



TURKEY-EU COOPERATION SCHEME ON HAZELNUTS

**Annual Consultations
3 October 2014, Salerno**



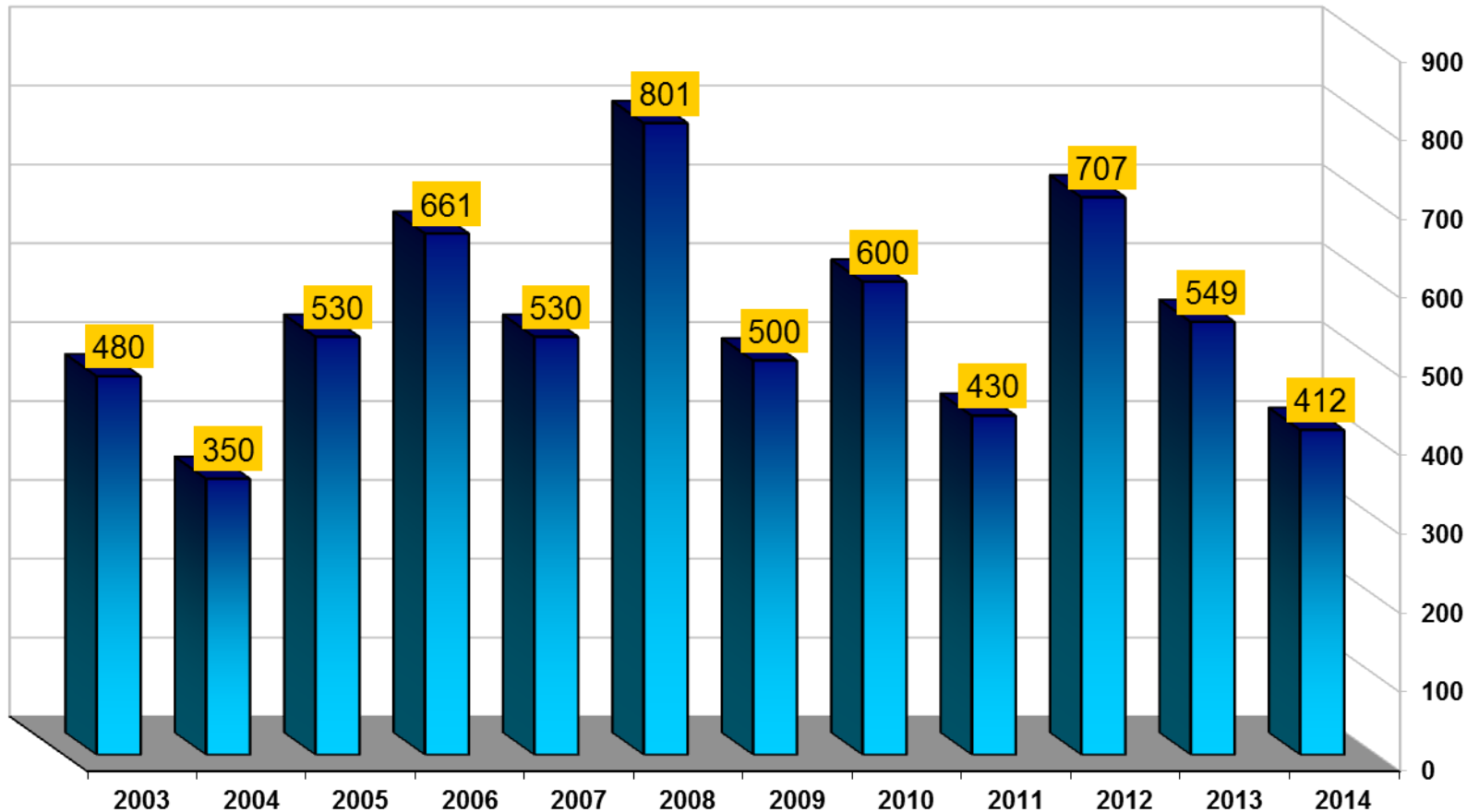
Outline

- 1. Production of Hazelnuts in Turkey/World & Turkey's Share**
 - a. Quantity**
 - b. Production Area**
- 2. Prices in Turkey**
 - a. 2013/2014 Average Prices**
 - b. Prices on 26 September 2014**
 - c. September 2013-August 2014**
- 3. Hazelnuts Exports of Turkey**
- 4. World Hazelnut Consumption**
- 5. Turkey's Hazelnut Strategy (Agenda Item 3)**
- 6. EU's Official Controls on Hazelnuts (Agenda Item 4)**



