



# Turkish Fats & Oils Supply State Amid the Pandemic

**FOI**  
**FGI**



**2020**

**FATS & OILS // FEEDS & GRAINS  
ISTANBUL "V" CONFERENCE**

**21 April 2020**

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**AgriPro Limited**



# Turkey



# Turkey Fact File

<b>Population:</b>	<b>82 million (81.3m/CIA - 83m/IMF)</b>
<b>Population Growth*:</b>	<b>0.49%</b>
<b>GDP PPPx:</b>	<b>US\$ 2,346 billion (13th globally)</b>
<b>GDP per capita PPP*:</b>	<b>US\$ 28,785 (2019 est.)</b>
<b>GDP Growth:</b>	<b>0.0% (2019 est.)</b>
<b>Exchange rate:</b>	<b>US\$ 1 = 6.975 Turkish Lira</b>
<b>Unemployment:</b>	<b>25% (2020 est.)</b>
<b>Annual inflationx:</b>	<b>15% (2020 est.)</b>



# Oils/Oilseeds Supply & Demand



# Turkish Oilseeds Production 2019/20

(thousand tonnes)

- Sunflowerseeds : 1,500,000 tonnes
  - Cottonseeds : 1,110,000 tonnes
  - Rapeseeds : 100,000 tonnes
  - Corn germs : 80,000 tonnes
  - Safflower : 11,000 tonnes
  - Soybeans : 110,000 tonnes
- TOTAL : 2,911,000 tonnes**



