1
MY Imports	3	2	10	6	0	10
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	3	2	10	5	0	0
TOTAL SUPPLY	3	5	10	8	0	11
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	3	5	10	8	0	11
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	3	5	10	8	0	11
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	3	5	10	8	0	11
Calendar Year Imports	0	10	0	3	0	6
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0