

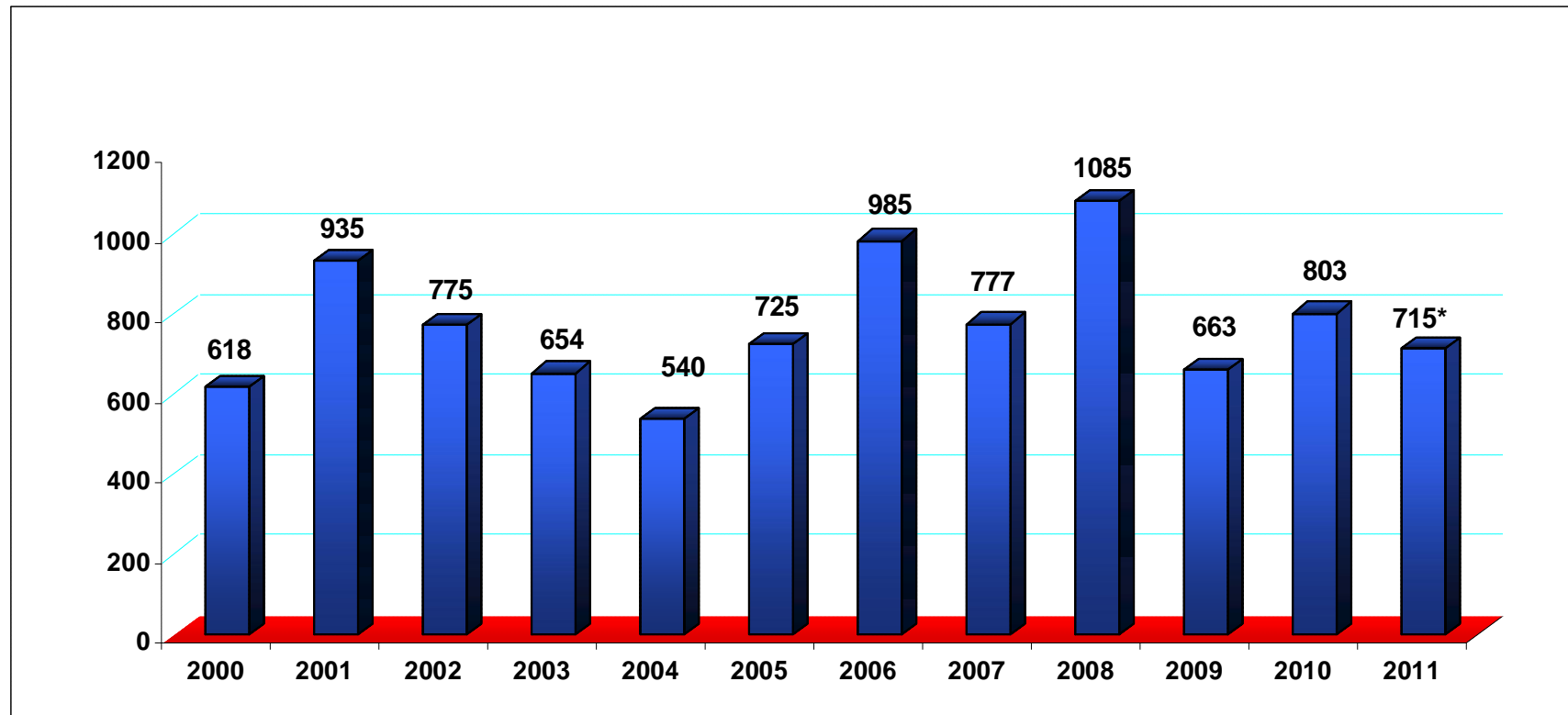


# **TURKEY-EU COOPERATION SCHEME ON HAZELNUTS**

**Annual Consultations**

