

**Voluntary Report** – Voluntary - Public Distribution

**Date:** July 12, 2024

**Report Number:** TU2024-0031

**Report Name:** Turkiye Raisins Update

**Country:** Turkiye

**Post:** Ankara

**Report Category:** Raisins

**Prepared By:** Dila Ikiz

**Approved By:** Rishan Chaudhry

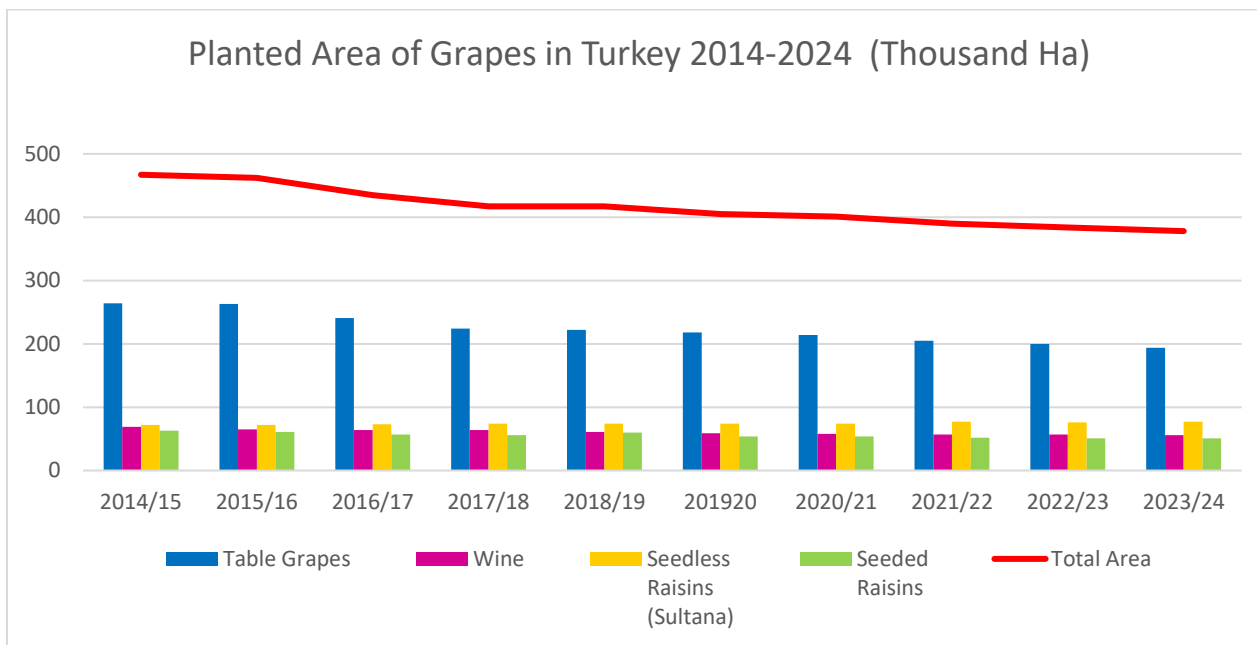
**Report Highlights:**

This report focuses on Turkiye's production of sultana raisins, which are a dried, seedless grape variety indigenous to the Aegean region of Turkiye and grown mostly in the regions of Manisa, Izmir, Mersin, and Denizli. In MY 2023/24, Turkish sultana raisin production decreased to 245,000 MT on 77,000 ha, following unexpected rains and subsequent mildew disease. Post expects the effects of the MY 2023/24 mildew disease to continue into the next MY, and production will continue to be below average. In MY 2024/25, sultana raisin production is forecast to be about 265,000 MT.

## Crop Area

Turkiye is one of the world’s major raisin producers and exporters. With over 1,200 grape varieties grown in the country, Turkiye is also one of the main genetic centers for grapes. As shown in Figure 1, Turkiye’s planted area for grapes is just under 400,000 hectares (ha). Grape planted area has been trending downward over the past decade, however, due to improvements in cultivation methods, overall production has remained stable. Planted area for raisins rose to a high of 77,000 ha in MY 2023/24, buoyed by a robust export market over the last several years. Post forecasts planted area of grapes for raisins to remain around 77,000 ha for MY 2024/25 due to high demand from export markets.

