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Report Highlights:

Marketing Year (MY) 2025/26 has been marked by unprecedented agricultural challenges in Türkiye, with severe frost, drought, hail, and excessive rainfall significantly impacting fruit production. Cherry production is forecast to decline by 60 percent to 400,000 MT, while peach and nectarine production is expected to drop by 45 percent to 649,000 MT. These losses have driven domestic prices higher and reduced export volumes, as growers prioritize local markets. Despite advancements in modern farming techniques, small-scale farmers continue to struggle due to rising input costs and limited access to insurance. The Turkish government is providing compensation through TARSIM and subsidies to registered farmers, but the scale of the disaster underscores the need for further support and resilience-building measures in the agricultural sector.

Sweet and Sour Cherries

Planting Area

The Marketing Year (MY) 2025/26 area planted in cherries – both sweet and sour – is forecast slightly lower than the previous year at 95,000 hectares (ha). This forecasted area is made up of 76,000 ha of sweet cherries and 19,000 ha of sour cherries. For the last decade, the total area planted in cherries has hovered around 100,000 ha.

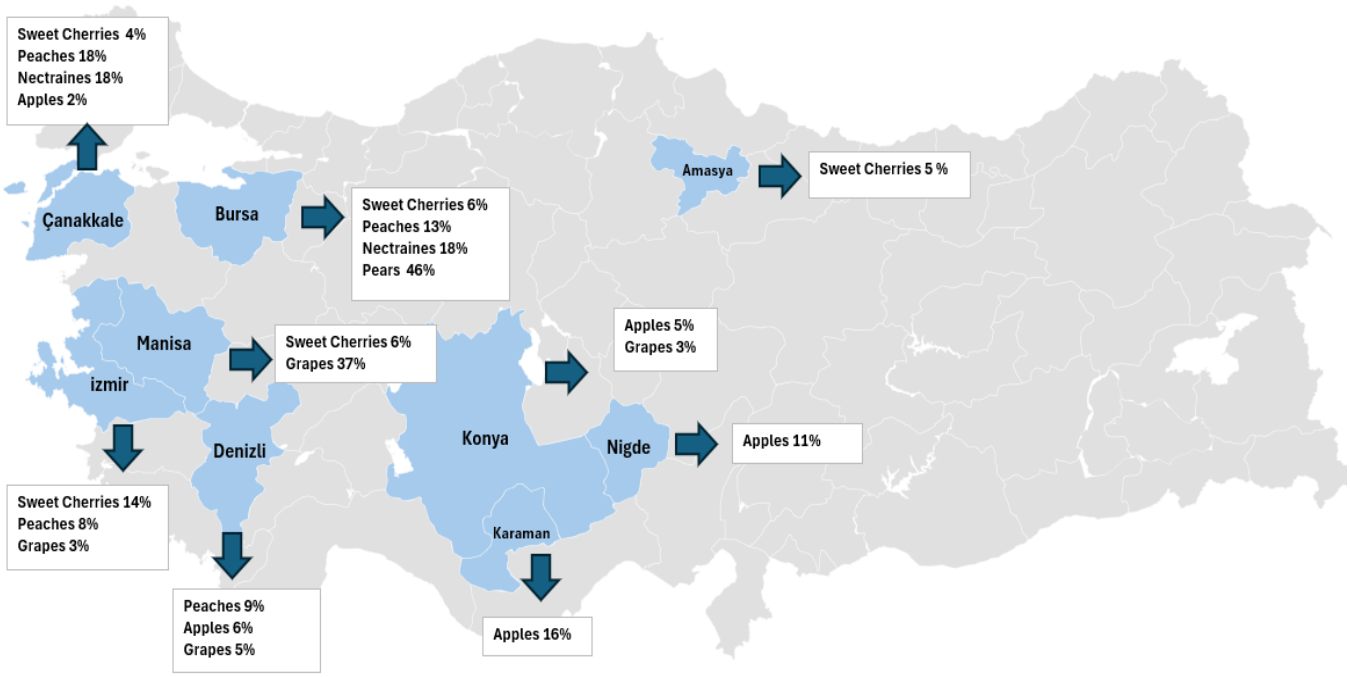
Although the area planted has remained fairly constant during this period, the number of sweet cherry bearing trees has slightly increased (i.e., densification) as growers have modernized their operations. According to Turkish statistics, the number of sweet cherry bearing trees is around 21 million in 2025, while the number of sour cherry bearing trees is around 5 million.