**23 September 2011, stanbul**

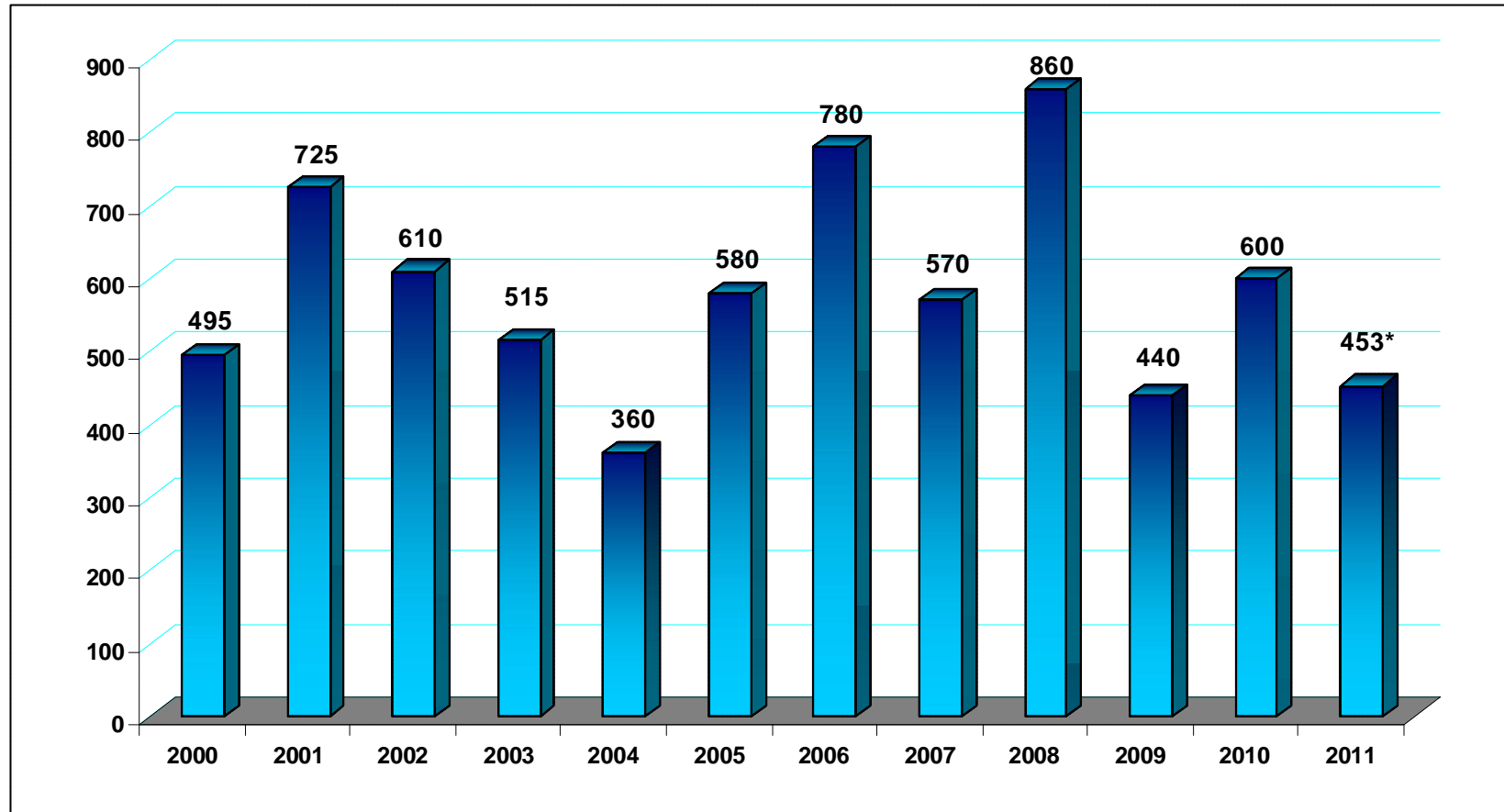
# WORLD HAZELNUT PRODUCTION (in shell, 1.000 t)