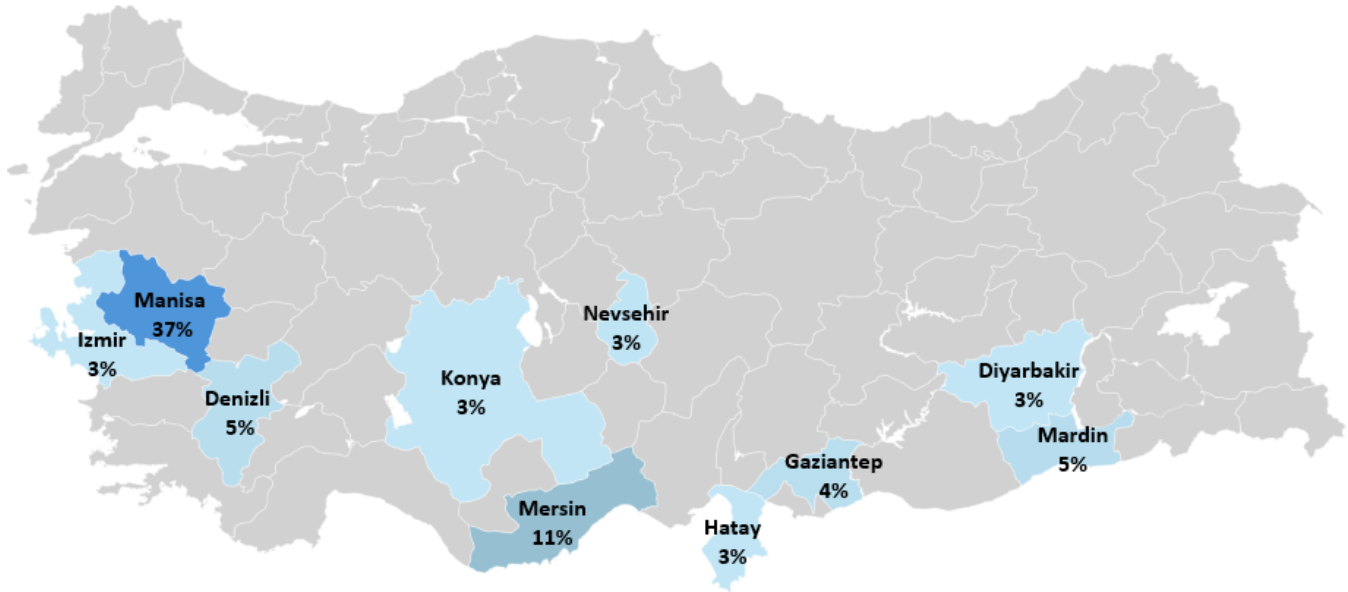
**Figure 1. Vineyards of Turkiye (2014-2024)**