Türkiye is home to more than 100 varieties of sweet cherries. The most popular variety is the Napolean, known locally as the *0900 Ziraat*. It is a large, juicy, heart-shaped cherry that has a longer shelf life than other varieties, making it the ideal cherry for shipping long distances domestically and abroad. Over the last decade, Turkish scientists have developed higher yielding and better-quality Napolean cherries, and growers have gradually replaced the older variety with newer, improved versions. In addition to the Napolean cherry, growers have also started experimenting with other high yielding sweet cherry varieties, such as Early Burlat, Van, Bing, Vista, Noir De Guben, Noble, Lamber, Sweetheart, Celeste, Early Lory, Kordia, Regina, and Stella.

Production

For MY 2025/26, Post forecasts total cherry production at 400,000 MT, which is down around 60 percent from last year's production due to the severe frost which occurred in March and April 2025. The frost impacted 36 provinces and led to significant losses in products in stone fruit production.
The Turkish Statistical Institute (TurkSTAT) has released its agricultural production estimate for 2025, revealing a significant decline in output due to adverse weather conditions experienced in late 2024 and early 2025. Drought, agricultural frost, excessive rainfall, and hail have severely impacted production, with losses in the fruit sector projected to reach as high as 60 percent. Post contacts characterized this year's frost as a natural disaster, and the most severe frost the country has experienced in the past 30 years (Figure 1).

Figure 1. Top fruit producing provinces and percent production affected by frost damage



Source: FAS/Turkiye 2025

The total forecasted cherry production for MY 2025/26 includes 300,000 metric tons (MT) of sweet cherries and 100,000 MT of sour cherries. This forecast is based on field visits and discussions with cherry growers. In comparison, the TurkSTAT projects total cherry production at 436,000 MT, or 322,000 MT of sweet cherries and 114,000 MT of sour cherries. However, due to this year's unusual weather patterns, accurately predicting production remains challenging, and the standard deviation in this year's estimates is expected to be higher than usual.

Cherry production is mainly concentrated in western Türkiye. The coastal province of Izmir and the inland province of Afyonkarahisar are the two leading areas for sweet and sour cherry production, respectively (Figures 2, 3). The marketing year for cherries in Türkiye begins in May and lasts through early August. The exact timing of the cherry season can vary depending on the region and weather conditions, but generally, the peak harvest period begins in June. The cherry harvest first starts in Izmir, located on the Aegean coast in late May, and later moves to the inland provinces like Afyonkarahisar and Konya in June and July.

