Turkish Grain Update 2017/18

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Main Topics

1. Turkey
2. Grains Supply & Demand
3. Turkish Wheat Product Exports
4. Russia-Turkey Trade War
5. Conclusions

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Turkey

Turkey Fact File

Population:	**80.5 million (80.8m/CIA - 80.6m/IMF)**
Population Growth*:	**0.52%**
GDP PPP*:	**US$ 2,249 billion (13th globally)**
GDP per capita PPP*:	**US$ 27,630 (2017 est.)**
GDP Growth*:	**7.4% (2017) 2nd OECD after Ireland**
Exchange rate:	**US$ 1 = 4.02 Turkish Lira**
Unemployment:	**11% (2017)**
Annual inflation:	**11.92% (2017 consumer)**

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Source : CIA WorldFactbook November 2018

Turkey Fact File

Age Structure*:	**0-14 ..... 24.68%**
	15-24 .....15.99%
	25-54 .....43.21%
	55-64 ..... 8.58%
	65 & over .. 7.53%
Median Age*:	**30.9**
Fertility Rate*:	**2.01 born/woman***

Urban Population*: 74.4%

Rate of urbanisation*: 1.54%

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Source : CIA WorldFactbook November 2017

Turkey Fact File

Total Land:	**783,562 sq km**
Agricultural Land:	**49.7%**
Arable Land*:	**26.7%**
Permanent Crops*:	**4%**
Irrigated Land*:	**65,000 sq km (AgriPro est.)**

*** CIA Data (November 2017)**

x IMF Data (April 2016)

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Source : IMF/CIA WorldFactbook, November 2017

Turkey Major Crops (2017/18 season)

Wheat:	***c.* 22 million tonnes (3.8 m durum)**
Sugar beat:	***c.* 16 million tonnes**
Corn:	***c.* 6 million tonnes**
Barley:	***c.* 7.5 million tonnes**
Oilseeds:	**2.9 million tonnes**

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Source: AgriPro 2017

Grains Supply & Demand

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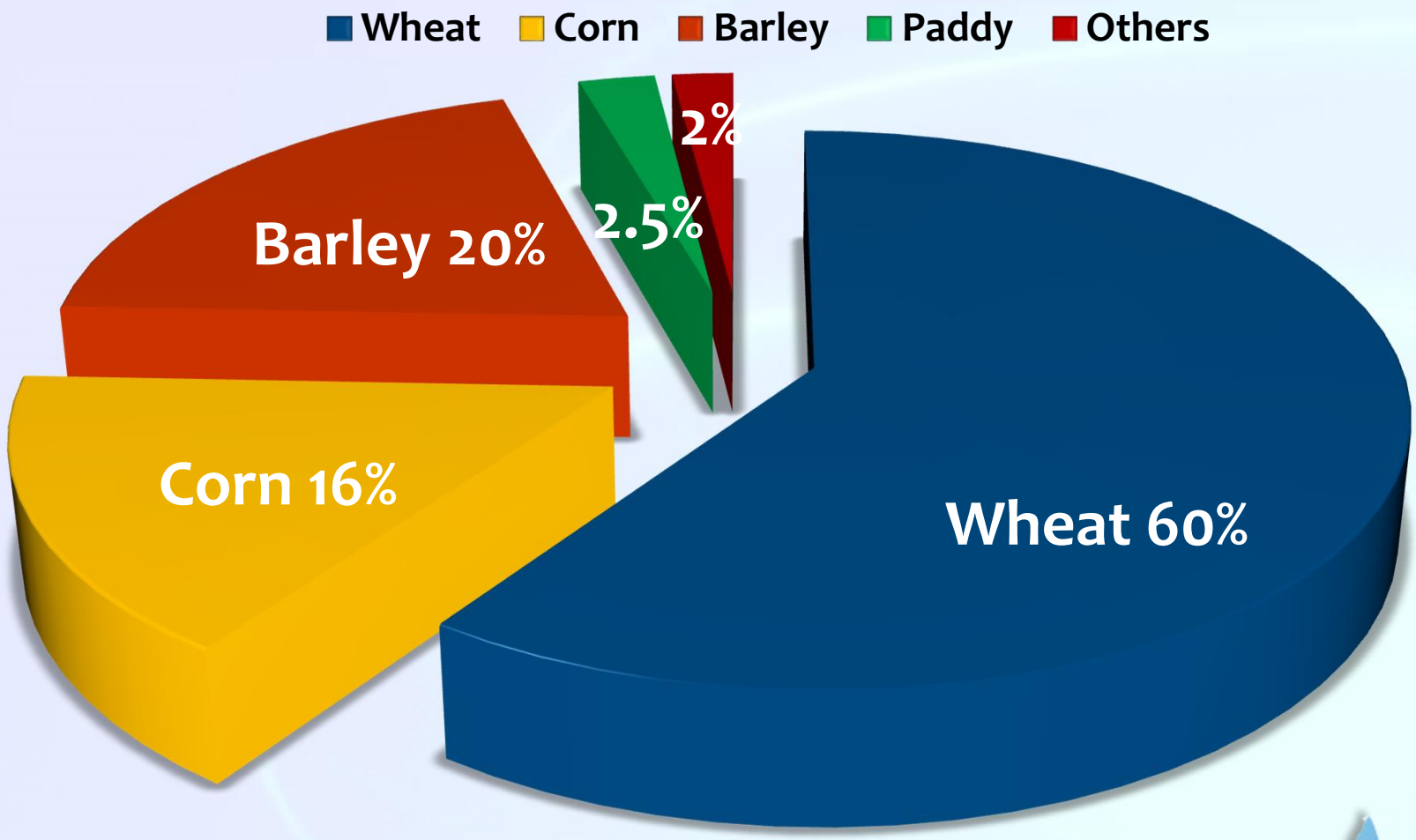
Turkish Grain Production 2017/18