Source: TurkStat, 2024

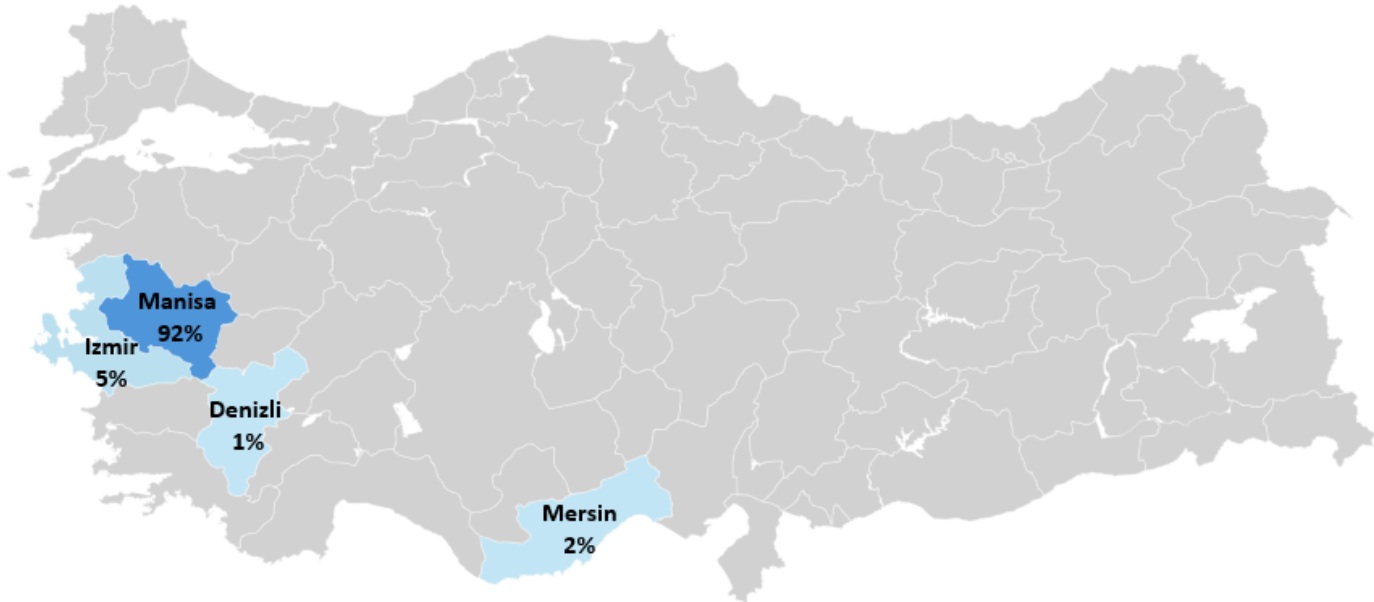
The Aegean Region is the engine of Turkish grape production; almost half of the vineyards are in this region (Figure 2). Manisa has 37 percent of all vineyards, and Mersin (eleven percent), Mardin (five percent), Denizli (five percent), and Gaziantep (four percent) were the other top locations for vineyards in 2023. Manisa produces 92 percent of all sultana raisins, Izmir produces five percent, and Mersin, and Denizli produces rest, most of which were exported in 2023 (Figure 3).