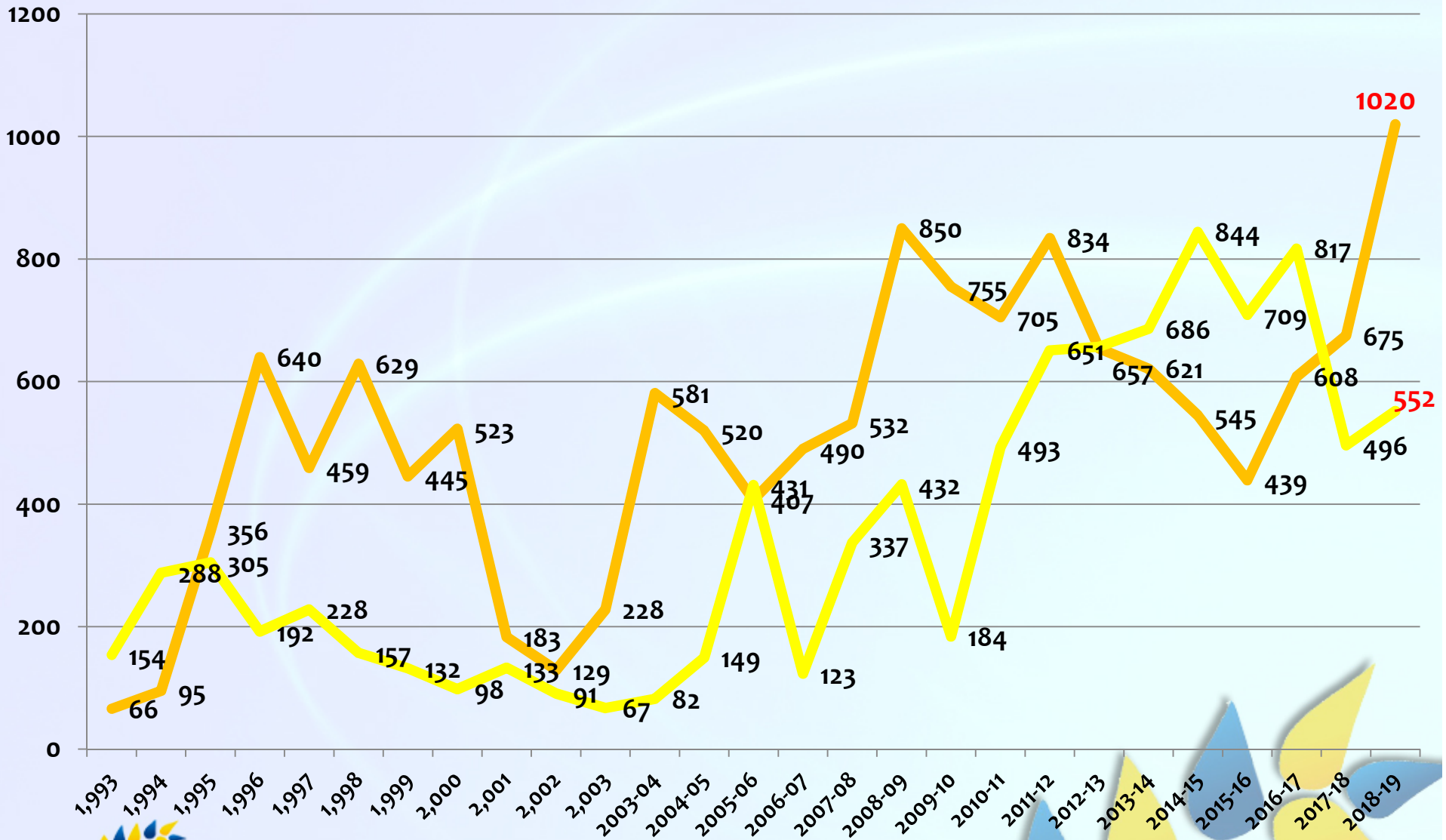
# Major Import Duties

<b>Sunseeds</b>	<b>: 9% (or \$34.20/mt minimum)</b>
Soybeans	: 0%
Rapeseed	: 10% (or \$100/mt minimum)
<b>Crude Sunoil</b>	<b>: 18% (or \$144/mt minimum)</b>
Refined Sunoil	: 67.50%
RBD Palm Oils	: 31.2% (22% for Malaysia origin)
Other Vegoils	: 31.2%
Soymeal	: 5.0% (0% for EU origin soymeal)
Other meals	: 0%
<b>DDGs</b>	<b>: 4.3%</b>
Wheat Bran	: 0%