- **Wheat : 21.5 million tonnes**
- **Corn : 5.7 million tonnes**
- **Barley : 7.2 million tonnes**
- **Paddy : 0.895 million tonnes**
- **Others : 0.716 million tonnes**

TOTAL : 35.82 million tonnes

Source: AgriPro 2018

Turkish Grain Production 2017/18



*** 60% of all Turkish Grain Production is Wheat**

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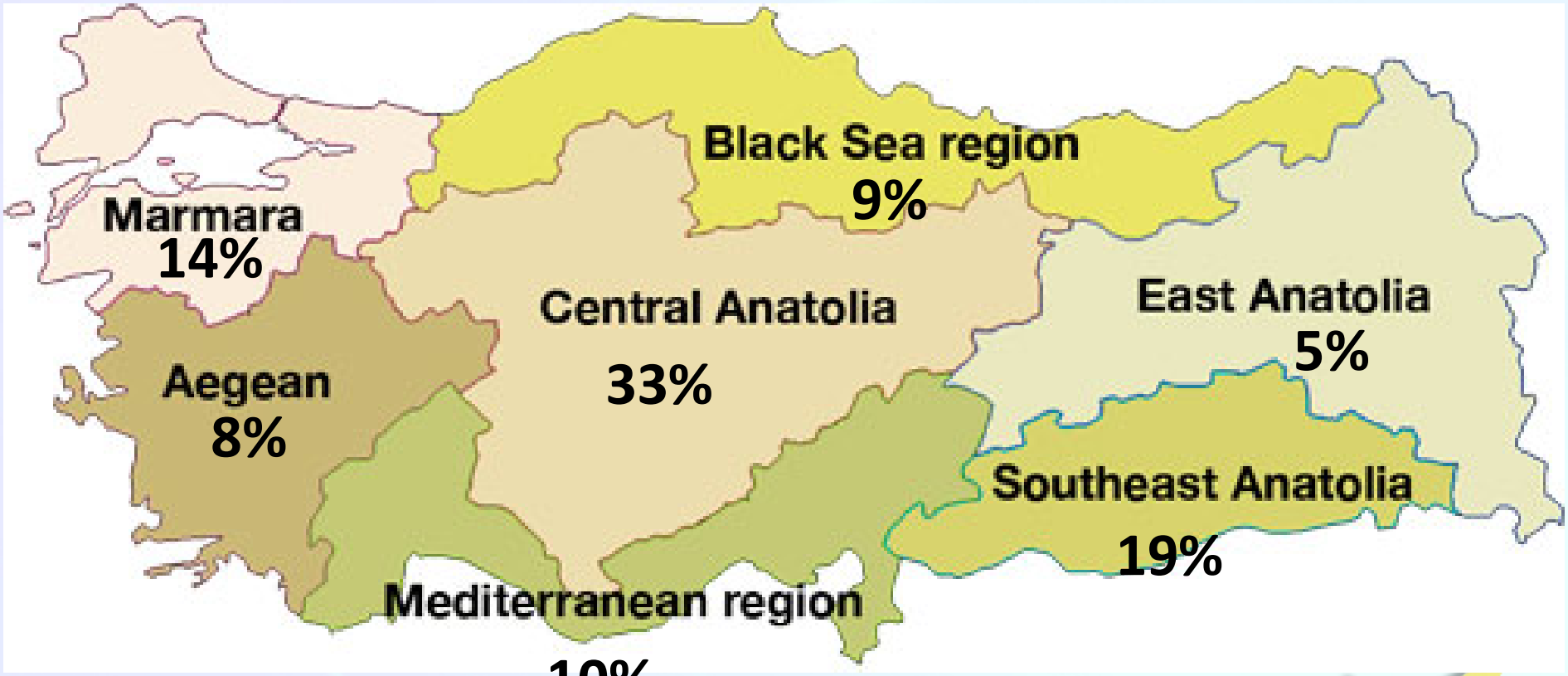
Source: AgriPro 2018