**Figure 2. Location of the Top Cities for Grape Production in Turkiye**



Source: TurkStat, 2024

**Figure 3. Location of the Top Cities for Seedless Raisin (Sultana) Production in Turkiye**

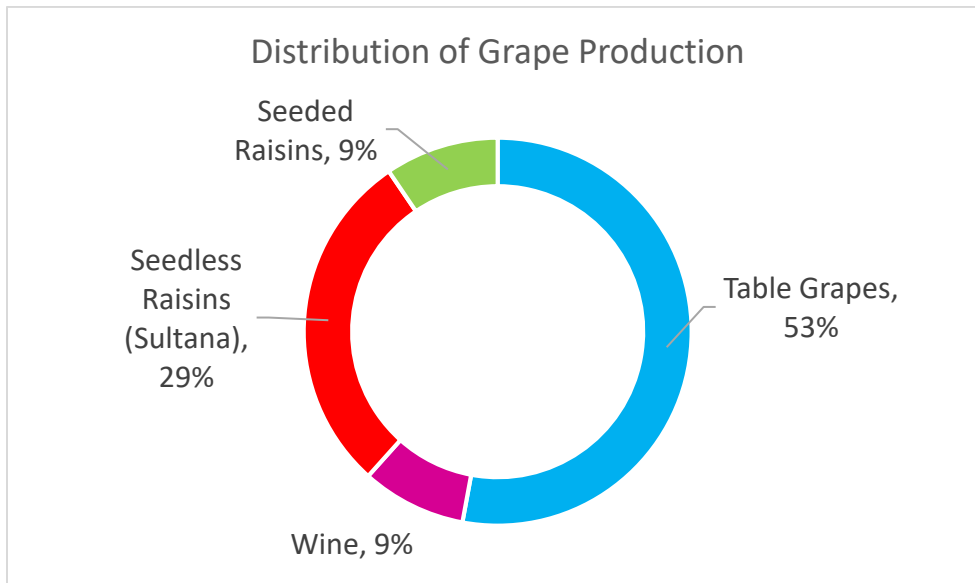


Source: TurkStat, 2024

## Production

The Aegean region is the most important grape-producing region in Türkiye and is the main production area of seedless grapes used for raisins. Table grapes make up about 53 percent of Aegean grape production, whereas drying grapes make up 38 percent (29 percent for seedless raisins (sultanas) and 9 percent for the seeded raisins), and 9 percent are used for wine production (Figure 4). The Marmara region surrounding Istanbul as well as Central and Southeast Anatolia also produce smaller quantities of table and wine grapes.

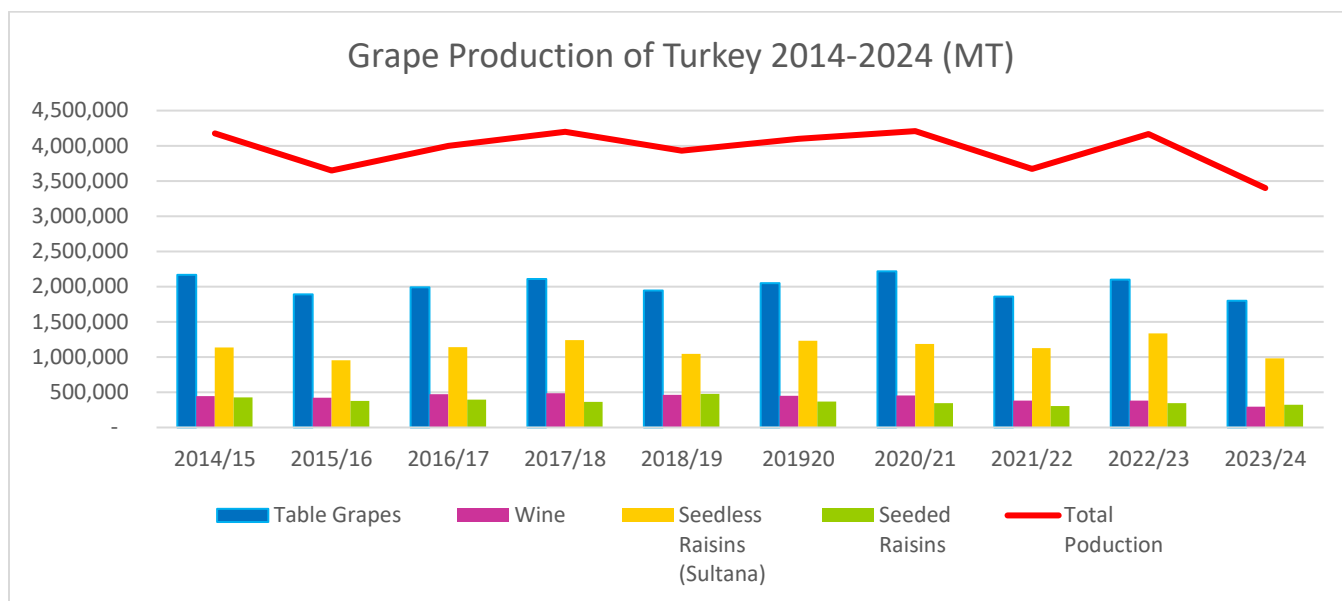
**Figure 4. Distribution of Grape Production of Türkiye, 2023**



Source: TurkStat, 2024

As Figure 5 indicates, over the last ten years, grape production has remained at around 4 million metric tons (MMT). This is the result of improved varieties and technological advancements, which offsets the slight decline in total planted area. Türkiye is producing around 1.1 MMT of grapes for raisins each year.