Figure 2. Top Sweet Cherry Producing Provinces in Türkiye

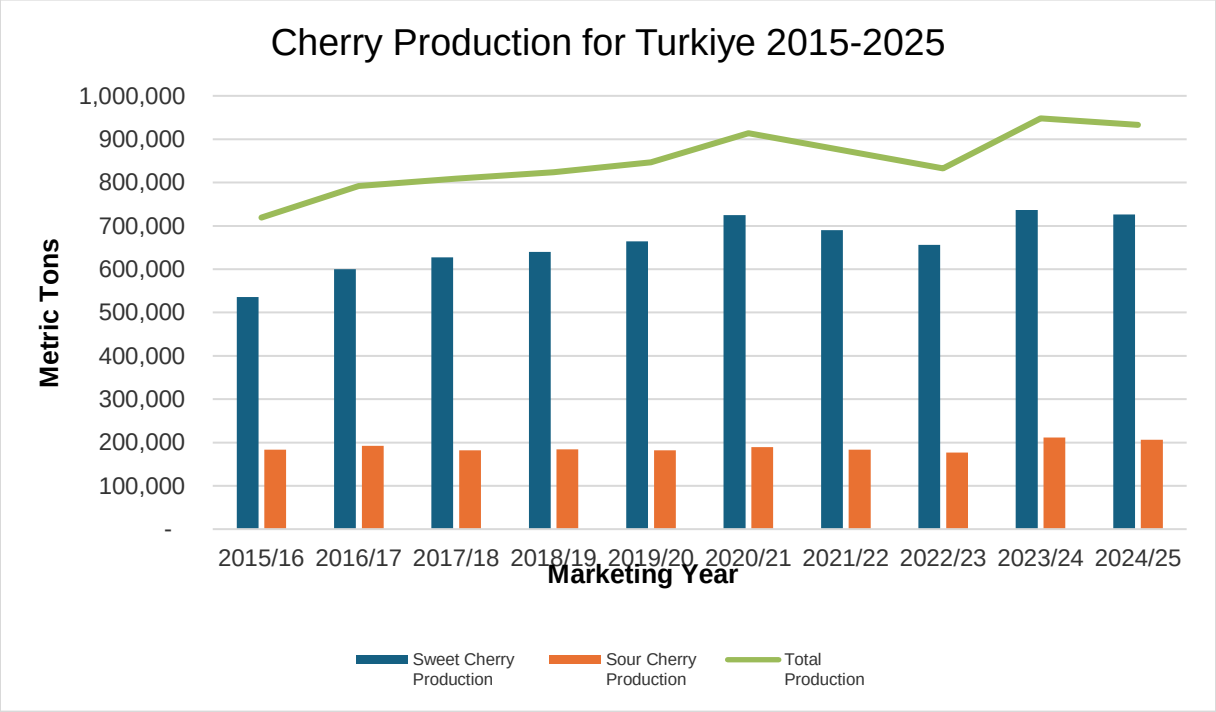
Source: TurkStat, 2025

Figure 3. Top Sour Cherry Producing Provinces in Türkiye

Source: TurkStat, 2025

The price of on-farm inputs, such as labor, energy, and fertilizer, continues to increase because of persistent inflationary conditions in Turkiye. Labor accounts for the biggest share of overall input prices, costing around 1,500 TL ($36.89) per day. Amid these higher costs, some growers, especially smaller operations, are struggling to stay profitable.

Figure 4. Cherry Production of Türkiye 2015-2025



Source: TurkStat, 2025

Strong export demand in recent years has been the driving force behind increased cherry production, which has increased 63 percent over the last decade (Figure 4). This increase is mostly coming from expanded sweet cherry production, a sizeable share of which is exported. The production of sour cherries, however, remains steady, as the fruit is used primarily in the juice and jam industries in Türkiye.

Türkiye has been slowly transitioning from traditional to modern cherry production, including the development of modern, high-density orchards with the latest high-yielding varieties and using the latest technologies. However, even with these continuous advancements, most cherry production is still carried out using traditional methods on family-owned farms.

Consumption

In MY 2025/26, domestic cherry consumption is forecasted at 390,000 MT, down from last year's record by about 60 percent. This decline is partially attributed to the expected drop in production due to severe frost damage. The MY 2024/25 consumption estimate is revised higher to about 866,574 MT to account for the adjustment to production volumes for that year.