Wheat Production by Region



* Central Anatolia is the biggest Wheat region with 33%

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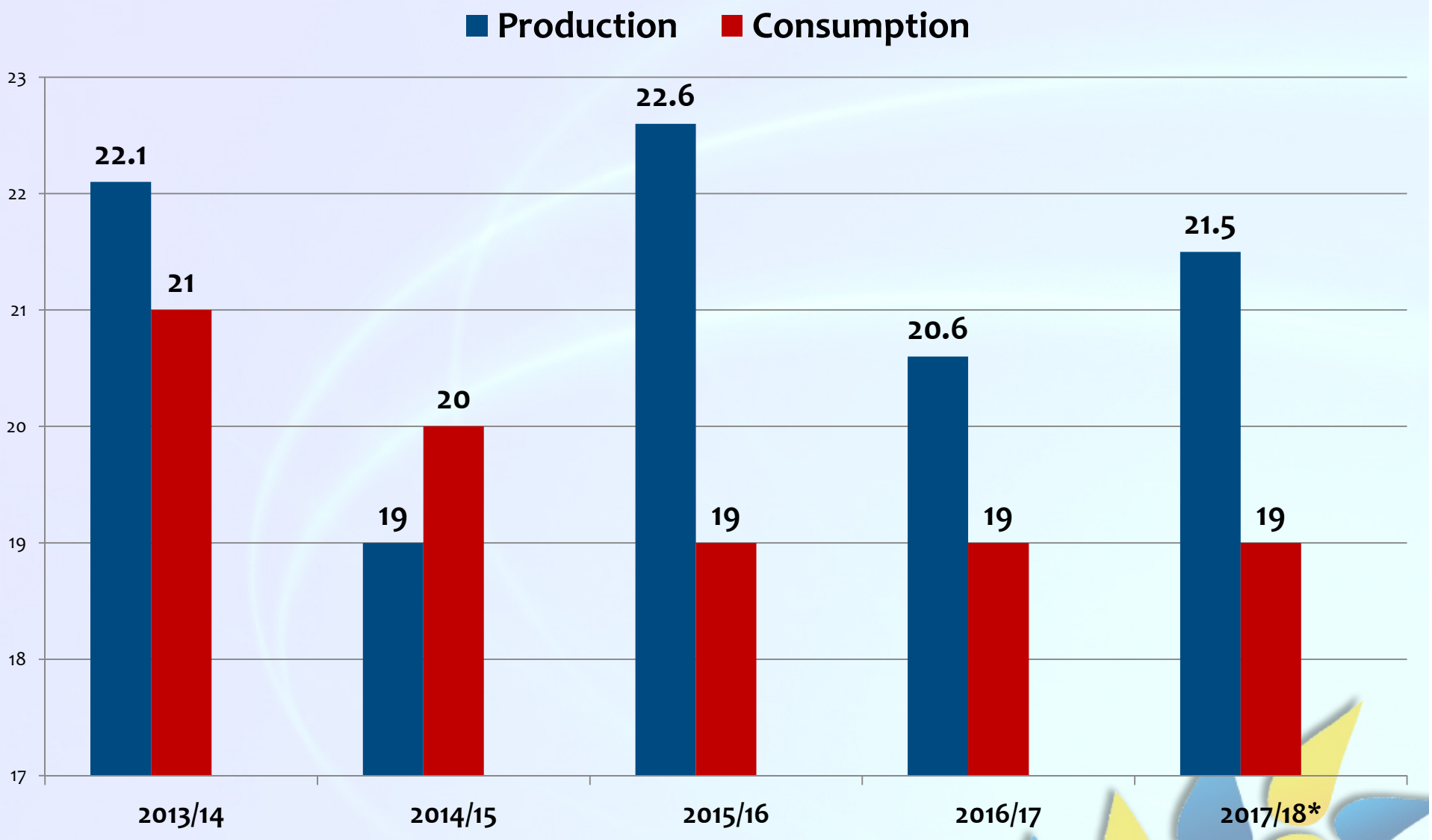
Source: AgriPro 2018