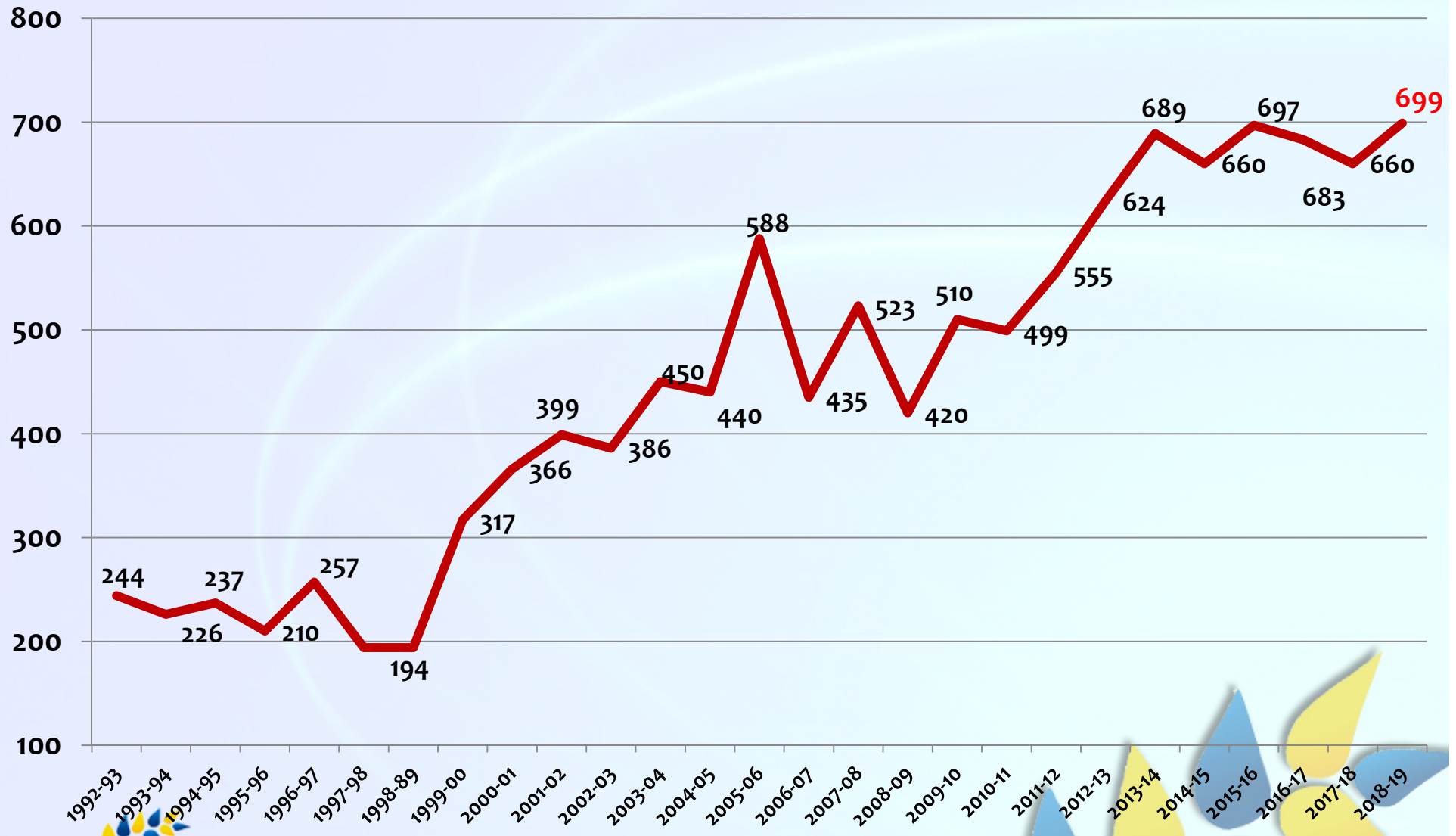


# Sunseeds & Sunoil Imports (th tonnes)

— Sunseeds — Crude Sunoil