Source: Fiskobirlik

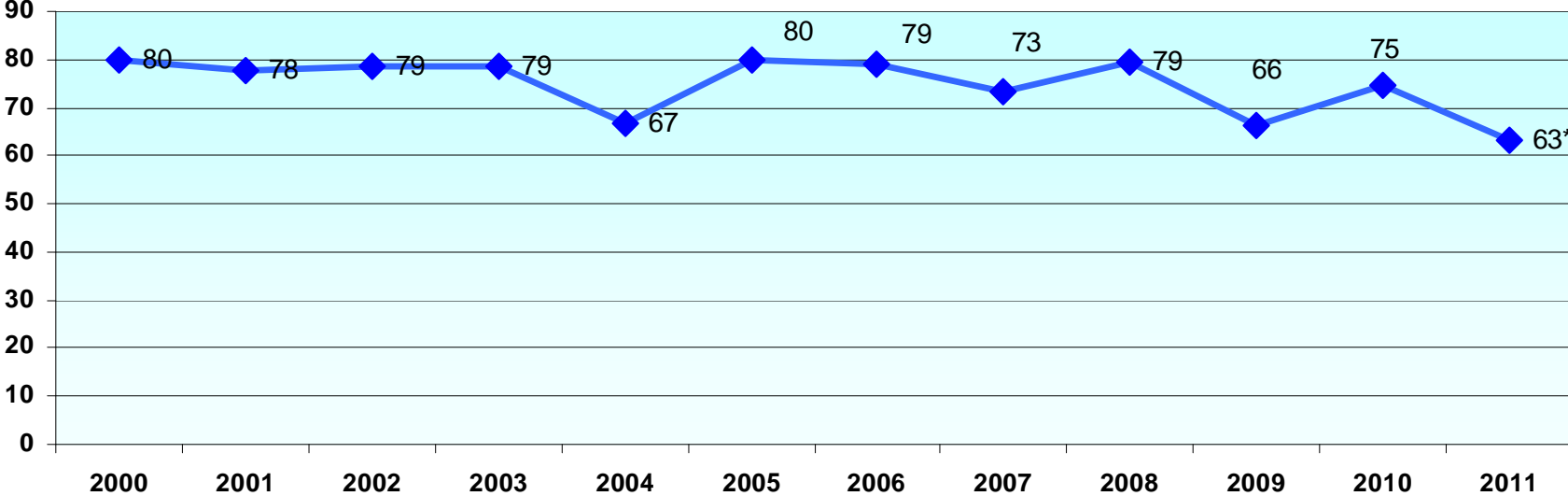
(\*) Estimate

# HAZELNUT PRODUCTION IN TURKEY (in shell, 1.000 ton)



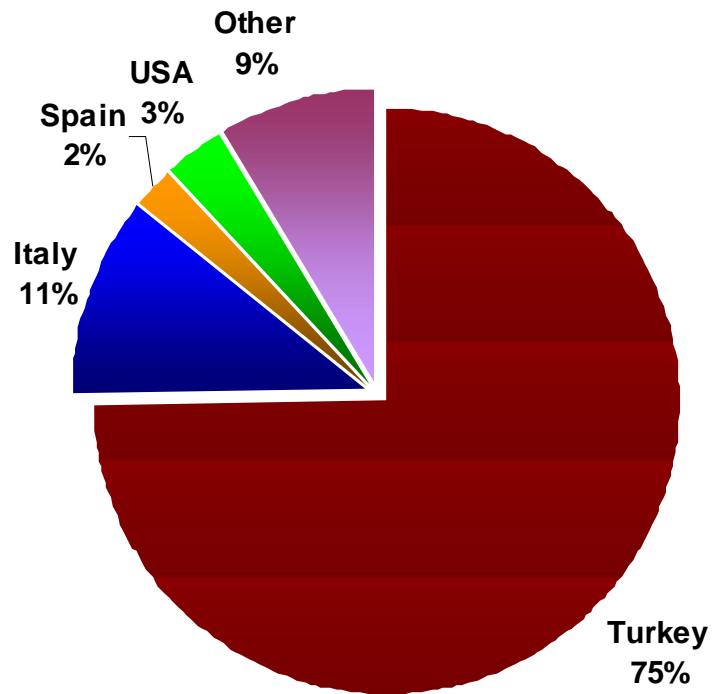
(\*) Estimate: Ministry of Food, Agriculture and Livestock

# SHARE OF TURKISH HAZELNUT PRODUCTION IN THE WORLD (%)



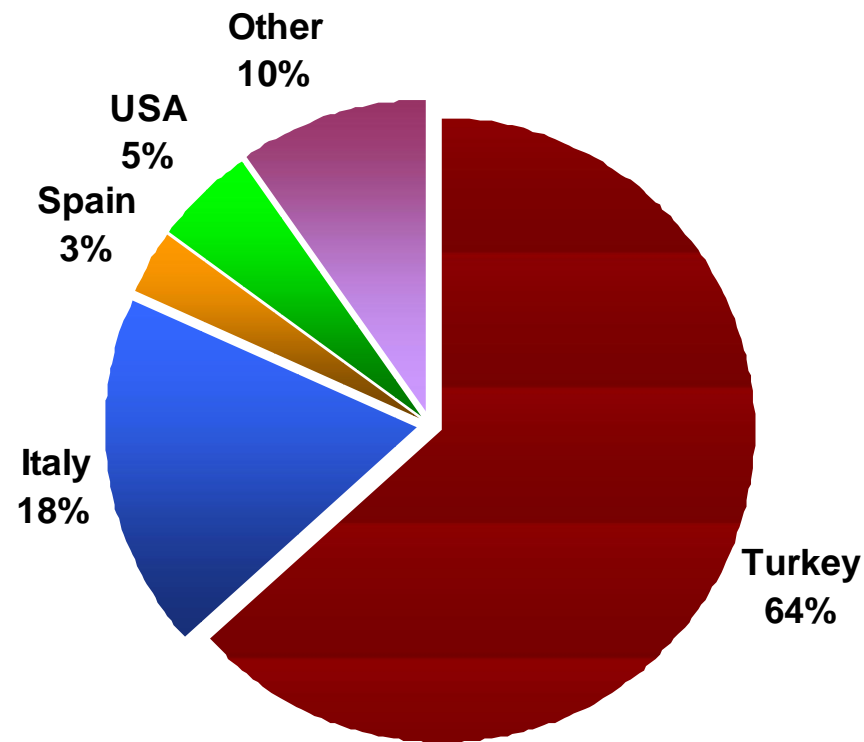
(\*) Estimate

# WORLD HAZELNUT (IN SHELL) PRODUCTION IN 2010/2011 SEASON



Turkey	600.000
Italy	90.000
USA	25.000
Spain	18.000
Other	70.000
Total	803.000

# WORLD HAZELNUT (IN SHELL) PRODUCTION IN 2011/2012 SEASON (ESTIMATE)



Turkey	453.000*
Italy	130.000
USA	37.000
Spain	25.000
Other	70.000
Total	715.000

(\*)Estimate: Ministry of Food, Agriculture and Livestock

## **WORLD HAZELNUT PRODUCTION AREA (2010, Hectare)**

<b>Country</b>	<b>Production Area (Hectare)</b>
<b>Turkey</b>	688.000
<b>Italy</b>	71.000
<b>Georgia</b>	23.800
<b>Azerbaijan</b>	22.000
<b>Spain</b>	20.000
<b>USA</b>	11.700
<b>Iran</b>	9.600
<b>China</b>	8.800
<b>France</b>	3.500
<b>Greece</b>	1.800
<b>Krgyzstan</b>	1.600
<b>Others</b>	28.000
<b>Total</b>	889.800

Source : Ministry of Food, Agriculture and Livestock (Data of Turkey), Fiskobirlik

**HAZELNUT (IN SHELL) PRICES IN DOMESTIC  
MARKET OF TURKEY  
(Average September 2010-August 2011)**

<b>Levant Quality</b>	<b>4,47 TL/Kg</b>	<b>2,88 \$/Kg</b>
<b>Giresun Quality</b>	<b>4,80 TL/Kg</b>	<b>3,10 \$/Kg</b>

**Source : Fiskobirlik**

**FX rate : TL, CBRT**



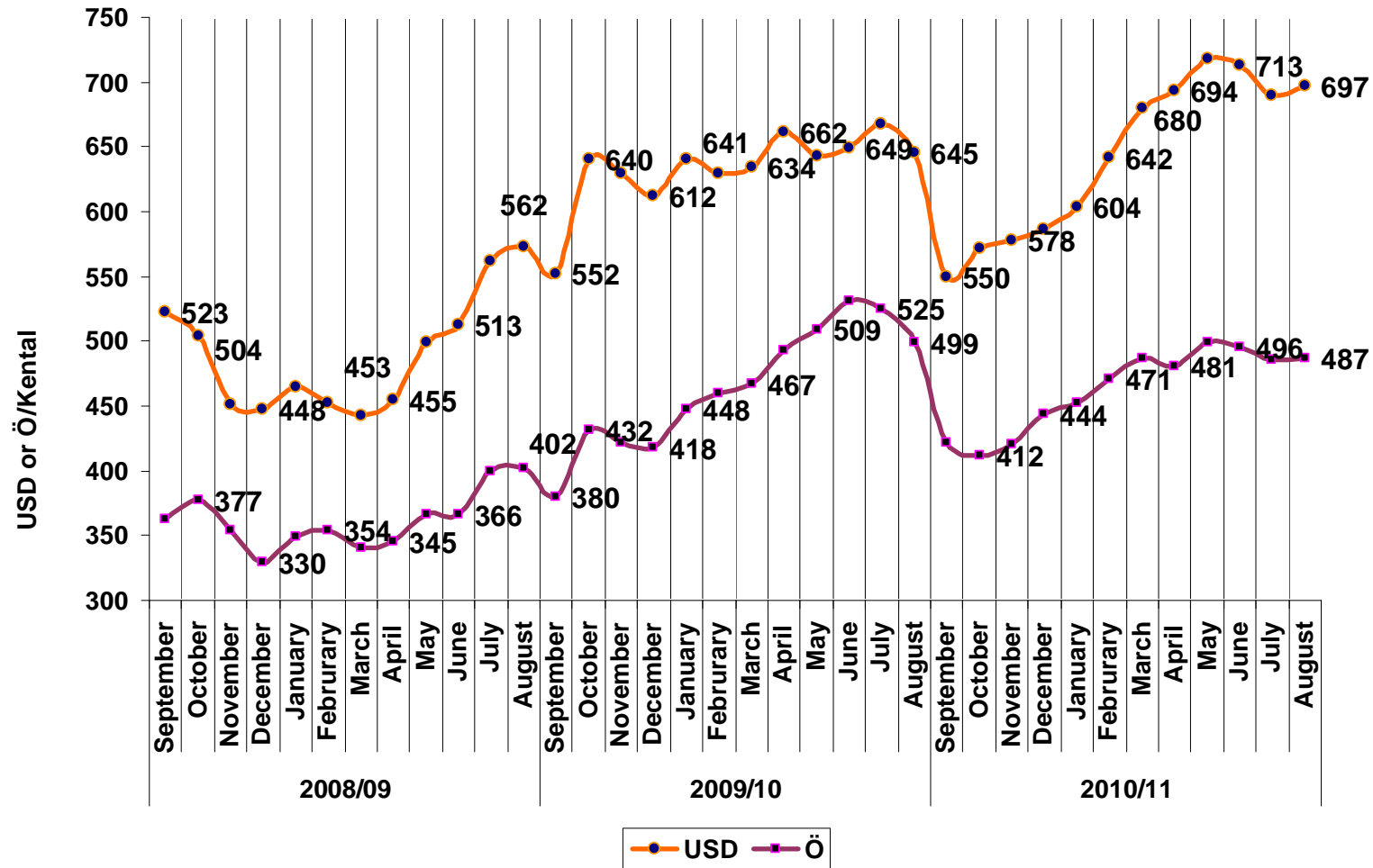
**HAZELNUT (IN SHELL) PRICES IN DOMESTIC  
MARKET OF TURKEY  
(20 September 2011)**

<b>Levant Quality</b>	<b>6,70 TL/Kg</b>	<b>3,74 \$/Kg</b>
<b>Giresun Quality</b>	<b>7,00 TL/Kg</b>	<b>3,91 \$/Kg</b>

**Source : Fiskobirlik**

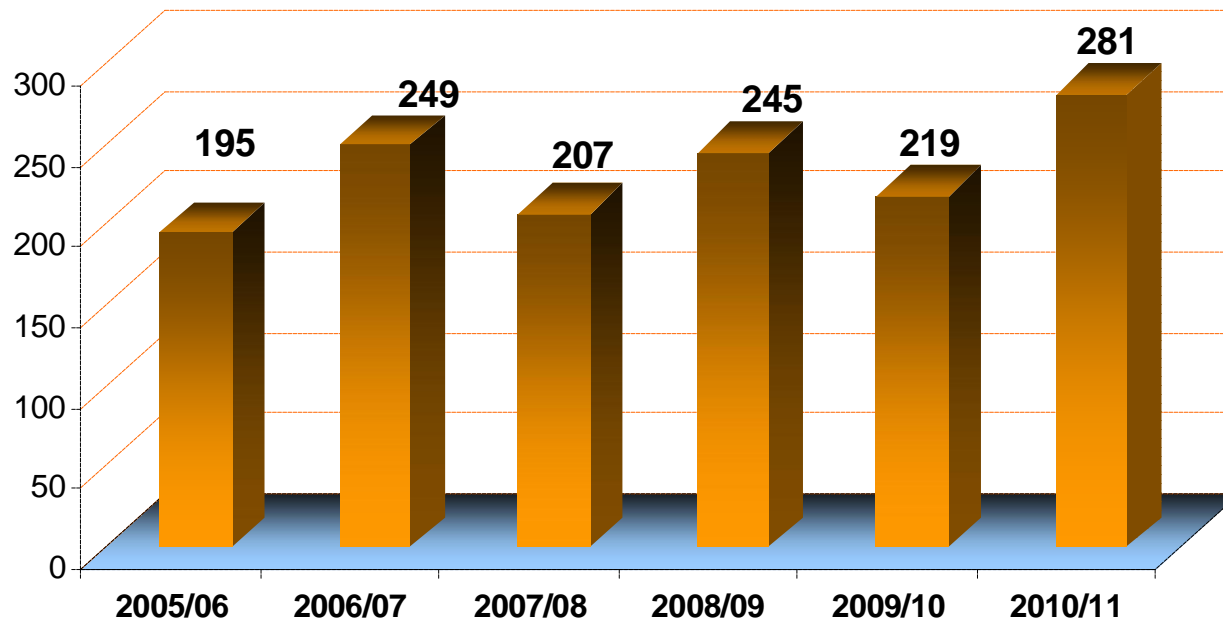
**FX rate : TL, CBRT (20 September 2011)**

# DEVELOPMENT OF TURKEY'S AVERAGE EXPORT PRICES FOR STANDARD HAZELNUTS (\$ & Ö)



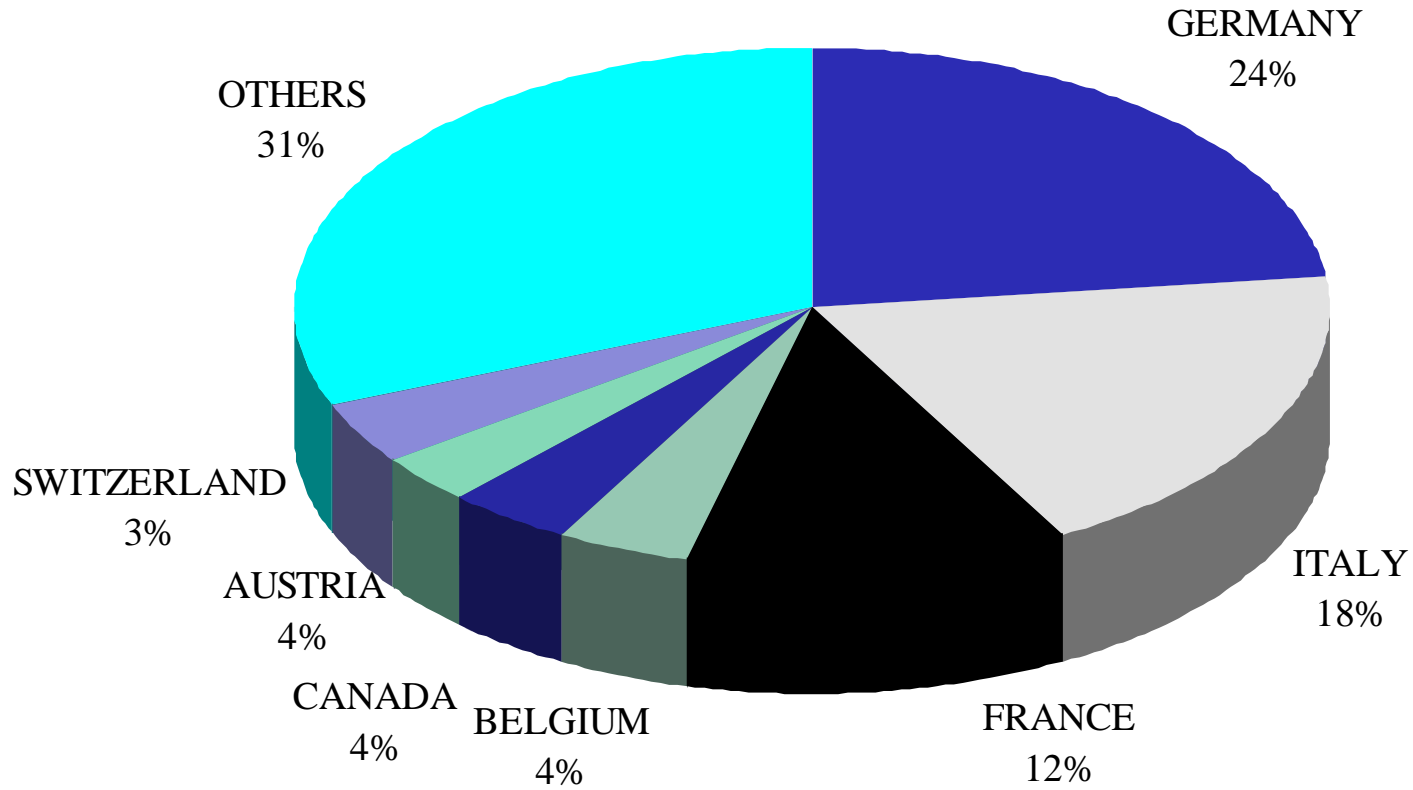
Source: TURKSTAT, Exporters' Associations FOB Prices

# TURKEY'S SHELLED HAZELNUT EXPORTS (Quantity, 1000 Tons)



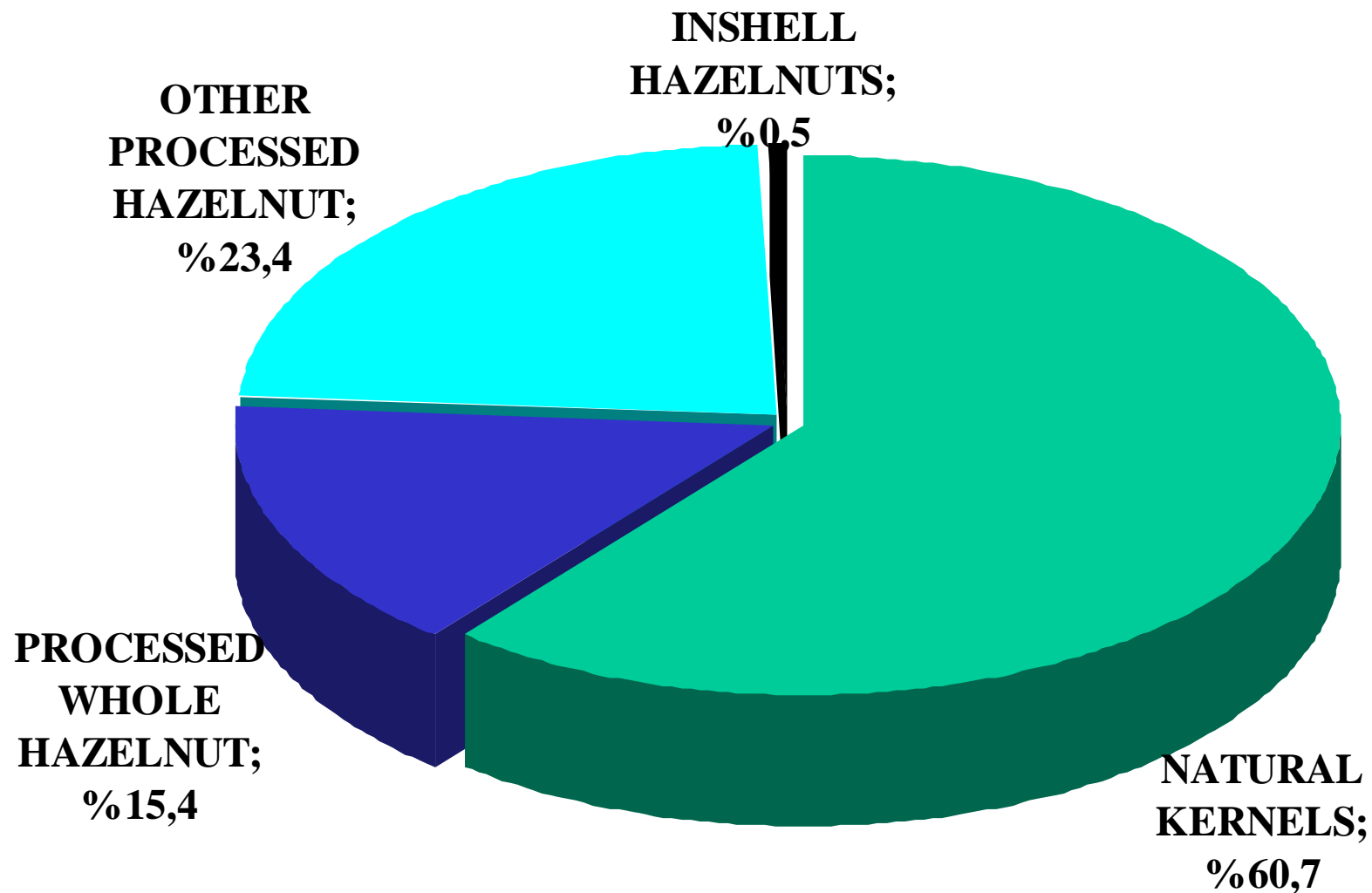
Source: TURKSTAT, Exporters' Associations FOB Prices

# TURKEY'S HAZELNUT EXPORT MARKETS (01.09.2010-31.08.2011)



Source: TURKSTAT, Exporters' Associations FOB Prices

# TURKISH HAZELNUT EXPORTS BY PRODUCT GROUPS (01.09.2010-31.08.2011)



Source: TURKSTAT, ExportersøAssociations FOB Prices

## WORLD HAZELNUT CONSUMPTION (Shelled, Tons)

<u>YEAR</u>	<u>TURKEY</u>	<u>WORLD</u>	<u>TOTAL</u>
1997	30.000	299.000	329.000
1998	30.000	282.000	312.000
1999	35.000	315.000	350.000
2000	35.000	310.000	345.000
2001	40.000	318.000	358.000
2002	40.000	321.000	361.000
2003	35.000	314.000	349.000
2004	30.000	297.000	327.000
2005	30.000	319.250	349.250
2006	40.000	367.655	407.655
2007	40.000	352.719	392.719
2008	50.000	374.370	424.370
2009	45.000	366.600	411.600
2010	55.000	405.000	460.000
2011*	50.000	390.000	440.000

Source: Fiskobirlik  
(\* Estimate)

## **TURKEY'S HAZELNUT TRADE BALANCE** (in shell, by 01.09.2011)

Hazelnut stocks (End of August 2010)	355.000 (328+27)
2010-2011 supply	635.000
<b>TOTAL SUPPLY</b>	<b>990.000</b>
2010-2011 exports	563.000
Consumption in Turkey	110.000
Hazelnut Oil Production	126.000
Process Loss	25.000
<b>ESTIMATED TOTAL DEMAND</b>	<b>824.000</b>
<b>EXCESS STOCKS (End of August 2011)</b>	<b>166.000 (119+47)</b>



# **IMPLEMENTATION OF TURKISH POLICY FOR THE HAZELNUT SECTOR**



## **THE NEW HAZELNUT STRATEGY**

- **Planning of the hazelnut production and registration and authorization of the sowing areas**
  - **14 towns declared as hazelnut production area by the decree of Cabinet No: 2011/1424 and currently hazelnut can be produced in 105 towns in 14 city**
  
- **Area based support scheme continue to be implemented as:**
  - (1) Income support**
  - (2) Compensatory payments for alternative production**

## OFFICIAL CONTROLS ON HAZELNUTS

- By 1 January 2010, Commission Regulation 1152/2009/EC increased the frequency of controls from 5% to 10%
- New frequency of controls resulted in longer waiting period during official controls
- There is a remarkable decrease in RASFF notifications regarding contamination with aflatoxin in imports of hazelnuts from Turkey

2007	2008	2009	2010	2011 (As of 20 Sept)
101	60	62	18	15

- Review of the control frequency of hazelnuts of Turkish origin was postponed due to dioxin crisis in EU
- We expect the positive results of this review as soon as possible



TÜRKİYE CUMHURİYETİ  
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