TR Wheat Production & Consumption



Source: TÜİK/Turkish Grain Board * 2018

Turkish Wheat Product Exports

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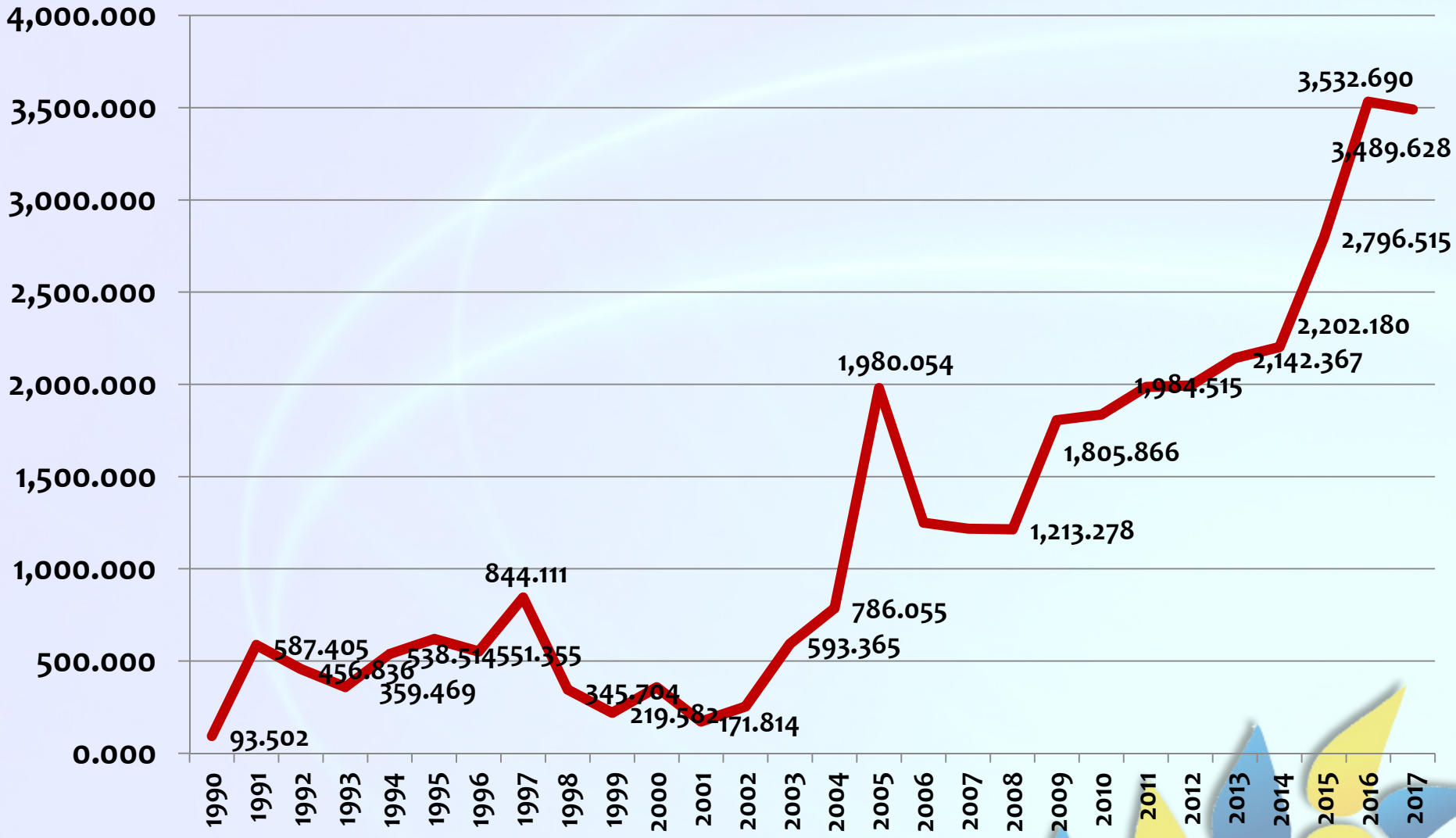
Turkish Wheat Flour Exports (tonnes)



Source: Ministry of Economy 2018

Turkish Wheat Flour Exports

- Turkish wheat flour exports reached 3.5 million tonnes in 2017

- Export value reached $ 1.052 billion.

- For 3.5 million tonnes of flour exports 5 million tonnes of wheat is required.

- Turkey imported 3.3 million tonnes of wheat in 2017.

1.7 million tonnes of Turkish wheat was used for export in 2017.

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Source: Ministry of Economy 2018

Turkish Wheat Flour Exports

Turkey is the #1 Wheat Flour Exporting Country in the World!

3.489 million tonnes in 2017 worth $1.052 billion

1.	Turkey	$ 1.052m
2.	Kazakhstan	$ 505m
3.	Germany	$ 300m
4.	Argentina	$ 189m
5.	France	$ 178m

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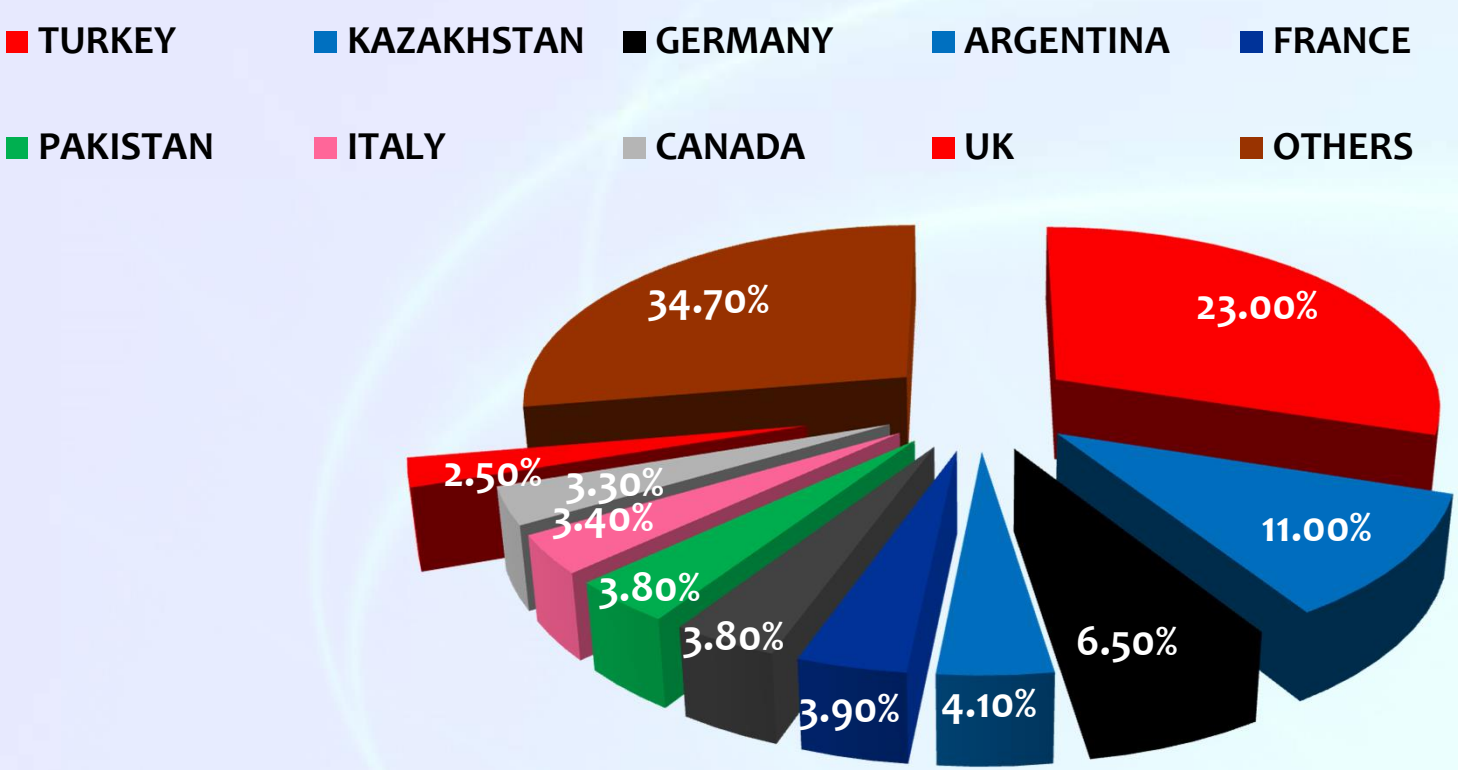
Source: OEC 2018