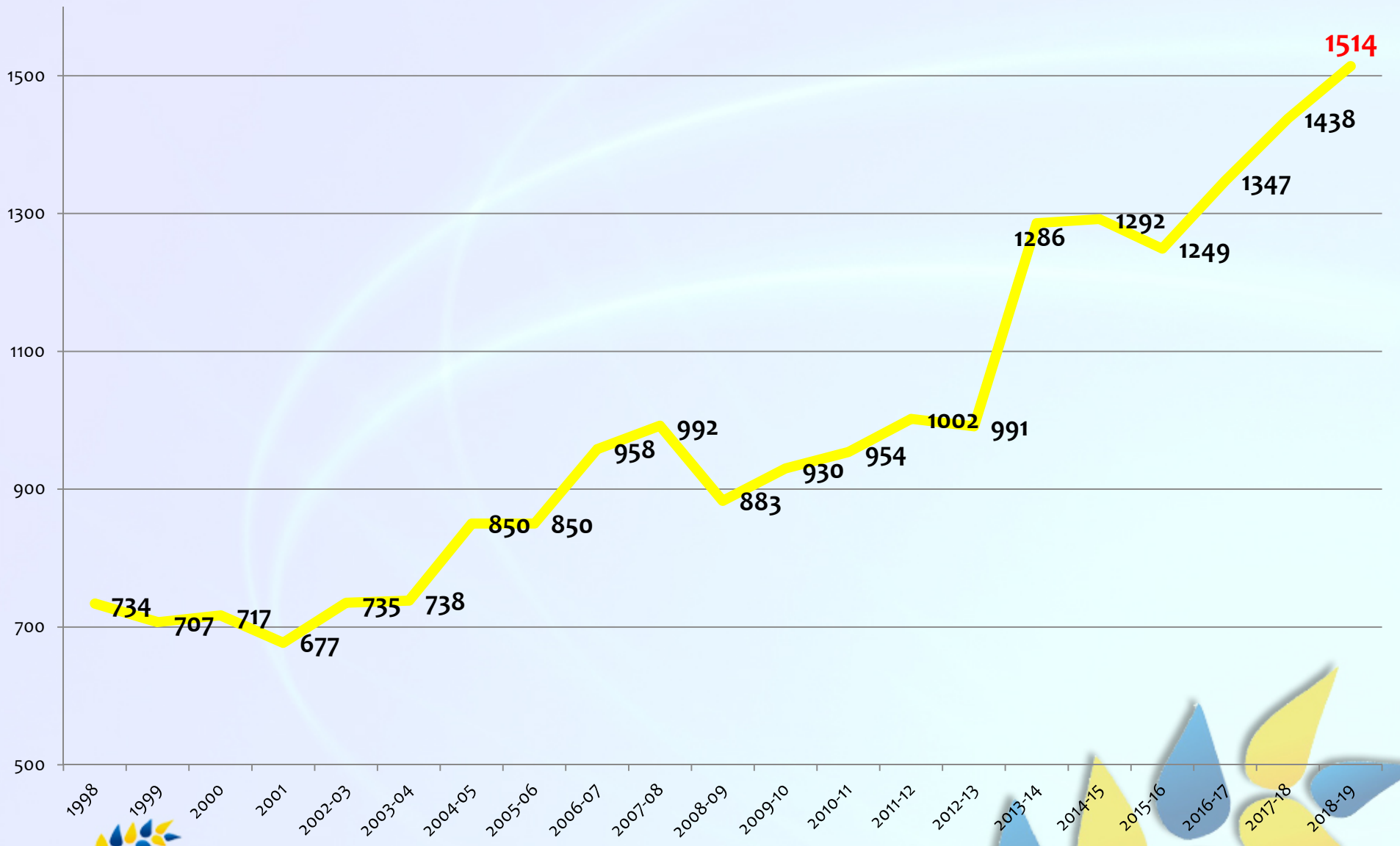


# Palm Oil Imports (thousand tonnes)

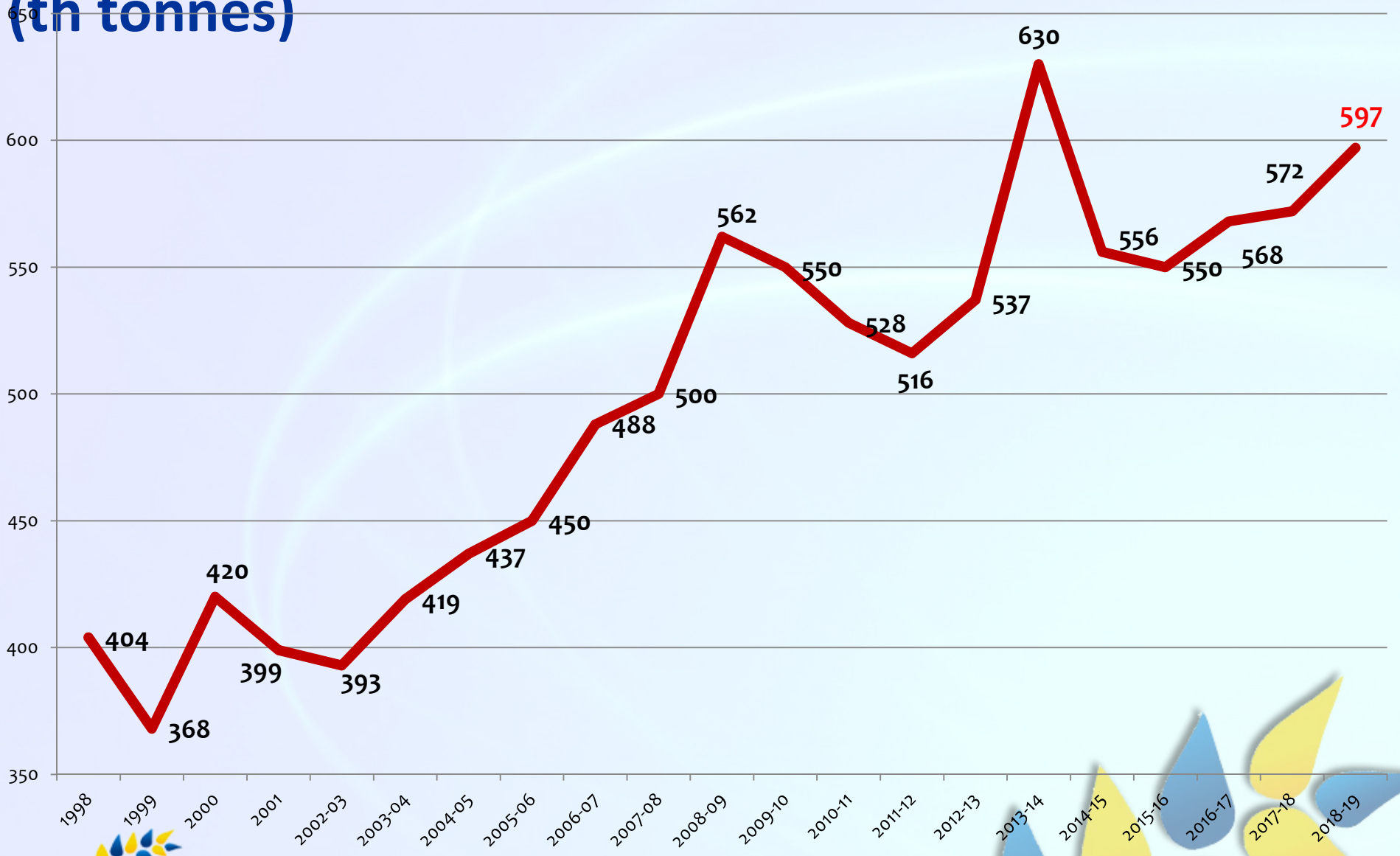