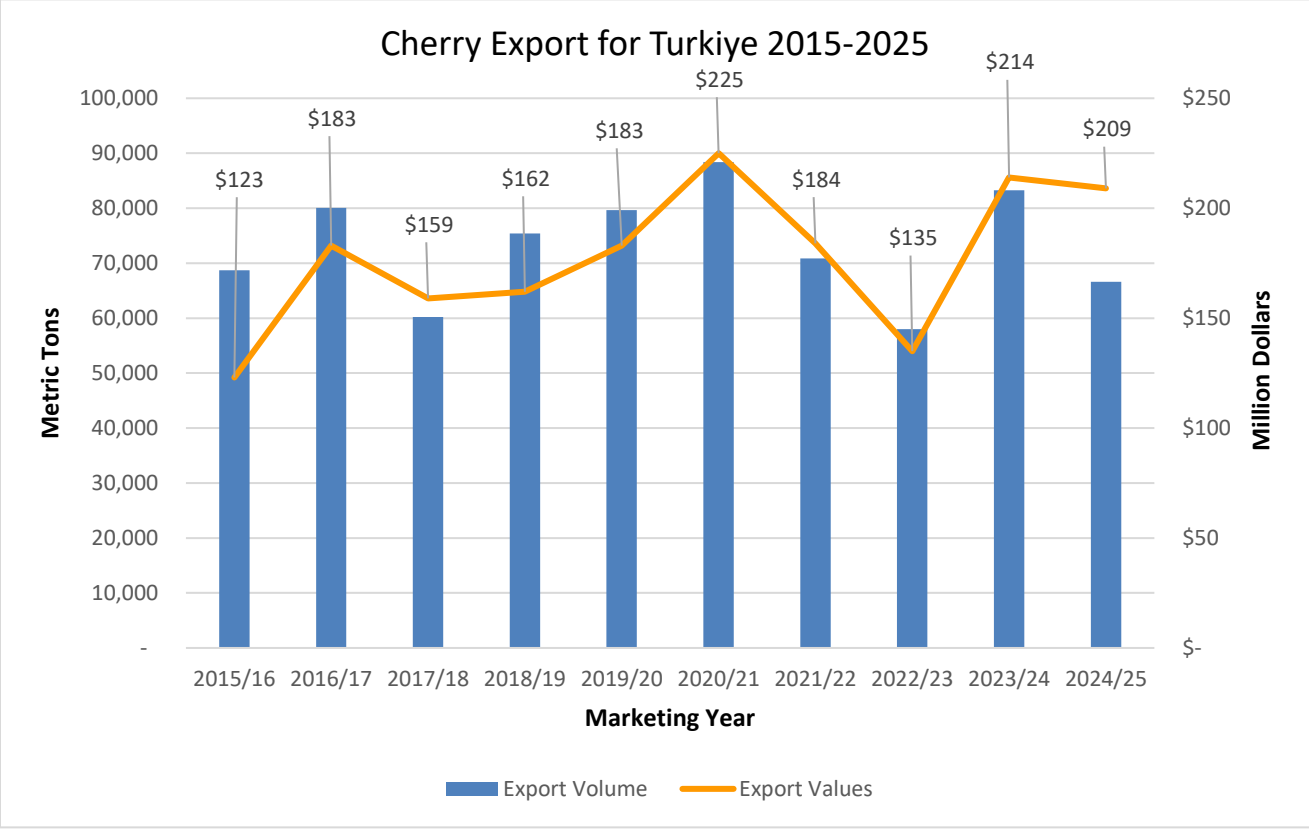
There are over one hundred different varieties of cherries that are grown and consumed in Turkiye. Most sweet cherries are eaten fresh whereas 90 percent of sour cherry production is used to make canned products, marmalades, frozen fruits, and juice.

In MY 2025/26, the farmgate price for sweet cherries was around 200 TL Turkish Lira (TL) per kilogram (kg) ($4.93/kg), while the retail price ranged from 400-500TL per kg ($7.39-$12.32/kg). Retail prices for sour cherries were between 350-400 TL per kg ($2.59-$4.46).

Trade

In line with the significant decline in production, Post forecasts fresh cherry exports for MY 2025/26 to drop sharply to 10,000 MT, marking an unprecedented decrease compared to previous years. Farmers are likely to prioritize selling their cherries in the domestic market, where reduced supply has driven prices higher compared to previous years. Additionally, the Turkish Central Bank's efforts to stabilize inflation by exerting downward pressure on the dollar exchange rate have made Turkish cherry producers less competitive in international markets. With the lower exchange rate, producers struggle to cover their production costs at the prices offered in export markets. The top three export destinations for Turkish cherries in MY 2024/25 were Germany, Russia, and Poland (Table 1). Uzbekistan and Iran are Turkiye's primary competitors in cherry production and have capitalized on reduced output this year by offering their cherries at more competitive prices.

Figure 5. Türkiye's Cherry Export Volume and Value 2015-2025



Source: Trade Data Monitor, LLC, 2025

Table 1. Fresh Cherry Exports of Türkiye 2020-2025

Türkiye's Cherry Exports to World 2019-2024 (MT)					
Partner	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Germany	25,894	24,558	15,343	26,673	31,460
Russia	29,788	23,116	25,169	22,638	16,817
Poland	449	912	220	1,638	3,010
Iraq	7,243	7,128	7,813	10,131	2,590
Netherlands	2,142	2,241	1,117	2,028	1,728
Italy	2,754	1,154	20	2,443	1,093
Spain	988	79	-	880	1,011
Bulgaria	216	536	246	3,103	944
Norway	1,523	1,520	1,157	1,084	931
Denmark	1,239	1,031	1,013	905	789
Others	15,276	8,674	5,817	11,929	6,253
World	87,512	70,949	57,915	83,452	66,626

Source: Trade Data Monitor, LLC, 2025

Marketing

In recent years, there has been a considerable increase in the amount of domestic and international marketing for Turkish sweet cherries. To complement these expanded marketing efforts, Turkish businesses have made new investments in cold storage and packaging operations to get fresher cherries and cherry-containing products into the hands of consumers. At the same time, farmers are producing sweet cherry varieties demanded by export markets and a greater number of Turkish companies are more familiar with exporting cherries than in the past.