Turkish Wheat Flour Exports

World Wheat Flour Trade = $ 4.6 billion



*** Turkey accounts for 23% of all Wheat Flour Trade**

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Source: OEC 2018

Turkish Wheat Flour Exports

Top 10 By Country

1.	Iraq	40.1%
2.	Sudan	16.2%
3.	Syria	10.7%
4.	Angola	3.8%
5.	Phillippines	2.5%
6.	Madagascar	2.5%
7.	Indonesia	1.9%
8.	Benin	2.2%
9.	Israel	1.2%
10.	China	1.1%

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Source: Ministry of Economy 2018

Turkish Wheat Flour Exports

Largest Exporters

- Erişler Gıda (Thrace)
- Beşler Un (Gaziantep)
- Doruk Gıda (Thrace & Ankara)
- Ulusoy Un (Thrace & Samsun)
- Azim Un (Mardin)
- Acarsan Gıda (Gaziantep)
- Ulaş Gıda (Thrace)
- Eksun Gıda (Thrace)
- Mersin Un (Mersin)
- Intermill Un (Ankara)

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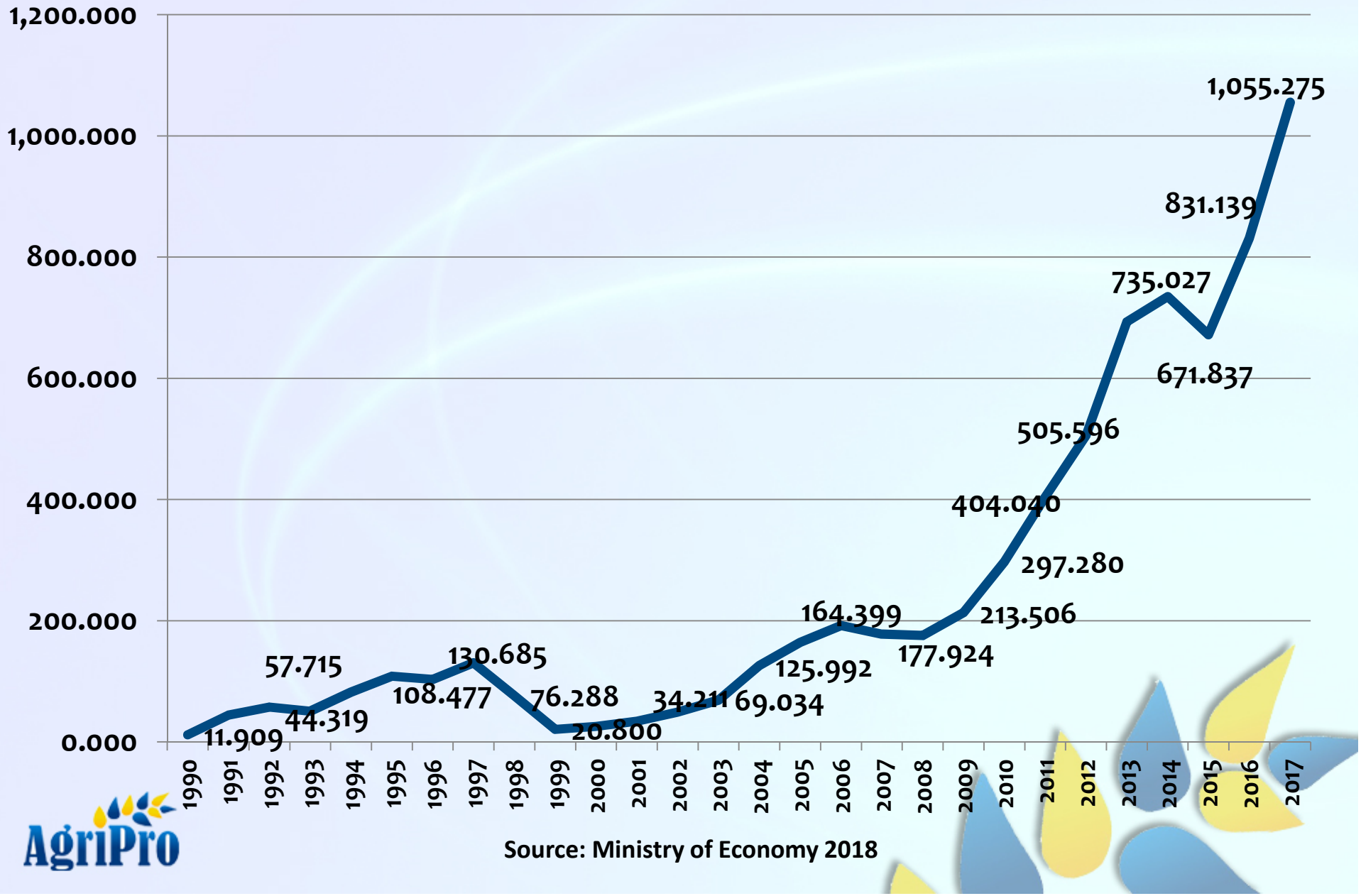
Source: AgriPro 2018