Production of Hazelnuts in Turkey/World & Turkey's Share

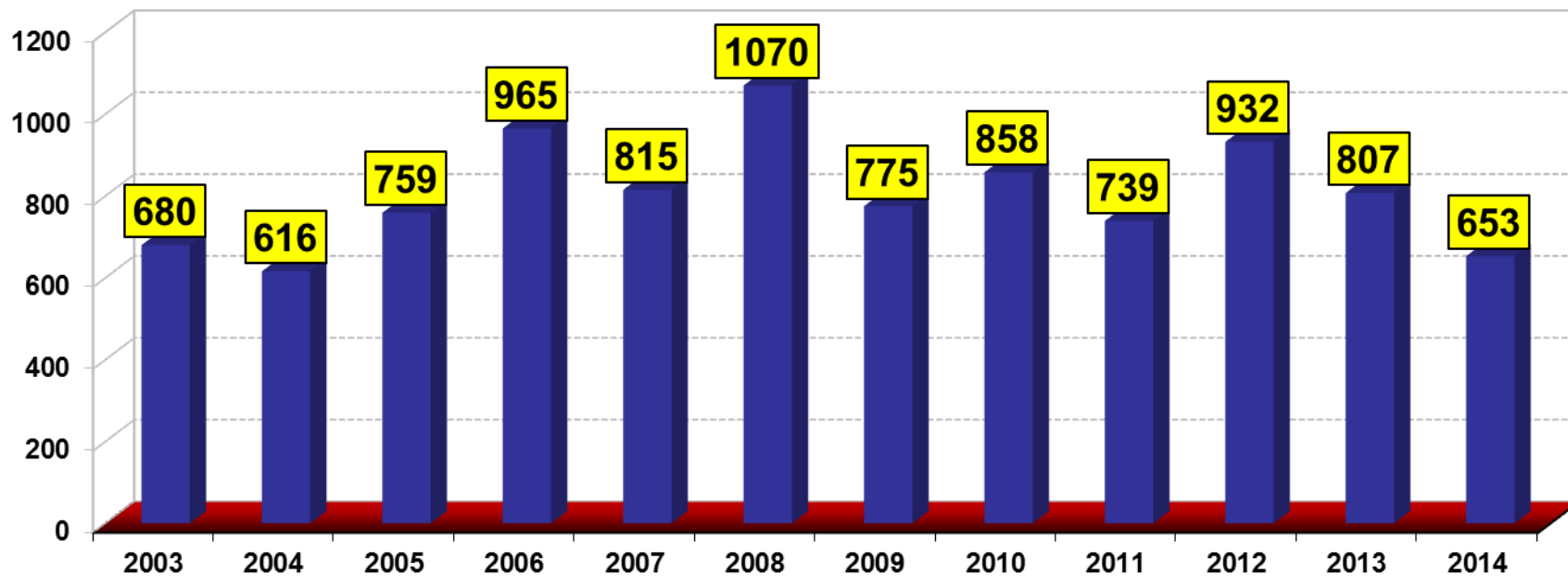
HAZELNUT PRODUCTION IN TURKEY (in shell, 1.000 ton)



Source : Min. of Food, Agriculture and Livestock (First Estimation Related to Season 2014/2015)

* Exporters' Associations have higher estimations regarding to Season 2013/2014 and Season 2014/2015