# Liquid Oil Consumption (thousand tonnes)

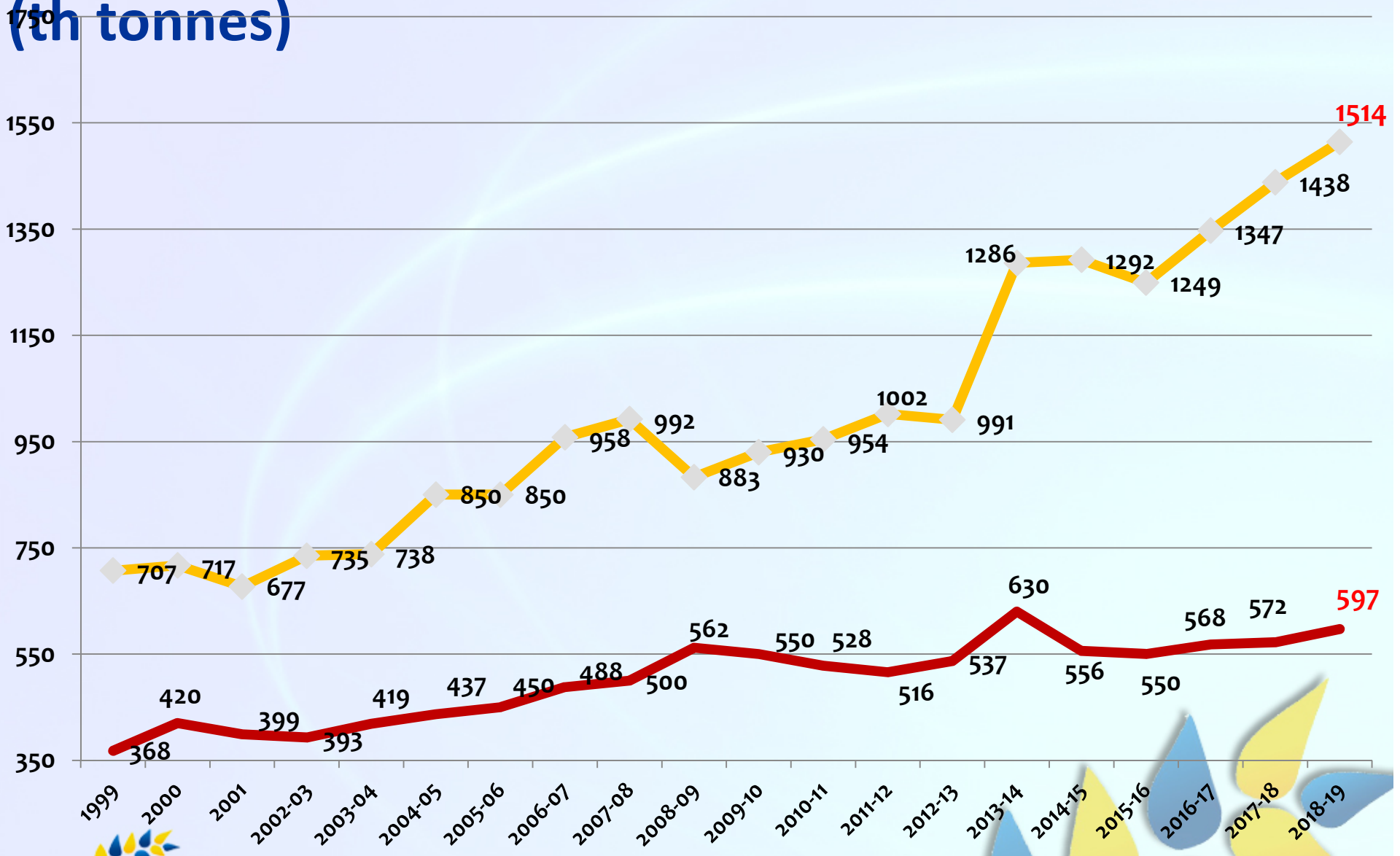


# Margarine/Industrial Fats