Turkish Pasta Exports (tonnes)



Source: Ministry of Economy 2018

Turkish Pasta Exports

- **Turkish Pasta Exports reached 1.055 million tonnes in 2017.**

- **Total Export value reached $ 490.7 million**

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Source: Ministry of Economy 2018

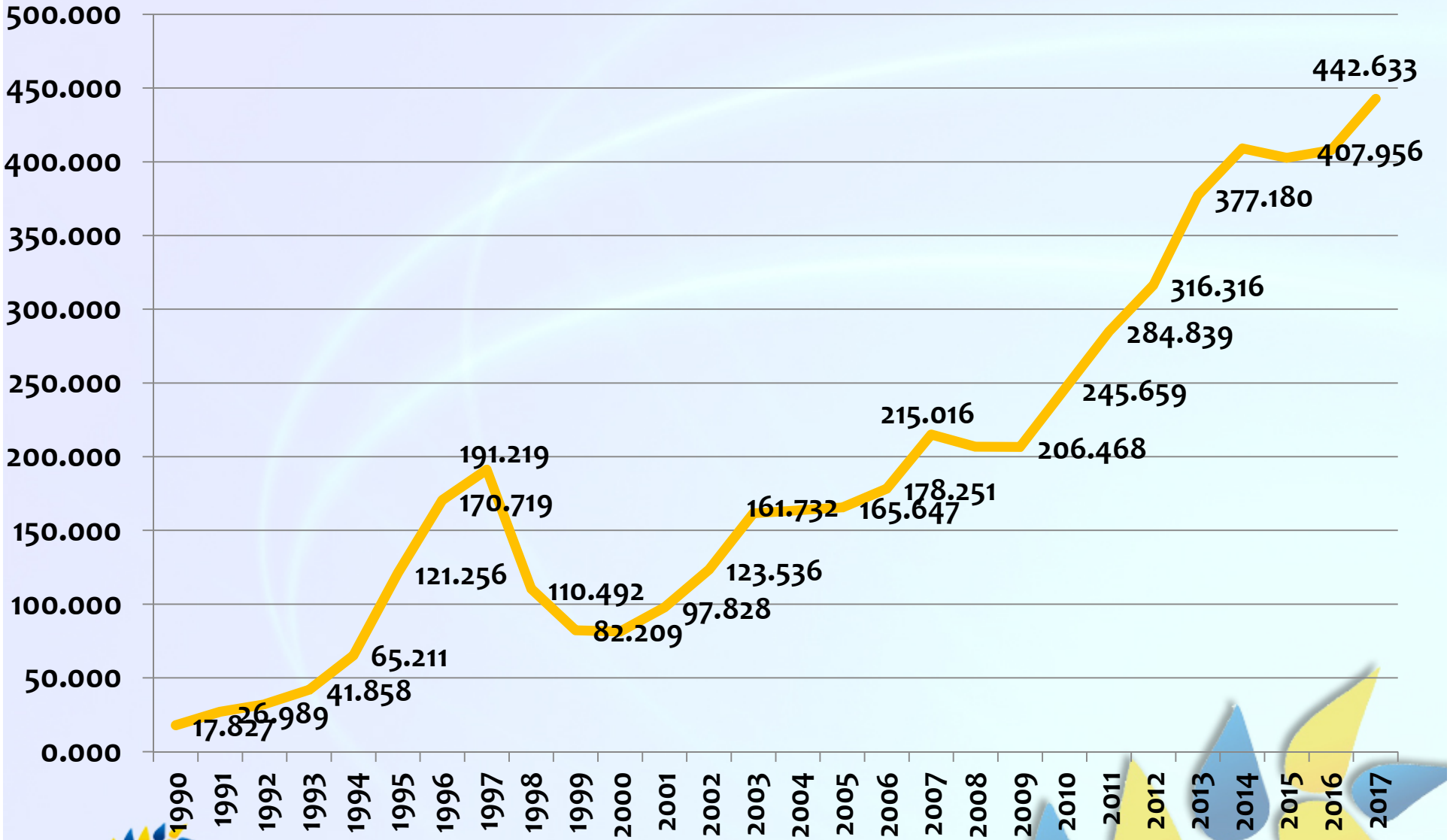
Turkish Pasta Exports

Largest Exporters

- Oba Makarna (Gaziantep/Sakarya)
- Arbel (Mersin)
- Beşler Makarna
- Nuhun Ankara Makarnası (Ankara)
- Doğa Makarna
- Tat Gıda
- Mutlu Makarna
- Selva Gıda