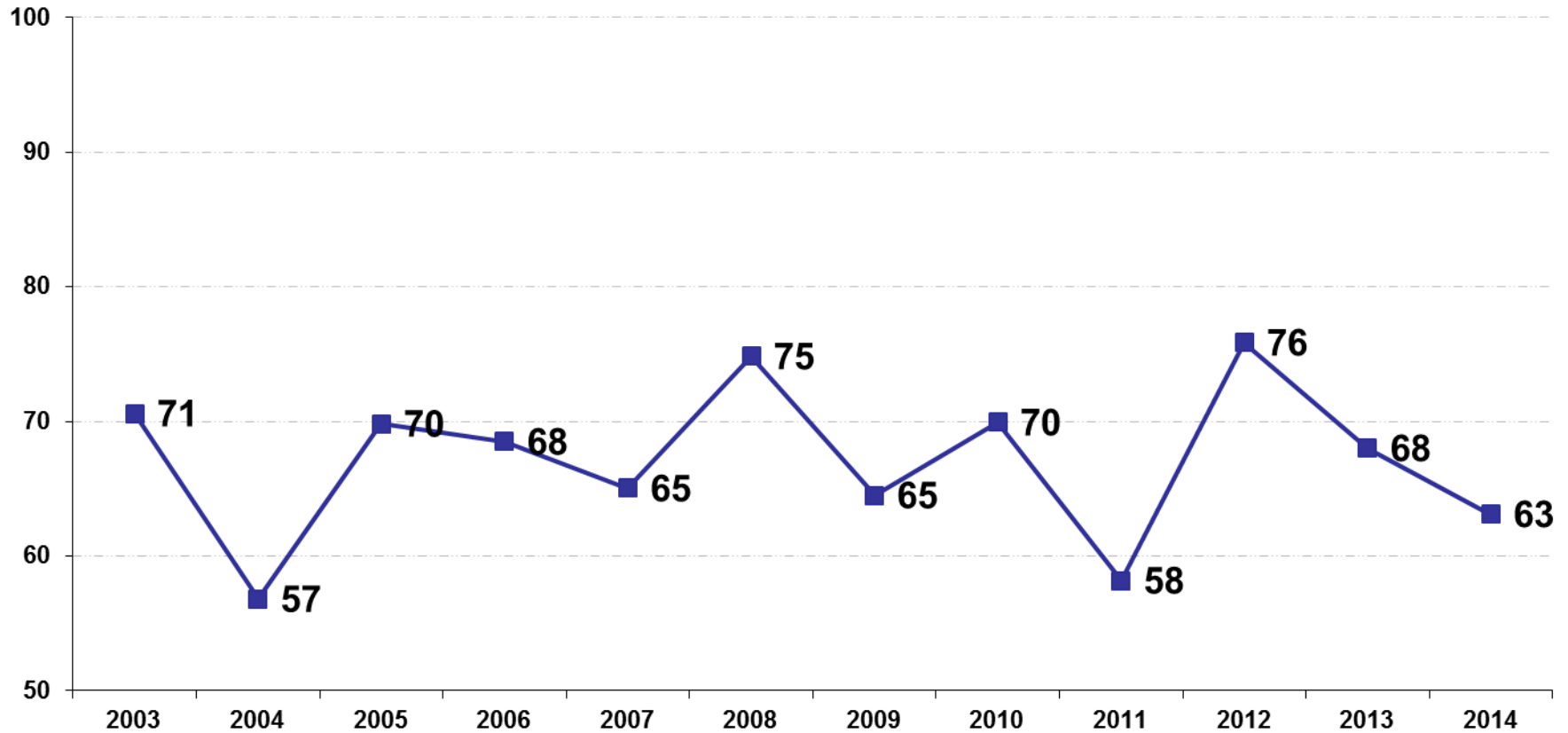
WORLD HAZELNUT PRODUCTION (in shell, 1.000 t)



Source: FAOSTAT (Until 2012)

