Required Report: Required - Public Distribution **Date:** August 27, 2026

Report Number: TU2026-0020

Report Name: Stone Fruit Annual

Country: Turkiye

Post: Ankara

Report Category: Stone Fruit

Prepared By: FAS Staff

Approved By: Karisha Kuypers

Report Highlights:

After MY 2025/26's severe frost, drought, and hail devastated orchards nationwide, Türkiye's stone fruit sector is set for a record rebound in MY 2026/27: cherry production is forecast to jump roughly 250 percent to 1 MMT, while peach and nectarine output nearly doubles to 1.2 MMT. This surge has driven consumer prices down nearly 50 percent despite ongoing inflation and lira depreciation, boosting domestic consumption sharply. However, export competitiveness remains strained, as high input costs and an undervalued lira leave Turkish growers struggling to compete with Spain, Italy, Iran, and other rivals—even as fresh cherry and peach/nectarine exports recover from last year's lows.

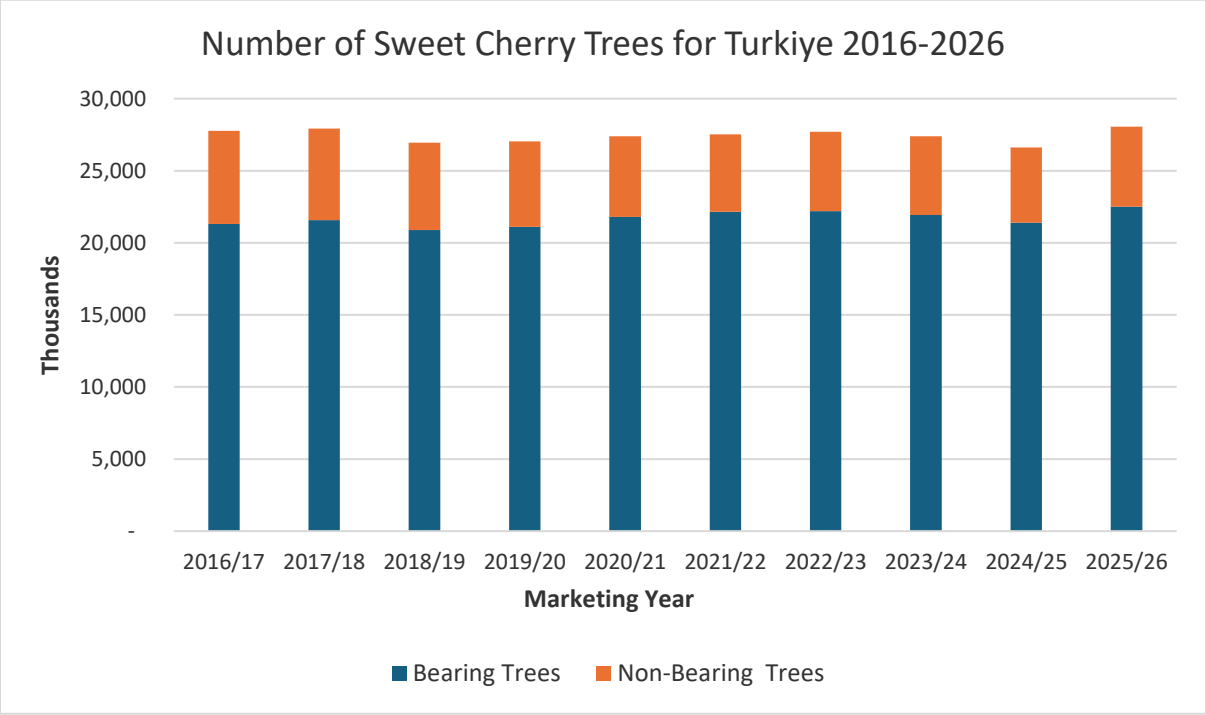
Sweet and Sour Cherries

Planting Area

The Marketing Year (MY) 2025/26 area planted in cherries – both sweet and sour – is forecast similar to the previous year at 95,000 hectares (ha). This forecast 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.