Source: AgriPro 2018

Turkish Biscuit Exports (tonnes)



Source: Ministry of Economy 2018

Turkish Biscuit Exports

- **Turkish Biscuit Exports reached 442,633 tonnes in 2017.**

- **Total Export value reached $ 941.3 million**

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Source: Ministry of Economy 2018

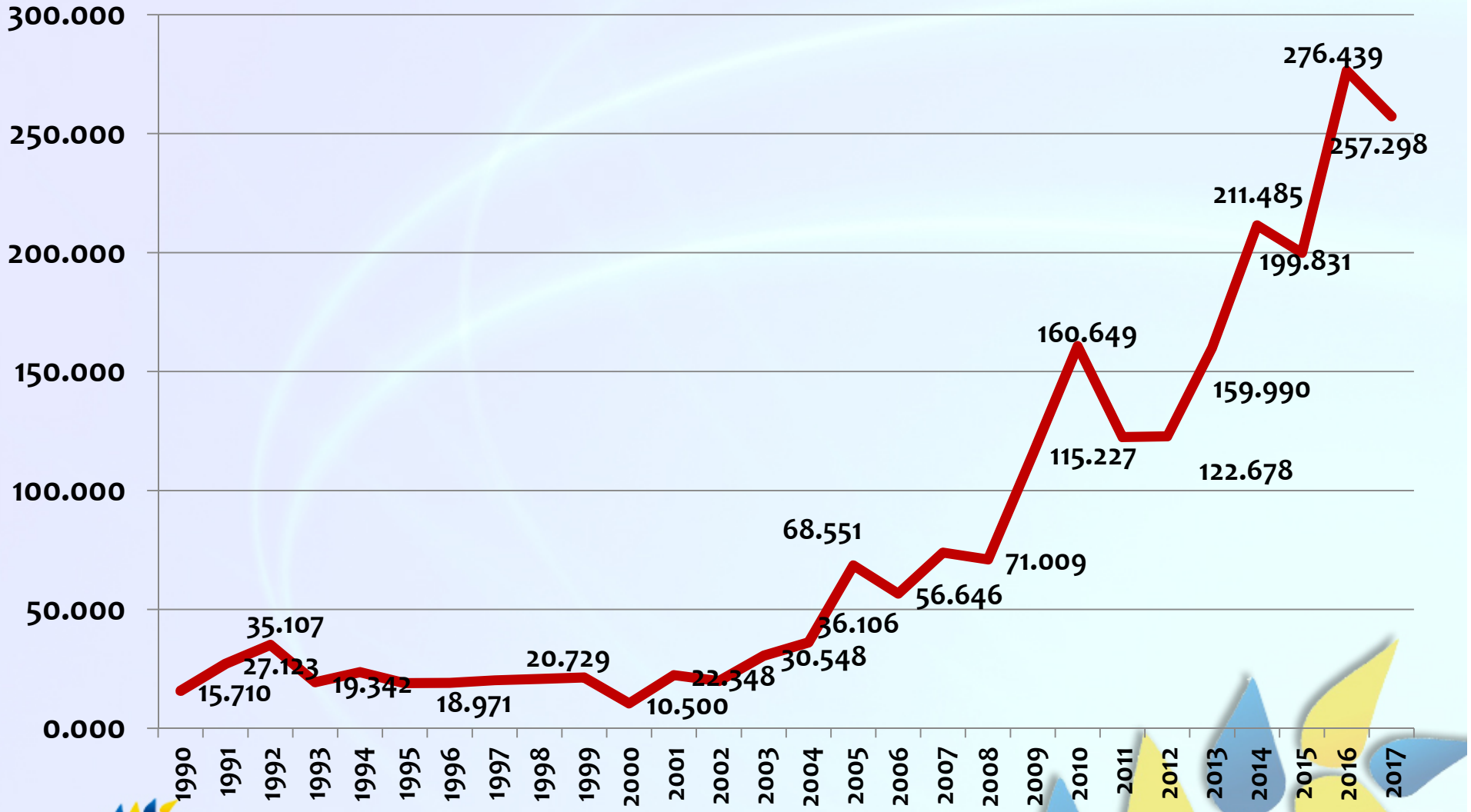
Turkish Biscuit Exports

Largest Exporters

- Ülker (Istanbul)
- Anı Bisküvi (Karaman)
- Azra Bisküvi (Karaman)
- Bifa Bisküvi (Karaman)
- Eti Bisküvi (Eskişehir)

Source: AgriPro 2018

Turkish Bulgur (cracked wheat) Exports (tonnes)