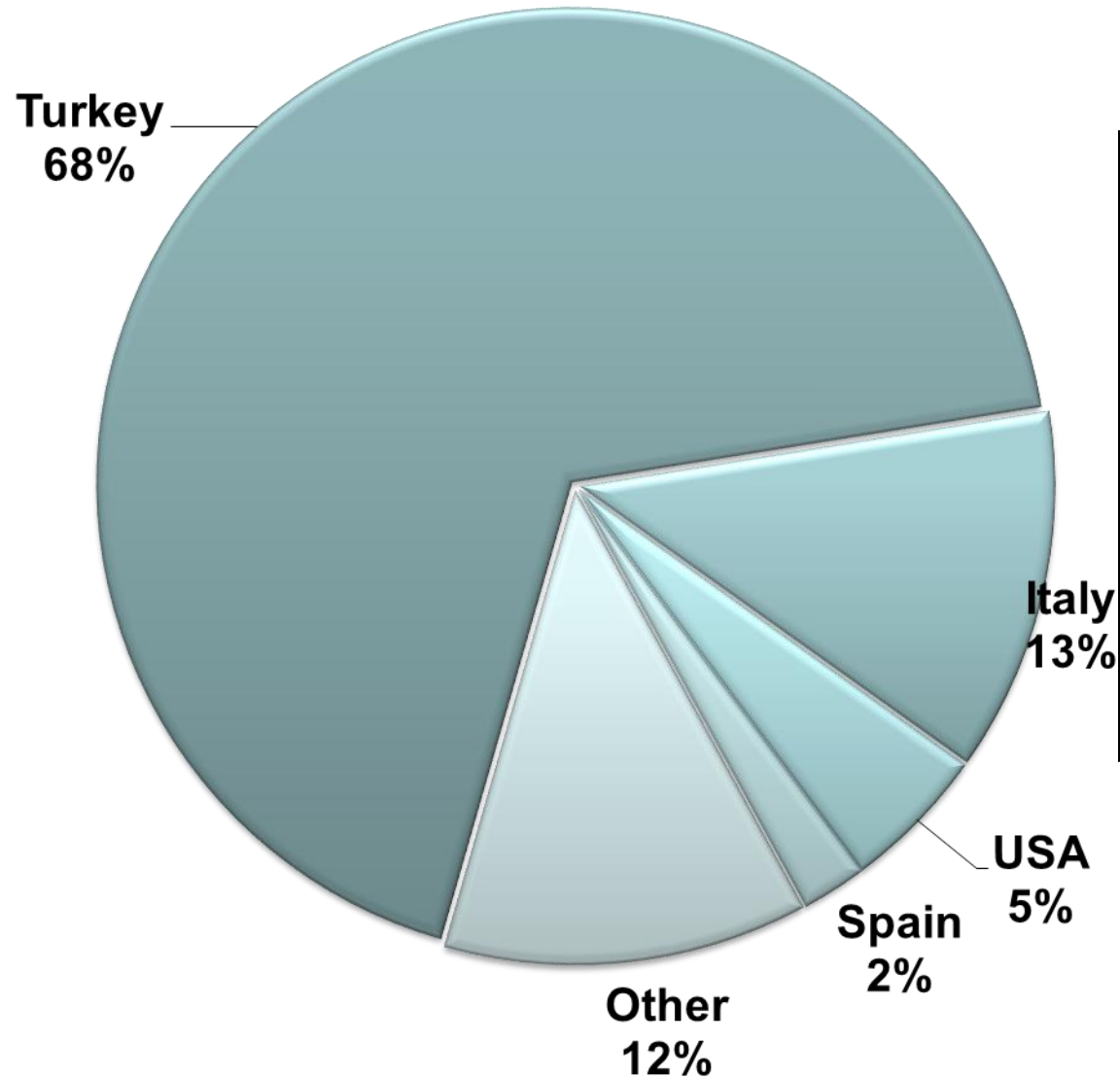
: Min. of Food, Agriculture and Livestock (for TR) and INC (for other countries) (2013, 2014)