Consumption (th tonnes)



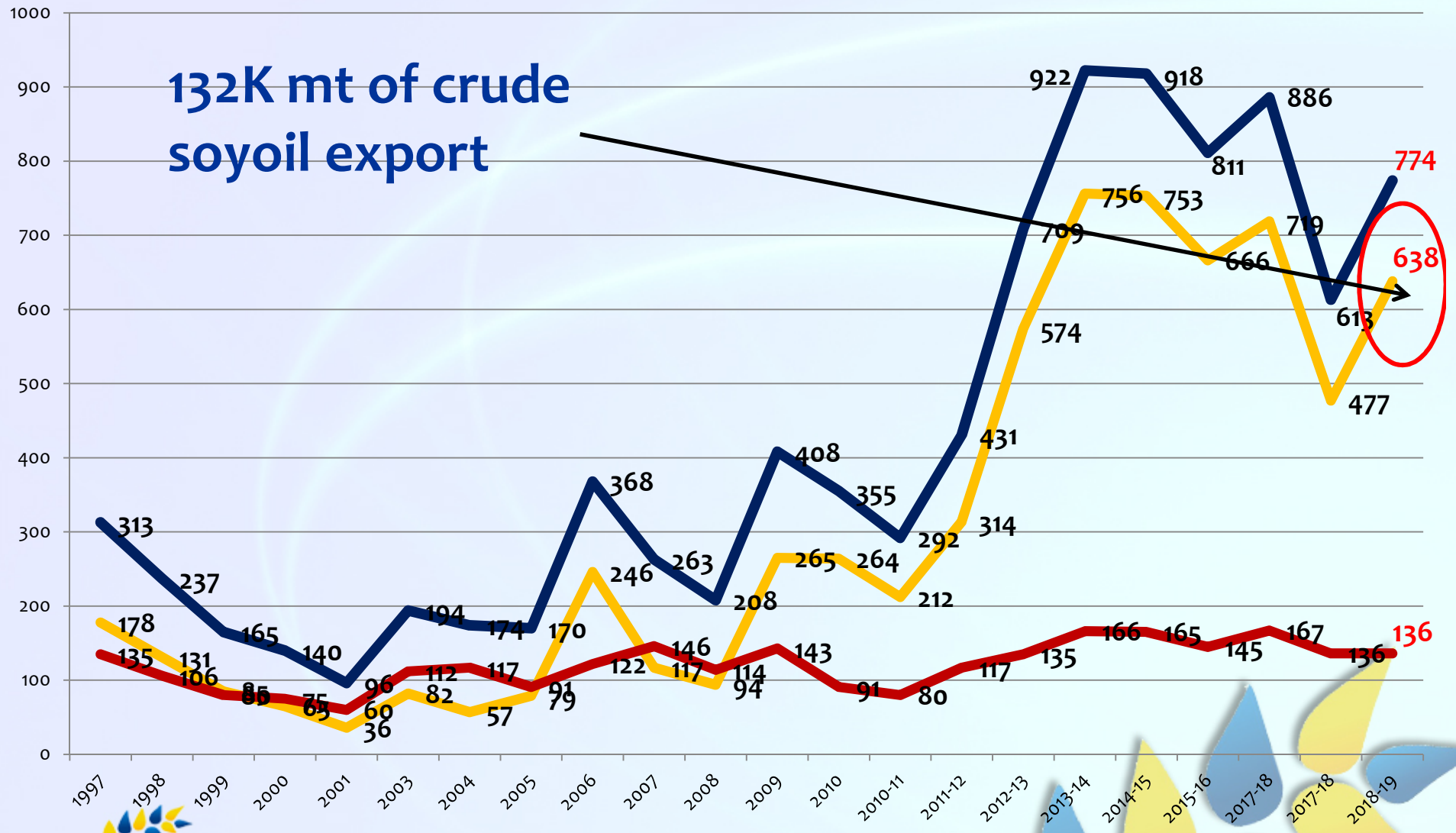
# Liquid Oils vs Margarine Consumption

(th tonnes)



