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# GAIN Report

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## Turkey

### Tomatoes and Products

### Semi-Annual Report

### 2005

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**Report Highlights:**

Turkey's total fresh tomato production in MY 2005 is estimated at 9.7 MMT. Tomato paste production will decrease to 270,000 MT due to increasing production costs from high fuel prices coupled with a strong Turkish lira. While Turkey's fresh tomato exports are increasing annually, tomato paste exports are expected to decline.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Semi-Annual Report  
Ankara [TU1]  
[TU]

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## Summary

Fresh tomato production in MY 2005 is estimated at 9.7 MMT up about three percent compared to a year ago due to an increase in the number of green houses and increased demand. Tomato paste production however decreased about four percent to 270,000 MT. Increased production costs due to increased world petroleum prices coupled with a strong Turkish lira hindered Turkish production of paste. Turkey's canned tomato (diced and peeled) production will also drop to 25,000 MT in MY 2005 due to competition with Italian producers and a strong lira, which decreased exports.

Fresh tomato exports are increasing annually. Exports during the first nine months of MY 2005 were 225,000 MT and year-end exports are expected to reach 275,000 MT. Russia is the leading market for fresh Turkish tomato exports. MY 2004 exports of Turkish tomato paste exports exceeded early season estimates reaching 183,000 MT. Higher than expected exports to Iraq (28,000 MT) helped to boost total exports. Japan, Saudi Arabia and Russia continue to be leading markets for Turkish paste exports.

Despite an 8 percent inflation rate, abundant local supplies kept paste prices stable in MY 2004. However, decreased tomato paste production will result in a reduction in stocks and possible increased in prices in MY 2005.

Turkey is unable to utilize a EU 30,000 MT TRQ for tomato paste because of a trade dispute over European Union duty free meet exports to Turkey.

## PS&D, Fresh Tomatoes

Turkey Fresh Tomatoes							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[ New]	USDA Official [Old]	Post Estimate[ New]	USDA Official [Old]	Post Estimate[ New]	
<b>Market Year Begin</b>		01/2003		01/2004		01/2005	MM/YYYY
<b>Plnt For Fresh Consump</b>	157400	157650	156000	151000	156000	157300	(HA)
<b>Plnt For Processing</b>	38600	38800	36000	38000	34000	36700	(HA)
<b>TOTAL Area Planted</b>	196000	196450	192000	189000	190000	194000	(HA)
<b>Harv. For Fresh Cons.</b>	157400	157650	156000	151000	156000	157300	(HA)
<b>Harv. For Processing</b>	38600	38800	36000	38000	34000	36700	(HA)
<b>TOTAL Area Harvested</b>	196000	196450	192000	189000	190000	194000	(HA)
<b>Fresh Sale Production</b>	7870000	7880000	7800000	7530000	7800000	7865000	(MT)
<b>Processing Production</b>	1930000	1940000	1800000	1910000	1700000	1835000	(MT)
<b>TOTAL Production</b>	9800000	9820000	9600000	9440000	9500000	9700000	(MT)
<b>TOTAL SUPPLY</b>	9800000	9820000	9600000	9440000	9500000	9700000	(MT)

**Export Trade Matrix, Fresh Tomatoes**

Time Period	MY 2003		MY 2004
Exports for:	Jan/Dec		Jan/Dec
U.S.		U.S.	
Others		Others	
Russia	86114	Russia	125753
Saudi Arabia	56044	Saudi Arabia	33407
Romania	18780	Romania	17733
Serbia	13872	Serbia	12263
Germany	6978	Greece	8494
Greece	6568	Moldova	6642
France	6428	Germany	4229
Austria	4638	Bosnia	3513
Moldova	3429	Macedonia	3216
Netherlands	3263	France	3176
Total for Others	206114		218426
Others not Listed	21286		16937
Grand Total	227400		235363

Time Period	MY 2003
Exports for:	Jan/Sept
U.S.	
Others	
Russia	88598
Romania	23611
Saudi Arabia	22813
Bosnia	9938
Moldova	9401
Serbia	8844
Germany	6216
Belarus	5703
Greece	4941
Slovenia	4703
Total for Others	184768
Others not Listed	40029
Grand Total	224797

## PS&amp;D, Tomato Paste, 28-30% TSS Basis

<b>Turkey</b>						
<b>Tomato Paste, 28-30% TSS Basis</b>						
(MT) (MT, Net Weight)						
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
<b>Market Year Begin</b>		<b>09/2003</b>		<b>09/2004</b>		<b>09/2005</b>
<b>Deliv. To Processors</b>	1930000	1930000	1800000	1750000	1700000	1700000
<b>Beginning Stocks</b>	4369	4369	29446	29446	21946	13756
<b>Production</b>	320000	320000	270000	280000	260000	270000
<b>Imports</b>	0	0	0	0	0	0
<b>TOTAL SUPPLY</b>	324369	324369	299446	309446	281946	283756
<b>Exports</b>	184923	184923	165000	183190	155000	160000
<b>Domestic Consumption</b>	110000	110000	112500	112500	115000	115000
<b>Ending Stocks</b>	29446	29446	21946	13756	11946	8756
<b>TOTAL DISTRIBUTION</b>	324369	324369	299446	309446	281946	283756

## Export Trade Matrix, Tomato Paste, 28-30% TSS Basis

Time Period	MY 2003	MY 2004	
Exports for:	Sept/Aug	Sept/Aug	
U.S.	200	675	
Others	Others		
Russia	32919	Iraq	28258
Japan	23302	Japan	21880
Saudi Arabia	20205	Saudi Arabia	20164
Algeria	17018	Russia	19251
Germany	12043	Algeria	12661
Iraq	8207	N. Cyprus	7960
Sudan	5385	Romania	6835
Kuwait	5385	Philippines	5695
Oman	4555	Kuwait	4255
Romania	3485	Oman	3810
Total for Others	132504		130769
Others not Listed	52219		51746
Grand Total	184923		183190