SHARE OF TURKISH HAZELNUT PRODUCTION IN THE WORLD (%)



(*) 2014 Estimate

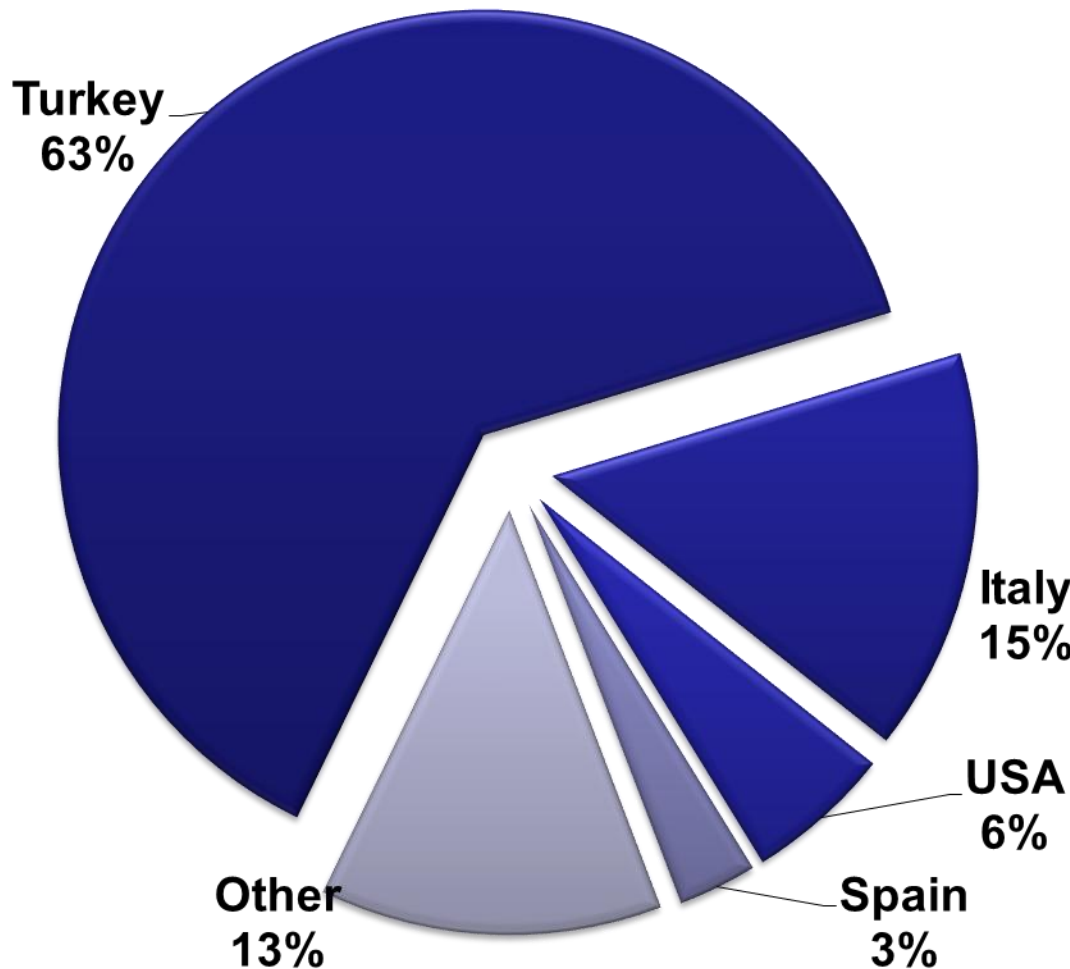
WORLD HAZELNUT (IN SHELL) PRODUCTION IN 2013/2014 SEASON