Fresh Peaches and Nectarines

Planting Area

Peach and nectarine growers have gradually been replacing older varieties with new, higher yielding ones and have invested in modern, high-density orchards that use the latest technology and growing techniques. The use of modern technology and the switch to higher yielding trees has led to an increase in the production of higher quality fruit. In the case of peaches, these changes have made it possible over the last five years to expand production without significant increases to the planted area.

In contrast to peaches, the area and number of nectarine trees has expanded in response to growing demand from both domestic and foreign markets. In recent years, the number of nectarine orchards in the southern coastal province of Mersin have rapidly grown due to favorable growing conditions and because the province has the logistical advantage of being able to readily ship through the nearby Port of Mersin, a major Mediterranean port. This year, Post visited the Mersin-Adana region and observed significant investment in peach and nectarine orchards. A new generation of farmers, highly educated and deeply knowledgeable, is transforming agriculture into a modern, industry-driven enterprise. These individuals have inherited traditional family farms and reimagined them as cutting-edge orchards, employing advanced technologies and innovative cultivation methods. Their investments in new peach and nectarine orchards reflect a forward-thinking approach, including experimentation with new fruit varieties to enhance productivity and quality.

Peaches and nectarines are mainly grown in coastal areas in the western and southern parts of the country. The top producing provinces are Mersin, Canakkale, Bursa, and Izmir on the Aegean and Mediterranean seas (Figures 6, 7). A significant share of the production of nectarines and peaches in Izmir are exported, since the province is home to a major seaport that makes exporting logistically easier.

The marketing year for peaches and nectarines in Turkiye starts in April, with the harvest running from May to early October. Most of the peach varieties planted in Türkiye are Early Amber, Spring Crest, May Crest, Red Haven, and Early Red.

Figure 6. Top Peach Producing Provinces in Türkiye

Source: TurkStat, 2025

Figure 7. Top Nectarine Producer Cities of Türkiye

Source: TurkStat, 2025


Photos from Post's field trip to Mersin province in 2025

Photos from Post's field trip to Mersin province in 2025

Production

MY 2025/26 will be remembered as the "year of disasters" in Turkish agriculture. During the first 4 months of the year, agricultural areas were affected by drought, frost, hail, storms, and excessive rainfall. Undoubtedly, the event with the most negative impact was the frost that occurred between April 9-13, 2025.