**Figure 5. Grape Production of Turkiye (2014-2024)**



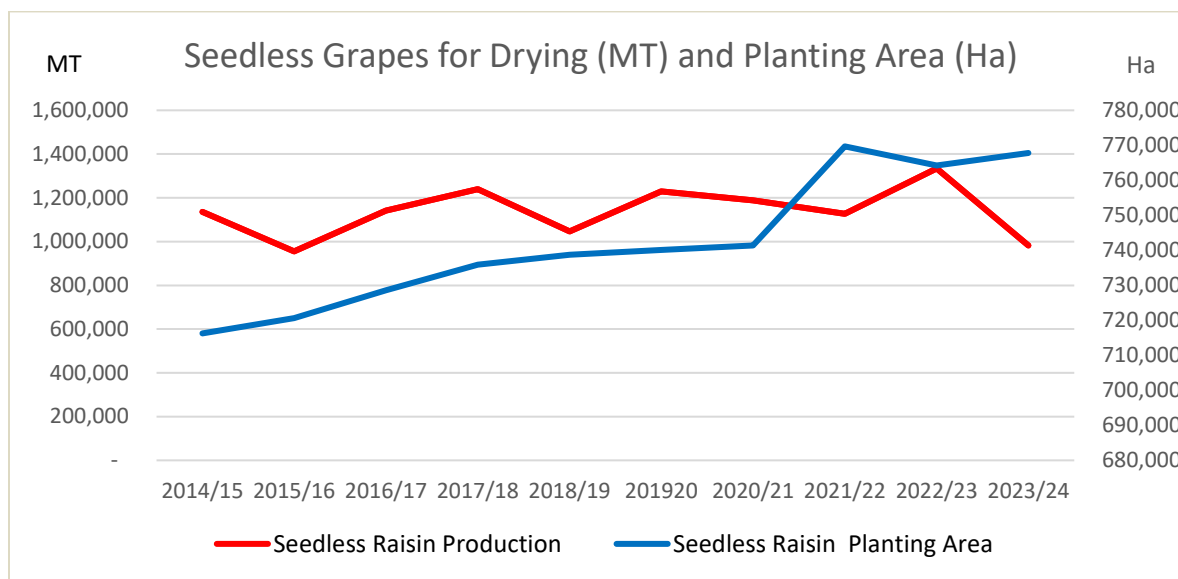
Source: TurkStat, 2024

In MY 2023/24, Turkish sultana raisin production decreased to 245,000 MT on 77,000 ha, due to mildew disease. Due to changing climate conditions, there were unexpected heavy rains in the beginning of the summer season, which farmers had not yet sprayed for. As a result, most of the vineyards suffered from mildew disease and production decreased by 26 percent compared to 334,000 MT in MY 2022/23.

Grape production in Turkiye in MY 2023/24 was around 3.4 million metric tons (MMT), down 18 percent compared to 4.1 MMT in MY 2022/23. This was the again because of mildew disease. Post expects the effects of mildew disease will continue into MY 2024/25 and production will be below average. Additionally, higher than average temperatures in June 2024 in the Aegen region negatively impacted production. The Turkish Statistical Institute (TUIK) estimated an 8.8 percent increase in grape production for the MY 2024/25 compared to the very low production last year. Even with this increase, it is expected that production will remain below average. In MY 2024/25, sultana raisin production is forecast to be about 265,000 MT.

Turkiye has a comparative advantage in the export of sultana raisins due to their reputation for high quality. Figure 6 shows the increase of the sultana raisin planting area and production from 2014 to 2024. Farmers have been moving to cultivate their land to grow sultana raisins rather than other grape varieties over the years because of higher profits from exports. Volatility in production comes from unexpected weather conditions and fertility issues with the soil. Over the last 10 years, seedless grape production (sultana raisins) averaged around 1.1 MMT and accounted for 29 percent of overall grape production. When dried, 4 kg of grapes results in around 1 kg of raisins.

**Figure 6. Seedless Grapes for Drying (MT) and Planted Area (Ha) (2014-2024)**



Source: TurkStat, 2024

## Policy

Since 1990, the Turkish government has been implementing a targeted development policy to increase agricultural productivity in Türkiye. The Turkish Ministry of Agriculture and Forestry (MinAF) gives subsidies and trainings to its farmers to adopt superior cultivation and irrigation systems.

To regulate the domestic raisin market for sustainable production and keep export prices at a stable level, the government, exporters, and producers work together. The Turkish Grain Board (TMO), a government-affiliated body, intervenes in the raisin market and buys surplus raisins to keep prices stable. Raisin producers expect the same interactions in the marketplace from TMO in the MY 2023/24 season. On September 25, 2023, the Agricultural Sales Cooperative Union of Türkiye (TARIS) announced the purchase price for raisins at between 55-70 Turkish Lira (TL) per kg (\$2.05-\$2.60) based on size (7-10). This is a 40 percent increase compared to the previous year's price in dollar terms. Retail prices of sultana rains are between 170-240 TL (\$5.22-\$7.37) per kg as of June 2024.

The Minister of Agriculture also emphasized that grapes are a strategic agricultural product for Türkiye, and that they have an important place in the country's agricultural exports [in one of his speeches](#). The Ministry provides grape producers with subsidized diesel and fertilizers, supports them in improving good agricultural practices (in both open fields and greenhouses), organic agriculture, small family businesses, and applying bio-tech pest controls. In MY 2023/24, MinAF gave a 107 TL/decare (da) (\$4.22) fuel subsidy and fertilizer subsidy to grape producers. For more details on these subsidies, please visit [Resmi Gazete](#).

## **Consumption**

In MY 2023/24, sultana raisin domestic consumption is about 40,000 MT. Most grapes are consumed in Turkiye as fresh fruit in the summer and dried fruit in the winter, but some grapes are used as an ingredient to produce molasses, dried fruit pulp, Turkish Delight, wine, and vinegar. Despite Turkiye's leading role in the production of raisins, domestic consumption is not stable. Domestic consumption varies based on production levels and quality, exports, and domestic price. In general, domestic consumption for raisins in Turkiye is on average between 35,000 MT and 50,000 MT in any given year, which is around 10-15 percent of total raisin production.

## **Stocks**

Domestic stocks vary based on production levels and exports. In MY 2023/24, ending stocks are forecast at 35,000 MT, down 35,000 MT compared to MY2022/23, in parallel with decreased production. In the long run, Turkish exporters aim to improve export markets and increase stock capacity to prevent volatility in export prices. MinAF also wants to increase licensed storage warehouses to be able to stock more raisins in the higher production years to maintain enough higher quality raisins for export markets during low production years.

## **Marketing**

TARIS Sultana Raisin Cooperative and the Izmir Commodity Exchange are the two price determining organizations in the market. The former announces the advance procurement prices in the beginning of the season and the latter is the main cash market for raisins. Generally, TARIS purchases around 15-20 percent of total production. The cooperatives of the union are spread across the Aegean region, located in the western part of Turkiye. The vineyards of TARIS members have a good reputation for high yields and the quality of their product.

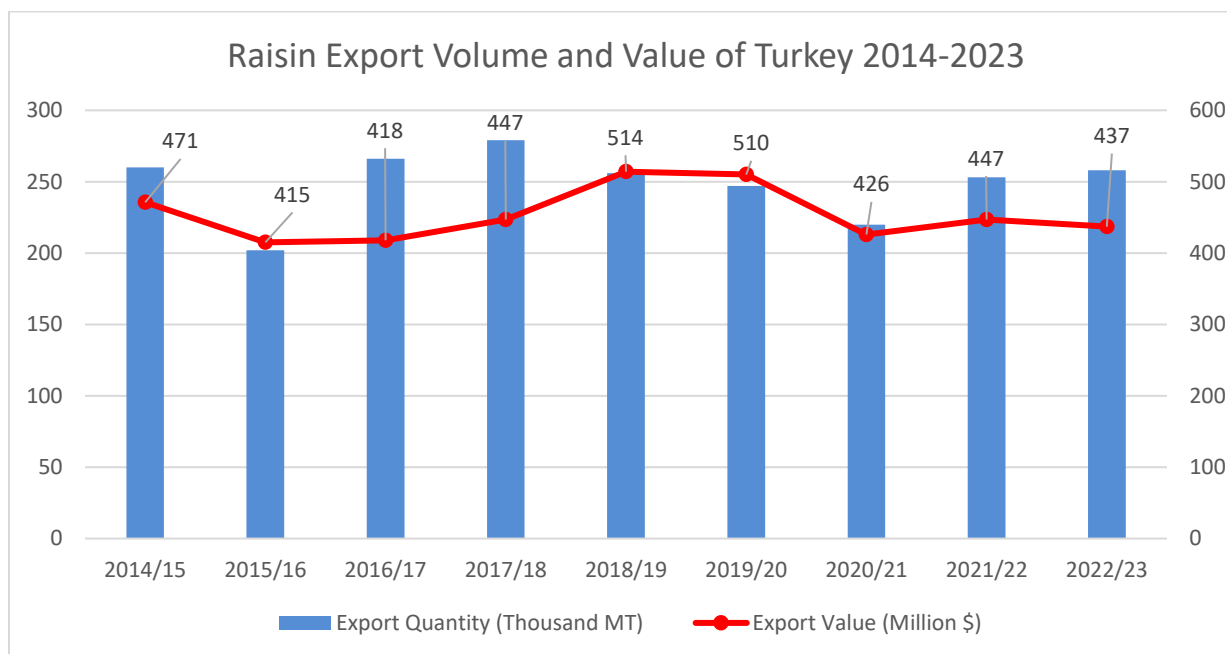
According to TARIS, seedless grapes are generally grown on small farms averaging about 1.3 hectares. They estimate that nearly 65,000 growers produce seedless grapes in Turkiye, and about half of all raisin producers are members of TARIS. Each year, TARIS announces a procurement price for raisins, which also serves as a support price. TARIS is required to buy raisins from its members, but members are free to sell to other buyers, and they often do. TARIS is the largest exporter of raisins from Turkiye. Although there are numerous firms in the dried fruit processing and export business in Turkiye, the top ten firms are estimated to control about 80 percent of the raisin export market.

## **Trade**

In MY 2023/24, raisin exports are forecast at 220,000 MT due to lower production numbers. Turkiye has experienced stable demand for raisins from EU countries over the years, and this year's below average production is still expected to find demand in the market. Furthermore, the Turkish Lira (TL) is still weak compared to other currencies, which supports demand in export markets.

Turkiye is the world's leading raisin exporter, accounting for about 30 percent of total global raisin exports. Over the last ten years Turkiye exported approximately 240,000 MT of raisins per year, worth an average of \$458 million annually (see Figure 6).

**Figure 7. Raisins Export Volume and Value of Turkiye (2014-2023)**



Source: Trade Data Monitor, LLC, 2024

**Table 1. Raisin Exports of Turkiye 2018-2023 (HS:080620)**

Turkiye's Raisin Exports to World 2018-2023 (MT)					
Partner	2018/19	2019/20	2020/21	2021/22	2022/23
United Kingdom	71,539	73,760	66,526	65,492	64,114
Germany	29,168	28,281	28,113	35,421	31,341
Netherlands	26,181	24,583	21,915	23,562	31,311
Italy	18,645	18,657	16,940	19,690	17,193
France	16,404	15,002	15,567	15,871	16,237
Australia	16,176	12,697	11,181	17,638	11,220
Canada	8,094	8,376	6,562	8,471	8,879
Japan	5,987	5,414	5,025	6,007	8,513
Spain	7,443	7,510	5,809	7,207	8,038
Poland	4,092	4,404	4,067	5,706	6,757
<b>World</b>	<b>255,762</b>	<b>246,296</b>	<b>220,240</b>	<b>253,321</b>	<b>257,924</b>

Source: Trade Data Monitor, LLC, 2024

EU countries and the United Kingdom are the top export destinations for Turkish raisins, with Australia and Canada also in the top ten. Table 1 shows the top 10 export destinations for Turkish grapes over the last five years in descending order. The United Kingdom (25 percent), Germany (12 percent), and the Netherlands (12 percent) are the top three countries for Turkish raisin exports.



**Attachments:**

No Attachments.