# Turkish Vegoil Exports (thousand tonnes)

— Liquid Oils — Margarine — Total



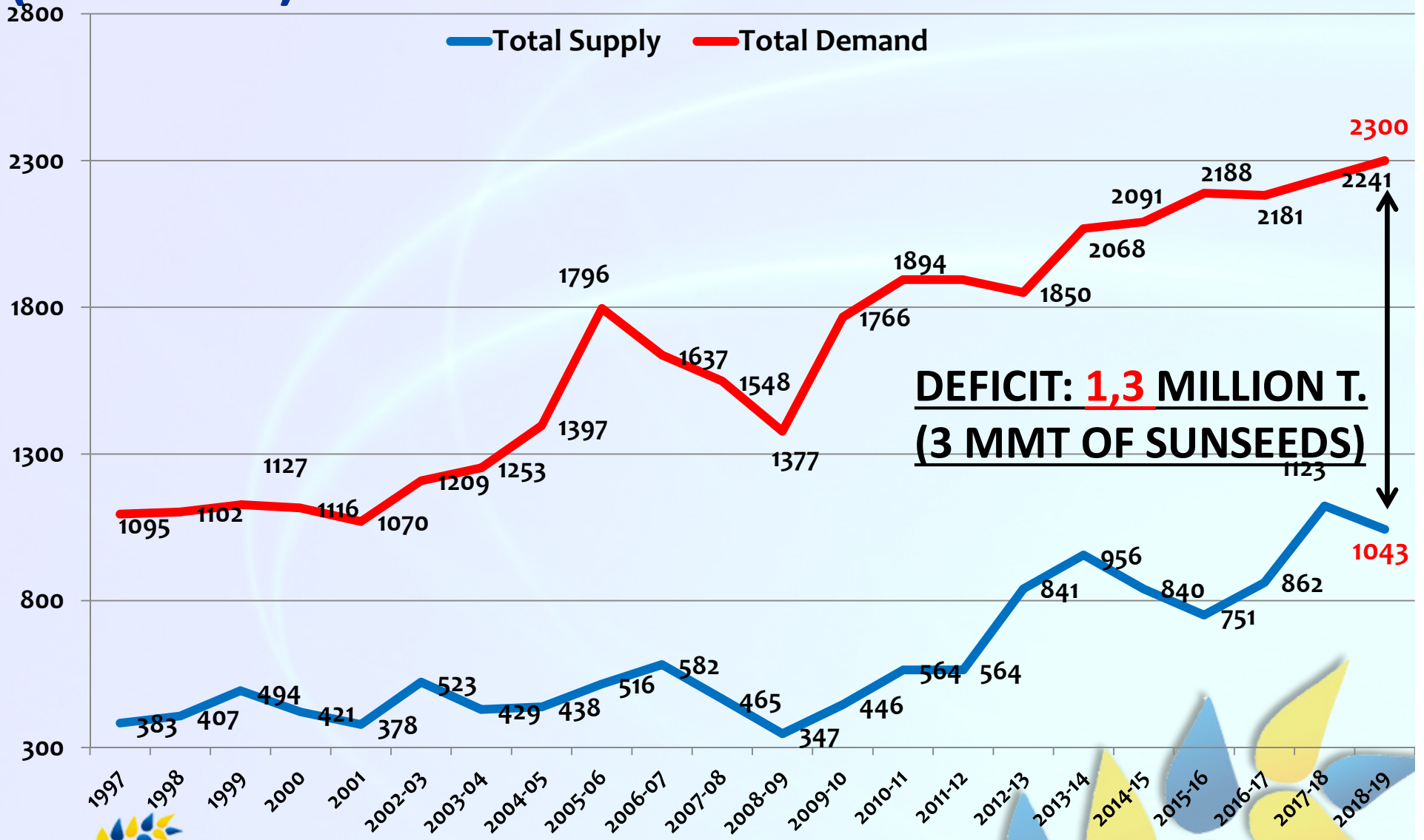
Source: Ministry of Economy 2019

# Turkish Oils & Oilseeds Balances



# Vegoils Supply & Demand 2018/19

(th tonnes)



**DEFICIT: 1,3 MILLION T.  
(3 MMT OF SUNSEEDS)**



Source: Agripro 2019

# Turkish Fats/Oils Trade Balance 2018/19

SUPPLY / DEMAND 2018/19	OILSEEDS SUPPLY		OILSEED USE	OILSEED CRUSH	OILS				CONSUMPTION					
	Domestic Productn	Imports	Fullfat Feed Hybrid	CRUSH	Domestic Oil Equivalent	Import Oilseed Equivalent	Import Crude Oils	TOTAL CRUDE OIL SUPPLY	OTHER	EXPORTS		DOMESTIC CONSUMPTN		TOTAL OIL CONS.
									Feed Paint Biod.	Liq. Oils	Marg	Marg	Liq. Oils	
SUNFLOWER	1,435	1,020		2,455	617	439	552	1,608		425			1,183	1,608
SOYA	110	2,498	1,150	1,458	19	236		255	105	132			18	255
LINS/CAMLINA														
SAFFLOWER	30	5		35	9	2		11					11	11
CORN GERM	90	80		170	40	35	25	100		42			58	100
OLIVE OIL					177			177		27			150	177
COTTONSEED	1,350		80	1,270	165			165	10	7		68	80	165
PALM OILS							699	699	73	3	136	487		699
RAPESEED	40	5		45	16	2		18	1	2			15	18
MARGARINE							42	42				42		42
<b>TOTAL</b>	<b>3,055</b>	<b>3,608</b>	<b>1,230</b>	<b>5,433</b>	<b>1,043</b>	<b>713</b>	<b>1,318</b>	<b>3,075</b>	<b>189</b>	<b>638</b>	<b>136</b>	<b>597</b>	<b>1,514</b>	<b>3,075</b>



# Post Covid-19 Oils Balance





# Turkish Fats/Oils Trade Balance 2019/20\*

ARZ / TALEP 2019/20*	TOHUM ARZ		TOHUM KULLANIM	TOHUM İŞLEME	YAĞLAR				TÜKETİM					
	İç Arz	İthalat	Fullfat Yem Hibrid	KIRMA	İç Yağ Karşılığı	İthal Yağ Karşılığı	İthal Ham Yağ	TOPLAM HAM YAĞ ARZ	DİĞER Yem Boya Biod.	İHRACAT		İÇ TÜKETİM		TOPLAM YAĞ TÜKETİM
										Likit Yağlar	Marg	Marg	Likit Yağlar	
AYÇİÇEK	1,500	820		2,320	645	353	690	1,688		425			1,263	1,688
SOYA	120	2,650	1,150	1,620	21	263		284	136	120			28	284
LINS/CAMLINA		5				2		2	2					2
ASPIR	11	5		16	3	2		5					5	5
MISİRÖZÜ	85	80		165	37	35	25	98		42			56	98
ZEYTİNYAĞI					220			220		45			175	220
ÇİĞİT/PAM. Y.	1,110		80	1,030	134			134	10	20		40	64	134
PALM YAĞI							640	640	34	10	136	460		640
KANOLA	100	8		108	41	3		44		4			40	44
MARGARİN		25						25				25		25
<b>TOPLAM</b>	<b>2,926</b>	<b>3,593</b>	<b>1,230</b>	<b>5,259</b>	<b>1,102</b>	<b>657</b>	<b>1,380</b>	<b>3,139</b>	<b>182</b>	<b>666</b>	<b>136</b>	<b>525</b>	<b>1,630</b>	<b>3,139</b>

\* Projection

# Turkish Prot. Meals Trade Balance 2018/19

SUPPLY / DEMAND 2018/19	OILSEEDS SUPPLY		OILSEED USE	OILSEED CRUSH	PROTEIN MEALS				MEAL CONSUMPTION		
	Domestic Productn	Imports	Fullfat Feed Hybrid	CRUSH	Domestic Meal Equivalent	Import Meal Equivalent	Import Meals	TOTAL MEAL SUPPLY	MEAL EXPORT	DOMESTIC CONSUMPTION	TOTAL MEAL CONSUMP.
SUNFLOWER	1,435	1,020		2,455	718	510	881	2,109	5	2,104	2,109
SOYA	110	2,498	1,150	1,458	83	1,011	670	1,764	60	1,704	1,764
LINS/CAM'NA										0	
SAFFLOWER	30	5		35	20	3		24		24	24
CORN GERM	90	80		170	49	43		92		92	92
COTTONSEED	1,350		80	1,270	699			699	27	672	699
PALM MEAL							220	220		220	220
RAPESEED	40	5		45	23	3	25	51		51	51
OTHER MEAL							54	50	44	6	50
<b>TOTAL</b>		<b>3,608</b>	<b>1,230</b>	<b>5,433</b>	<b>1,590</b>	<b>1,570</b>	<b>1,850</b>	<b>5,007</b>	<b>136</b>	<b>4,871</b>	<b>5,007</b>

**DDGs Excluded – 2018/19 Imports 869K MT**

# Post Covid-19 Protein Meals Balance



# Turkish Prot. Meals Trade Balance 2019/20\*

ARZ / TALEP 2018/19	TOHUM ARZ		TOHUM KULLANIM	TOHUM İŞLEME	PROTEİN KÜSPELERİ				KÜSPE TÜKETİMİ		
	İç Arz	İthalat	Fullfat Yem Hibrid	KIRMA	İç Küspe Karşılığı	İthal Küspe Karşılığı	İthal Küspe	TOPLAM KÜSPE ARZI	KÜSPE İHRACAT	İÇ TÜKETİM	TOPLAM KÜSPE TÜKETİMİ
AYÇİÇEK	1,500	820		2,250	750	410	920	2,080	10	2,070	2,080
SOYA	120	2,650	1,150	1,620	90	1,125	900	2,115	100	2,015	2,115
KETEN/KTNCK		5								0	
ASPIR	11	5		16	7	3		11		11	11
MISİRÖZÜ	85	80		165	46	43		89		89	89
ÇİĞİT	1,100		80	1,020	561			561	10	551	561
PALM							170	170		170	170
KANOLA	100	8		108	57	5	90	152		152	152
DİĞER KÜSPE							30	50	44	6	50
<b>TOPLAM</b>		<b>3,568</b>	<b>1,230</b>	<b>5,179</b>	<b>1,511</b>	<b>1,586</b>	<b>2,110</b>	<b>5,228</b>	<b>164</b>	<b>5,064</b>	<b>5,228</b>

**DDGs Excluded – 2019/20 Imports to be 615 MT**

**\* Projection**

# Remedies

- **Import duties** for **oils & oilseeds** should be brought to «0%» **immediately** until the rapeseed season and perhaps until **sunflower harvest** in the **Thrace**.
- **Import duty** on **soft seeds** should be **nullified** for crush to resume and encourage use of other vegoils, rather than **expensive** sunflower oil
- **Import duty** for **soymeal** should be «0%» for **all origins**, in order to make-up for DDGs shortage.
- The **soybean oil** usage **for food** should be **allowed** by «Biosafety Board», to encourage bigger crush and make-up for **DDGs shortage**.
- For crude **sunflower oil**, the government must have a tender mechanism in place through TMO & **Trakya Birlik**, in case we need to purchase centrally.
- Turkish **vegoil deficit** is still the biggest problem for **food security**.
- **Turkey is not self-sufficient** in **vegoils** and **protein meals!**





**Thank you**