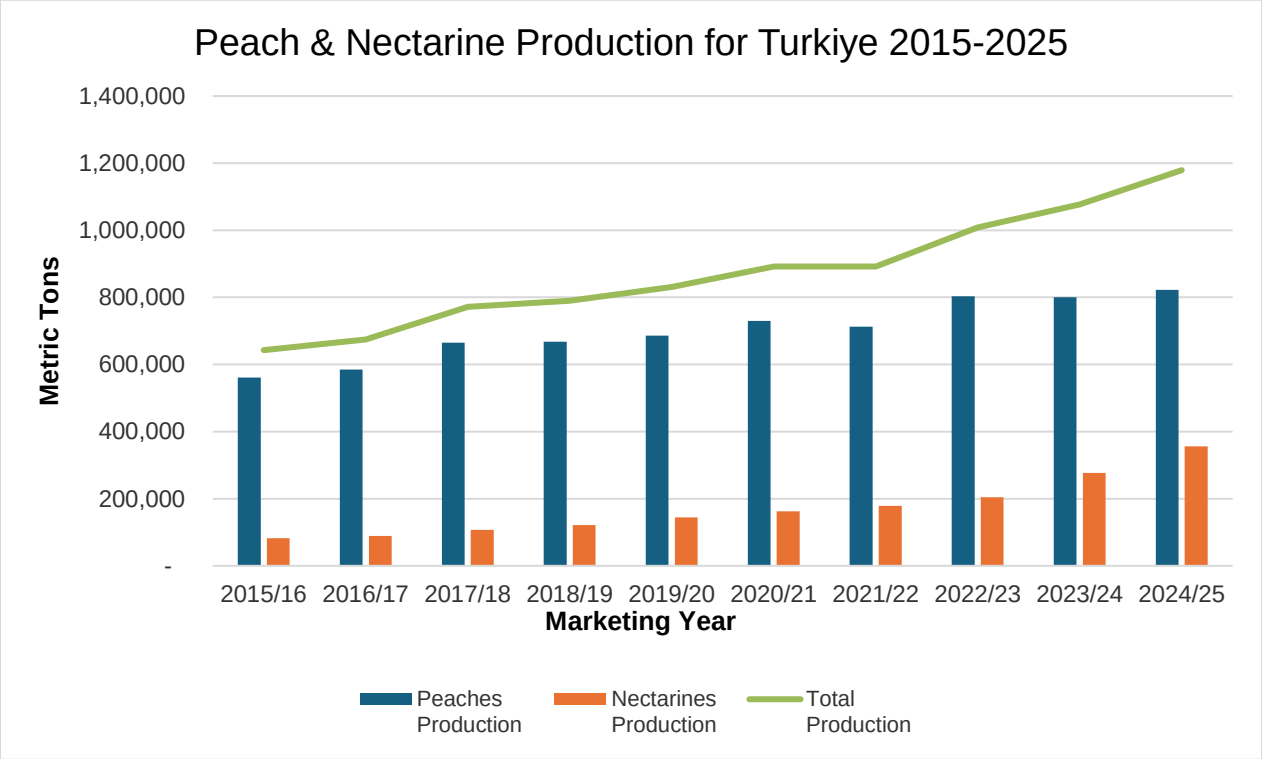
For MY 2025/26, Post forecasts total peach and nectarine production below by 45 percent to 649,00 MT due to the unexpected spring frost. For reference, TurkStat's production forecast is slightly higher at 788,500 MT. Post lowered its MY 2024/25 production forecast to about 1.18 MMT to align with TurkStat's official number.

Peaches and nectarines are predominantly cultivated in the coastal regions of western and southern Türkiye. The provinces of Mersin, Çanakkale, Bursa, and Izmir, situated along Türkiye's Aegean and

Mediterranean coasts, are among the country's leading agricultural producers. Bursa, which typically yields approximately 100 metric tons (MT) of peaches annually, is projected to experience a 50 percent decline in production this year. During a recent visit to the Mersin-Adana region, which accounts for 53 percent of Türkiye's nectarine production, farmers reported devastating losses from the spring frost, with up to 90 percent of their nectarine harvest destroyed. Describing the event as a natural disaster, farmers noted that temperatures in the region dropped to an unprecedented minus 9 to minus 11 degrees Celsius for an entire week in April. This extreme cold is highly unusual for the southernmost part of Türkiye, which is typically characterized by a warmer climate.

Peach and nectarine production has been trending upward for the better part of the last decade as farmers have modernized their orchards and switched to newer, higher yielding trees. Nectarine production, however, has almost doubled in the last five years as Turkish growers expanded their operations in response to strong domestic and international demand for nectarines (Figure 8).

Figure 8. Production of Peaches and Nectarines for Türkiye 2015-2025



Source: TurkStat, 2025

Consumption

In MY 2025/26 domestic consumption of peaches and nectarines is forecast at 505,000 MT, which is down year-over-year by about 50 percent due to expected lower production. Post is revising the MY 2024/25 estimate to about 917,205 MT based on TurkStat's most recent estimate.

In recent years, nectarine consumption has really grown as consumers are interested in eating new fresh fruits and eating healthier. Most nectarines and peaches are consumed fresh. Approximately 15 percent of all peach products are used for juice. Turkish consumers prefer to drink peach, cherry, and apricot nectar, which is a beverage made with 25-99 percent fruit concentrate. While nectars are very popular, there is a growing trend towards 100 percent fruit juices. Peaches are also used to make canned products, marmalades, and are sold frozen.