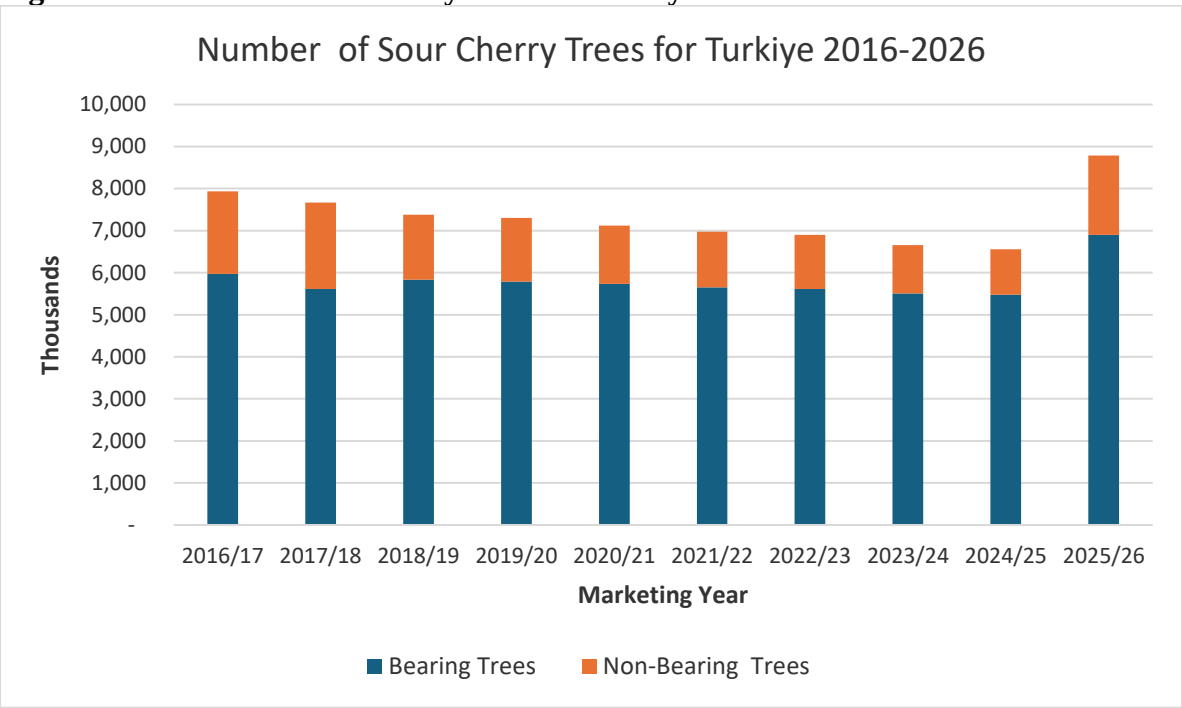
Although the area planted has remained fairly constant during this period, the number of sweet cherry bearing trees has slightly increased (i.e., densification) as growers have modernized their operations. According to Turkish statistics, the number of sweet cherry bearing trees is around 25 million in 2026, while the number of sour cherry bearing trees is around 7 million (Figure 1,2).

Figure 1. Number of Sweet Cherry Trees in Türkiye from 2016-2026



Source: TurkStat, 2026

Figure 2. Number of Sour Cherry Trees in Türkiye from 2016-2026



Source: TurkStat, 2026

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 2026/27, Post forecast total cherry production at 1million metric ton (MMT) an all-times highest record, which is around 250 percent higher from last year's production of 288,000 MT of production. In the 2025/26 season there were extreme weather conditions; drought, agricultural frost, excessive rainfall, and hail severely negatively impacted production, and severe frost which occurred in March and April 2025. The frost impacted 36 provinces and led to significant losses in stone fruit production. Post contacts characterized last year's frost as a natural disaster, and the most severe frost the country has experienced in the past 30 years. After a very bad yield from last year, this year's production is expected to be the highest in the last five years due to the favorable weather and soil conditions.

The total forecasted cherry production for MY 2026/27 includes 750,000 metric tons (MT) of sweet cherries and 250,000 MT of sour cherries. This forecast is based on discussions with cherry growers which is also parallel with TurkSTAT'S projections of total cherry production at 1,032,490 MT.