Turkey	549.000
Italy	100.000
USA	40.200
Spain	18.000
Other	100.000
Total	807.200

Source: MoFAL (Turkey),
INC (Others)

WORLD HAZELNUT (IN SHELL) PRODUCTION IN 2014/2015 SEASON (Estimate)



Turkey	412.000
Italy	100.000
USA	36.300
Spain	19.500
Other	85.000
Total	652.800

Source: MoFAL (Turkey),
INC (Others)

WORLD HAZELNUT PRODUCTION AREA (2013, Hectare)

Country	Production Area (Hectare)
Turkey	702.144
Italy	71.200
Azerbaijan	23.300
Georgia	16.000
Spain	15.000
Iran	13.100
USA	12.500
China	11.000
Krgyzstan	4.000
France	3.900
Greece	1.500
Others	29.000
Total	902.644

Source : MoFAL (Turkey), Fiskobirlik



Prices in Turkey

HAZELNUT (IN SHELL) PRICES IN DOMESTIC MARKET OF TURKEY

(Average September 2013-July 2014, per kg)

Average Price for Hazelnut	6,86 TL	\$3,25
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Source : Turkish Statistical Institute

FX Rate : TL, Central Bank of the Republic of Turkey

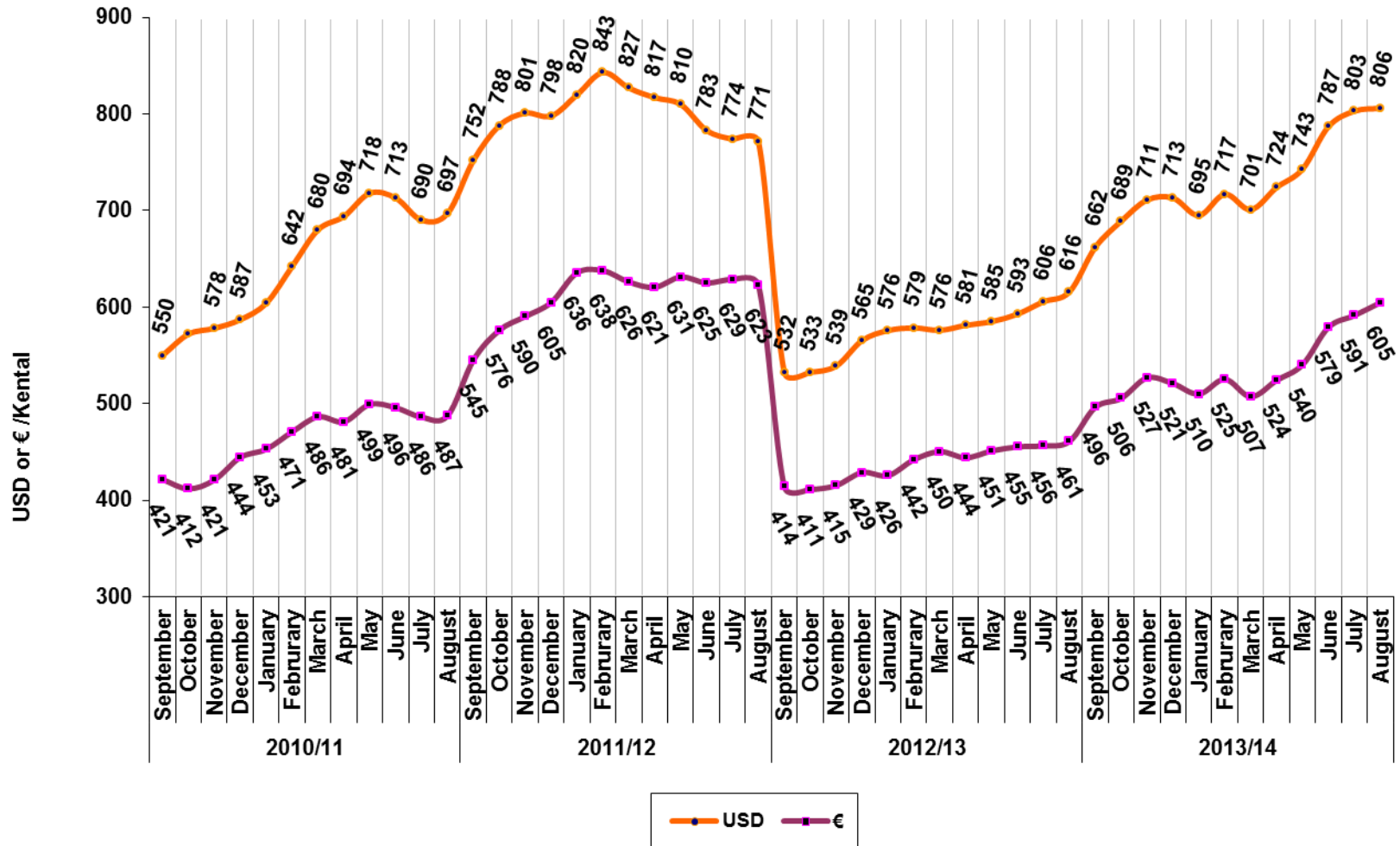
**HAZELNUT (IN SHELL) PRICES IN DOMESTIC
MARKET OF TURKEY
(26 September 2014, per kg)**