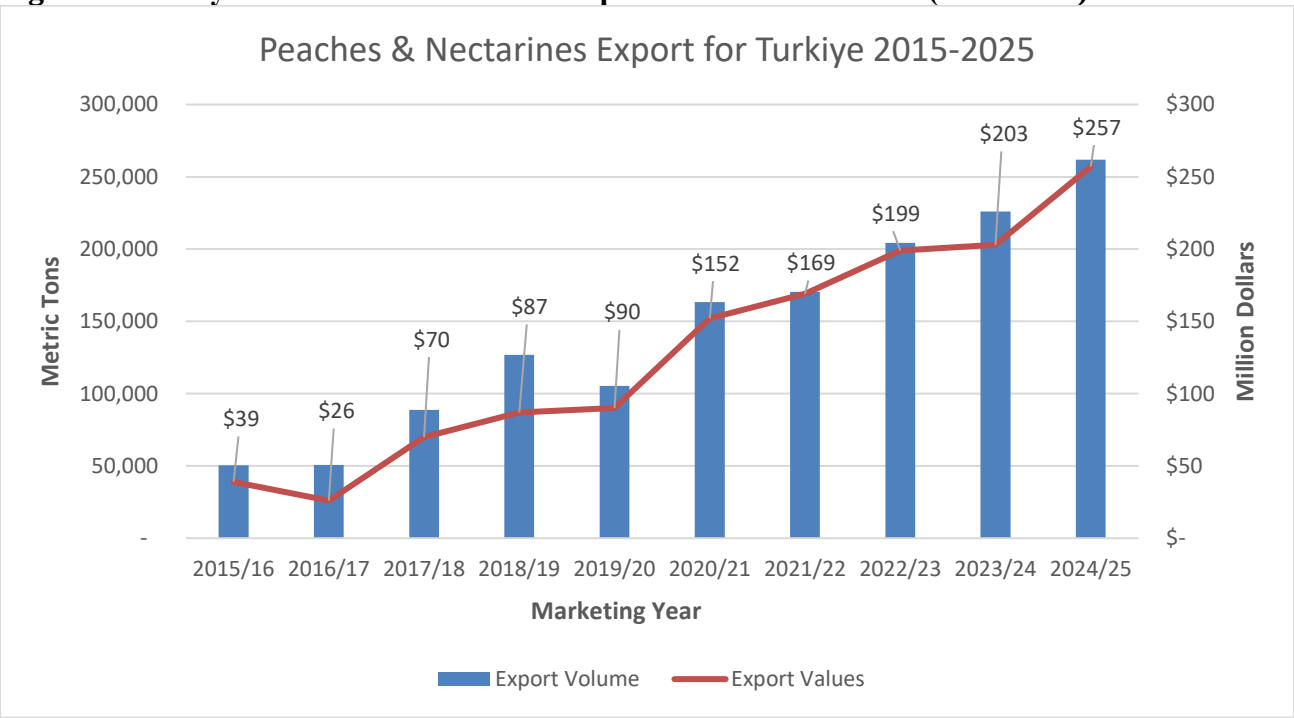
In MY 2025/26, the farmgate price for peaches and nectarines ranges from 35-40 TL Turkish Lira (TL) per kilogram (kg) ($0.86-0.98/kg). The retail price for peaches ranges from 80-150 TL per kg ($1.97-$3.69), while nectarines retail for 100-200 TL per kg ($2.46-$4.92/kg).

Trade

Marketing year 2025/26 Post forecasts for fresh peach and nectarine exports decreased year-over-year to 144,000 MT. This projected decrease in exports is primarily due to the decrease in production. Domestic market prices are currently higher than international prices due to decreased production, while the relatively low exchange rate further limits export opportunities. These factors will collectively contribute to the decline in exports in MY 2025/26.

For the past decade, Türkiye's exports of fresh peaches and nectarines have steadily climbed higher (Figure 9). In the last five years alone, exports have more than doubled as Turkish growers have expanded production to meet increased domestic and foreign demand. Russia, Iraq, and Romania were the main destinations for Turkish peaches and nectarines in MY 2024/25 (Table 2). Türkiye continues to be among the top ten exporters in the world for fresh peaches and nectarines.

Figure 9. Türkiye's Peach and Nectarine Export Volume and Value (2015-2025)



Source: Trade Data Monitor, LLC, 2025

Table 2. Fresh Peaches and Nectarines Export of Türkiye 2020-2025

Türkiye's Fresh Peaches and Nectarines Exports to World 2018-2023 (MT)					
Partner	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Russia	118,162	118,407	153352	148,396	161,627
Iraq	9,611	12,484	14,841	20,725	29,502
Romania	6,204	9,697	5,466	14,110	19,185
Ukraine	7,678	13,149	6,837	13,394	13,892
Syria	3,057	3,611	6,946	5,260	8,881
Belarus	1,658	1,445	2,758	2,739	3,107
Saudi Arabia	2,303	-	2,537	1,923	2,364
Croatia	1,266	564	1,090	1,503	2,222
Poland	478	568	517	1,406	2,084
Cyprus	999	937	969	1,317	1,495
Others	11,966	9,555	8,897	15,191	17,547
World	163,382	170,417	204,210	225,964	261,836

Source: Trade Data Monitor, LLC, 2025

Marketing

Reduced production has driven up domestic market prices while significantly lowering export volumes. This year stands out as exceptional in terms of production quantities, pricing, and export performance. Traders have shifted their focus away from export markets, prioritizing local consumption instead.