Source: Ministry of Economy 2018

Turkish Bulgur (cracked wheat) Exports

- **Turkish Bulgur Exports reached 257,297 tonnes in 2017,.**

- **Total Export value reached $ 104.2 million**

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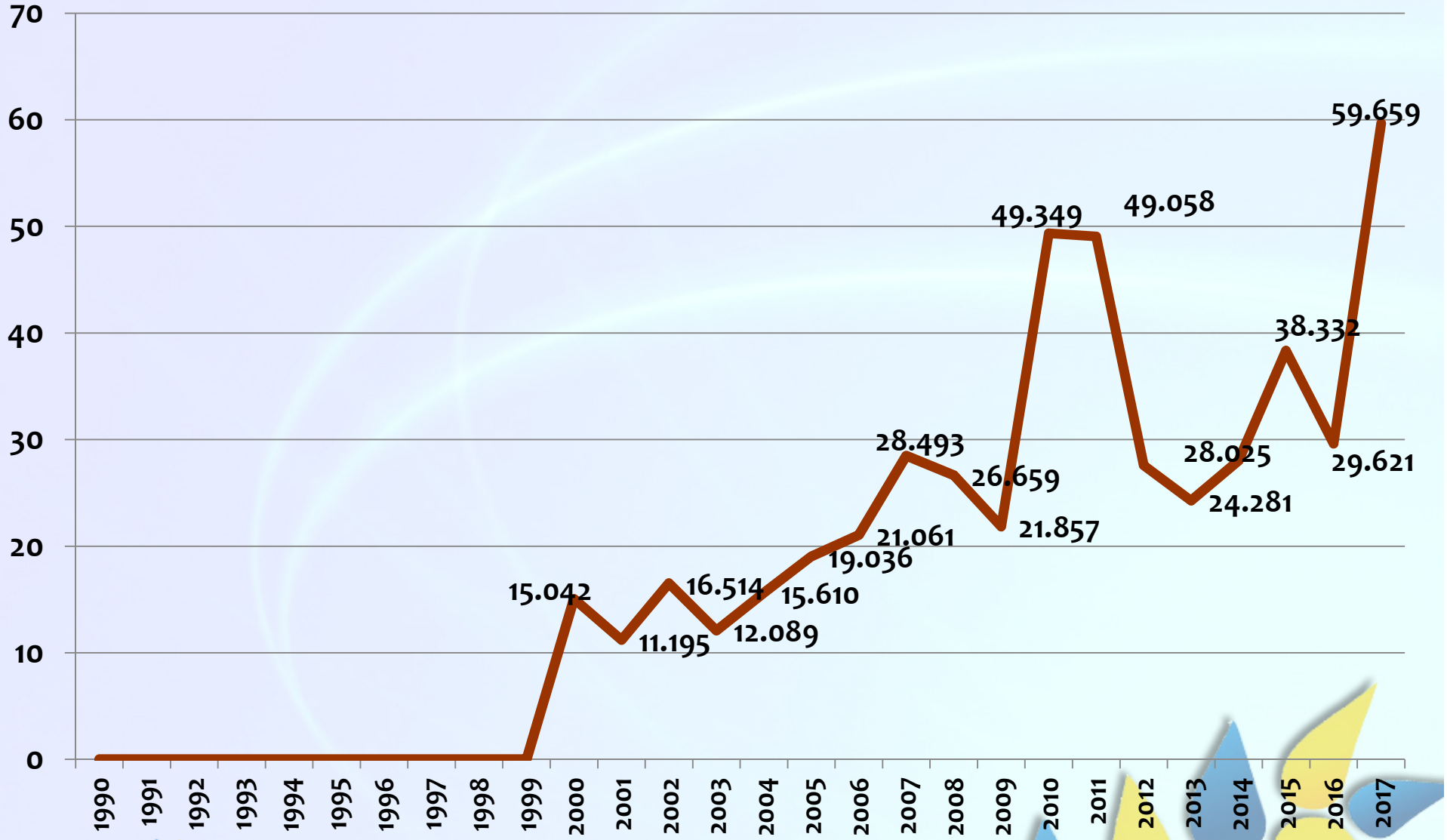
Source: Ministry of Economy 2018

Turkish Semolina Exports (tonnes)



Source: Ministry of Economy 2018

Turkish Semolina Exports

- **Turkish Semolina Exports reached 59.659 tonnes in 2017.**

- **Total Export value reached $ 22.6 million**

- **«Oba Makarna» does 60% of all Turkish semolina exports.**

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Source: Ministry of Economy 2018

Turkish Total Wheat Products Exports

- Turkish wheat product exports reached 5.3 million tonnes in 2017, including Wheat Flour, Pasta, Semolina & Bulgur.

- Total export value reached $ 2.6 billion.

- This corresponded to 7.4 million tonnes of Wheat.

Source: Ministry of Economy 2018

Russia - Turkey Trade War?

Russian Grain & Sun products

vs. Turkish Tomatos

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Russia - Turkey Trade War

- With trade surplus to Turkey, Russia wins!
  - (a surplus of US$1.2m vs Turkey)

- With trade surplus to the world, Turkey wins!
  - (re-exporting Russian wheat as «flour» (3.5 million mt & US$ 1.1 bn) to the world.

No losers!

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Conclusions

Turkish total wheat production stands **21.5** million tonness for **2017/18** season.

Consumption in Turkey is estimated as **19** million tonnes for 2017/18.

Total Turkish wheat imports has been **3.3** million tonnes in 2017.

Turkish wheat flour exports have been **3.489** million tonnes in 2017.

Total Turkish wheat product exports was **5.3** million tonnes in year 2017.

This corresponded to **$2.6** billion in revenues and **7.4** million tonnes of wheat.

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