Levant Quality	13,60 TL	6,04 \$
Giresun Quality	14,30 TL	6,35 \$

Source : Commodity Exchanges

FX Rate : TL, Central Bank of the Republic of Turkey

DEVELOPMENT OF TURKEY'S AVERAGE EXPORT PRICES FOR STANDARD SHELLLED HAZELNUTS (FOB \$ & €)

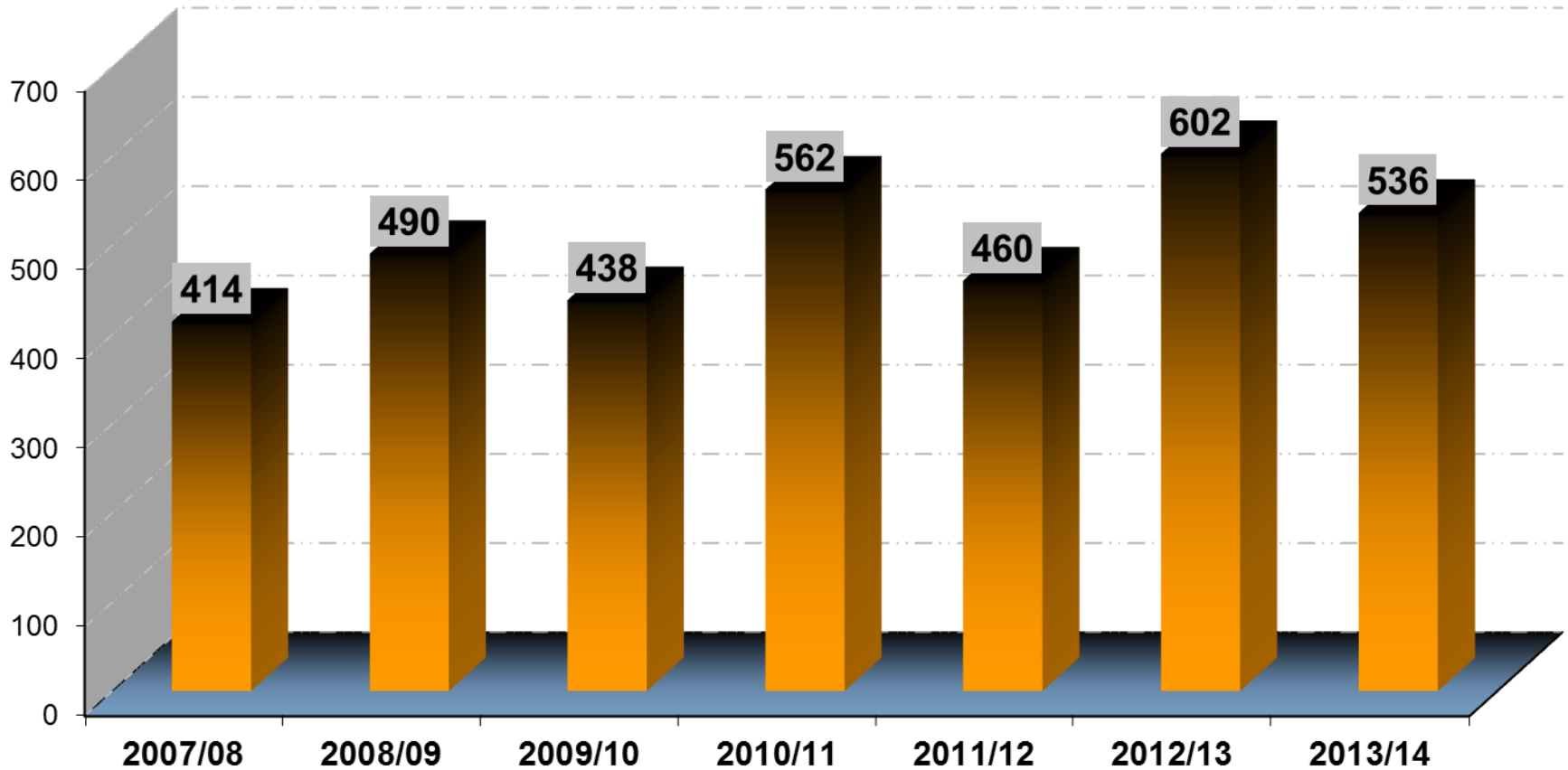


Source: Exporters' Associations



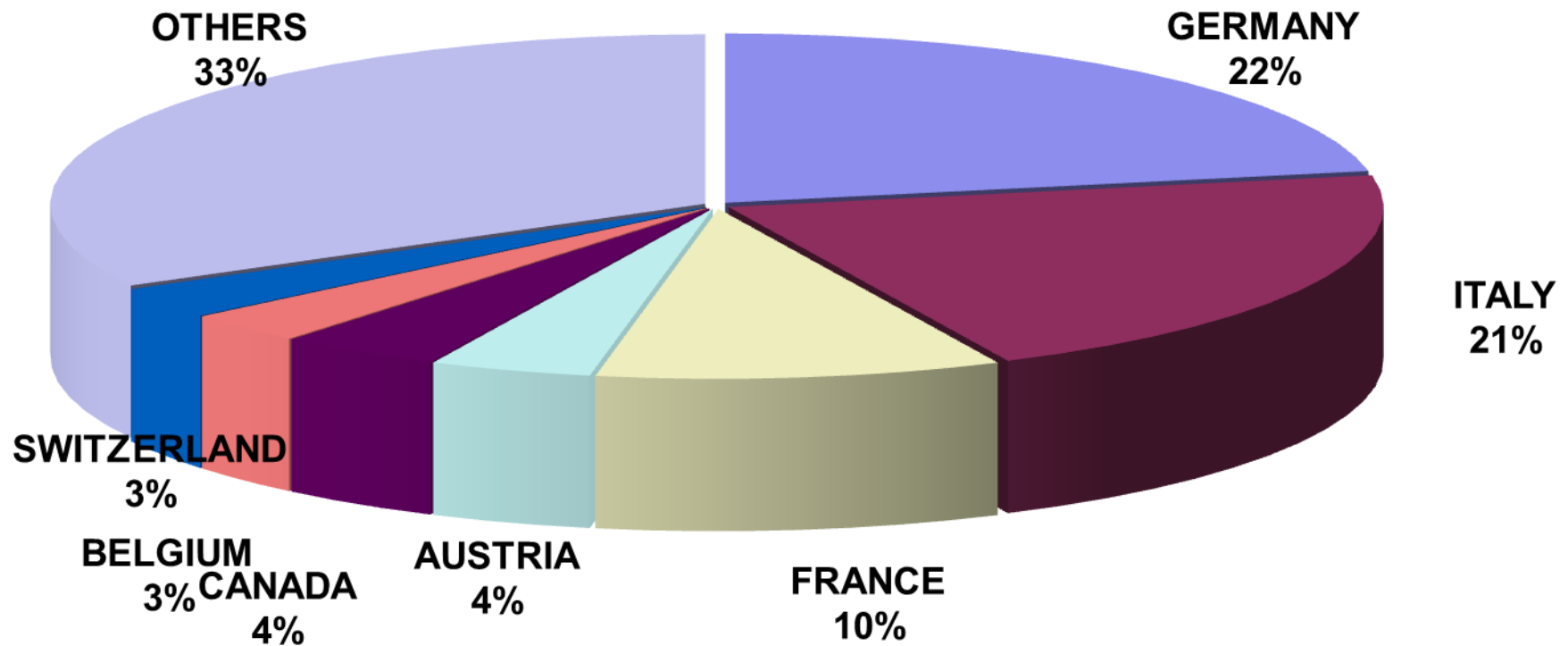
Hazelnuts Exports of Turkey

TURKEY'S HAZELNUT EXPORTS (IN SHELL) (Quantity, 1000 Tons)



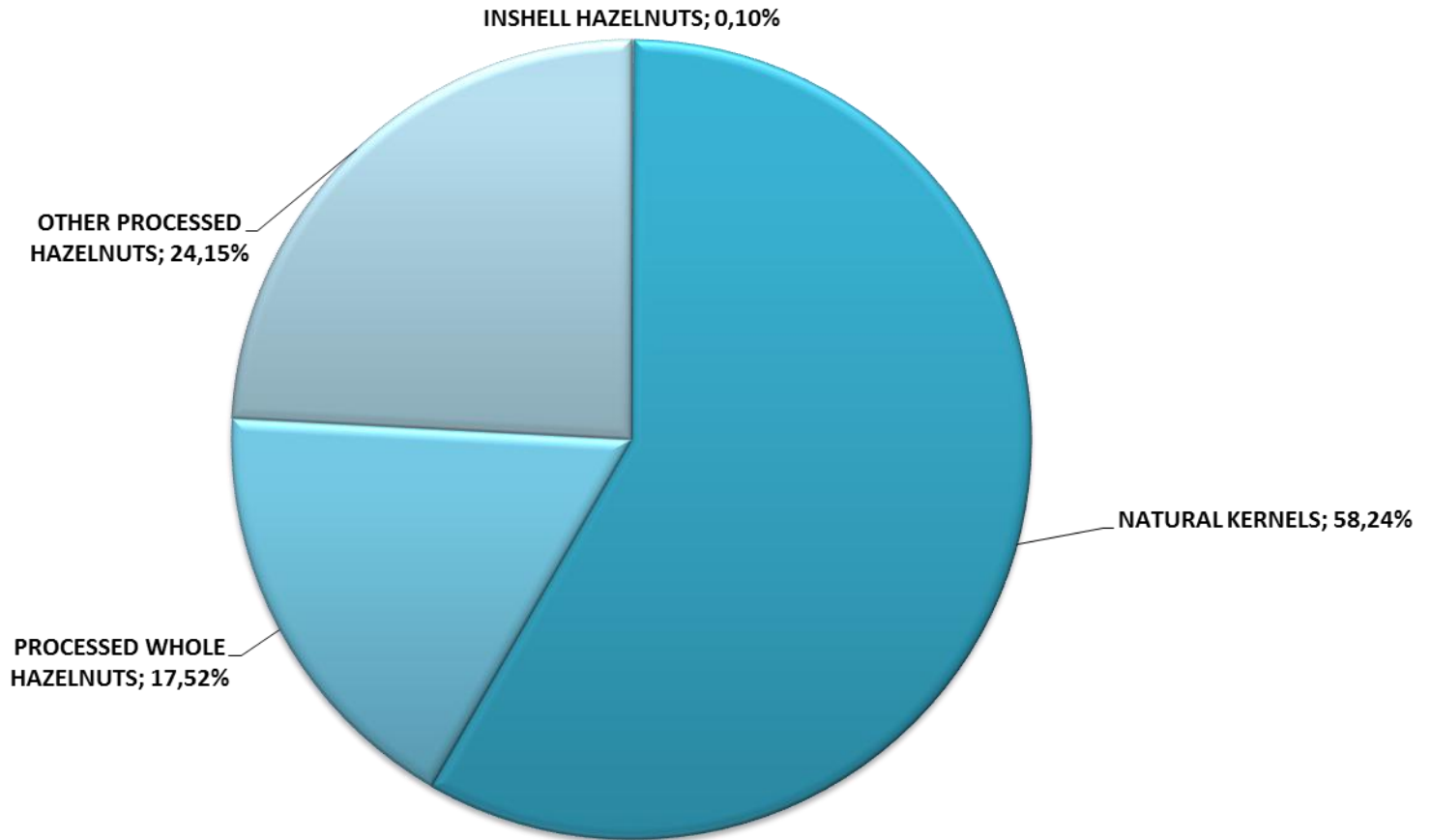
Source: Exporters' Associations

TURKEY'S HAZELNUT EXPORT MARKETS (01.09.2013-31.08.2014)



Source: Exporters' Associations

TURKISH HAZELNUT EXPORTS BY PRODUCT GROUPS (01.09.2013-31.08.2014)



Source: Exporters' Associations



World Hazelnut Consumption

WORLD HAZELNUT CONSUMPTION (In Shell, Tons)

<u>YEAR</u>	<u>TURKEY</u>	<u>REST OF THE WORLD</u>	<u>TOTAL</u>
2001	80.000	636.000	716.000
2002	80.000	642.000	722.000
2003	70.000	628.000	698.000
2004	60.000	594.000	654.000
2005	60.000	638.500	698.500
2006	80.000	735.310	815.310
2007	80.000	705.438	785.438
2008	100.000	748.740	848.740
2009	90.000	733.200	823.200
2010	100.000	810.000	910.000
2011	100.000	744.000	844.000
2012	130.000	810.000	940.000
2013	110.000	---	---
2014	75.000*	---	---

*Estimate



Turkey's Hazelnut Strategy

THE NEW HAZELNUT STRATEGY (2009-2011) EXTENDED TO 2014

- **Hazelnut production is authorised in 105 towns of 14 cities**

- **Area based support scheme is applied via:**
 - (1) Income support: Provided to farmers where cultivation of hazelnut is permitted**

 - (2) Compensatory payments: Provided to farmers who alter from hazelnut production where hazelnut cultivation is not permitted**



EU's Official Controls on Hazelnuts

OFFICIAL CONTROLS ON HAZELNUTS

- **Since September frequency of official controls on hazelnuts has been reduced from 5% to random.**
- **However, we still receive complaints regarding the duration of controls.**



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