In MY 2024/25, Türkiye exported $261 million worth of peaches and nectarines, which is about $11 million more than the previous marketing year. According to the Vice President of the Aegean Exporters Association, exports of these fruits could reach as much as $500 million if Turkiye gains market access to Asian markets.[1] Increased marketing efforts will play an important role in reaching this export goal. In recent years, demand for nectarines has increased sharply in both domestic and international markets, as they are considered easier to consume compared to peaches since they are less juicy and messy. Also, nectarines are easier to store and distribute, since they are less likely to bruise during harvest and transportation.

Stone Fruit Policy

Marketing year 2025/26 has posed significant challenges for the Turkish government due to widespread agricultural disasters. In response to the devastating frost damage, the government is compensating insured farmers through TARSIM[2], a state-owned insurance mechanism designed to protect farmers against crop losses caused by natural disasters. However, only a small percentage of farmers—primarily those engaged in large-scale farming and treating agriculture as an industry—purchased insurance due to high premium costs. Small-scale farmers, unable to afford the premiums, remain uninsured. TARSIM will reimburse insured farmers for their production costs, while the Ministry of Agriculture has announced plans to provide subsidies to all farmers affected by frost damage, provided they are registered in the government system. The specific subsidy amounts have yet to be disclosed.

Over the last decade, larger growers producing stone fruit have gradually modernized and expanded their orchards due to stable demand for their fruit along with continued government support. The Ministry of Agriculture & Forestry (MinAF) provides support payments to farmers and growers who have signed up in an online registration system. Support payments help offset some of the costs of fuel and fertilizer, and also encourage growers to buy government-certified saplings to improve the quality of the fruit being grown in the country.

In 2025 MinAF announced a subsidy for saplings. According to the program, a grower will receive a subsidy of 488 TL/acre ($12) for a regular sapling and 1,220 TL/acre ($30) for a certified sapling. More information can be found at the Ministry of Agriculture and Forestry Website. Despite this assistance, however, some growers complain that it isn't enough to make ends meet.

[1] https://www.eib.org.tr/Sayfa.Asp?SI_Id=5A02DF31AF&HID=6A131F98550A46FB825CC7334D34DF20
[2] https://www.tarsim.gov.tr/

Production, Supply, and Distribution (PS&D) Tables (MT)

Cherries (Sweet&Sour), Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	99200	99202	99300	96753	0	95000
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	27400	27431	28000	26866	0	26000
Non-Bearing Trees (1000 TREES)	6600	6623	6600	6311	0	6000
Total Trees (1000 TREES)	34000	34054	34600	33177	0	32000
Commercial Production (MT)	948082	948082	900000	933200	0	400000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	948082	948082	900000	933200	0	400000
Imports (MT)	10	0	10	0	0	0
Total Supply (MT)	948092	948082	900010	933200	0	400000
Domestic Consumption (MT)	864592	864804	815010	866574	0	390000
Exports (MT)	83500	83278	85000	66626	0	10000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	948092	948082	900010	933200	0	400000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Peaches & Nectarines, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	55900	55928	56000	58000	0	59200
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	21200	21196	23000	22900	0	23300
Non-Bearing Trees (1000 TREES)	5900	5865	5000	5368	0	5200
Total Trees (1000 TREES)	27100	27061	28000	28268	0	28500
Commercial Production (MT)	1076852	1076852	1200000	1179041	0	649000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1076852	1076852	1200000	1179041	0	649000
Imports (MT)	300	160	200	0	0	0
Total Supply (MT)	1077152	1077012	1200200	1179041	0	649000
Domestic Consumption (MT)	851152	851048	950200	917205	0	505000
Exports (MT)	226000	225964	250000	261836	0	144000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1077152	1077012	1200200	1179041	0	649000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments