



GIEWS Country Brief Turkey

Reference Date: 04-February-2022

FOOD SECURITY SNAPSHOT

- Abundant rainfall in January improved crop prospects
- Currency depreciation increases input costs
- Below-average cereal harvest estimated in 2021
- Cereal imports forecast to increase in 2020/21, while exports expected to remain stable
- Inflation increasing as Turkish lira depreciates

Abundant rainfall in January improved crop prospects

The sowing of the 2022 winter wheat and barley crops was completed in November under relatively dry weather conditions. Up to mid-December 2021, rainfall amounts were 25 percent below the average in the Anatolian Plateau, one of the main cereal-producing areas. Above-average precipitation amounts in late December and January improved crop prospects across the country. Torrential rainfall affected the southern coast, but, despite some lowland flooding, no major damages are reported to the agricultural sector.

The Agricultural Input Price Index in November 2021 increased by 36 percent compared to November 2020. In particular, the prices of fertilizers increased by more than 120 percent in the same period as sharp increases of international prices of fertilizers were magnified by currency devaluation. Consequently, many farmers reduced fertiliser use.

Below-average 2021 harvest gathered

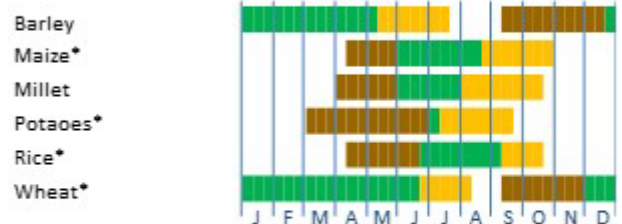
The final production estimate by the Turkish Statistical Institute, issued in December 2021, estimated the 2021 cereal output at 32 million tonnes, about 10 percent less than the average of the previous five years, including 17.7 million tonnes of wheat, 5.8 million tonnes of barley and 6.8 million tonnes of maize. The decrease in wheat and barley output was due to unfavourable weather conditions.

Every year, the intervention prices by the Turkish Grain Board (TMO) are announced in May for the upcoming harvest. In the 2021 campaign, intervention prices were set at TRY 2 250/tonne of common wheat (up from TRY 1 650 in 2020) and at TRY 2 450/per tonne of durum wheat (up from TRY 1 800). The amounts purchased by TMO in 2021 are not

Turkey

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Turkey

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	20 320	20 500	17 700	-13.7
Barley	7 340	8 300	5 800	-30.1
Maize	6 100	6 500	6 800	4.6
Others	1 692	1 754	1 673	-4.6
Total	35 452	37 054	31 973	-13.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

known, but are likely to be lower than in the past due to high market prices. In July 2021, market prices already exceeded TMO intervention prices as 1 tonne of milling wheat was sold for TRY 2 500 (up from TRY 1 650 in 2020). As of January 2022, TMO was selling durum wheat for TRY 3 250/tonne, and common wheat for TRY 2 625-2 675/tonne, depending on specifications.

Cereal imports forecast to increase in 2021/22, while exports expected to remain stable

In the 2021/22 marketing year (July/June), aggregate cereal imports, the largest share of which is wheat grain for processing, are forecast at 15.5 million tonnes, almost 40 percent above the average level of the previous year to cover the production shortfall in the 2020/21 crop season. The Russian Federation is historically the leading supplier of wheat.

Cereal exports, mainly wheat flour and wheat products, are forecast at 4.8 million tonnes, similar to the previous year and 10 percent below the average. The country remains one of the world's leading exporter of wheat flour, using an inward processing regime policy that allows duty free imports of wheat grains to be processed into food products for exports. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products. Although the ongoing currency depreciation would make exports more competitive, they are unlikely to increase substantially considering that the inputs used in the inward processing regime are imported.

In an effort to curb food inflation, in September 2021, the country suspended import taxes on wheat, barley, maize, rye, oats, pulses and sorghum ranging from 19 to 130 percent, depending on the commodity. The decision was then extended until December 2022. In late January 2022, the Government passed a regulation granting the Ministry of Agriculture and Forestry the authority until December 2022 to restrict exports of 20 agricultural products, which have experienced the highest price increases. The list includes poultry meat, eggs, butter, olive oil, potatoes and selected fruits and vegetables.

Inflation increases as currency depreciates

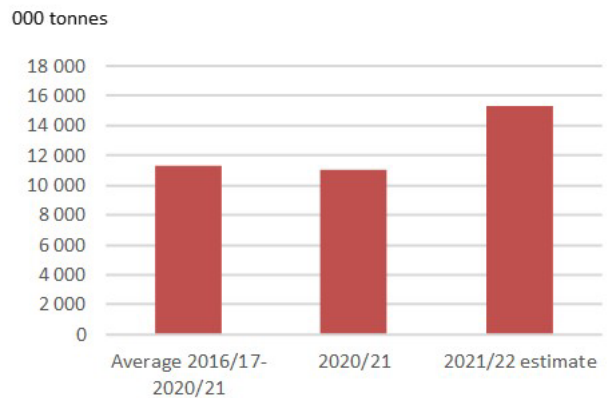
The latest figures by the Turkish Statistical Institute indicate an annual food inflation rate of 55.6 percent in January 2022, up from the already elevated levels between 25 and 30 percent between July and November 2021, and almost 44 percent in December 2021. The overall inflation index in January 2022 stood at 48.7 percent, a 19-year high, gradually increasing up from 11 percent in the second quarter of 2020 and accelerating to 36 percent in December 2021. The increase was supported by maintaining unconventional low interest rates and the currency depreciation, which is mainly attributed to political uncertainty and declining foreign exchange reserves. The currency depreciated from TRY 4.6 per US dollar in 2018 to TRY 16.60 in December 2021, losing 44 percent of the value in 2021 alone.

Stable number of Syrian Arab Republic refugees in country

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. As of December 2021, about 3.6 million Syrian

Turkey

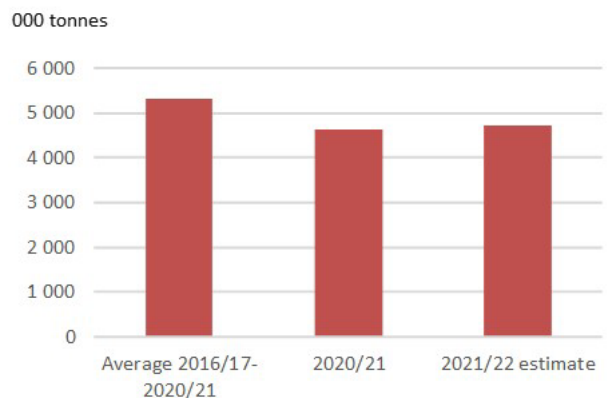
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Turkey

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

refugees were registered in the country, stable since early 2018. However, a large number of Syrian refugees is probably not officially registered. More than 90 percent of the refugees live in urban and peri-urban areas, outside the camps. About 70 percent of refugees are children and women. Syrians registered in the country have access to national services and can apply for working permits. However, due to difficulties in obtaining formal employment, many refugees work in informal sectors.

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GIEWS Country Brief Turkey

Reference Date: 17-December-2020

FOOD SECURITY SNAPSHOT

- Dry weather conditions in central and eastern parts hamper development of 2021 cereal crops
- Slightly above-average cereal harvest estimated in 2020
- Cereal imports forecast to decrease in 2020/21, while exports expected to increase
- Inflation increasing as Turkish Lira depreciates

Dry weather conditions in central and eastern parts hamper development of 2021 cereal crops

Most of the 2021 winter wheat and barley crops were sown in October and November. Abundant rainfall amounts in the first decade of November replenished soil moisture in the southern and southeastern parts of the country to relatively satisfactory levels with only localized pockets of dry conditions. In contrast, very dry weather conditions persist in central and eastern parts of the country, raising concerns about establishment and development of winter grains as well as replenishment of reservoirs for irrigation. The most affected area remains the Anatolian Plateau, where cumulative rainfall amounts between September and early December did not exceed 50 percent of the average. However, if precipitation in December 2020 and January 2021 are abundant, crop prospects could still improve.

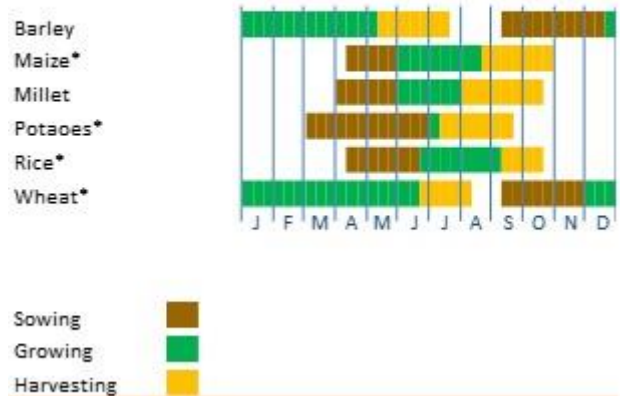
Currency depreciation from TRY 4.6 per US dollar in 2018 to TRY 7.8 in December 2020 increased input costs. In particular, the prices of compound fertilizers more than doubled in the past two years. Intervention prices by the Turkish Grain Board are usually announced in May for the upcoming harvest. In the 2020 campaign, intervention prices were TRY 1 650 (up from TRY 1 350 in 2019) per tonne of common wheat and TRY 1 800 (up from TRY 1 450) per tonne of durum wheat. In October 2020, the Board was offering to sell domestic and imported milling wheat stocks at TRY 1 850 per tonne to stabilize the domestic wheat market.

The second production forecast by the Turkish Statistical Institute, issued in October 2020, estimated the 2020 cereal output at 36.6 million tonnes, about 7 percent more than the

Turkey

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Turkey

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	20 740	19 000	20 500	7.9
Barley	7 280	7 600	8 300	9.2
Maize	6 080	6 000	6 031	0.5
Others	1 641	1 710	1 734	1.4
Total	35 741	34 310	36 565	6.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

average of the previous five years, including 20.5 million tonnes of wheat, 8.3 million tonnes of barley and 6 million tonnes of maize. The increase in wheat output is due to a slight increase in area (3 percent compared to the previous year) and improved weather conditions.

The country introduced several rounds of restrictions to contain the spread of the COVID-19 pandemic. Agriculture has been exempted from curfew obligations and movement restrictions to ensure the continuation of activities taking into account the crop calendar of each province. However, farmers, particularly those producing fruits and vegetables, complained about the fluctuating prices due to lockdowns and market closures. Among other measures, the Government responded by creating an online marketplace for farmers and agri-business producers to connect with buyers to support and supplement the traditional food value chain.

Cereal imports forecast to decrease in 2020/21, while exports expected to increase

In the 2020/21 marketing year (July/June), aggregate cereal imports, mainly wheat grain for processing, are forecast at 11.5 million tonnes, about 30 percent below the level of the previous year, but 12 percent above the average. The Russian Federation is historically the leading supplier of wheat.

Cereal exports, mainly wheat flour and wheat products, are forecast at 6.1 million tonnes, about 20 percent above the level of the previous year and 12 percent above the average. The increase in exports is supported by currency depreciation. The country remains one of the world's leading exporter of wheat flour, using an inward processing regime policy that allows duty free imports for wheat grains to manufacture processed food products for exports. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products.

Inflation increases as currency depreciates

The latest figures by the Turkish Statistical Institute indicate an annual food inflation rate of 21 percent in November 2020, below the record levels of over 30 percent in early 2019, but the highest rate registered since the early 2019s. The overall inflation index in June 2020 stood at 14 percent, up from 11 percent in the second quarter of 2020. The increase was supported by the currency depreciation, which is mainly attributed to political uncertainty and declining foreign exchange reserves.

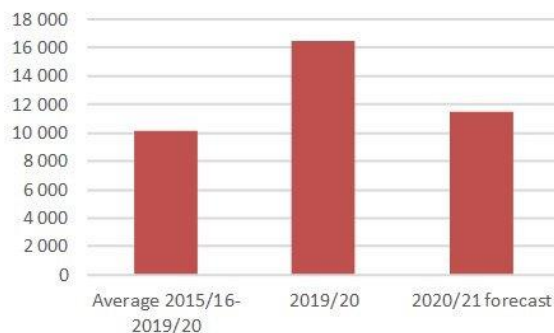
Stable number of Syrian Arab Republic refugees in country

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. As of November 2020, about 3.6 million Syrian refugees were registered in the country, stable since early 2018. However, a large number of Syrian refugees is probably not officially registered. More than 90 percent of the refugees live in urban and peri-urban areas, outside the camps. About 70 percent of refugees are children and women. Syrians registered in the country have access to national services and can apply for working permits. However, due to difficulties obtaining formal

Turkey

Cereals Imports

000 tonnes



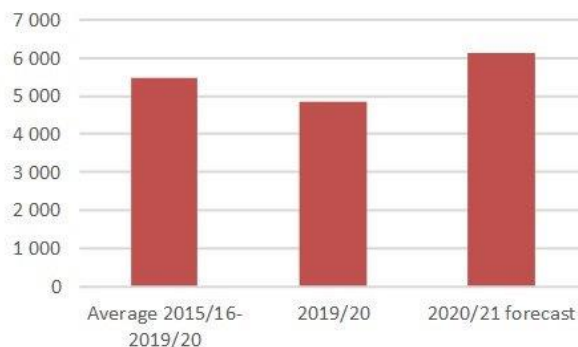
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Turkey

Cereals Exports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

employment, many work in informal sectors which were particularly affected by the measures introduced to limit the spread of COVID-19.

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GIEWS Country Brief Turkey

Reference Date: 13-July-2020

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest forecast in 2020
- Cereal imports forecast to decrease in 2020/21, while exports expected to be stable
- Inflation increasing as Turkish Lira depreciates

Above-average 2020 cereal harvest forecast

Harvesting of the 2020 winter barley crop, which started in mid-May, is nearing completion, while harvesting of winter wheat, which started in late June, will be concluded by early August. Sowing of maize, for harvesting from September, finalized in May and rice planting, for harvesting from mid-September, in June.

Below-average precipitation amounts between November 2019 and January 2020 resulted in winter drought conditions in the high plateau region of Central Anatolia, where more than half of the cereal crops is rainfed. Favourable rain from January onwards partially replenished soil moisture, but some pockets of dryness remained throughout the season. Cool and wet weather in May favoured grains in reproductive to filling stages in the central part of the country.

The first production forecast by the Turkish Statistical Institute, issued in May 2020, indicates a cereal output of 36.5 million tonnes, about 7 percent more than the average of the previous five years, including 20.5 million tonnes of wheat, 8.3 million tonnes of barley and 6 million tonnes of maize. The increase in wheat output is due to a slight increase in area (3 percent compared to the previous year) and improved weather conditions.

For the 2020 cropping season, the Turkish Grain Board announced its intervention prices of TRY 1 650 (up from TRY 1 350 in 2019) per tonne of common wheat, TRY 1 800 (up from TRY 1 450) per tonne of durum wheat and TRY 1 275 (up from TRY 1 100) per tonne of barley. At TRY 7.2 per US dollar in 2020, the procurement price of 1 tonne of common wheat in 2020 in dollar terms (USD 230) is just slightly above the 2019 price (USD 225 at TRY 6 per US dollar) reflecting the currency depreciation. Currency depreciation, particularly since August 2018, has also increased production costs, including the prices of compound fertilizers that more than doubled between 2018 (when USD 1 averaged TRY 4.6) and 2020.

Turkey

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Turkey

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Wheat	20 740	19 000	20 500	7.9
Barley	7 280	7 600	8 300	9.2
Maize	6 080	6 000	6 000	0.0
Others	1 641	1 710	1 690	-1.2
Total	35 741	34 310	36 490	6.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports forecast to decrease in 2020/21, while exports expected to be stable

The country is both a cereal importer and exporter, importing wheat grain and exporting wheat products such as pasta and flour.

In the 2020/21 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast at 11.5 million tonnes, about 15 percent below the level of the previous year, but almost 25 percent above the average. The Russian Federation is historically the leading supplier of wheat.

Cereal exports, mainly wheat flour and wheat products, are forecast at an average level of 4.7 million tonnes, on par with the previous year. The country remains one of the world's leading exporter of wheat flour, using an inward processing regime policy that allows duty free imports for wheat grains to manufacture processed food products for exports. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products.

Inflation increase as currency depreciates

The latest figures by the Turkish Statistical Institute indicate an annual food inflation rate of 12.9 percent in June 2020, similar to the level recorded in May 2020, but up 9 percent in the last quarter of 2019. The overall inflation index in June 2020 stood at 12.6 percent, up from 10 percent in the last quarter of 2020. The increase was supported by the currency depreciation and strong consumer demand.

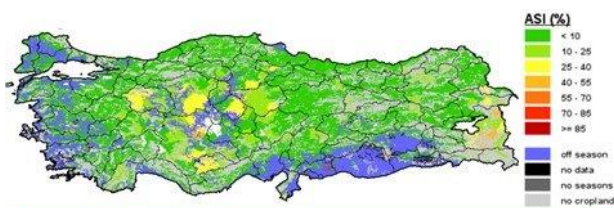
The exchange rate in 2020 depreciated from TRY 6 in January to TRY 7.2 per US dollar in early May and strengthened slightly to TRY 6.85 in late June. The depreciation is mainly attributed to political uncertainty and declining foreign exchange reserves.

Stable number of Syrian Arab Republic refugees in country

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. As of June 2020, about 3.6 million Syrian refugees were registered in the country, stable since early 2018. However, a large number of Syrian refugees is probably not officially registered. More than 90 percent of the refugees live in urban and peri-urban areas, outside the camps. About 70 percent of refugees are children and women.

Turkey - Agricultural Stress Index (ASI)

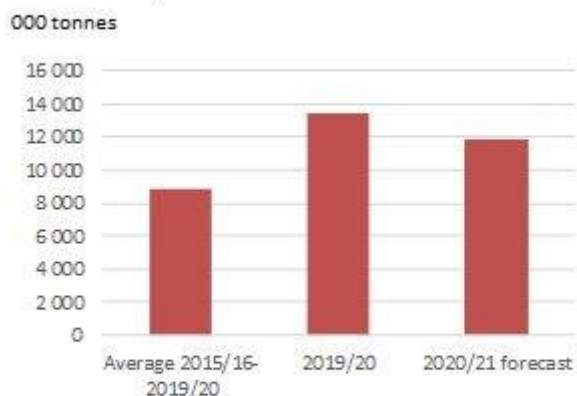
from start of season 1 to dekad 2, June 2020



Source: FAO/GIEWS Earth Observation System.

Turkey

Cereals Imports

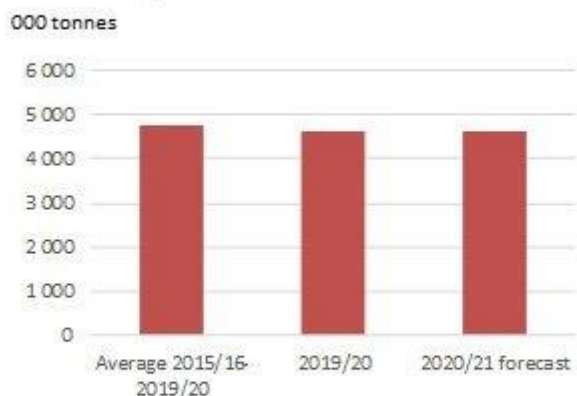


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Turkey

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

COVID-19 and measures adopted by the Government

In March 2020, the Government imposed precautionary measures to prevent the spread of the virus, including curfews, restrictions on movement, social distancing measures, quarantine for returnees, bans on gatherings, educational activities, social and religious events. While the easing of lockdown requirements took place in June, containment measures could be reintroduced depending on the developments in the epidemiological situation.

Movement of cargo remained guaranteed during the lockdown. Asymptomatic foreign truck drivers making deliveries in Turkey have not been subject to a 14-day quarantine provided they left the country within 72 hours. Trucks carrying medicine, foodstuffs and medical equipment have been given priority to enter.

Wholesale prices of some commodities decreased as in the case of lemons, after an export ban was introduced from April to August 2020 in an effort to guarantee sufficient supplies of Vitamin C for the domestic market. Some municipalities responded by buying lemons and distributing them to the most vulnerable households.

To ensure the uninterrupted continuation of agricultural activities, agriculture was exempt from curfew obligations. The Ministry of Agriculture and Forestry specified movements of farmers and seasonal workers with precautionary measures to be taken under COVID-19 measures based upon the agricultural production calendar of each Province. Grain purchasing centres of the Turkish Grain Board operate on appointment only basis to avoid crowding.

The measures aimed specifically at agriculture in response to the COVID-19 pandemic included:

- Postponing farmers' payments of Treasury-backed loans due in May and June by six months, totalling to about TRY 6 billion (approximately USD 859 million).
- Postponing agricultural cooperatives' debt payments to public entities for one year.
- Creating an on-line marketplace for farmers and agri-business producers to post available products and connect with buyers to support and supplement the traditional food value chain.

In March 2020, the Government introduced a USD 15.5 billion stimulus package to revive the economy and ease the financial burden on businesses and individuals impacted by the pandemic. The plan, referred to as Economic Stability Shield, aims to protect small businesses, exporters, employees and pensioners affected by the weakening economic conditions.

To ease the impact of the weakening economy on the most vulnerable, the Government increased the minimum monthly pensions from TRY 1 000 to TRY 1 500 (corresponding to USD 230). In addition, it introduced a series of one-off payments of TRY 1 000 (USD 154) per family in need and to workers that lost their jobs and do not qualify for short-term working arrangements or unemployment insurance.

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GIEWS Country Brief Turkey

Reference Date: 18-September-2019

FOOD SECURITY SNAPSHOT

- Slightly below-average harvest forecast in 2019
- Cereal imports and exports stable in 2019/20
- Inflation eased as Turkish Lira relatively stabilized

Slightly below-average 2019 harvest forecast

Harvesting of the 2019 winter wheat and barley crops was completed in early August. The maize harvest is currently ongoing in central and northern parts of the country under favourable dry weather conditions. Winter grains, to be harvested from June 2020 onwards, are expected to be sown in October, depending on soil moisture conditions.

The 2019 cereal harvest is forecast at 34.2 million tonnes, similar to the 2018 output and slightly below the five-year average. In the 2018/19 agricultural season, favourable weather conditions prevailed until March, but dry weather conditions during April and May had a negative impact on grain formation and filling, particularly in Central Anatolia, Cucurova, and Southeast regions.

In 2019, the Turkish Grain Board bought grains at intervention prices of TRY 1 350 (up from TRY 1 050 in 2018) per tonne of common wheat, TRY 1 450 (up from TRY 1 100) per tonne of durum wheat and TRY 1 100 (up from TRY 825) per tonne of barley. At TRY 4.6 per USD in 2018, the procurement price of 1 tonne of common wheat in 2018 in dollar terms (USD 228) is similar to the 2019 price (at TRY 6 per USD) reflecting currency depreciation.

Cereal imports and exports stable in 2019/20

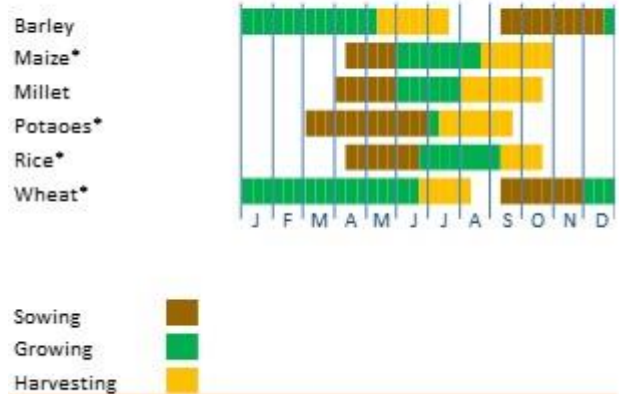
The country is both a cereal importer and exporter, importing wheat grain and exporting wheat products such as pasta and flour.

In the 2019/20 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast at 9.5 million tonnes, similar to the level of the previous year, but still over 20 percent above the average. The Russian Federation is historically the leading supplier of wheat.

Cereal exports, mainly wheat flour and wheat products, are forecast at an average level of 4.5 million tonnes, about 7 percent below the previous year. The country remains one of the world's leading exporter of wheat flour, using an inward processing regime policy that allows duty free imports for wheat grains to

Turkey

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Turkey

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	20 740	20 000	19 000	-5.0
Barley	7 020	7 000	7 500	7.1
Maize	6 070	5 700	6 000	5.3
Others	1 590	1 652	1 695	2.6
Total	35 420	34 352	34 195	-0.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

manufacture processed food products for exports. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products.

Inflation decreases as currency relatively stabilized

The exchange rate in 2019 was fluctuating between TRY 5.2 and TRY 6.2 per USD. The exchange rate as of early September 2019 was TRY 5.75 per USD. The volatility is mainly attributed to political uncertainty and declining foreign exchange reserves.

The latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 17 percent in August 2019, down from over 30 percent in the first quarter of 2019. The overall CPI in August 2019 stood at 15 percent, down from 20 percent in the first quarter of 2019. The decrease was supported by relatively more stable currency (in 2018, the Turkish Lira depreciated from TRY 4 to TRY 7), lower average oil prices and lower consumer demand.

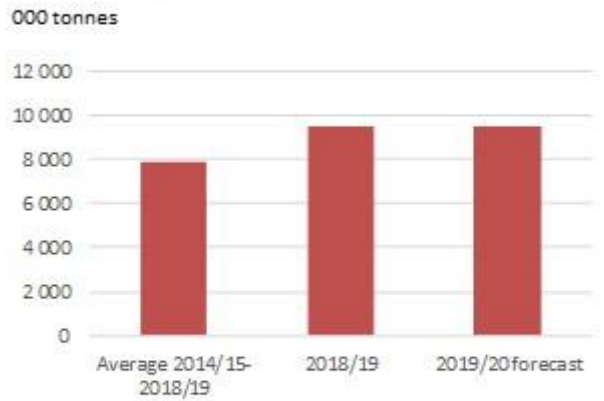
Stable number of Syrian Arab Republic refugees in country

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. As of September 2019, about 3.6 million Syrian refugees were registered in the country, about the same as in early 2018. However, a larger number of Syrian refugees is probably not officially registered. More than 90 percent of the refugees live outside of the camps in urban and peri-urban areas. About 70 percent of refugees are children and women.

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Turkey

Cereals Imports

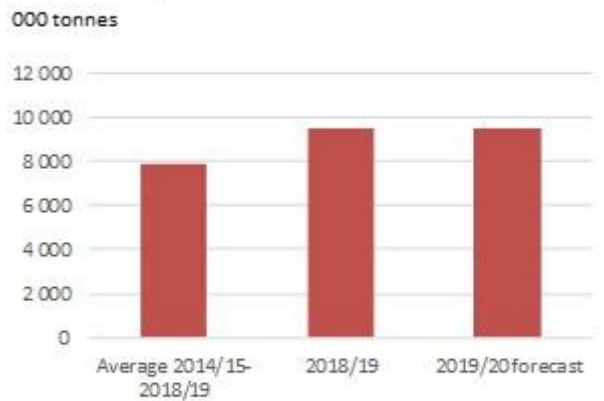


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Turkey

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Turkey

Reference Date: 21-December-2018

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for winter cereals
- Slightly below-average cereal harvest gathered in 2018
- Cereal imports stable, exports decreasing in 2018/19
- Inflation eased in November 2018 from record levels, but remains high due to weak Turkish Lira

Favourable weather conditions for winter grains

Planting of the 2019 winter wheat and barley crops was completed in mid-December 2018. While parts of Anatolian Plateau in central Turkey suffered from autumn dryness until late November 2018, adequate precipitation in early December, coupled with above average temperatures, improved prospects for crop establishment before winter dormancy in the second half of December.

The Turkish Statistical Institute estimates the 2018 cereal production at 34.4 million tonnes, about 5 percent below last year's harvest as well as the five-year average due to lower yields caused by localized winter drought and heavy rainfall in May and June, particularly in Central Anatolia and Thrace regions. About 20 million tonnes of wheat, 7 million tonnes of barley and 5.7 million tonnes of maize were produced.

The Turkish Grain Board (TMO) bought grains at intervention prices of TRY 1 050 per tonne of common wheat (equivalent to USD 228 in May 2018 and USD 175 in October due to currency depreciation), TRY 1 100 per tonne of durum wheat and TRY 825 per tonne of barley.

Cereal imports stable, exports decreasing in 2018/19

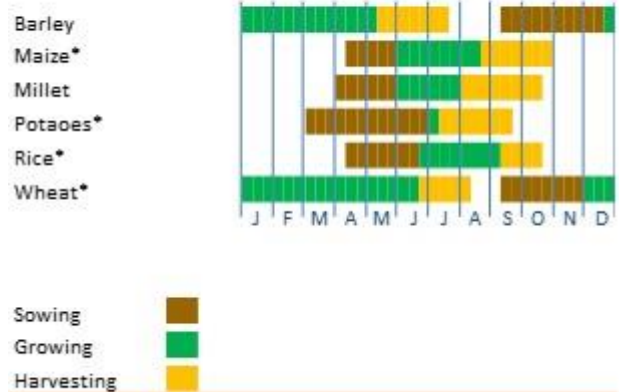
The country is both a cereal importer and exporter, importing wheat and exporting wheat products such as pasta and flour.

In the 2018/19 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 8.1 million tonnes, over 25 percent less than the previous year's 10.4 million tonnes, but still above the average. The decline is mainly due to the depreciation of the local currency and sales of domestic stocks. The Russian Federation is historically the leading supplier of wheat. In the past, the imported wheat was used primarily for processing for exports. This season, the TMO received

Turkey

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Turkey

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	21 150	21 500	20 000	-7.0
Barley	7 200	7 100	7 000	-1.4
Maize	6 110	5 900	5 700	-3.4
Others	1 584	1 633	1 652	1.2
Total	36 044	36 133	34 352	-4.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

authorization to import 2.25 million tonnes of cereals, including 750 000 tonnes of wheat, for domestic consumption at zero duty to stabilize domestic prices.

Cereal exports, mainly wheat flour and durum wheat, are forecast at 4.5 million tonnes, similar to last year and about 5 percent above the five-year average. The country remains one of the leading exporters of wheat flour in the world. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products. In response to increased domestic flour prices, from September 2018, the local millers are allowed to export only flour made with imported wheat.

Food inflation remains high supported by weak currency

The Turkish Lira (TYR) depreciated from TYR 4 per USD in January 2018 to almost TYR 7 per USD in August 2018. The currency has strengthened since then, settling at about TYR 5.3 per USD in December 2018.

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 26 percent in November 2018, down from 28 percent in October 2018, but up compared to levels averaging 10 percent in spring 2018. The overall CPI in November 2018 stood at 22 percent, down from 25 percent in October 2018 (the highest level in 15 years), but up from 10 percent in spring 2018, supported mainly by the weak Turkish Lira. The official medium-term inflation target in the country is 5 percent.

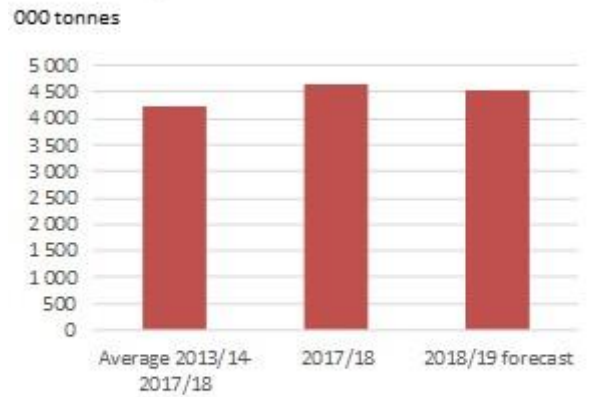
Stable number of Syrian Arab Republic refugees in country

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. As of December 2018, about 3.6 million Syrian refugees were registered in the country, up from about 2.8 million registered at the end of 2016. However, a larger number of Syrian refugees is probably not officially registered. More than 90 percent of the refugees live outside of the camps in urban and peri-urban areas. About 70 percent of refugees are children and women.

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Turkey

Cereals Exports

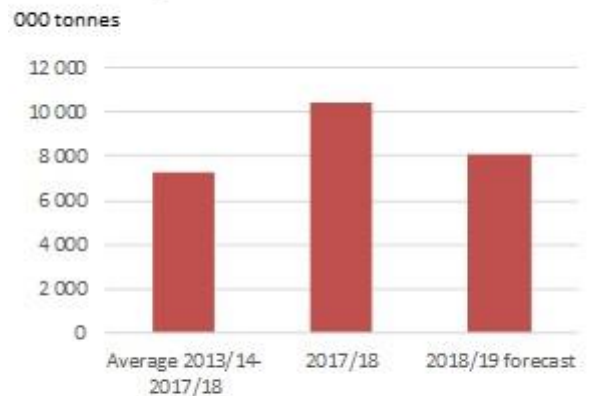


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Turkey

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Turkey

Reference Date: 17-January-2018

FOOD SECURITY SNAPSHOT

- Favourable conditions for dormant winter cereals
- Marginally above-average cereal harvest gathered in 2017
- Slightly higher cereal imports forecast in 2017/18, exports expected to ease
- Food inflation eased in December 2017 but remains high due to weaker Turkish Lira

Favourable conditions for dormant winter grains

Planting of the 2018 winter wheat and barley was completed in mid-December 2017. While the eastern crop areas suffered from localized autumn dryness up to mid-November 2017, current vegetation conditions indicate adequate to abundant moisture reserves across the main growing areas for dormant winter grains.

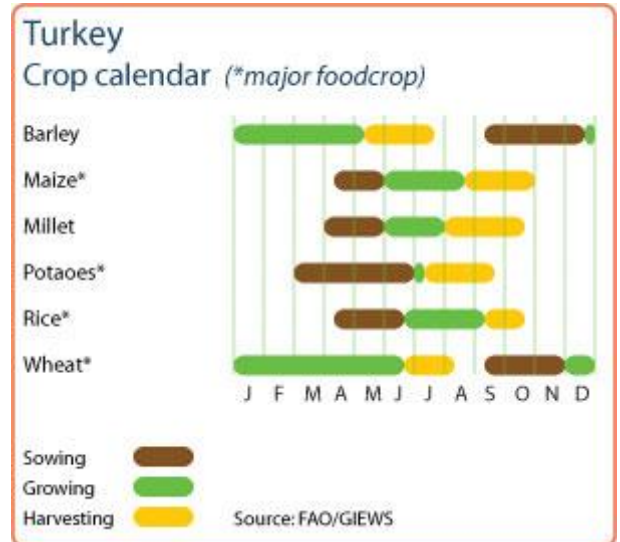
The final crop estimates by the Turkish Statistical Institute put the 2017 cereal production at 36 million tonnes, slightly above last year's harvest as well as the five-year average. About 21.5 million tonnes of wheat, 7.1 million tonnes of barley and 5.9 million tonnes of maize were produced.

New support programme for agricultural products started in 2017

In 2017, the country implemented a new subsidy allocation system for agricultural products to diversify local production, increase productivity and reduce the planted area of water-intensive crops such as rice and soybeans in drought-prone areas. Within the new scheme, the country is divided into 941 agricultural basins based on climate and soil categories to subsidize specific crops for each zone. In total, 19 strategic crops, including wheat, barley, maize, rye, oats, triticale, paddy rice and forage crops, will be subsidized. Only wheat and forage crops are subsidized in each basin.

Cereal imports forecast to slightly increase in 2017/18

The country is both a cereal importer and exporter, importing wheat and exporting wheat products such as pasta and flour. Under the current importing regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc.



Turkey
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	20 870	20 600	21 500	4
Barley	7 200	6 700	7 100	6
Maize	5 850	6 400	5 900	-8
Others	1 573	1 580	1 633	3
Total	35 493	35 280	36 133	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

In the 2017/18 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 7.4 million tonnes (up 4 percent) compared to last year's 7.1 million tonnes. The Russian Federation is historically the leading supplier of wheat. The imported wheat is used primarily for processing.

Cereal exports, mainly wheat flour and durum wheat, are forecast to decrease slightly to 4.1 million tonnes, some 8 percent above the five-year average. The country remains one of the leading exporters of wheat flour in the world. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of the country's total exports of wheat products.

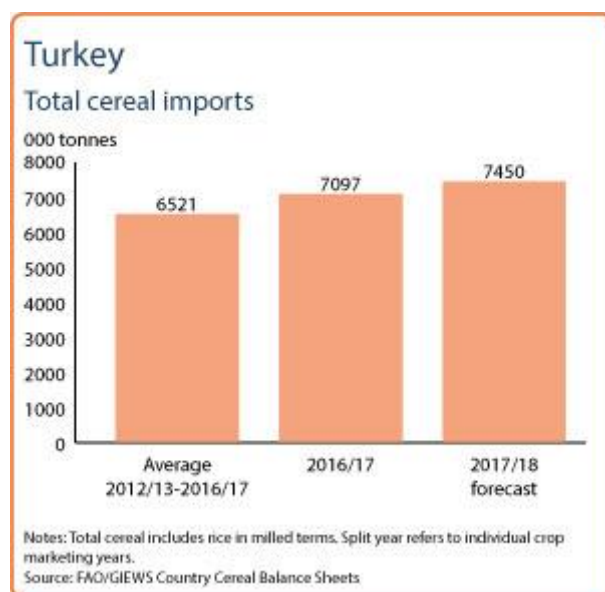
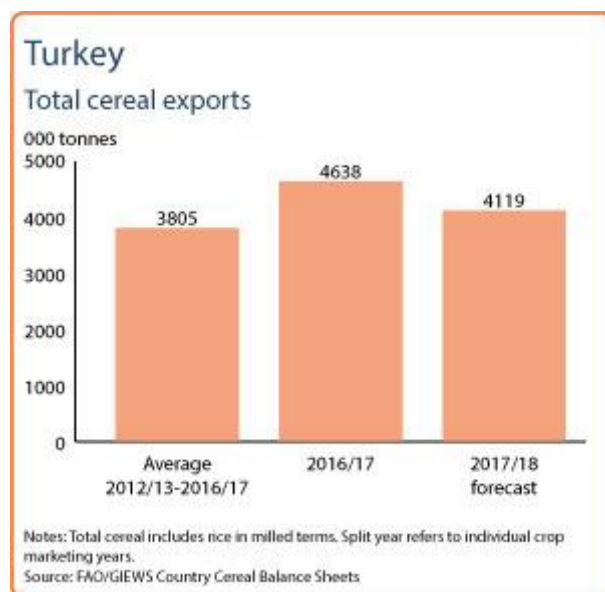
Food inflation eased in December 2017 but remains high

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 14 percent in December 2017, down from 16 percent in November 2017 but up compared to 3.29 percent in November 2016. The overall CPI in December 2017 stood at 12 percent, down from 13 percent in November 2017 but up from 7 percent in November 2016, supported mainly by the weaker Turkish Lira. The official medium-term inflation target in the country is 5 percent.

Stable number of Syrian Arab Republic refugees

The number of Syrian Arab Republic refugees in the country started increasing towards the end of 2013 and grew steadily until early 2016. At the end of 2017, about 3.4 million Syrian refugees were registered in the country, up from about 2.8 million registered at the end of 2016. A large number of refugees is probably not being registered. More than 90 percent of the refugees live outside of the camps in urban and peri-urban areas. Some 70 percent of the refugees are children and women.

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GIEWS Country Brief Turkey

Reference Date: 23-June-2017

FOOD SECURITY SNAPSHOT

- Despite autumn dryness, above average cereal crop forecasted
- New support programme for agricultural products starting in 2017
- Slightly higher cereal imports forecast in 2017/18, exports expected to ease
- Food inflation increases due to weaker Turkish Lira

Despite autumn dryness, above average crop forecasted

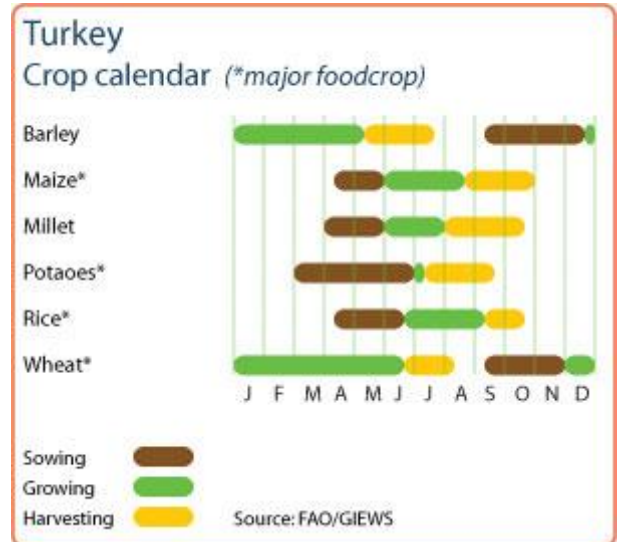
Harvesting of the 2017 winter barley started in mid-May and will be finished by mid-July. Wheat harvesting is expected to start at the last decade of June and will continue until early August.

An autumn drought was reported across the major producing areas following a lack of significant precipitation between the end of September and early November 2016. Precipitations resumed in December and continued in January, but were too late for the establishment of winter grains in the colder growing areas such as Anatolian Plateau which became dormant by late November following a cold spell. Dormant crops usually rely on winter precipitation for spring emergence and establishment. However, timely moisture during the reproductive and grain filling development stages significantly improved yield prospects on the Anatolian Plateau, resulting in a forecast of a slightly above average harvest.

The first pre-harvest forecasts from the Turkish Statistical Institute indicate a 5 percent increase in cereal production in 2017 compared to last year, to about 37 million tonnes, including 21.8 million tonnes of wheat (a 6 percent increase on last year) and 15.1 million tonnes of coarse grains (a 3 percent improvement).

New support programme for agricultural products starting in 2017

A new subsidy allocation system for agricultural products, called the National Agriculture Project, will be implemented from 2017 (actual implementation date has not yet been announced). The Project aims to diversify Turkey's agricultural production, increase productivity and reduce the planted area of water-intensive crops such as rice and soybeans in drought-prone areas. Within the new scheme, the country is divided into 941 agricultural basins based on climate and soil categories to



Turkey
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	20 870	20 600	21 800	6
Barley	7 200	6 700	7 500	12
Maize	5 850	6 400	6 000	-6
Others	1 573	1 580	1 660	5
Total	35 493	35 280	36 960	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

subsidize specific crops for each zone. In total, 19 strategic crops, including wheat, barley, maize, rye, oats, triticale, paddy rice and forage crops, will be subsidized. Only wheat and forage crops will be subsidized in each basin.

Slightly higher cereal imports forecast in 2017/18, while exports expected to slightly lower

The country is both a cereal importer and exporter, importing wheat and exporting wheat products such as pasta and flour. Under the current importing regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc. These licences are currently traded at USD 100 per tonne.

In the 2017/18 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 7.4 million tonnes (up 4 percent) compared to last year's 7.1 million tonnes. The Russian Federation is historically the leading supplier of wheat. The imported wheat is used primarily for processing.

Cereal exports, mainly wheat flour and durum wheat, are forecast to decrease slightly to 4.1 million tonnes, some 8 percent above the five-year average. The country remains one of the leading exporters of wheat flour in the world. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of country's total exports of wheat products.

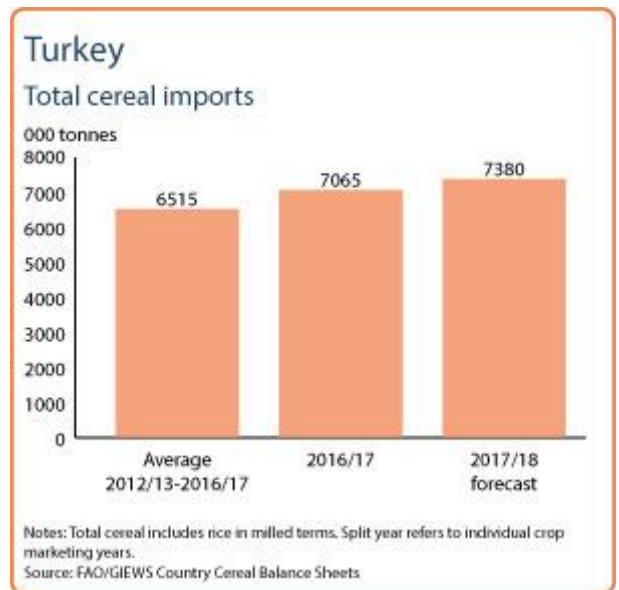
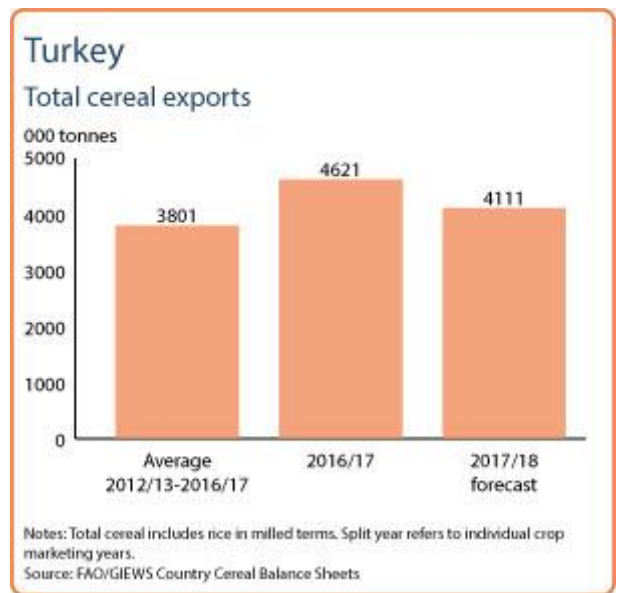
Food inflation increased in May 2017

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 17 percent in May 2017 compared to 3.29 percent in November 2016. The overall CPI in May 2017 stood at 11.7 percent up from 7 percent in November 2016, supported mainly by weaker Turkish Lira. The official medium-term inflation target in the country is 5 percent.

Stable number of Syrian Arab Republic refugees

According to UNHCR, the total number of Syrian Arab Republic refugees in the neighbouring countries exceeded 5 million by early June 2017, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian Arab Republic refugees in the region started increasing towards the end of 2013, and grew steadily until early 2016. The number of Syrian Arab Republic refugees registered in the country was estimated at close to 3 million, relatively stable since March 2016. However, a large number of refugees is probably not being registered. More than 90 percent of the refugees in the country live outside of the camps in urban and peri-urban areas. Some 70 percent of the refugees are children and women.

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GIEWS Country Brief Turkey

Reference Date: 19-January-2017

FOOD SECURITY SNAPSHOT

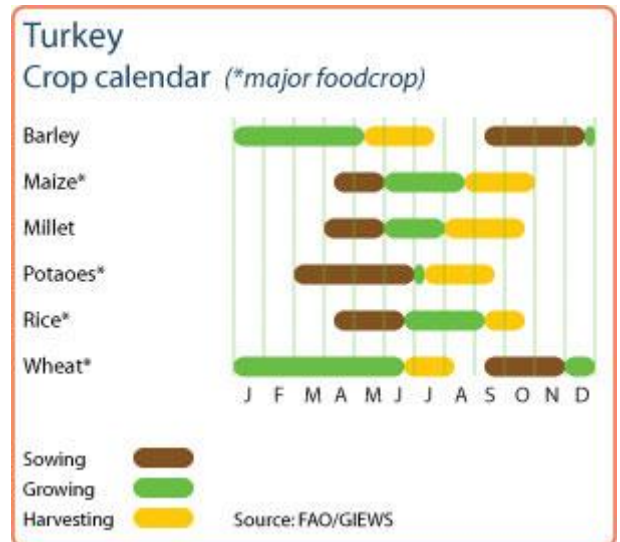
- After autumn dryness, crops rely on winter precipitation for emergence and establishment
- New support programme for agricultural products starting in 2017
- Cereal production in 2016 decreased from previous year's record harvest
- Higher cereal imports forecast in 2016/17, exports expected to remain stable
- Food inflation increases

After autumn dryness, crops rely on winter precipitation for emergence and establishment

Planting of the 2017 winter barley and wheat started in mid-September and concluded in early December. An autumn drought was reported across the major producing area following a lack of significant precipitation between the end of September and early November 2016. Abundant precipitation, which resumed in December and continued in January, was likely to be too late for the establishment of winter grains in the colder growing areas such as Anatolian Plateau which became dormant by late November following a cold spell. However, dormant crops rely on winter precipitation for spring emergence and establishment. Although snow cover across Turkey remained highly variable, the deepest snow coincided with the coldest temperature readings providing sufficient coverage for dormant crops.

New support programme for agricultural products starting in 2017

A new subsidy allocation system for agricultural products, called the National Agriculture Project, will be implemented from early 2017. The Project aims to diversify Turkey's agricultural production, increase productivity and reduce the planted area of water-intensive crops such as rice and soybeans in drought-prone areas. Within the new scheme, Turkey is divided into 941 agricultural basins based on climate and soil categories to subsidize specific crops for each zone. In total, 19 strategic crops, including wheat, barley, maize, rye, oats, triticale, paddy rice and forage crops will be subsidized. Only wheat and forage crops will be subsidized in each basin.



Turkey
Cereal production

	2011-2015	2015	2016	change
	average			
	000 tonnes			percent
Wheat	21 110	22 600	20 600	-9
Barley	7 380	8 000	6 700	-16
Maize	5 410	6 400	6 400	0
Others	1 589	1 632	1 580	-3
Total	35 489	38 632	35 280	-9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal production in 2016 decreased from previous year's record harvest

The final crop production estimates from the Turkish Statistical Institute indicate a 9 percent decline in cereal production in 2016 compared to the record-breaking 2015 harvest, while it is on a par with the five year average. Wheat production decreased by 9 percent to 20.6 million tonnes, barley production by 16 percent to 6.7 million tonnes, while maize production remained stable. The decrease was attributed to the uneven and untimely rains. Despite generous rainfall in May 2016, some of the rainfed fields in Central Anatolia, Cukurova and Southeast regions remained affected by drought conditions, resulting in lower yields of wheat and barley.

Higher cereal imports forecast in 2016/17, while exports expected to remain stable

Turkey is both a cereal importer and exporter, importing wheat and exporting wheat products such as pasta and flour. Under the current importing regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc. These licences are currently traded at USD 100 per tonne.

In the 2016/17 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 7.3 million tonnes (up 29 percent) compared to last year's 5.6 million tonnes. The Russian Federation is historically the leading supplier of wheat. The imported wheat is used primarily for processing.

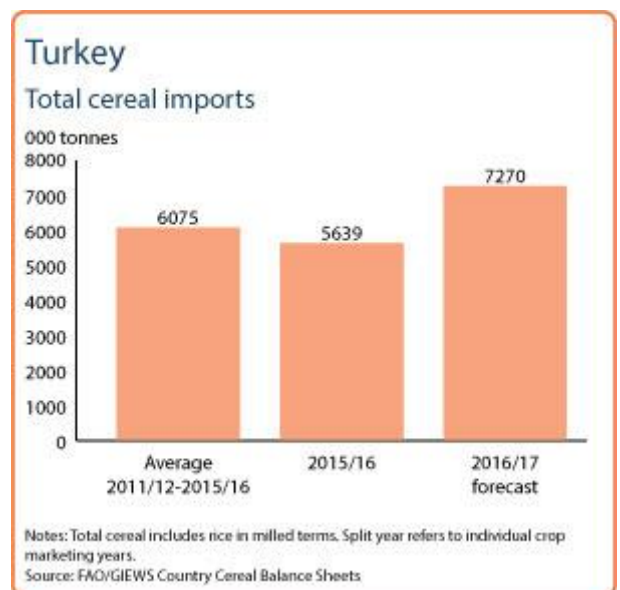
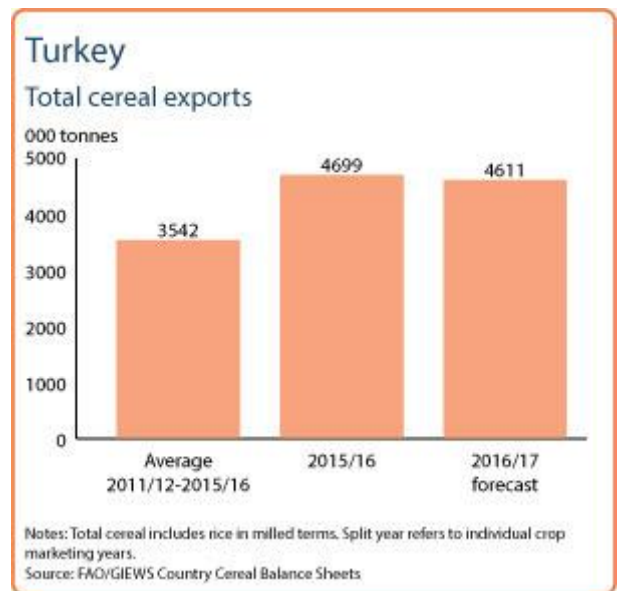
Cereal exports, mainly wheat flour and durum wheat, are forecast to remain stable at 4.6 million tonnes, some 30 percent above the five year average. Turkey remains one of the leading exporters of wheat flour in the world. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of Turkey's total exports of wheat products.

Food inflation increased in December 2016

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 5.65 percent in December 2016 compared to 3.55 percent in November 2016. The overall CPI in December 2016 stood at 8.53 percent up from 7 percent in November 2016, supported mainly by the increases in prices of tobacco and alcoholic beverages.

Stable number of Syrian Arab Republic refugees

According to UNHCR, the total number of Syrian Arab Republic refugees in the neighbouring countries exceeded 4.8 million by early January 2017, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian Arab Republic refugees in the region started increasing towards the end of 2013, and grew steadily until early 2016. The number of Syrian Arab Republic refugees registered in Turkey was estimated at about 2.8 million, stable since March 2016. However, a large number of refugees is probably not being registered.





GIEWS Country Brief Turkey

Reference Date: 19-July-2016

FOOD SECURITY SNAPSHOT

- Cereal production decreased from last year's record harvest
- Higher cereal imports forecast in 2016/17, exports expected to remain stable
- Aggregate food price index increases

Cereal production decreased from last year's record harvest

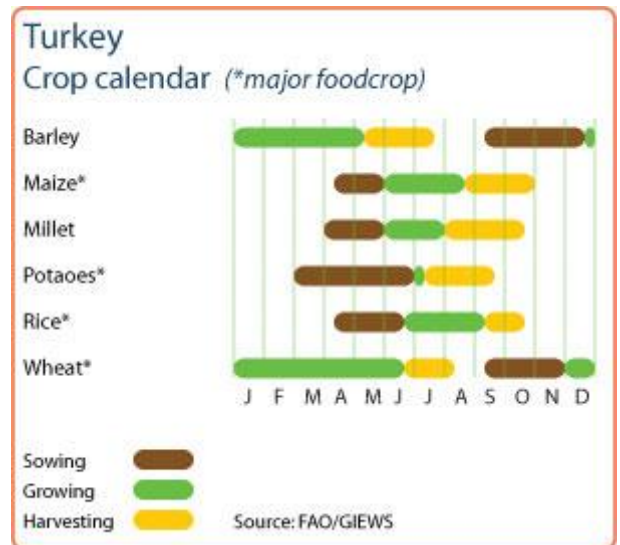
Harvesting of the 2016 winter barley concluded in mid-July, while winter wheat harvesting usually continues until early August. Cumulative precipitation has been uneven across the country. A wet October, which boosted soil moisture for winter grain planting and establishment, was followed by dry weather in November and December. Despite generous rainfall in May, some of the rainfed fields in Central Anatolia, Cukurova and Southeast remained affected by drought conditions, resulting in lower yields of wheat and barley. Area planted to maize decreased due to higher returns to other crops, such as cotton, vegetables and oilseeds.

First crop production estimates from the Turkish Statistical Institute indicate a 10 percent decline in cereal production in 2016 compared to the record breaking 2015 harvest, while it is on a par with the five-year average. Wheat production is estimated to decrease by 9 percent to 20.5 million tonnes, barley production by 15 percent to 6.8 million tonnes, and maize production by 6 percent to 6 million tonnes.

Higher cereal imports forecast in 2016/17, while exports expected to remain stable

Turkey is both a cereal importer and exporter, importing wheat and exporting wheat products such as pasta and flour. Under the importing regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc. These licences are currently traded at USD 100 per tonne.

In the 2016/17 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 7.6 million tonnes (up 20 percent) compared to last year's 6.4 million tonnes. The Russian Federation is traditionally the leading supplier of wheat, which is used entirely for processing.



Turkey
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	21,110	22,600	20,500	-9
Barley	7,380	8,000	6,800	-15
Maize	5,410	6,400	6,000	-6
Others	1,584	1,606	1,569	-2
Total	35,484	38,606	34,869	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

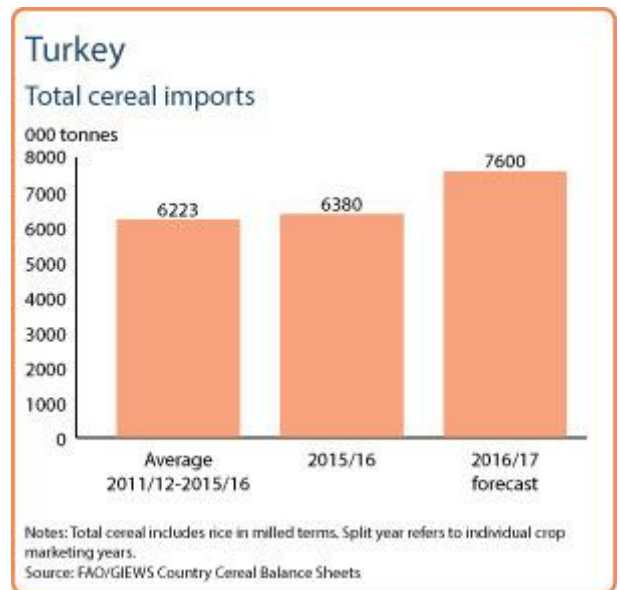
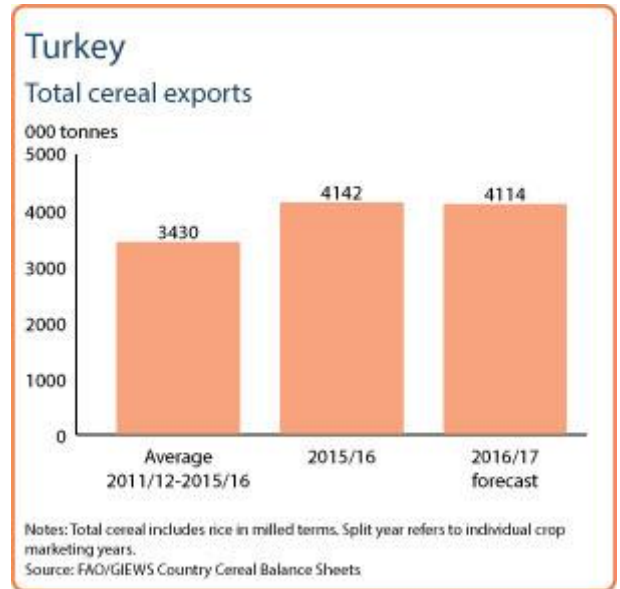
On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to remain stable at 4.1 million tonnes, some 20 percent above the five-year average. Still, Turkey remains one of the leading exporters of wheat flour in the world. Iraq, the Sudan and the Syrian Arab Republic account for over 60 percent of Turkey's total exports of wheat products. However, security concerns in the region increased transportation costs and reduced exports.

Food inflation increased in June 2016

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 12.8 percent in June 2016 compared to 10.9 percent in the last quarter of 2015, but below the peak levels of over 14.7 percent reached in the spring of 2015. The overall CPI in June 2016 stood at 7.6 percent, partially supported by the currency devaluation in 2015.

Increased number of Syrian refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries exceeded 4.8 million in early July 2016, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey was estimated at about 2.7 million, with a large number of refugees probably not being registered.



Reference Date: 25-April-2016

FOOD SECURITY SNAPSHOT

- Despite dry conditions in November and December, overall weather conditions relatively favourable for 2016 crop development
- Above-average cereal harvest gathered in 2015
- Cereal imports expected to decline and exports to increase in 2015/16
- Aggregate food price index increases

Relatively favourable conditions for 2016 winter crop development

Planting of the 2016 winter barley and wheat for harvest from mid-May (barley) and mid-June (wheat) was completed in mid-December. A wet October, which boosted soil moisture for winter grain planting and establishment, was followed by dry weather in November and December.

Nevertheless, although precipitation across the country has been uneven, with a few exceptions, as of early April 2016, above-average cumulative precipitation provided relatively favourable moisture supplies for further crop development in most regions. In the provinces of Gaziantep, Kilis and Konya, which so far received slightly less-than-average cumulative precipitation, some areas are currently suffering from localized dryness.

Above-average cereal crop gathered in 2015

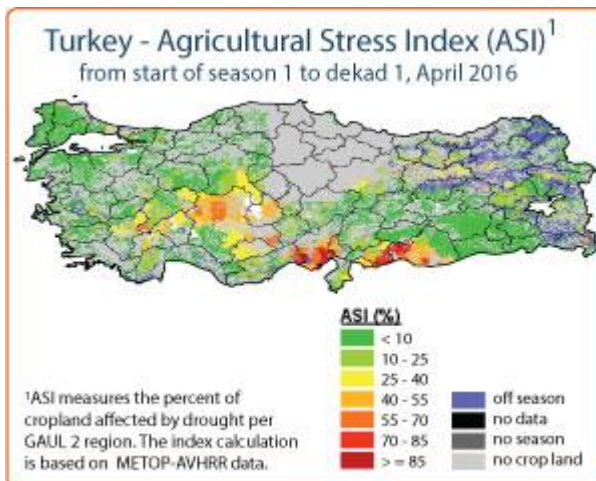
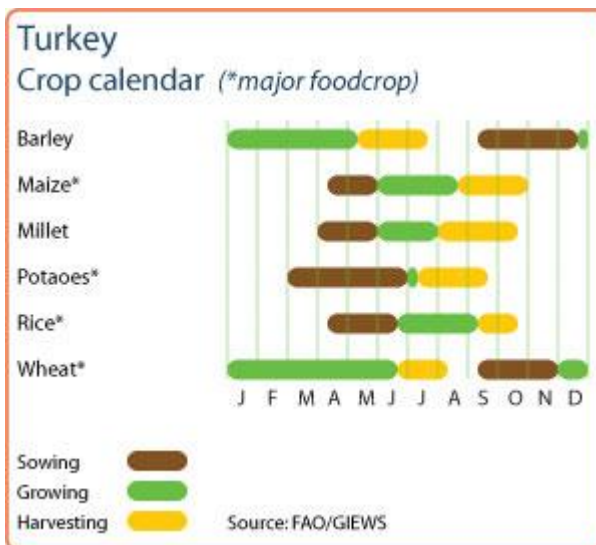
Following the drought-reduced harvest of 2014, cereal production in 2015 recovered owing to abundant moisture levels on account of heavy rains and adequate mountain snow which increased yields. Plantings increased only slightly compared to the 2014 level, as farmers in the southeast part of the country switched from cotton to milling wheat.

Official estimates from the Turkish Statistical Institute indicate an 11 percent increase in cereal production in 2015 compared to the previous year, to about 38.6 million tonnes, including 22.6 million tonnes of wheat (an 18 percent increase on last year) and 15 million tonnes of coarse grains (a 16 percent improvement).

Responding to the increased demand from the feed sector and the broader availability of irrigation, maize production in Turkey is increasing. Some areas, particularly in the southeastern part of the country, are planting maize as a second crop.

Higher cereal exports forecast in 2015/16, while imports expected to decline

Turkey is both a cereal importer and an exporter, importing wheat and exporting wheat products such as pasta and flour. Under the inward process regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc. These licences are currently traded at USD 100 per tonne.



Turkey Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	20 525	19 000	22 600	19
Barley	7 230	6 300	8 000	27
Maize	4 992	5 950	6 400	8
Others	1 569	1 519	1 614	6
Total	34 316	32 769	38 614	18

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

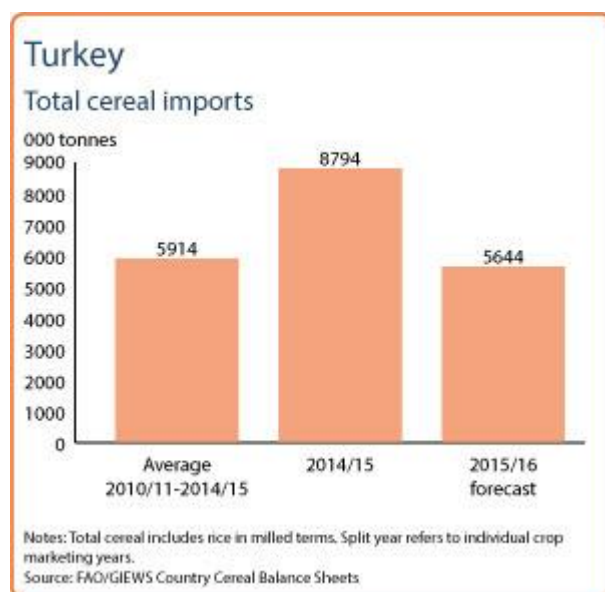
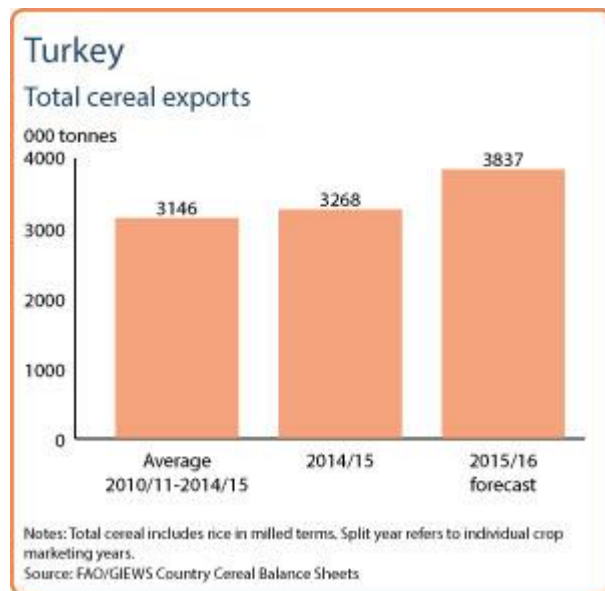
In the 2015/16 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 5.6 million tonnes (down 32 percent) compared to last year's 8.8 million tonnes. The Russian Federation is traditionally the leading supplier of wheat which is used entirely for processing. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to increase to 3.8 million tonnes, some 17 percent above last year's levels. Still, Turkey remains one of the leading exporters of wheat flour in the world, with Iraq and the Syrian Arab Republic being the main markets. However, security concerns in the region increased transportation costs and reduced exports. Flour exporters lost market in Indonesia and the Philippines, but made gains in the Sudan, Angola and Yemen.

Food inflation increased in last quarter of 2015

Latest figures from the Turkish Statistical Institute indicate an annual food inflation rate of 10.9 percent in the last quarter of 2015 compared to 9.28 percent in the second quarter of 2015, but below the peak levels of over 14.7 percent reached in the spring of 2015. The overall CPI in the last quarter of 2015 stood at 8.8 percent, partially supported by the currency devaluation in the first three quarters of 2015.

Increased number of Syrian refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries exceeded 4.8 million in early April 2016, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey was estimated at about 2.7 million, with a large number of refugees probably not being registered.



Reference Date: 04-December-2015

FOOD SECURITY SNAPSHOT

- Favourable conditions for 2016 winter crop planting
- Above-average cereal harvest gathered in 2015
- Cereal imports expected to decline, exports to increase in 2015/16
- Aggregate food price index decreases

Favourable conditions for 2016 winter crop planting and establishment

Land preparation and planting of the 2016 winter cereal crops are proceeding under favourable conditions following wet October, which boosted soil moisture for winter grain planting and establishment. Some localized short-term dryness was reported in the Anatolian Plateau (western Turkey), due to limited precipitation in November.

Above-average cereal crop gathered in 2015

Following the drought-reduced harvest of 2014, cereal production in 2015 recovered owing to abundant moisture levels on account of heavy rains and adequate mountain snow which increased yields. Plantings increased only slightly compared to the 2014 level, as farmers in the southeast part of the country switched from cotton to milling wheat.

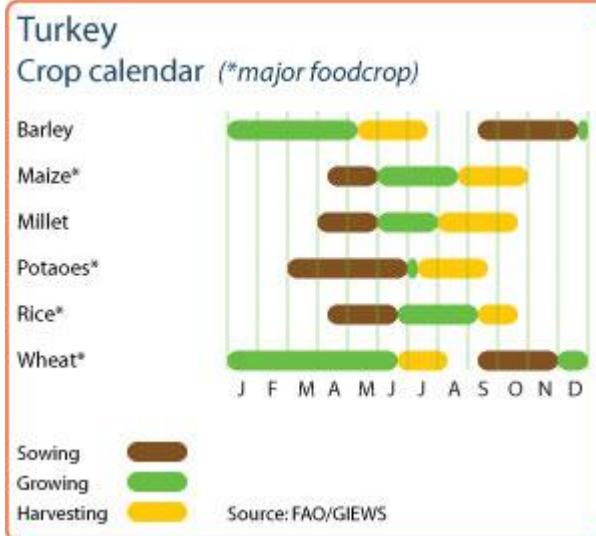
Official estimates from the Turkish Statistical Institute indicate a 11 percent increase in cereal production in 2015 compared to last year, to about 38.6 million tonnes, including 22.6 million tonnes of wheat (18 percent increase on last year) and 15 million tonnes of coarse grains (16 percent improvement).

Responding to the increased demand from the feed sector and the broader availability of irrigation, maize production in Turkey is increasing. Some areas, particularly in the southeastern part of the country, are planting maize as a second crop.

Higher cereal exports forecast in 2015/16, while Imports expected to decline

Turkey is both cereal importer and exporter, importing wheat and exporting wheat products, such as pasta and flour. Under the inward process regime, exporters of wheat products are eligible to obtain special import licenses when they export wheat flour, pasta, biscuits, etc. These licences are currently traded at USD 100 per tonne.

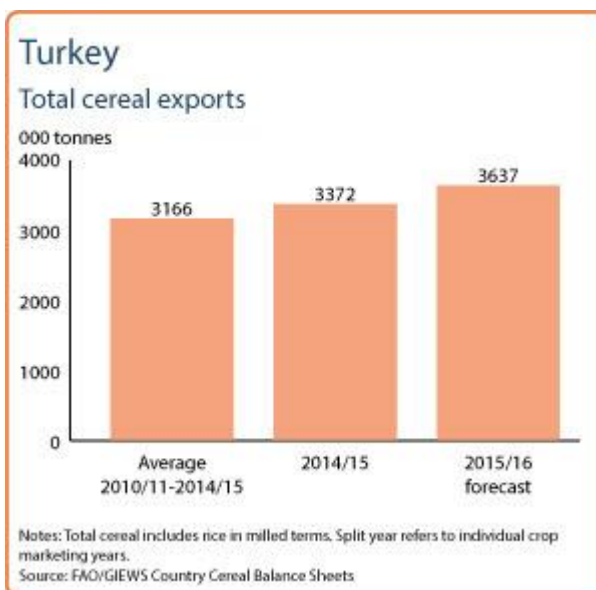
In the 2015/16 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 5.7 million tonnes (down 35 percent) compared to last year's 8.7 million tonnes. The Russian Federation is the leading supplier of wheat which is used entirely for processing. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to increase to 3.6 million tonnes, some 10 percent above last year levels. Still, Turkey remains one of the leading exporters of wheat flour in the world, with Iraq and the Syrian Arab Republic being the main markets. However, security concerns in the region increased transportation costs and reduced exports. Flour exporters lost market in Indonesia and the Philippines, but made gains



Turkey Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	20 525	19 000	22 600	19
Barley	7 230	6 300	8 000	27
Maize	4 992	5 950	6 400	8
Others	1 569	1 519	1 614	6
Total	34 316	32 769	38 614	18

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



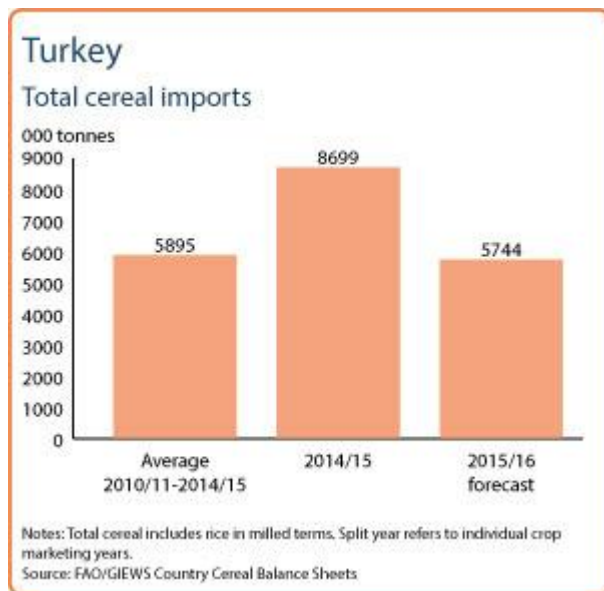
in the Sudan, Angola and Yemen.

Food inflation decreased in October 2015

Latest figures from the Turkish Statistical Institute (October 2015) indicate an annual food inflation rate of 8.7 percent, below the peak levels of over 14.7 percent reached in spring 2015. The overall CPI in October 2015 stood at 7.7 percent. The Government is concerned with the high levels of food inflation in the country and in December 2014 established a committee to evaluate food and agricultural markets.

Increased number of Syrian refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries exceeded 4.2 million in late November 2015, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey was estimated at about 2.2 million, with a large number of refugees probably not being registered.



Reference Date: 24-April-2015

FOOD SECURITY SNAPSHOT

- Winter grains production in 2015 forecast to increase from previous year's drought-reduced level
- Below-average cereal harvest gathered in 2014
- Cereal imports expected to increase, exports to decline in 2014/15
- Aggregate food price index increases

Favourable production outlook for 2015 winter grains

Harvesting of winter grains is expected to commence in May 2015. Current indications point to an above-average wheat output this year, following the drought-reduced harvest of 2014. The improved production prospects mainly reflect abundant moisture levels on account of heavy rains and adequate mountain snow, which is expected to result in a recovery in yields. Plantings are estimated to have increased only slightly compared to the 2014 level, as farmers in the southeast part of the country switched from cotton to milling wheat. Planting of the summer cereal crops, to be harvested from August, is underway.

Responding to the increased demand from the feed sector and the broader availability of irrigation, maize production in Turkey is increasing. Some areas, particularly in the South East region, are planting maize as a second crop.

In preparation for a bumper harvest, the Turkish Grain Board (TMO) is reported to be currently selling stocks to free storing capacity. The TMO announced that in the 2015/16 season, it will continue offering a premium of TRY 50 per tonne of wheat (USD 26/tonne) for higher protein content and lowest pest damage, and TRY 40 per tonne of maize. However, farmers prefer to sell maize to the private sector.

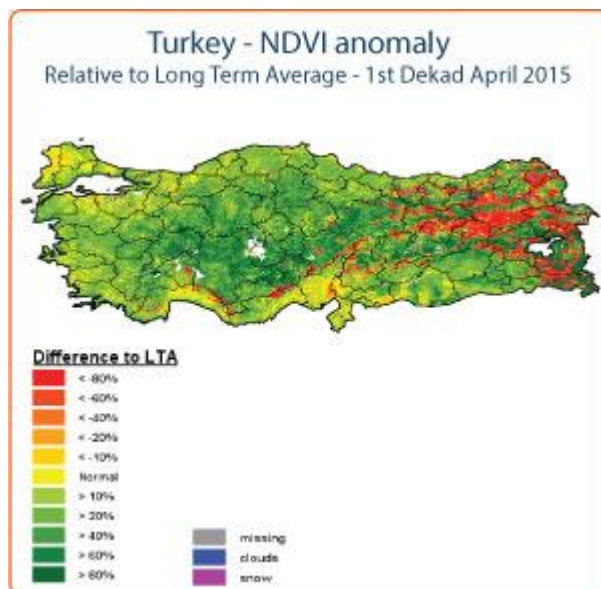
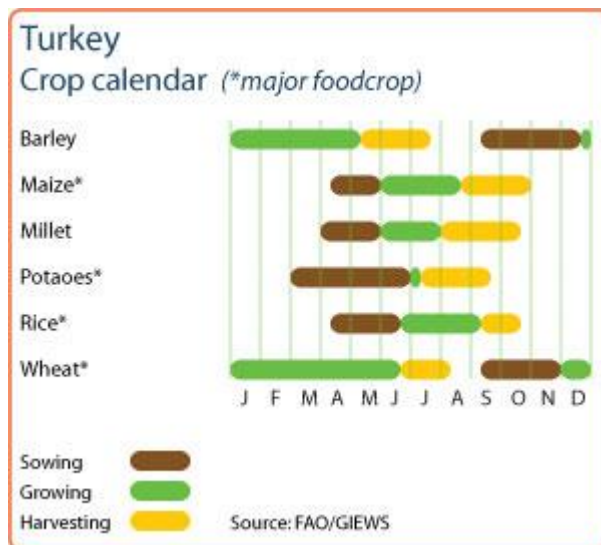
The Government support to agriculture in 2015 is budgeted at TRY 10.1 billion (USD 4.1 billion), some 10 percent higher than in 2014. Support included area-based input subsidies (such as for certified seeds, fertilizer and diesel), premiums for improved quality, as well as rural development type measures.

Below-average harvest gathered in 2014 due to erratic weather

The 2014 wheat crop suffered from drought in the autumn of 2013 followed by cold weather. Estimates from the Turkish Statistical Institute indicate a 12 percent decrease in cereal production in 2014, compared to 2013, to about 32.9 million tonnes. The estimate includes 19 million tonnes of wheat (14 percent decrease on last year), 6.3 million tonnes of barley (20 percent decrease) and 6 million tonnes of maize (2 percent increase).

Higher cereal imports forecast in 2014/15, while exports expected to decline

In the 2014/15 marketing year (July/June), aggregate cereal imports,



Turkey Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	20 845	22 050	19 000	-14
Barley	7 430	7 900	6 300	-20
Maize	4 652	5 900	6 000	2
Others	1 548	1 623	1 579	-3
Total	34 475	37 473	32 879	-12

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

mainly wheat, are forecast to increase to 7.2 million tonnes (+23 percent) compared to last year's 5.8 million tonnes. The Russian Federation is the leading supplier of wheat which is used entirely for processing. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to decrease to 2.8 million tonnes, some 25 percent below average and below last year. Still, Turkey remains one of the leading exporters of wheat flour in the world, with Iraq and the Syrian Arab Republic being the main markets. However, security concerns in the region increased transportation costs and reduced exports.

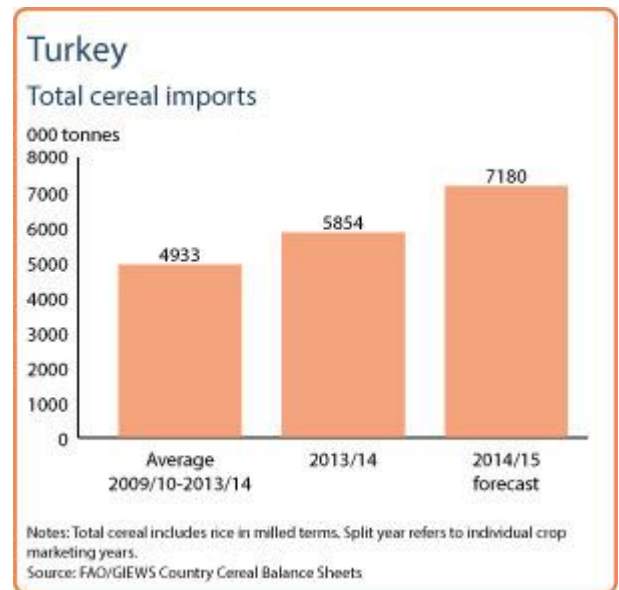
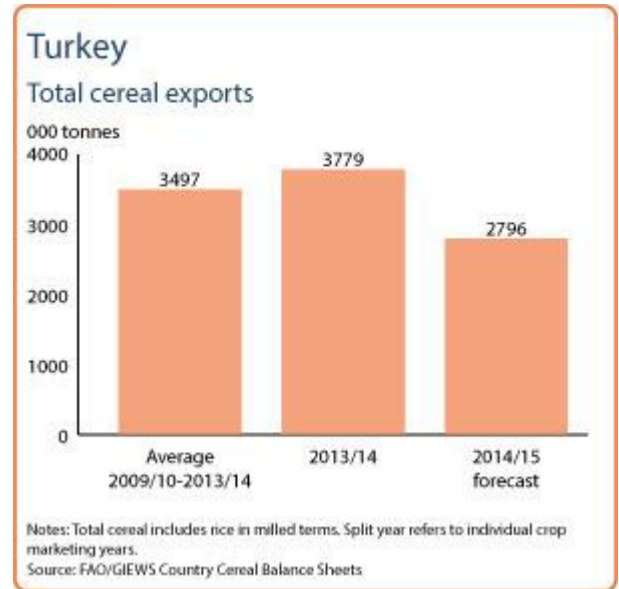
Food inflation increases in March 2015

Latest figures from the Turkish Statistical Institute (March 2015) indicate an annual food inflation rate of 14.1 percent, similar to the peak of 14.7 percent in May 2014, partly attributed to the upward pressure stemming from the poor 2014 harvest. The overall CPI in March 2015 stood at 7.6 percent. The Government is concerned with the high levels of food inflation in the country and in December 2014 established a committee to evaluate food and agricultural markets.

Increased number of Syrian refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries exceeded 3.9 million in early March 2015, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey was estimated at about 1.7 million. Some of the refugees, however, have been reported to have returned to the Syrian Arab Republic.

The World Food Programme (WFP) assisted approximately 220 000 beneficiaries in January 2015.



Reference Date: 11-February-2015

FOOD SECURITY SNAPSHOT

- Good prospects, so far, for 2015 winter grains
- Below-average cereal harvest gathered in 2014
- Cereal imports expected to increase, exports to decline in 2014/15
- Aggregate food price index declined recently but remains high

Favourable outlook for winter grains

Planting of winter grains to be harvested from May 2015 was concluded in December. Vegetation response captured by Normalized Difference Vegetation Index using satellite images suggests a good establishment of winter crops. As of early February 2015, winter crop prospects in Turkey are good owing to abundant moisture from heavy rains and mountain snow. Above-average temperatures present in early February were expected to be replaced by colder weather preventing early breaking of dormancy in Anatolia.

Below-average harvest gathered in 2014 due to erratic weather

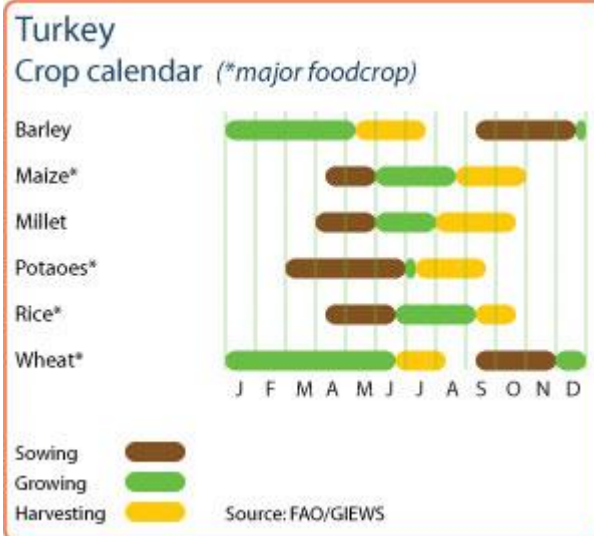
The 2014 wheat crop suffered from drought in the autumn of 2013 followed by cold weather. Estimates from the Turkish Statistical Institute indicate a 12 percent decrease in cereal production in 2014, compared to 2013, to about 32.9 million tonnes. The estimate includes 19 million tonnes of wheat (14 percent decrease on last year), 6.3 million tonnes of barley (20 percent decrease) and 6 million tonnes of maize (2 percent increase).

Higher cereal imports forecast in 2014/15, while exports expected to decline

In the 2014/15 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 7.2 million tonnes (+23 percent) compared to last year's 5.8 million tonnes. The Russian Federation is the leading supplier of wheat which is used entirely for processing. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to decrease to 2.8 million tonnes, some 25 percent below average and below last year. Still, Turkey remains one of the leading exporters of wheat flour in the world, with Iraq and the Syrian Arab Republic being the main markets. However, security concerns in the region increased transportation costs and reduced exports.

Slight decrease in food inflation

Latest figures from the Turkish Statistical Institute (January 2015) indicate an annual food inflation rate of 10.9 percent compared to a peak of 14.7 percent in May 2014. In 2014, food inflation averaged around 10 percent. The overall CPI in January 2015 stood at 7.75 percent supported by low oil prices. The Government is concerned with high levels of food inflation in the country and in December 2014 established a committee to evaluate food and agricultural markets.

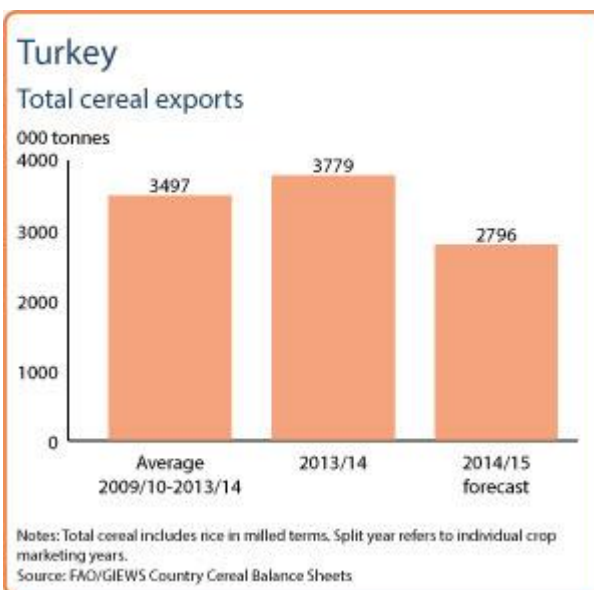


Turkey

Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	20 845	22 050	19 000	-14
Barley	7 430	7 900	6 300	-20
Maize	4 652	5 900	6 000	2
Others	1 548	1 623	1 579	-3
Total	34 475	37 473	32 879	-12

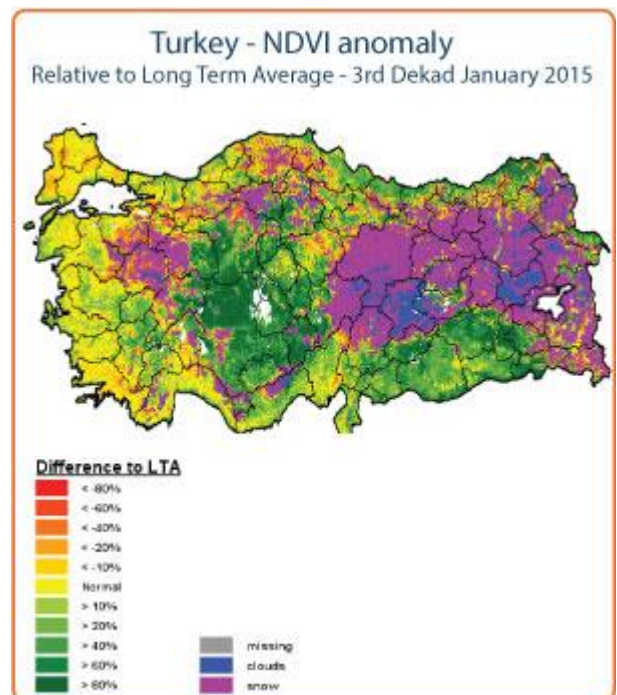
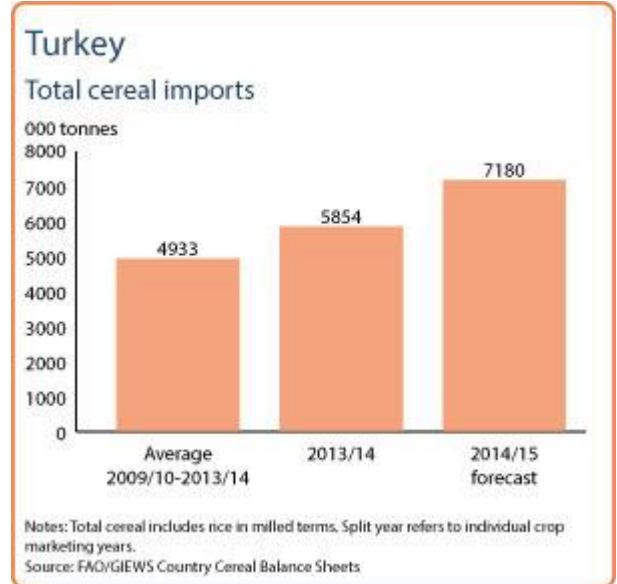
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Increased number of Syrian refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries exceeded 3.8 million in early February 2015, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey exceeded 1.6 million, of which about 220 000 reside in camps in ten southern or southeastern provinces, the part of the country that shares borders with the unrest-torn Syrian Arab Republic. Some of the refugees, however, have been reported to have returned to the Syrian Arab Republic.

The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 300 000 recipients.



Reference Date: 18-August-2014

FOOD SECURITY SNAPSHOT

- Below-average cereal harvest gathered in 2014
- Cereal imports expected to increase, exports to decline in 2014/15
- Aggregate food price index declined recently but remains high

Erratic weather affect cereal harvest in 2014

The 2014 wheat crop suffered from drought in the autumn of 2013 followed by cold weather. Spring rains improved soil moisture but first estimates from the Turkish Statistical Institute indicate a 10 percent decrease in cereal production in 2014, compared to last year, to about 33.8 million tonnes. The forecast includes 19.8 million tonnes of wheat (11 percent decrease on last year) and 13.1 million tonnes of coarse grains (also a 10 percent decline).

Higher cereal imports forecast in 2014/15, while exports expected to decline

In the 2014/15 marketing year (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 5.9 million tonnes (+17 percent) compared to last year's 5 million tonnes. Likewise, cereal exports, mainly wheat flour and durum wheat, are forecast to decrease to 2.7 million tonnes, some 25 percent below average and below last year. Still, Turkey remains one of the leading exporters of wheat flour in the world, with Iraq and Indonesia being the main markets.

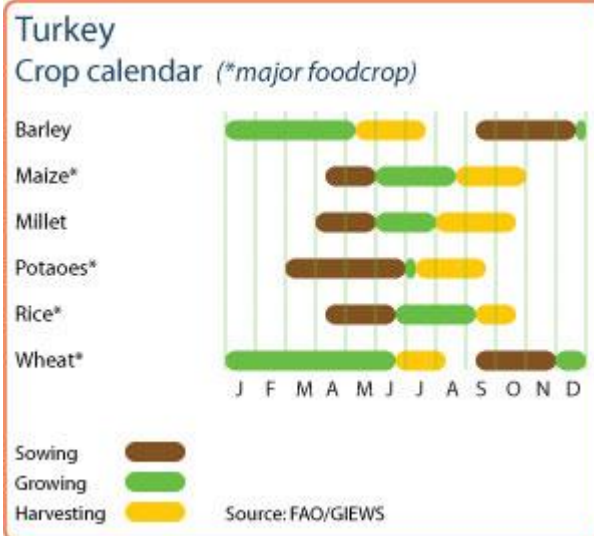
Slight decrease in food inflation

Latest figures from the Turkish Statistical Institute (July 2014) indicate an annual food inflation rate of 12.8 percent compared to a peak of 14.7 percent in May 2014. Earlier in 2014, food inflation averaged around 10 percent. The overall CPI in July 2014 stood at 9.3 percent. The weakening of the Turkish Lira may likely increase the rate of inflation.

Increased number of Syrian Refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries reached almost 3 million in early August 2014, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey exceeded 822 000, of which about 30 percent reside in about 22 camps in ten southern or southeastern provinces, the part of the country that shares borders with the unrest-torn Syrian Arab Republic. Some of the refugees, however, have been reported to have returned to the Syrian Arab Republic.

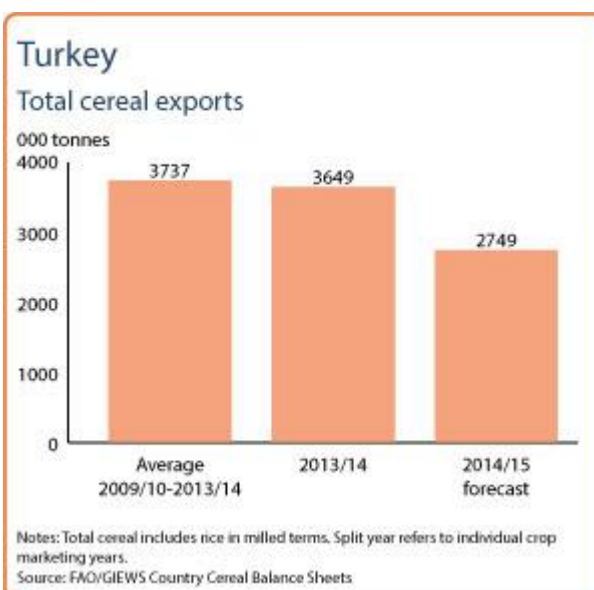
The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 300 000 recipients in December 2014.



Turkey Cereal production

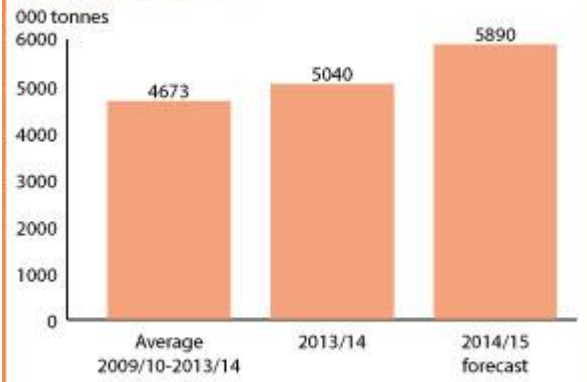
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	20 845	22 050	19 800	-10
Barley	7 430	7 900	6 900	-13
Maize	4 652	5 900	5 500	-7
Others	1 548	1 623	1 604	-1
Total	34 475	37 473	33 804	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 27-January-2014

FOOD SECURITY SNAPSHOT

- Concerns about weather conditions in Anatolia
- Above average cereal harvest gathered in 2013
- Cereal exports and imports expected to decline in 2013/14
- Aggregate food price index increased recently

Planting of winter grains to be harvested from May 2014 is completed. Following an unfavourably dry autumn and a cold snap in December, concerns over poor establishment of wheat and barley prevail in the key Turkish winter grain area in Anatolia. Elsewhere in central Turkey, precipitation since early September locally totalled less than 25 percent of normal, diminishing soil moisture reserves for spring growth.

Above average cereal harvest gathered in 2013

Estimates from the Turkish Statistical Institute indicated a 2013 cereal crop of about 37.5 million tonnes (an increase of about 12 percent on last year). The wheat harvest, estimated at 22.05 million tonnes, was about 10 percent higher than the previous five-year average and the last year's crop.

Similarly, barley production in 2013 was put at around 8 million tonnes, about 11 and 12 percent above last year and the five-year average respectively. Maize production increased by 28 percent compared to last year, owing to an increase in the second crop area in Central Anatolia, Cukurova and Mediterranean regions. High level of investment in the dairy and poultry sectors resulted in increased feed, and maize, demand.

Both cereal imports and exports expected to decline in 2013/14

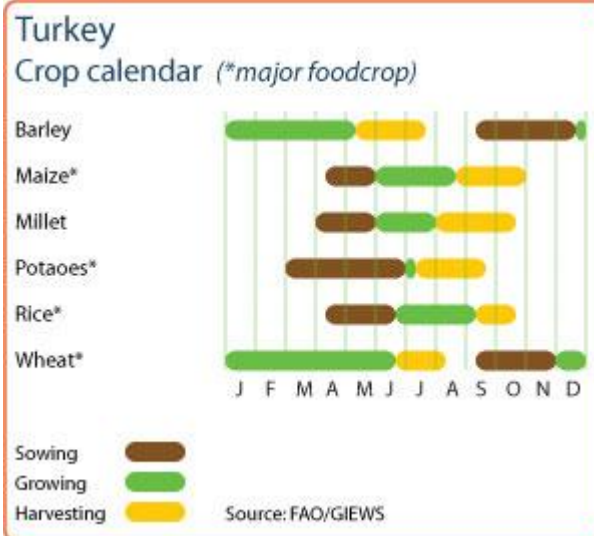
In marketing year 2013/14 (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 3 million tonnes from last year's 3.8 million tonnes. Likewise, cereal exports, mainly wheat flour and durum wheat, are forecast to decrease to 3.4 million tonnes, about 5 percent below average and about 13 percent below last year.

Still, Turkey remains one of the leading exporters of wheat flour in the world. In 2013/14, cereal exports are expected to outperform imports by about 10 percent compared to the 2 percent the previous year.

As of December 2013, the Turkish Grain Board purchased locally about 2 million tonnes of wheat (about 9 percent of wheat production) in cash at the intervention prices of TRY 620-765/tonne (USD 307-380) depending on type and quality.

Increase in food inflation

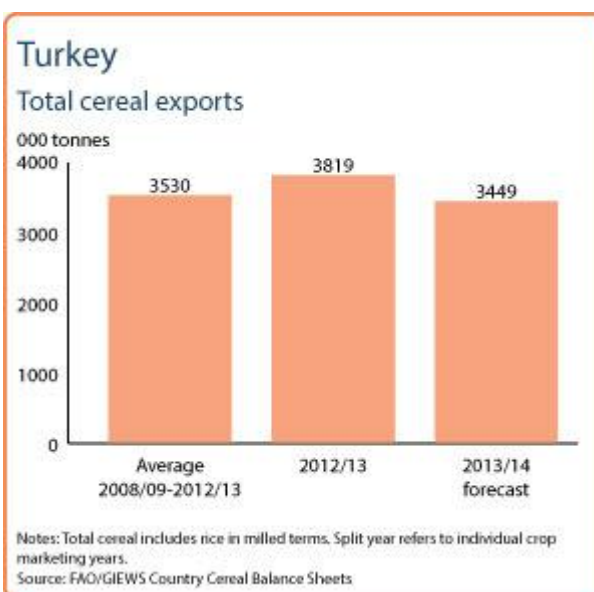
Latest figures from the Turkish Statistical Institute (December 2013) indicate a higher annual food inflation rate of 9.67 percent while the overall CPI in December 2013 stood at 7.4 percent. Earlier in 2013, food and non-alcoholic beverages inflation lingered between 6 to 8 percent. Weakening of the Turkish lira would likely increase the rate of inflation.



Turkey Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Wheat	19,993	20,100	22,050	10
Barley	7,035	7,100	7,900	11
Maize	4,327	4,600	5,900	28
Others	1,487	1,578	1,622	3
Total	32,841	33,378	37,472	12

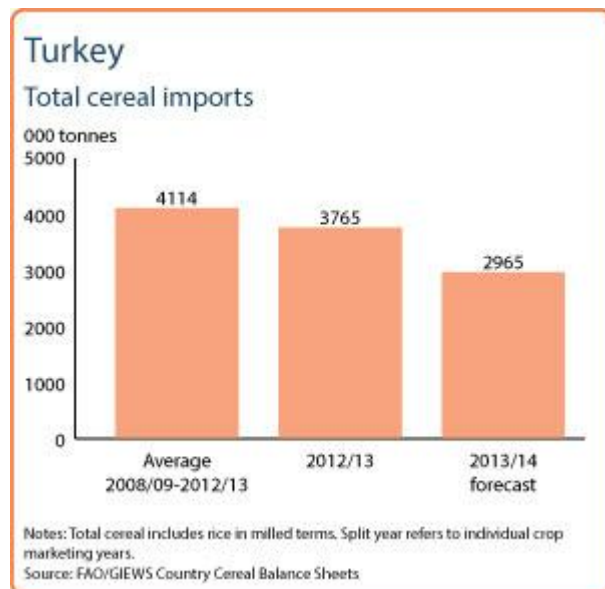
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Increased Number of Syrian Refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries reached almost 2.5 million in January 2014, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey exceeded 575 000, of which about 215 000 reside in about 22 camps in ten southern or southeastern provinces, the part of the country that shares border with unrest-torn Syria. Some of the refugees, however, have been reported to have returned to Syria.

The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 185 000 recipients in December 2013.



Reference Date: 28-August-2013

FOOD SECURITY SNAPSHOT

- Above average cereal harvest gathered in 2013
- Cereal exports and imports expected to decline in 2013/14
- Aggregate food price index increased recently

Preliminary estimates indicate an above average cereal harvest in 2013

The 2013 winter grain (mostly wheat and barley) harvest has just been concluded with warm weather conditions prompting an early start to the harvest in almost all of Turkey. Overall weather conditions were favourable during the cropping season although in some areas, the late onset of precipitation affected early crop conditions while in others late cessation of rains affected crops. In addition, this year, farmers increased the use of certified seeds in response to the Turkish Grain Board new protein-based procurement policy,

Despite the overall favourable conditions, significant differences were observed in yields in different parts of the country; yields in Cukurova region and Amik valley, for instance, benefited from favourable rains in April and May while the Southeastern Anatolia Project (GAP) region suffered from rains at harvest time. In Central Anatolia, despite the less than favourable weather conditions during in the winter months, yields in the region increased but quality remains a concern.

Accordingly, preliminary estimates from the Turkish Statistical Institute indicate a 2013 cereal crop of about 36.4 million tonnes (an increase of about 9 percent on last year). The wheat harvest, estimated at 21.95 million tonnes, is almost 10 percent higher than the previous five-year average and about 9 percent higher than last year's crop.

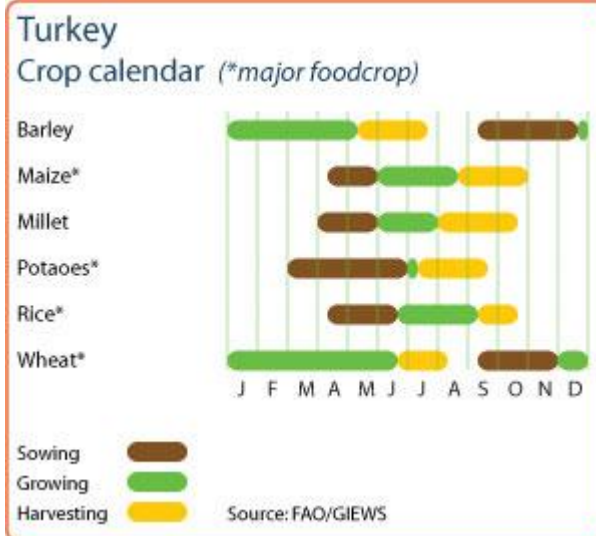
Similarly, barley production in 2013 is put at around 8 million tonnes, about 11 and 12 percent above last year and the five-year average. Maize production is forecast to increase by 8 percent compared to last year, owing to an increase in second crop area in Central Anatolia, Cukurova and Mediterranean regions. High level of investment in the dairy and poultry sectors resulted in increased feed – and maize – demand.

Both cereal imports and exports expected to decline in 2013/14

In marketing year 2013/14 (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 3.1 million tonnes from last year's 3.8 million tonnes. Likewise, cereal exports, mainly wheat flour and durum wheat, are forecast to decrease to 3.4 million tonnes, about 5 percent below average and about 13 percent below last year.

Still, Turkey remains one of the leading exporters of wheat flour in the world. In 2013/14, cereal exports are expected to outperform imports by about 10 percent compared to the 2 percent the previous year.

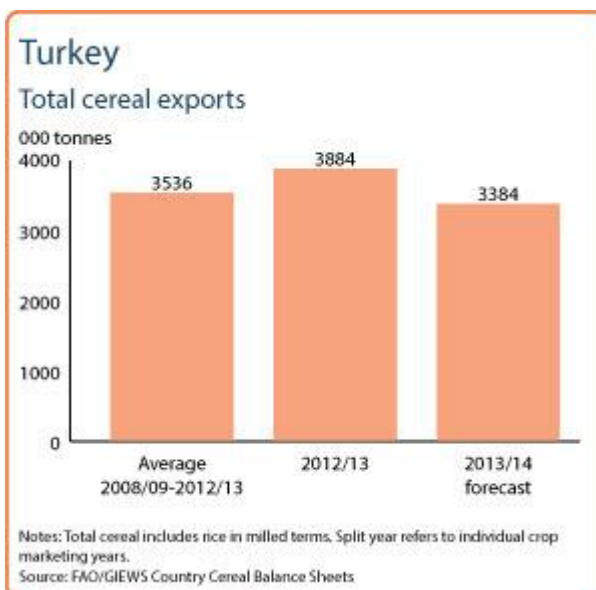
As of August 2013, the Turkish Grain Board purchased locally about 1.9 million tonnes of wheat (about 8 percent of wheat production) by



Turkey Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Wheat	19,993	20,100	21,950	9
Barley	7,035	7,100	7,900	11
Maize	4,327	4,600	4,950	8
Others	1,487	1,578	1,613	2
Total	32,841	33,378	36,413	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



cash at the intervention prices of TRY 620–765/tonne (USD 307-380) depending on type and quality.

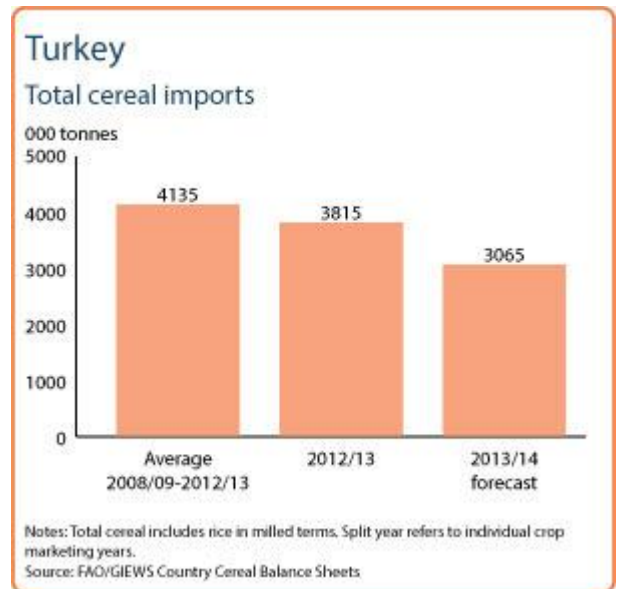
Increase in food inflation

Latest figures from the Turkish Statistical Institute (July 2013) indicate a higher annual food inflation rate of 12.7 percent while the overall CPI in July 2013 stood at 8.9 percent. Earlier in 2013, food and non-alcoholic beverages inflation lingered between 6 to 8 percent. Weakening of the Turkish lira would likely increase the rate of inflation.

Increased Number of Syrian Refugees

According to UNHCR data, the total number of Syrian refugees in the neighbouring countries reached more than 1.8 million in August 2013, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey exceeded 425 000, of which about 200 000 reside in about 20 camps in eight southern or southeastern provinces, the part of the country that shares border with unrest-torn Syria. Some of the refugees, however, have been reported to have returned to Syria.

The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 100 000 recipients in June 2013. The number of WFP beneficiaries is projected to increase to 180 000 in December 2013.



Reference Date: 11-June-2013

FOOD SECURITY SNAPSHOT

- Cereal production in 2013 forecast to increase significantly
- Cereal imports expected to decline in 2012/13 (July/June) while slightly increased exports foreseen
- Aggregate food price index decreased in the last month

Cereal production in 2013 is forecast to increase significantly

Harvesting of winter crops (mostly wheat and barley) is under way. Seasonably drier weather at the end of May promoted winter crop maturation and harvesting. Despite less than favourable weather conditions during in the winter months in Central Anatolia, first estimates of the 2013 crop by the Turkish Statistical Institute forecast about 36.4 million tonnes of cereals (an increase of about 9 percent compared to last year).

Preliminary estimates of Turkey's 2013 wheat harvest, at 21.95 million tonnes, is almost 10 percent higher than the previous five-year average, and about 9 percent higher than last year's crop. Responding to the Turkish Grain Board new protein-based procurement policy, farmers increased their use of certified seeds.

Similarly, barley production in 2013 is put at around 8 million tonnes, about 11-12 percent above last year and the five-year average. Maize production is forecast to increase by 8 percent compared to last year, owing to an increase in second crop area in Central Anatolia, Cukurova and Mediterranean regions.

Cereal imports at par with exports in 2012/13

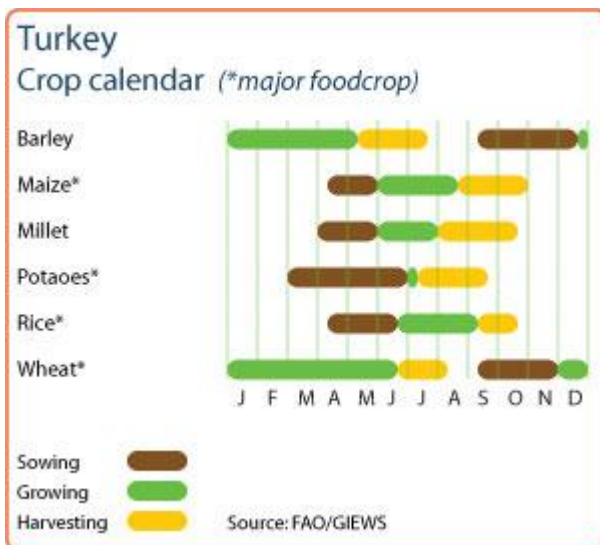
In marketing year 2012/13 (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 3.8 million tonnes from last year's 4.5 million tonnes. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to increase to 3.9 million tonnes, about 26 percent above average and about 6 percent above last year. Turkey remains one of the leading exporters of wheat flour in the world.

As of May 2013, the Turkish Grain Board purchased about 8 percent of wheat produced in the country in the 2012/13 marketing year compared to 3.8 percent in 2011.

Decrease in food inflation

Latest figures from the Turkish Statistical Institute (May 2013) indicate a lower annual food inflation rate of 7.07 percent while the overall CPI in May 2013 stood at 6.51 percent. Although rather high, food and non-alcoholic beverages recorded the highest monthly decrease (2.18 percent) compared to the previous month. The greatest annual increases in consumer prices were noted in the category of alcoholic beverages (16 percent compared to May 2012). Weakening of the Turkish lira is likely to support additional increases in inflation.

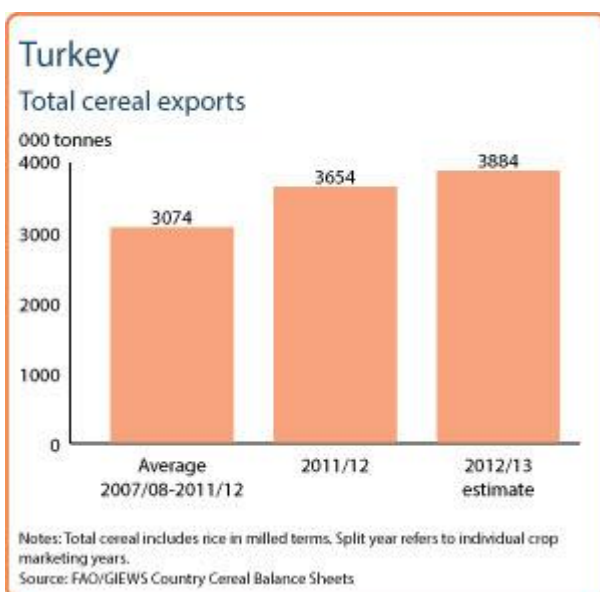
Increased Number of Syrian Refugees



Turkey Cereal production

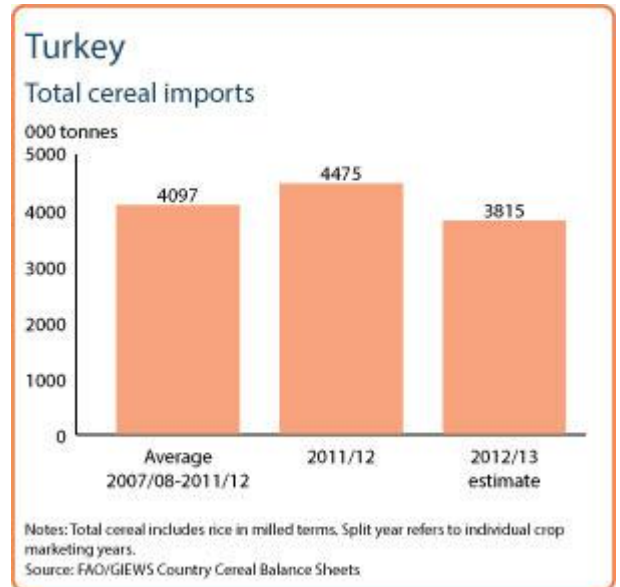
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Wheat	19,993	20,100	21,950	9
Barley	7,035	7,100	7,900	11
Maize	4,327	4,600	4,950	8
Others	1,487	1,578	1,613	2
Total	32,841	33,378	36,413	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



According to UNHCR data, the total number of Syrian refugees reached more than 1 416 000 registered in May 2013, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey reached almost 350 000, of which about 200 000 reside in about 17 camps in eight southern or southeastern provinces, the part of the country that shares border with unrest-torn Syria. Some of the refugees, however, have been reported to have returned to Syria.

The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 100 000 recipients in June 2013.



Reference Date: 10-December-2012

FOOD SECURITY SNAPSHOT

- Above average cereal harvest gathered in 2012
- Cereal imports expected to decline in 2012/13 (July/June) while slightly increased exports foreseen
- Aggregate food price index decreases in the last several months

The winter cropping season has begun under generally favourable conditions

Planting of winter crops (mostly wheat and barley) is under way. Wet October weather in the region improved soil moisture for planting and establishment while above-normal temperatures supported crop growth prior to the arrival of the cold winter weather. Reports indicate that many farmers in the Cukurova region were undecided whether to plant wheat or oilseeds depending on their profitability.

Estimates of Turkey's 2012 wheat harvest, at 20.1 million tonnes, is some 4 percent higher than the previous five-year average, but about 8 percent lower than last year's bumper crop. Despite yields being lower in 2012 than in 2011, grain quality in terms of protein content is considered to be higher in 2012.

Similarly, barley production in 2012 is put at around 7 million tonnes, about the same as the five-year average but 7 percent below last year. Maize production increased by 10 percent compared to last year, owing to an increase in second crop area in South East Anatolia and Central Anatolia.

Cereal imports at par with exports in 2012/13

In marketing year 2012/13 (July/June), aggregate cereal imports, mainly wheat, are forecast to decrease to 3.8 million tonnes from last year's 4.5 million tonnes. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast to increase to 3.7 million tonnes, about 31 percent above average and similar to last year.

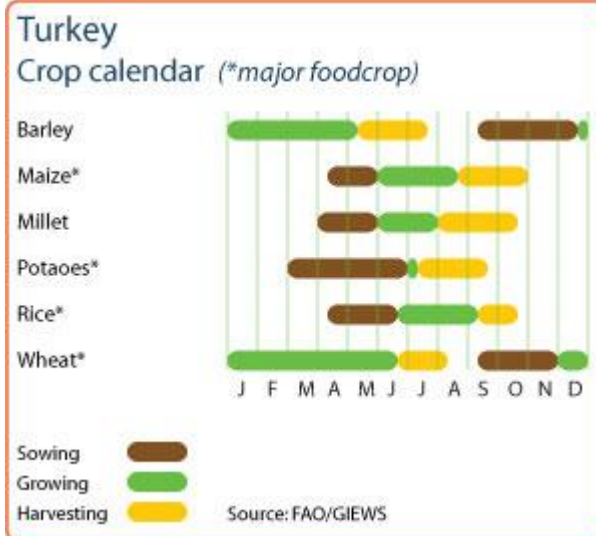
Turkey remains one of the leading exporters of wheat flour in the world. However, lack of competitively priced grain supplies from Russia and Ukraine are slowing down wheat flour re-exports from Turkey.

In 2012 the Turkish Grain Board purchased about 8 percent of wheat produced in the country compared to 3.8 percent in 2011.

Following shortage of feed ingredients, the Turkish government reduced the import duty on soybean meal and wheat bran from 13.5 percent to 5 percent in October 2012. In addition, the Turkish Grain Board was given quotas for duty-free imports of 500 000 tonnes of maize and 500 000 tonnes of barley until 31 May 2014.

Food inflation decreases

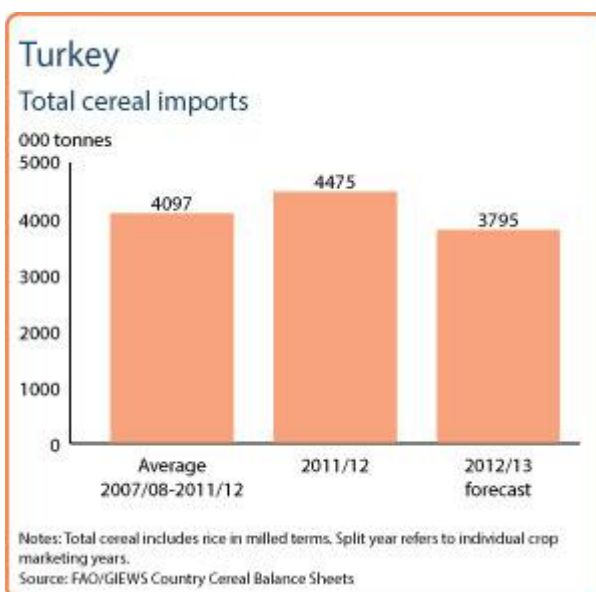
Latest figures from the Turkish Statistical Institute (November 2012) indicate a lower annual food inflation rate of 4.3 percent while the overall CPI in November 2012 stood at 6.37 percent, the lowest in the



Turkey Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Wheat	19,419	21,800	20,100	-8
Barley	7,076	7,600	7,100	-7
Maize	4,114	4,200	4,600	10
Others	1,406	1,594	1,549	-3
Total	32,015	35,194	33,349	-5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

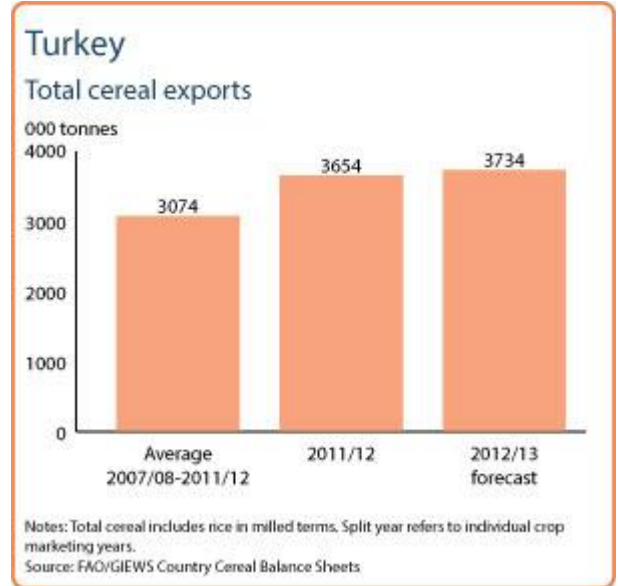


last 13 months. Increases in the cost of housing, water, electricity, gas and other fuels contributed mainly to the rate of inflation. This follows the sharp increases of about 11-12 percent in December 2011 and early 2012, from the minimum level of 2 percent in September 2011.

Increased Number of Syrian Refugees

According to UNHCR data, the total number of Syrian refugees reached more than 408 000 registered in December 2012, mostly residing in Turkey, Jordan, Lebanon and Iraq. The number of Syrian refugees registered in Turkey reached over 135 000 in about 14 camps in seven southern or southeastern provinces, the part of the country that shares border with unrest-torn Syria. Some of the refugees, however, have been reported to have returned to Syria.

The World Food Programme (WFP) complements the Government's effort in supporting the refugees by supplying food vouchers to about 30 000 recipients



Reference Date: 09-August-2012

FOOD SECURITY SNAPSHOT

- An average winter grain harvest estimated in 2012
- Grain imports expected to exceed exports in 2012/13 (July/June)
- Aggregate food price index remains high

The 2012 winter grains output is estimated at an average level

Turkey's 2012 wheat harvest has just been concluded and estimates indicate an average level of production. At 19.5 million tonnes, the 2012 wheat crop is some 11 percent lower than last year's bumper crop. Earlier forecasts were rather optimistic following the timely onset of the rainy season, that favoured more planting, and the subsequent abundant rains and snowfall during the winter months. However, below average rains in April and below average temperatures at the end of dormancy period in March, particularly in Central Anatolia, affected crop growth. Similarly, barley production is put at around 7 million tonnes, about average but 7 percent below last year.

The state purchase agency raised its benchmark grain price to TRY 655 per tonne from TRY 605 last year following an increase in international grain prices.

Cereal imports expected to exceed exports in 2012/13

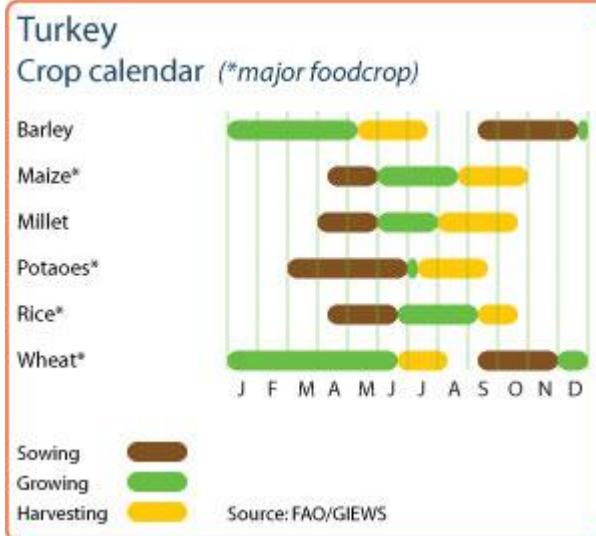
In marketing year 2012/13 (July/June), aggregate cereal imports, mainly wheat, are forecast to increase to 3.8 million tonnes from last year's 3.5 million tonnes. On the other hand, cereal exports, mainly wheat flour and durum wheat, are forecast at 3.5 million tonnes, about 12 percent above average, but 300 000 tonnes less than last year.

Turkey remains one of the leading exporters of wheat flour in the world. Some 70 percent of flour exports are destined to Iraq and Indonesia - a fact that is inducing exporters to look for new export destinations.

Food inflation stabilizes at an elevated level

According to the Turkish Statistical Institute, food inflation increased sharply from a minimum of 2 percent year-on-year in September 2011 to about 11-12 percent in December 2011 and early 2012. The latest figures (July 2012) indicate an annual inflation rate of 9 percent. Increases in unprocessed food prices contributed to the high inflation rates. The overall CPI is around the same level.

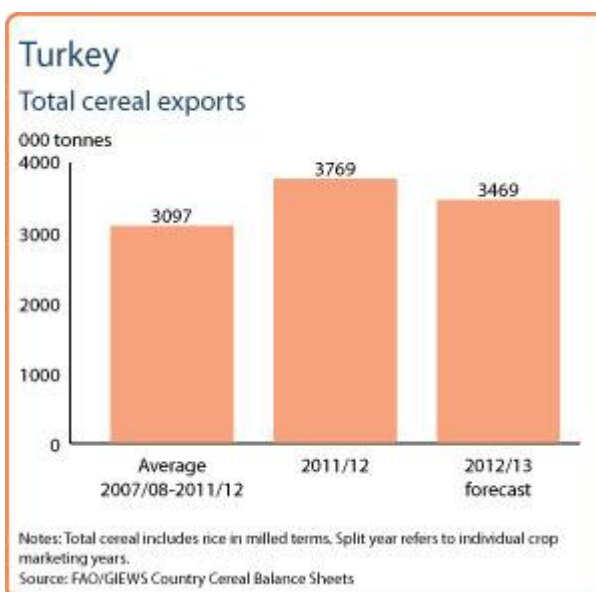
Turkey hosts a large number of refugees from the Syrian Arab Republic. Up to August 2012 almost 80 000 persons entered Turkey although some 30 000 of them are estimated to have returned to Syria.



Turkey Cereal production

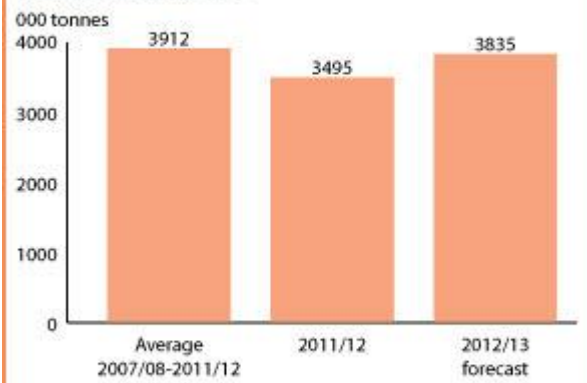
	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Wheat	19 419	21 800	19 439	-11
Barley	7 076	7 600	7 047	-7
Maize	4 114	4 200	4 064	-3
Others	1 406	1 594	1 541	-3
Total	32 015	35 194	32 091	-9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 13-March-2012

FOOD SECURITY SNAPSHOT

- Favourable forecast for 2012 winter crops
- Wheat exports expected to increase in 2011/12 (July/June)
- Aggregate food price index remains high

Favourable production prospects for winter crops in 2012

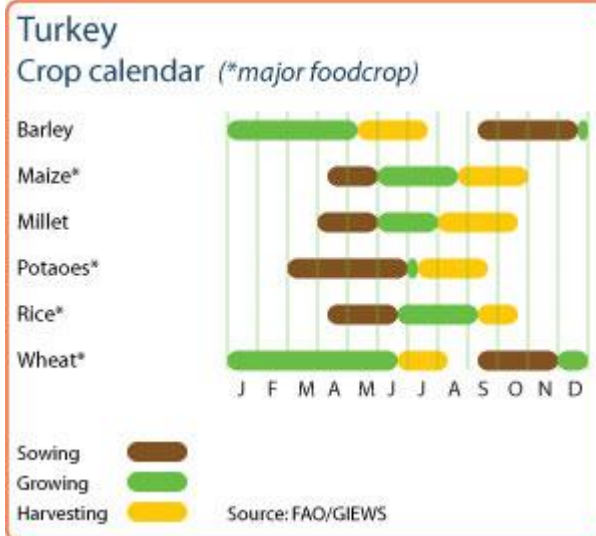
Winter wheat and barley crops have just broken dormancy in main producing areas. Assuming average weather conditions until the beginning of harvesting operations in June, the 2012 winter crop production is very promising due to a timely start of the rainy season that favoured planting and abundant rains and snowfall during the winter. In addition, a moderate to deep snow pack successfully protected crops from very low temperatures, especially in the Anatolia's Plateau, avoiding crop losses due to winterkill.

Cereal exports expected to exceed imports in 2011/12

In marketing year 2011/12 (July/June), aggregate cereal exports, mainly wheat flour and durum wheat, are forecast at 3.8 million tonnes, almost 40 percent above average, following the bumper wheat production obtained in 2011. At the same time, cereal imports, mainly wheat, are forecast to decline to 3.5 million tonnes, the lowest level since marketing year 2006/07 due to the high level of domestic stocks. With the implementation of the Biosafety Law in 2012, imports of biotech maize are currently banned and, given the insufficient domestic maize production to cover the high demand from the poultry sector, the proportion of wheat and barley in feed ratios has significantly increased.

Food inflation stabilizes at a high level

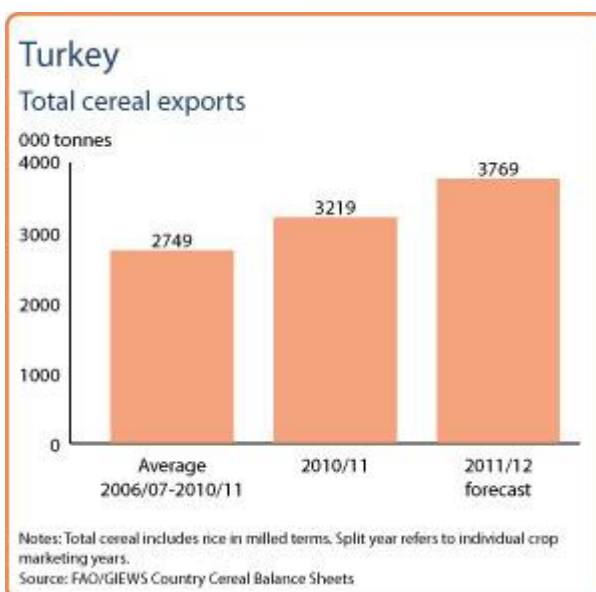
According to the Turkish Statistical Institute, food inflation sharply increased from a minimum of 2 percent year-on-year that was registered in September 2011 to about 12 percent in December 2011. Inflation remained at that high level during first months of 2012.



Turkey Cereal production

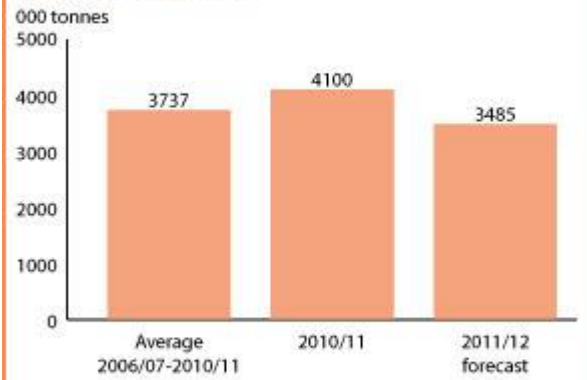
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	19 059	19 660	21 800	11
Barley	7 464	7 240	7 600	5
Maize	4 036	4 310	4 200	-3
Others	1 340	1 530	1 604	5
Total	31 899	32 740	35 204	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 15-September-2011

FOOD SECURITY SNAPSHOT

- Bumper forecast for 2011 winter crops
- Wheat exports expected to increase in 2011/12 (July/June)
- Aggregate food price index declines

Increased production estimates for winter crops in 2011

Harvesting of 2011 winter cereals is almost complete and early estimates indicate a near-record production. The positive result is essentially due to the favourable growing conditions along the season. In particular, abundant rainfall benefitted most major wheat and barley producing areas during the April-June period, coinciding with the most moisture sensitive growth stages of both crops. High yields are reported in central Anatolian highlands, the Cukurova region and throughout the south and south-east.

On the other hand, harvesting of 2011 maize crop is underway and production is forecast at 4.2 million tonnes, about 3 percent below the previous year. The reduction is mainly due to the increase in cotton cultivated area at the expense of maize, following the very high prices of cotton at planting time.

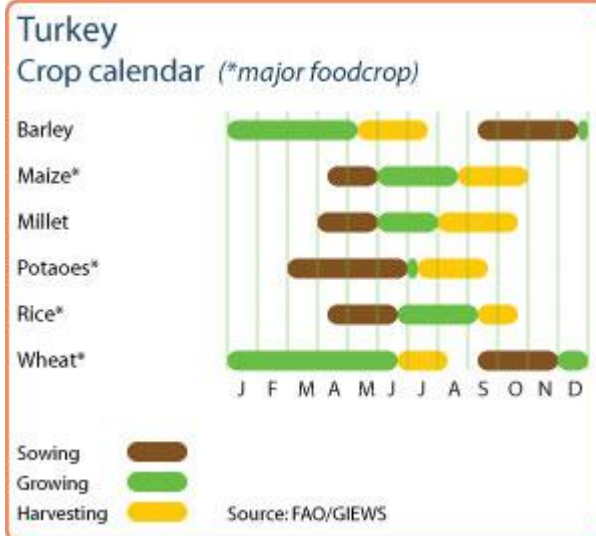
Overall, the 2011 cereal production is estimated at 35.2 million tonnes, about 7.5 percent more than the good crop in 2010 and 10 percent above the last five years' average.

Cereal exports expected to well exceed imports in 2011/12

Aggregate cereal exports in marketing year 2011/12 (July/June) are forecast at 3.9 million tonnes, about 40 percent above average. At the same time, cereal imports, mainly high quality wheat plus minor quantities of maize, barley and rice, are forecast to decline to 3.1 million tonnes, the lowest level since marketing year 2006/07.

Food inflation declined from last May but still remains high

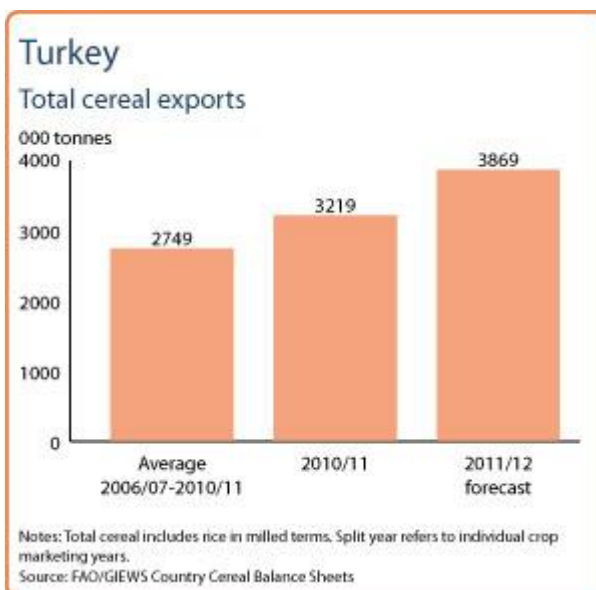
According to the Turkish Statistical Institute, food inflation peaked in May 2011 at 12.6 percent year-on-year, mainly owing to the weather induced reduction and/or delay of seasonal fresh fruits. A gradual decline continued during the following months, reaching 6.0 percent in August 2011.



Turkey Cereal production

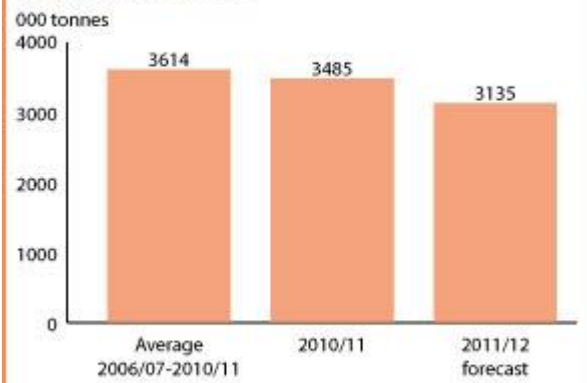
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Wheat	19 059	19 660	21 800	11
Barley	7 464	7 240	7 600	5
Maize	4 036	4 310	4 200	-3
Others	1 340	1 530	1 604	5
Total	31 899	32 740	35 204	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 20-May-2011

FOOD SECURITY SNAPSHOT

- Promising outlook for 2011 winter crops for harvest from June
- Wheat exports are expected to decline in 2010/11 (July/June) compared to the previous year
- Food prices continue to decline since last November

Favourable prospects for 2011 winter crops in key growing areas

Harvesting of 2011 winter cereals is expected to start in June and production prospects are favourable. Based on satellite images, harvest outlook is currently very promising in main producing regions of Central Anatolia, Aegean and Cukurova. The positive result is essentially due to adequate rainfall from February to April that, despite a 10-day dry spell at the end of March, benefited crop development. In the rest of the country, yields are expected to be about average.

Planting of the 2011 first season maize crop is well advanced and planted area is expected to decline due to the very high prices of cotton that are expected to induce some maize farmers to switch to cotton. Most of the switch is likely to take place in traditional maize growing areas of Cukurova and South-east Anatolia regions that are also suitable to cotton production.

Overall, the early forecast of the 2011 cereal production is put at 33.3 million tonnes, slightly more than the good output obtained in 2010.

External trade in wheat and wheat flour expected to decline in 2010/11 compared to 2009/10

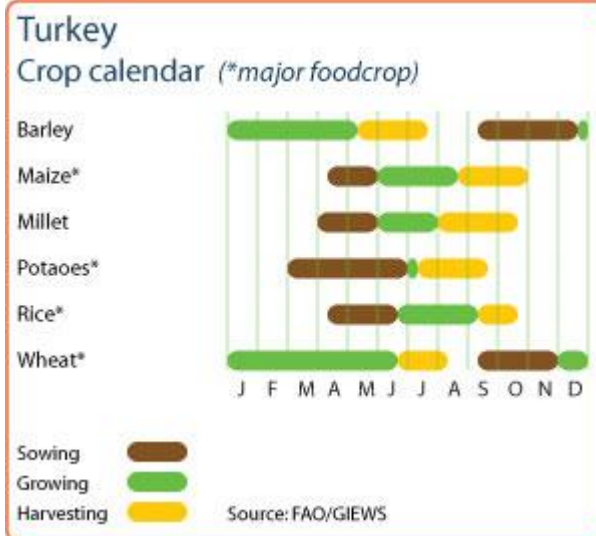
Cereal imports in the current marketing year 2010/11 (July/June) are forecast at about 3.5 million tonnes, slightly less than in 2009/10, but well above the last five years average. This includes 2.8 million tonnes of wheat (mainly high quality wheat from Kazakhstan and the US) plus minor quantities of maize, barley and rice.

High local prices are expected to lower exports of wheat and wheat flour, especially to Iraq, Indonesia, the Philippines and some North African countries such as Sudan and Egypt. Aggregate cereal exports in marketing year 2010/11 (July/June) are forecast at 3.2 million tonnes, still above average, but well below the 4.5 million tonnes exported in 2009/10.

Food inflation continues to decline

Food prices, which were increasing since the summer months of 2010, peaked in October 2010 by 17 percent year-on-year, but steadily declined since reaching 2.8 percent in April 2011.

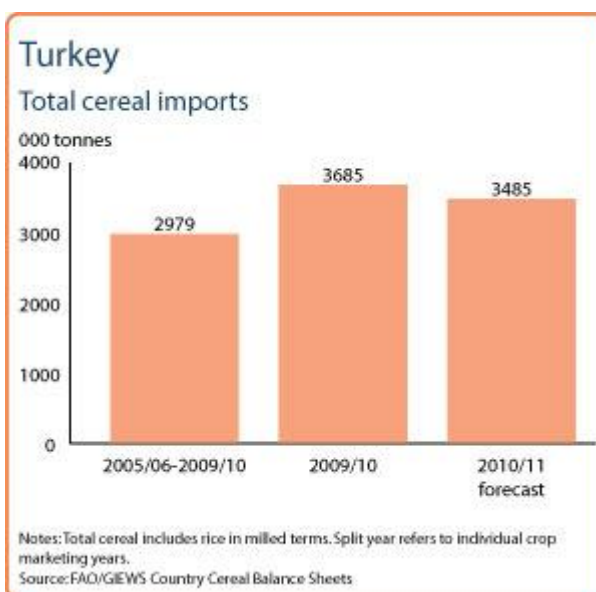
According to the Turkish Statistical Institute, the annual rate of the aggregate price index for food and non-alcoholic beverages stood at 7 percent in 2010, compared to 9.3 percent in 2009 and 11.9 percent in 2008.



Turkey Cereal production

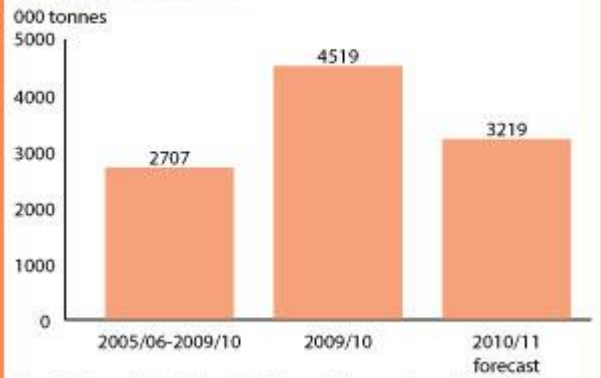
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	19 059	19 660	20 500	4
Barley	7 464	7 240	7 307	1
Maize	4 036	4 310	3 980	-8
Others	599	670	613	-9
Total	31 899	32 740	33 300	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal exports

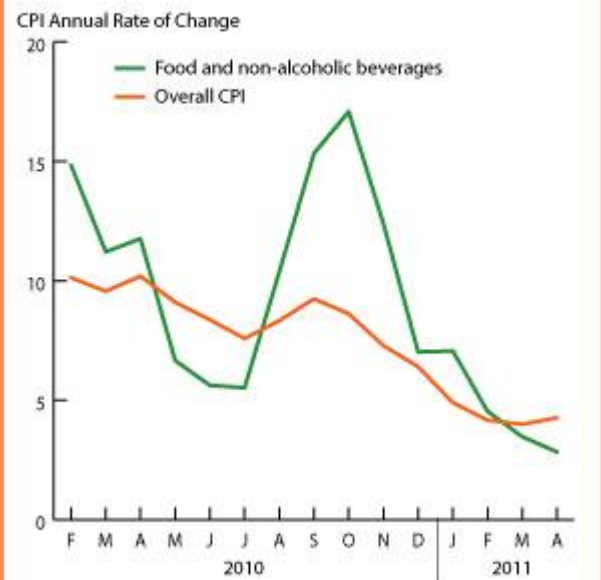


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Turkey

Consumer Price Indices for basic foods



Source: Turkish Statistical Institute

Reference Date: 07-April-2011

FOOD SECURITY SNAPSHOT

- Promising outlook for 2011 winter crops to be harvested from June
- Wheat exports are expected to decline in 2010/11 compared to last year
- Food prices continue to decline since last November

Favourable prospects for 2011 winter crops in key growing areas

Favoured by warmer-than-average temperatures the 2011 winter cereals, due for harvest from June, have entered the heading phase earlier than normal. Despite a dry spell in November, that affected some south-eastern growing areas, prospects are generally favourable. Harvest outlook is currently very promising in western Central Anatolia representing about 40 percent of annual wheat production, due to adequate rainfall during February and March. In South-east Anatolia and Cukurova regions yields are expected to be about average.

Planting of the 2011 first season maize crop is about to start. Planted area is expected to decline due to the very high prices of cotton that are expected to induce some maize farmers to switch to cotton. Most of the switch is likely to take place in traditional maize growing areas of Cukurova and South-east Anatolia regions that are also suitable to cotton production.

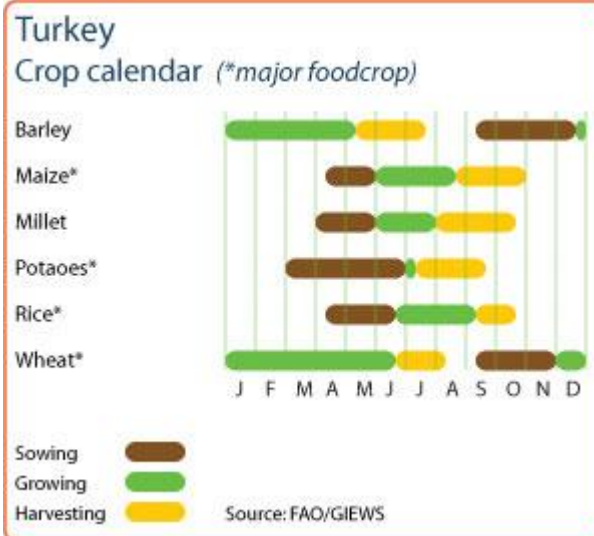
Imports and exports of wheat and wheat flour expected to decline in 2010/11 compared to 2009/10

Early forecast of cereal import requirements for marketing year 2010/11 (July/June) is put at about 3.5 million tonnes, slightly less than in 2009/10, but well above the last five years average. This includes 2.8 million tonnes of wheat (mainly high quality wheat from Kazakhstan and the US) plus minor quantities of maize, barley and rice.

High local prices are expected to result in lower exports of wheat and wheat flour, especially to Iraq, Indonesia, the Philippines and some African countries such as Sudan and Egypt. Aggregate cereal exports in marketing year 2010/11 (July/June) are forecast at 3.2 million tonnes, still above average, but well below the 4.5 million tonnes exported in 2009/10.

Food inflation continue to decline

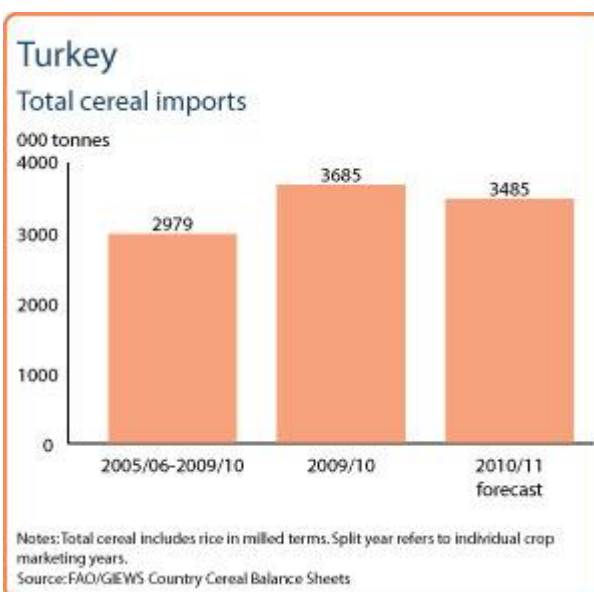
According to the Turkish Statistical Institute, the annual rate of change of aggregate price index for food and non-alcoholic beverages stood at 7 percent in 2010, compared to 9.3 percent in 2009 and 11.9 percent in 2008. Food prices increased sharply in October 2010, with an increase of 17 percent year-on-year and steadily declined in the following months reaching 3.5 percent in March 2011.



Turkey Cereal production

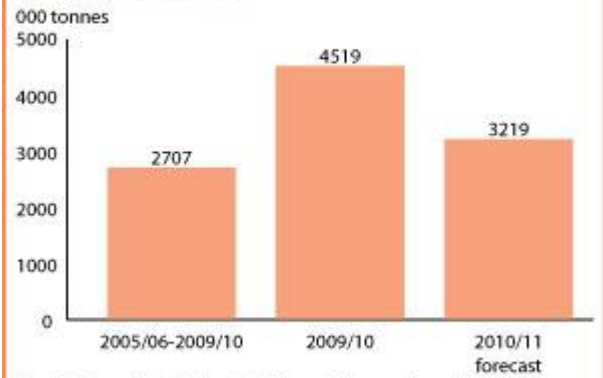
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	19427	20600	19660	-5
Barley	7916	7300	7240	-1
Maize	4016	4250	4310	1
Others	1294	1428	1440	1
Total	32652	33578	32650	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal exports

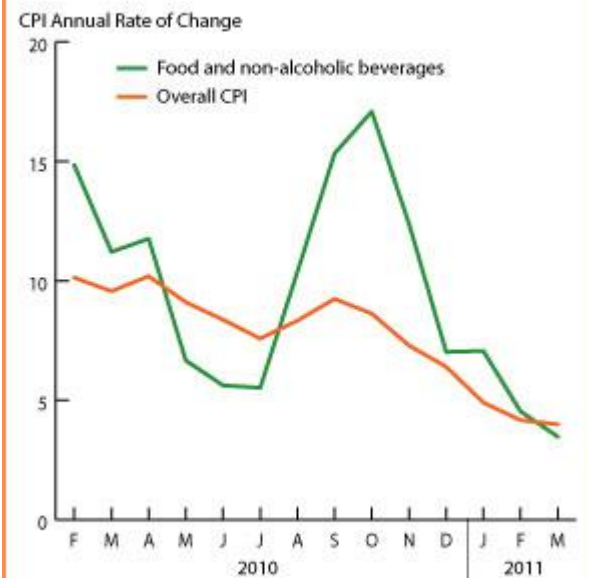


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Turkey

Consumer Price Indices for basic foods



Source: Turkish Statistical Institute

Reference Date: 27-January-2011

FOOD SECURITY SNAPSHOT

- Area planted to winter crops in 2010 increased, while a sizable reduction in the maize crop, for planting in April/May, may occur due to prevailing high prices of cotton
- A decline in wheat exports is forecast in 2010/11 compared to last year but levels are still above average

Acreage expansion of 2011 winter crops observed

Sowing of the 2011 winter crops has been recently completed under normal weather conditions. Area under wheat and barley crops has substantially increased due to prevailing high prices and farmers' expectations of high purchase wheat prices by the Turkish Grain Board (TMO) in 2011. Despite a dry spell in November that affected some south-eastern growing areas, crop prospects are favourable especially in central and western regions that received adequate rainfall and mountain snow.

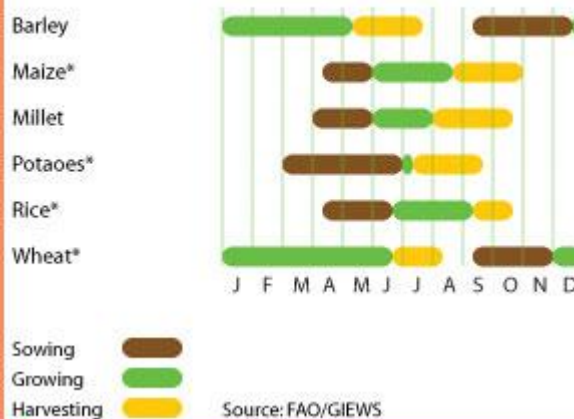
Land preparation of the 2011 first season maize crop is about to start. Maize plantings may decline, due to the very high prices of cotton that are expected to induce some maize farmers to switch to cotton. Most of the switch is likely to take place in traditional maize growing areas of Cukurova and south-east Anatolia regions that are also suitable to cotton production.

Imports and exports of wheat and wheat flour expected to decline in 2010/11

Early forecast of cereal import requirements for marketing year 2010/11 (July/June) is put at about 3.4 million tonnes, slightly less than in 2009, but still well above the last five years average. This includes 2.7 million tonnes of wheat (mainly high quality wheat from Kazakhstan and the US) plus minor quantities of maize, barley and rice.

High local prices are expected to result in lower exports of wheat and wheat flour, especially to Iraq, Indonesia, Philippines and some African countries such as Sudan and Egypt. Aggregate cereal exports in marketing year 2010/11 (July/June) are forecast at 3.1 million tonnes, still above average, but well below the 4 million tonnes exported in 2009/10.

Turkey Crop calendar (*major foodcrop)

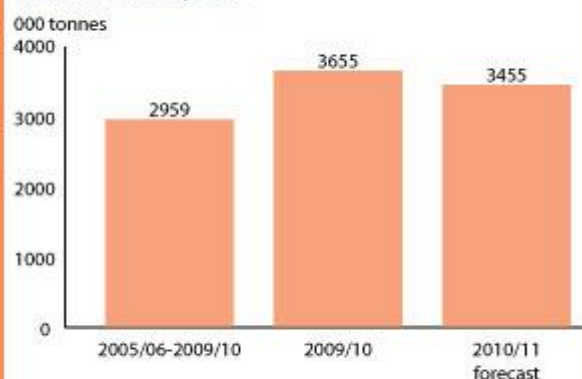


Turkey Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	19427	20600	19500	-5
Barley	7916	7300	7500	3
Maize	4026	4300	4000	-7
Others	1274	1329	1338	1
Total	32642	33529	32338	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

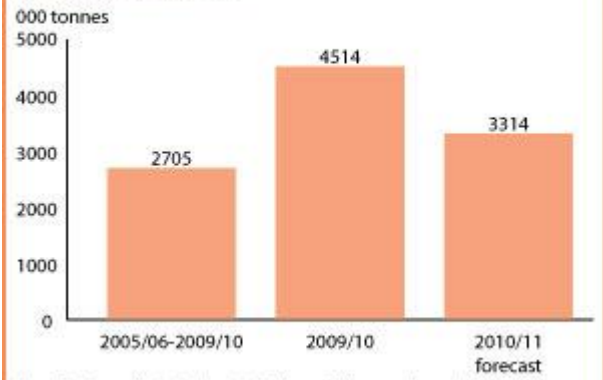
Turkey Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Turkey

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 13-October-2010

FOOD SECURITY SNAPSHOT

- Winter crops production in 2010 estimated at average levels
- A decline in wheat exports is forecast in 2010/11 compared to last year but levels are still above average

Yellow rust and excessive rains at harvest reduced 2010 winter wheat production

Sowing of 2011 winter crops has just started under normal weather conditions.

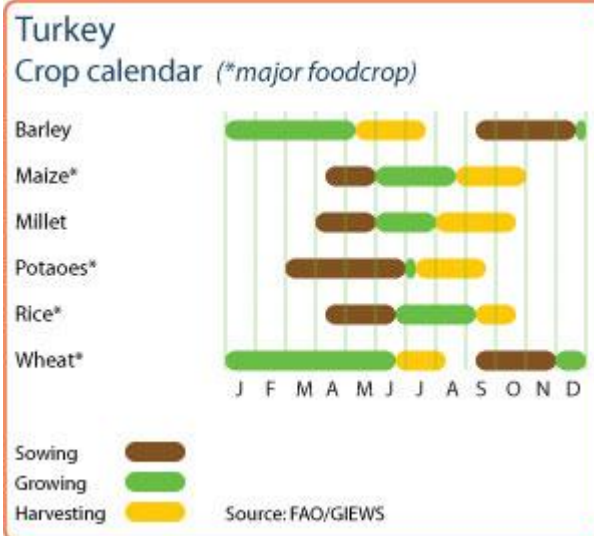
Production of the 2010 wheat crop is estimated at average 19.5 million tonnes, about 1 million tonnes less than the previous optimistic forecast. In fact, following a positive start to the rainy season from October 2009 to March 2010, a widespread infestation of yellow rust affected yields, in particular in South-East Anatolia region, close to the Syrian and Iraqi border. In addition, heavy rainfall in Central Anatolia and the Thrace region just before and during harvest time affected crops, especially the durum wheat. Production of barley is estimated at 7.5 million tonnes, slightly below average.

Harvesting of the 2010 maize crop is well underway in main growing areas of Aegean, Cukurova and south-east Anatolia regions and production is forecast at an average level of 4 million tonnes.

Harvesting of 2010 paddy crop is also underway in main producing areas of the Marmara and Thrace regions. Paddy production is forecast at an above average 770 000 tonnes, due to favourable weather conditions and increased water levels in main reservoirs that induced farmers to augment planted area by about 10 percent and had a general positive effect on yields.

Imports and exports of wheat expected to decline in 2010/11

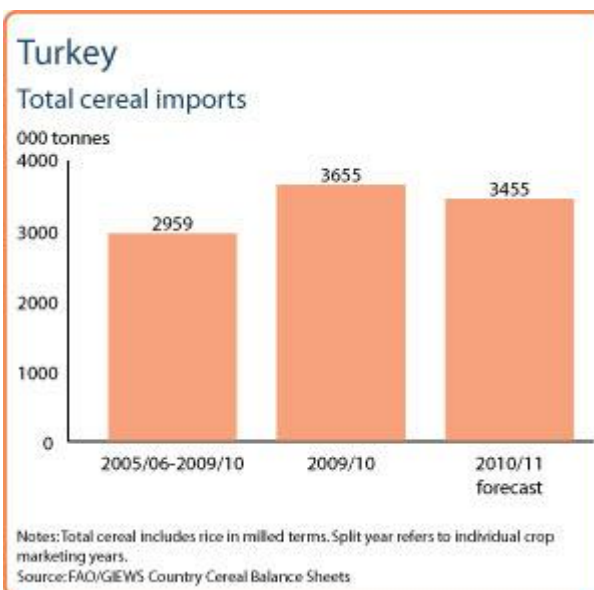
Preliminary forecast of cereal import requirements for marketing year 2010/11 (July/June) is put at about 3.5 million tonnes, slightly less than in 2009, but still well above the last five years average. This includes 2.8 million tonnes of wheat (mainly high quality used for wheat flour) plus minor quantities of maize, barley and rice. High wheat prices (for local and imported durum and milling wheat prices) that followed the wheat export ban in Russia, the main wheat exporter to Turkey, are expected to result in lower Turkish wheat exports, especially to Indonesia, Philippines and some African countries. Aggregate cereal exports in marketing year 2010/11 (July/June) are forecast at 3.1 million tonnes, still above average, but well below the 4 million tonnes exported in 2009/10.



Turkey Cereal production

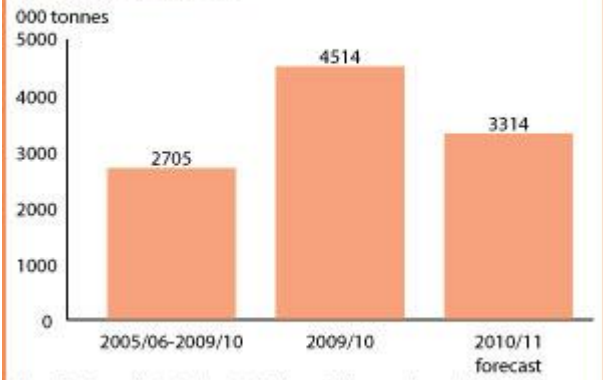
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	19427	20600	19500	-5
Barley	7916	7300	7500	3
Maize	4026	4300	4000	-7
Others	1274	1329	1338	1
Total	32642	33529	32338	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Turkey

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 08-June-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2010 winter crops production
- Lower cereal import bill estimated in 2009/10

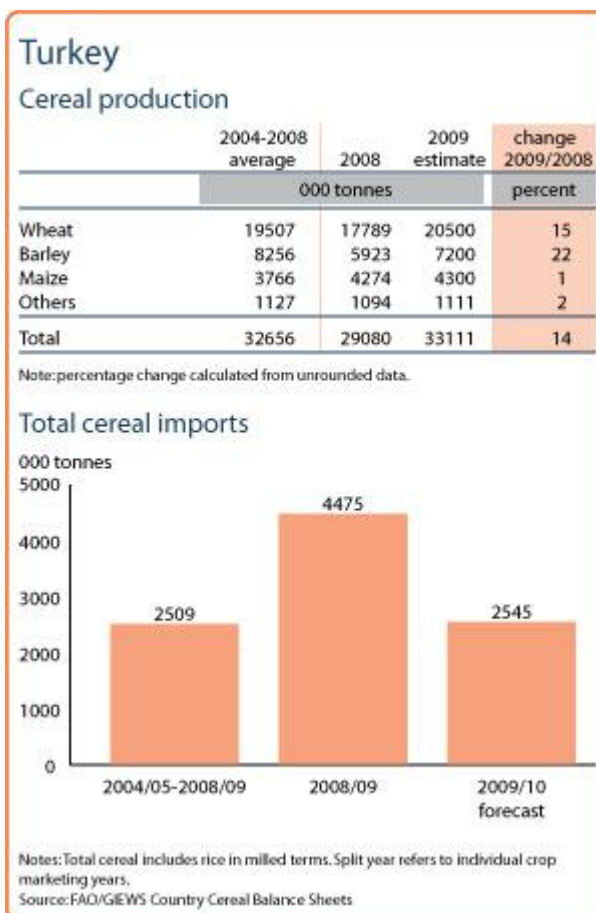
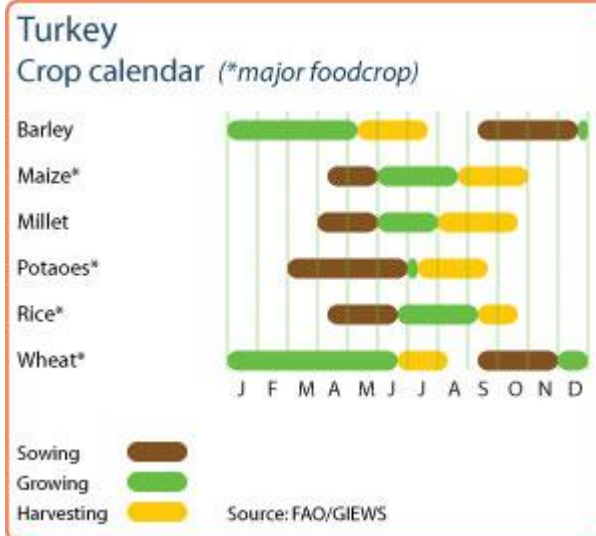
Favourable production prospects for 2010 winter cereals

Harvesting of 2010 winter wheat and barley crops is about to start. Early estimates are put at 20.6 million and 7.5 million tonnes, respectively. The estimates are slightly higher than the 2009 levels and compares to an average of 19.5 million and 8.2 million tonnes in the previous five years. Abundant precipitations from October 2009 to March 2010 have increased soil moisture across the country, benefiting crop establishment and growth particularly in the eastern and south-eastern regions that have been affected by drought in the last two consecutive years. In February, some floods have been reported in the Thracian and Aegean regions where about 3 000 hectares of wheat have been damaged. Rains continued positively in April and May, boosting yields during the reproductive and filling stages.

Planting of 2010 maize crop is almost complete in the main growing areas of Aegean and Cukurova as well as in south-east Anatolia. Planted area to maize is expected to decline giving way to cotton or soybean due to the increase in their government subsidies. Planting of the 2010 paddy crop is well underway and prospects are favourable following the good rains that benefited main producing areas in Marmara and Thrace regions.

Imports of cereals expected to decline

Cereal import requirements - mainly wheat - for marketing year 2009/10 (July/June) are forecast at about 2.5 million tonnes, compared to the record level of 4.5 million tonnes imported during the previous year.



Reference Date: 31-March-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2010 winter crops production
- Production of wheat and barley in 2009 rebounds from the 2008 drought affected year
- Lower cereal import bill estimated in 2009/10

Favourable production prospects for 2010 winter cereals

Winter wheat and barley crops have broken dormancy at the beginning of March following above average temperatures. Abundant precipitations from October 2009 to January 2010 have increased soil moisture across the country, benefiting in particular the eastern and south-eastern regions that have been affected by drought in the last two consecutive years. Some flooded areas have been reported in the Thracian and Aegean regions in February where about 3 000 hectares of wheat have been damaged. The widespread wet weather conditions may increase plant diseases and lower the quality of the grains. However, assuming sufficient rain and favourable weather conditions until next June, the early forecast for the 2010 wheat crop production is put at a high of 21 million tonnes.

Planting of the maize crop is underway in main growing areas of Aegean and Cukurova as well as in south-east Anatolia. Planted area with maize may decline giving way to cotton or soybean crops whose governmental subsidies have been recently increased. Planting of the 2010 paddy crop is expected to start in May and prospects are favourable following the good rains that affected main producing areas in Marmara and Thrace regions.

Cereal production in 2009 rebounds following the drought reduced crop in 2008.

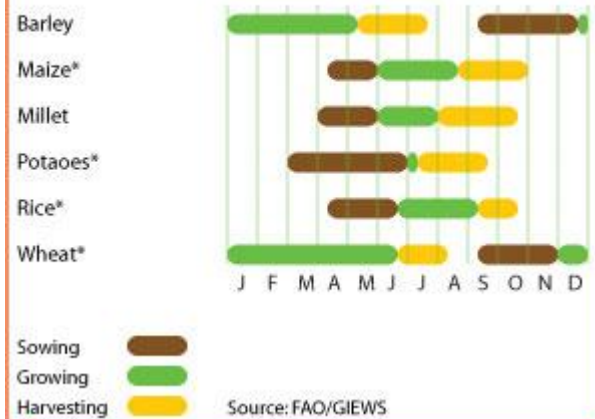
Overall cereal production in 2009 is officially estimated at about 33 million tonnes, with a 14 percent increase on 2008 when levels of production were severely reduced by extreme dry weather conditions. Wheat and barley have shown an increase of 15 percent and 21 percent respectively.

Imports of cereals expected to decline

Cereal import requirements - mainly wheat - for marketing year 2009/10 (July/June) are forecast at about 2.5 million tonnes, compared to the record level of 4.5 million tonnes imported during the previous year.

Turkey

Crop calendar (*major foodcrop)



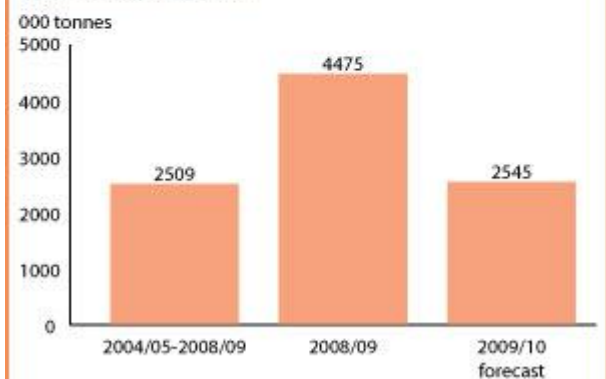
Turkey

Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Wheat	19507	17789	20500	15
Barley	8256	5923	7200	22
Maize	3766	4274	4300	1
Others	1127	1094	1111	2
Total	32656	29080	33111	14

Note: percentage change calculated from unrounded data.

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 01-February-2010

FOOD SECURITY SNAPSHOT

- Favourable weather favours planting of 2010 winter crops
- 2009 production of wheat and barley crops rebounds from 2008 drought affected year
- Lower cereal import bill for 2009/10

Planting of 2010 winter cereals under generally favourable weather conditions

Planting of 2010 winter wheat and barley crops, to be harvested from next July, has been recently completed under generally favourable weather conditions. Crops are currently dormant and abundant precipitation during the last several weeks has boosted soil moisture. Unseasonably warm weather is affecting parts of the country since mid-December, with temperatures from 5 to 12 degrees C above average. This affects the protective snow cover and may expose the crops to cold. Nevertheless, current winter crop prospects are generally favourable due to timely beneficial rainfall and the absence, so far, of winterkill.

Cereal production in 2009 rebounds after the losses due to 2008 severe drought

Overall cereal production in 2009 is officially estimated at about 33 million tonnes, with a 14 percent increase on 2008 when levels of production were severely reduced by extreme dry weather conditions.

Imports of cereals expected to decline

Cereal import requirements - mainly wheat - for marketing year 2009/10 (July/June) are forecast at about 2.5 million tonnes, compared to the record level of 4.5 million tonnes imported during the previous year.

Crop calendar Turkey



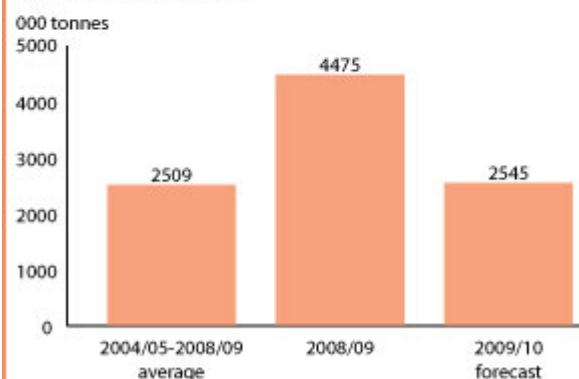
Turkey

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	19507	17789	20500	15
Barley	8256	5923	7200	22
Maize	3766	4274	4300	1
Others	1127	1094	1111	2
Total	32656	29080	33111	14

Note: percentage change calculated from unrounded data.

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 18-September-2009

FOOD SECURITY SNAPSHOT

- Good prospects for 2009 output of wheat and barley crops
- 35 000 people affected by flash floods in north-west regions and the capital city receive food and non food assistance
- Lower cereal import bill for 2009/10

Cereal production in 2009 rebounds after the losses due to 2008 severe drought

Harvesting of the 2009 wheat crop has been completed and output is provisionally estimated at about 20.5 million tonnes, some 15 percent above last year when production was severely reduced by extreme dry weather conditions. Similarly, production of the 2009 barley crop has recovered from last year's low level of 5.9 million tonnes, to reach about 7.2 million tonnes. On the other hand, maize production, estimated at 4.2 million tonnes, is similar to last year's output due to improved yields despite the reduction in area planted. The overall cereal production in 2009 is therefore estimated officially at about 33 million tonnes compared to 29 million tonnes harvested in 2008, a 14 percent increase.

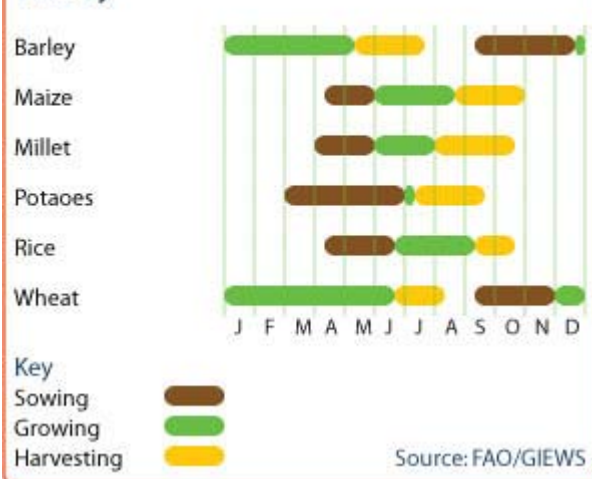
Damages to infrastructures and housing due to record rains

At the beginning of September 2009, the north-western regions of the country and the city of Istanbul have been hit by the heaviest rains in 80 years. The consequent flash floods caused loss of human lives and severe damage to urban infrastructures and housing. According to official reports, more than 35 000 people have been affected and they are receiving food and non food emergency assistance.

Imports of cereals expected to decline

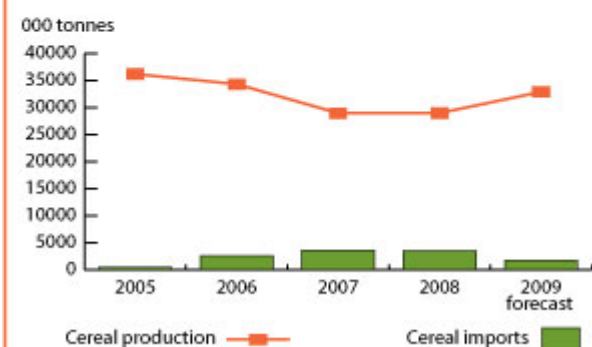
Cereal import requirements - mainly wheat, barley and maize - for marketing year 2009/10 (July/June) are forecast at 1.8 million tonnes, compared to 3.6 million tonnes imported during the previous year.

Crop calendar Turkey



Cereal production and imports Turkey

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Wheat	19507	17789	20500	15.2%
Barley	8256	5923	7200	21.6%
Maize	3764	4274	4200	-1.7%
Other	923	1024	1030	0.6%
Total Cereals	32504	29010	32930	13.5%



Source: FAO/GIEWS Country Cereal Balance Sheets