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 3, 4). 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 3. Top Sweet Cherry Producing Provinces in Türkiye

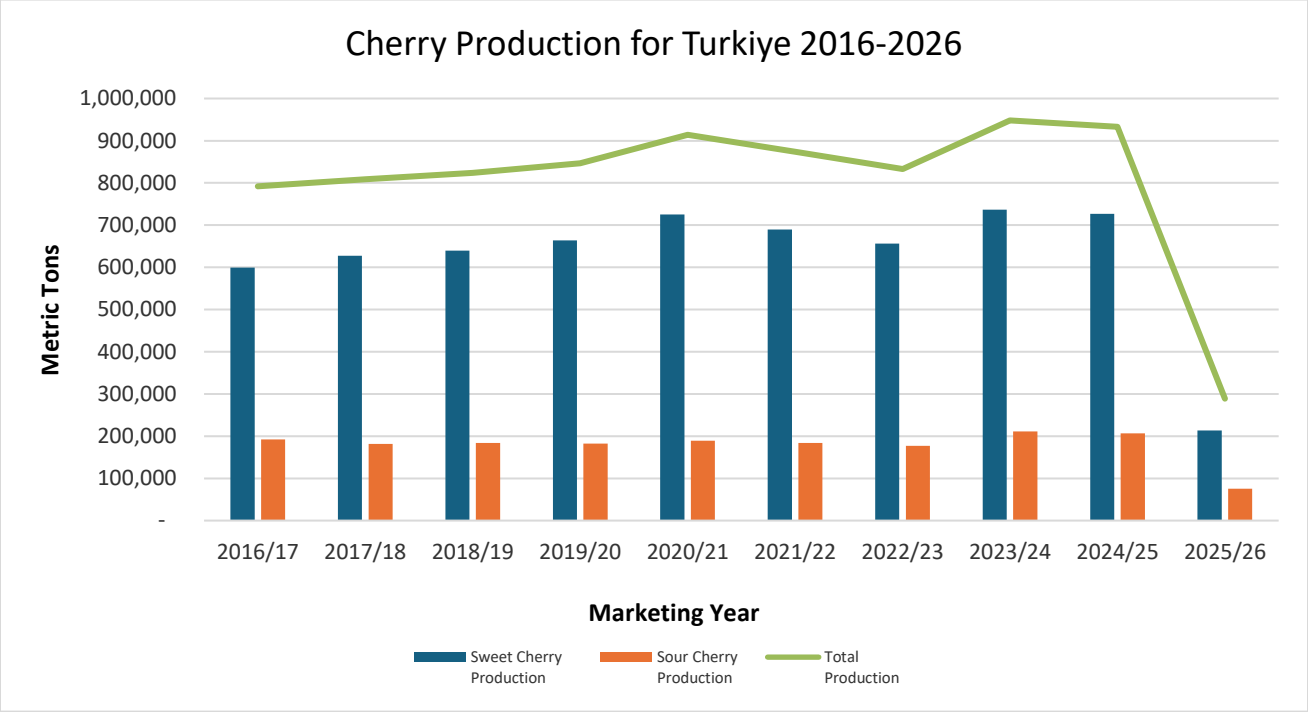
Source: TurkStat, 2025

Figure 4. 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 Türkiye. Labor accounts for the biggest share of overall input prices, costing between 1700TL-2000 TL ($35.60-$41.88) per day. Amid these higher costs, some growers, especially smaller operations, are struggling to stay profitable.

Figure 5. Cherry Production of Türkiye 2016-2026



Source: TurkStat, 2026

Robust export demand in recent years has driven consistently high cherry production (Figure 4). Sweet cherry output is roughly three times that of sour cherries, reflecting stronger local consumption and export preference for the sweet variety. Sour cherry production, by contrast, has remained stable, as the fruit is used primarily by Türkiye's juice and jam industries.

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 2026/27, domestic cherry consumption is forecast at 920,000 MT, nearly three times last year's low consumption level, in line with this year's record production yield. This year's higher production was clearly reflected in the consumption market, as consumers had access to greater volumes of reasonably priced sweet cherries. The MY 2025/26 consumption estimate is revised lower to about 282,400 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 Türkiye. Most sweet cherries are eaten fresh whereas 90 percent of sour cherry production is used to make canned products, marmalades, frozen fruits, and juice.

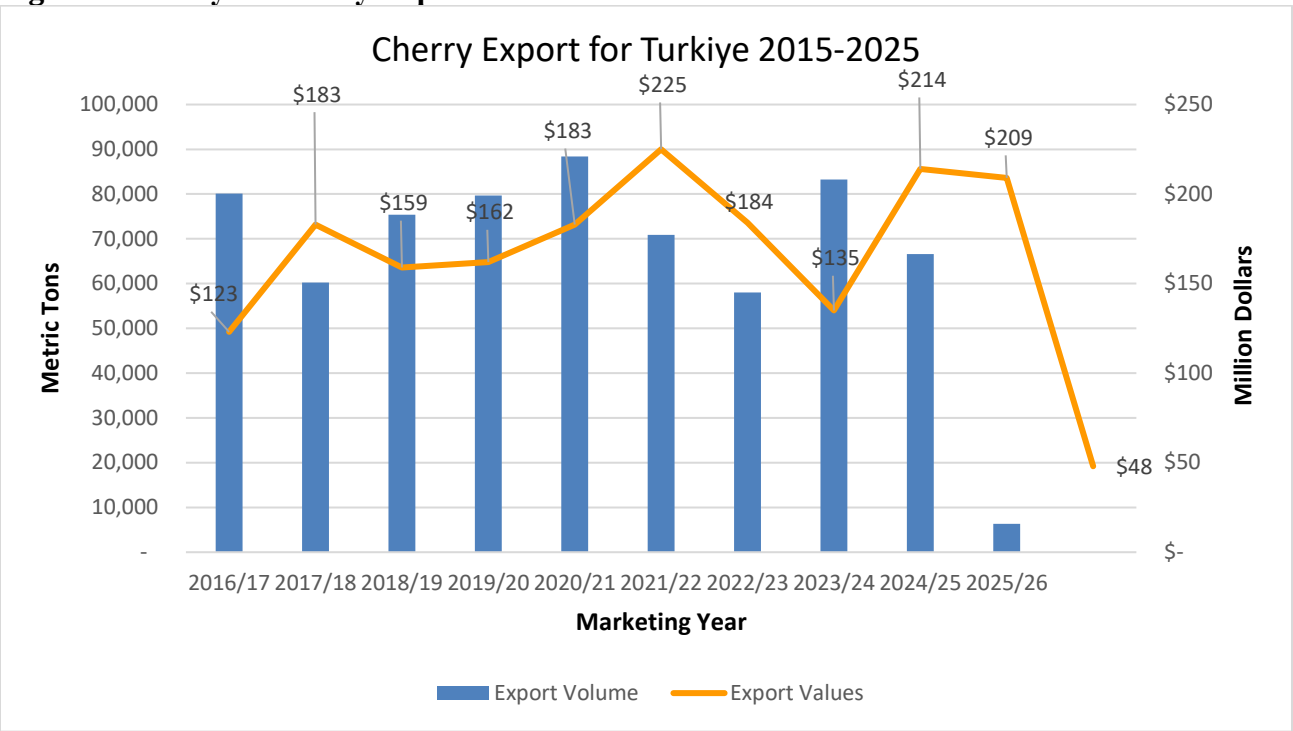
In MY 2026/27, the farmgate price for sweet cherries was around 60 Turkish Lira (TL) per kilogram (kg) ($1.26/kg), while the retail price ranged from 100 TL-150TL per kg ($2.9-$3.13/kg). Retail prices for sour cherries were between 250-300 TL per kg ($5.22-$6.27). ($1 = 47.75 TL as of August 2026). Despite food inflation rising by approximately 37% and the dollar exchange rate increasing by around 18%, both sweet and sour cherry prices fell by nearly 50% compared to last year, driven by the high volume of production

Trade

In line with the significant increase in production, Post forecasts fresh cherry exports for MY 2026/27 to rise to 80,000 MT. In MY 2025/26, fresh cherry exports fell to just 6,344 MT due to extreme weather conditions, a figure well below the ten-year average of 72,000 MT for fresh cherry exports (Figure 6).

Türkiye is one of the world's largest fresh cherry producers, with an average annual production of 700,000 MT, yet only 60,000-70,000 tons of this massive volume are exported. High input costs, combined with an exchange rate that has remained low relative to inflation, have made Turkish producers less competitive in international markets. Over the past two years, the Turkish Central Bank's efforts to stabilize inflation by exerting downward pressure on the dollar exchange rate have further eroded the competitiveness of Turkish cherry producers abroad. With a weaker exchange rate, producers struggle to cover production costs at the prices offered in export markets. Germany, Russia, and Norway were the top three destinations for Turkish cherry exports in MY 2025/26 (Table 1). Meanwhile, Spain, Italy and Iran—Türkiye's primary competitors in cherry production—have capitalized on last year's reduced Turkish output by offering their cherries at more competitive prices. This year's exceptionally high production in competitor countries intensified price competition in the global fresh cherry market, making it increasingly difficult for Turkish producers to sell their fruit abroad.

Figure 6. Türkiye's Cherry Export Volume and Value 2016-2026



Source: Trade Data Monitor, LLC, 2026

Table 1. Fresh Cherry Exports of Türkiye 2021-2026

Türkiye's Cherry Exports to World 2011-2026 (MT)					
Partner	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**
Germany	24,558	15,343	26,673	31,460	2,924
Russia	23,154	25,169	22,638	16,817	1,524
Norway	1,520	1,157	1,084	931	726
Iraq	7,128	7,813	10,131	2,590	317
Poland	912	220	1,638	3,010	139
Denmark	1,031	1,013	905	789	130
Cyprus	238	194	432	403	96
Austria	2,194	407	3,583	406	60
Sweden	1,311	833	500	719	56
Finland	-	-	-	97	50
Others	8,944	5,767	15,879	9,406	326
World	62,046	57,149	83,463	66,628	6,022

Source: Trade Data Monitor, LLC, 2026

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.

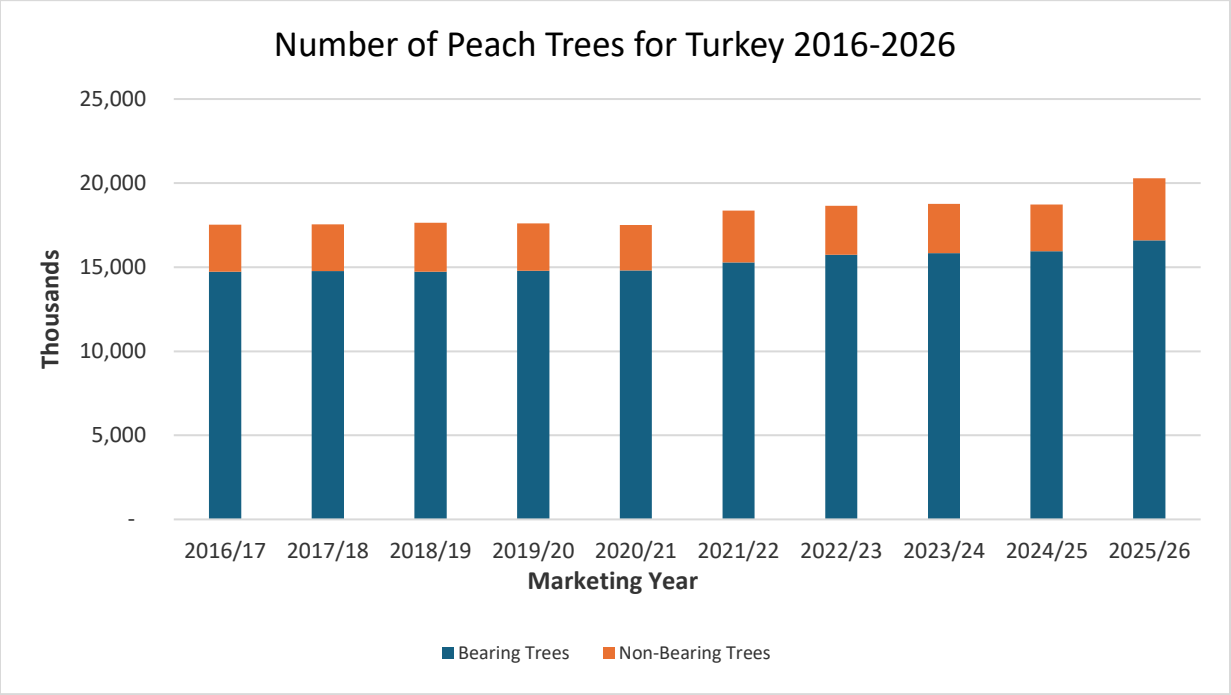
Fresh Peaches and Nectarines

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 have 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.

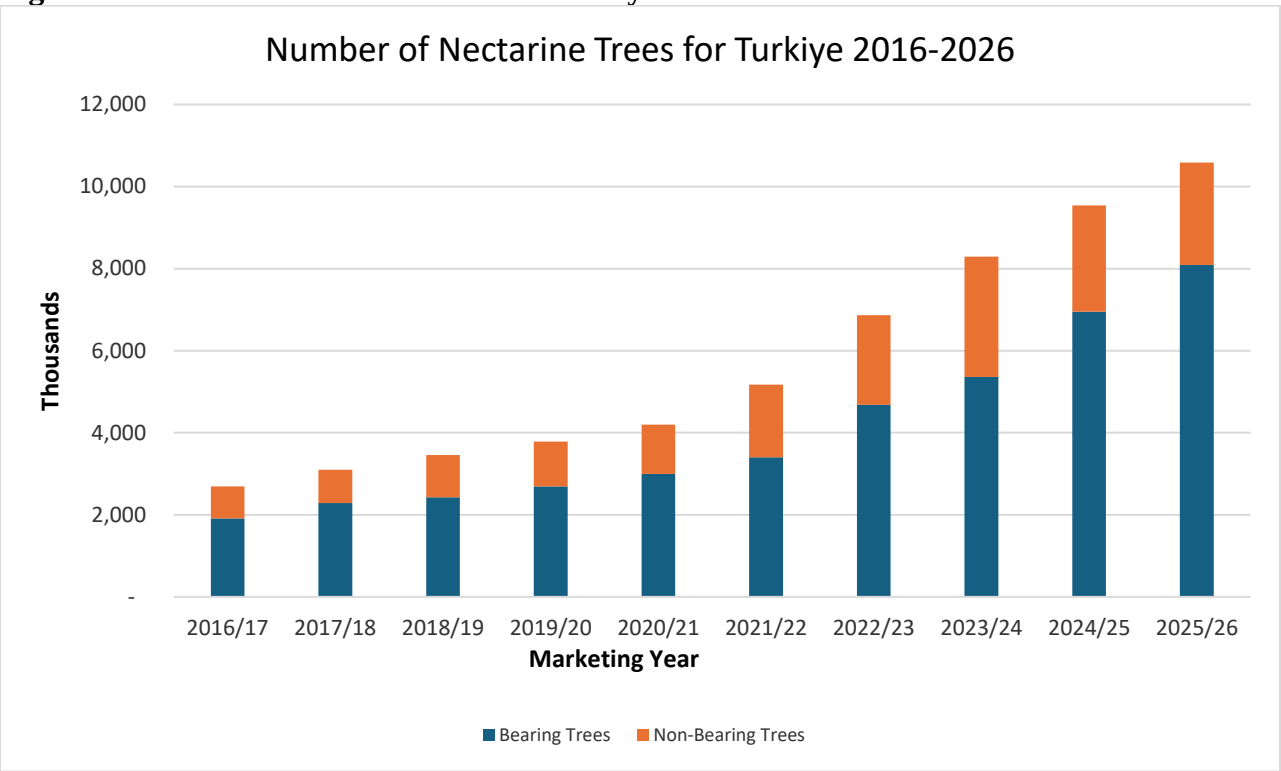
In contrast to peaches, the area and number of nectarine trees have expanded in response to growing demand from both domestic and foreign markets. In recent years, the number of nectarine orchards in the southern coastal province of Mersin have rapidly grown due to favorable growing conditions and because the province has the logistical advantage of being able to readily ship through the nearby Port of Mersin, a major Mediterranean port (Figure 8). Last 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.

Figure 7. Number of Peach Trees of Türkiye from 2016-2026



Source: TurkStat, 2026

Figure 8. Number of Nectarine Trees of Türkiye from 2016-2026



Source: TurkStat, 2026

Peaches and nectarines are mainly grown in coastal areas in the western and southern parts of the country. The top producing provinces are Mersin, Çanakkale, Bursa, and Izmir on the Aegean and Mediterranean seas (Figures 9, 10). 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 Türkiye 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 9. Top Peach Producing Provinces in Türkiye

Source: TurkStat, 2025

Figure 10. Top Nectarine Producer Cities of Türkiye

Source: TurkStat, 2025

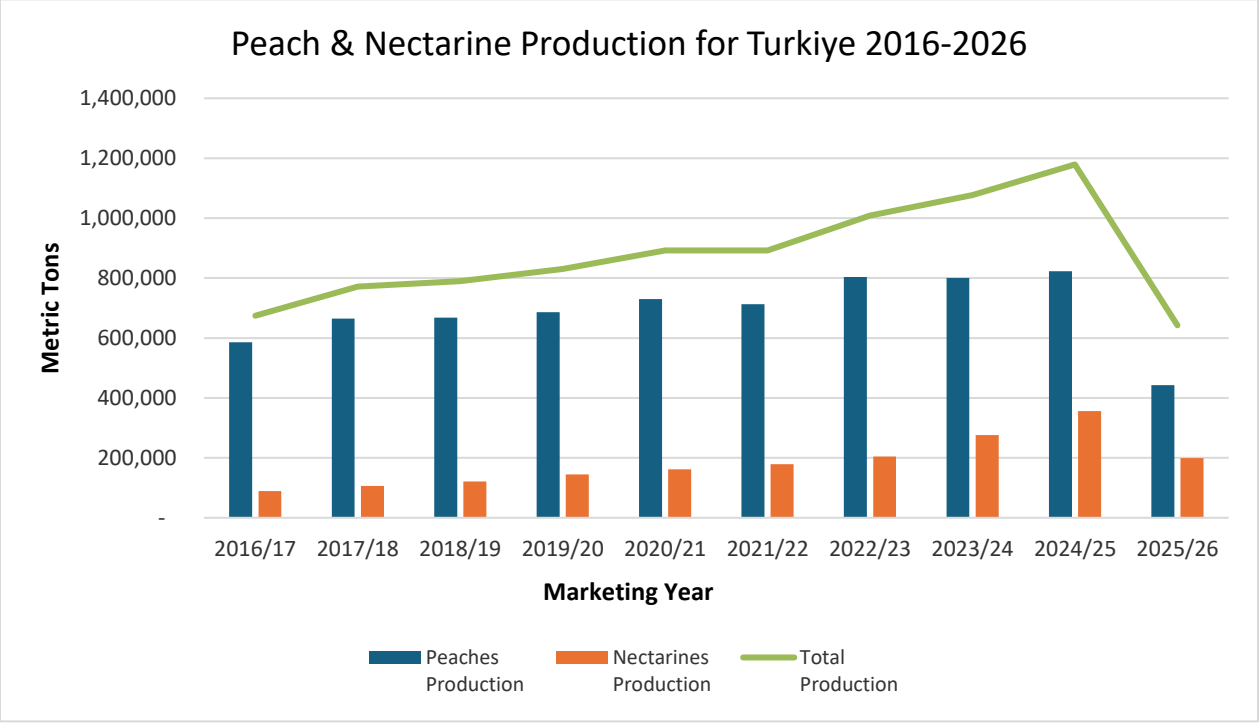
Production

For MY 2026/27, Post forecasts total peach and nectarine production at an all-time record of 1.2 million metric tons (MMT), nearly double last year's output of 642,300 MT—an increase of approximately 87 percent. MY 2025/26 will be remembered as the "year of disasters" for Turkish agriculture. During the first four months of the year, agricultural areas suffered from drought, frost, hail, storms, and excessive rainfall, with the April 9–13, 2025, frost event causing the most severe damage. This year, however, favorable weather and strong yield conditions have driven production to record-breaking levels. TurkStat's production forecast aligns with Post's estimate, similarly projecting output at approximately 1.2 MMT.

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.

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 11).

Figure 11. Production of Peaches and Nectarines for Türkiye 2016-2026



Source: TurkStat, 2026

Consumption

In MY 2026/27, domestic consumption of peaches and nectarines is forecast at 1 MMT, which is 82 percent higher than last year's 555,627 MT consumption in parallel with higher production.

In recent years, nectarine consumption has grown significantly 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 2026/27, the farmgate price for peaches and nectarines ranges from 15-20 TL Turkish Lira (TL) per kilogram (kg) ($0.21-0.42/kg). The retail price for peaches ranges from 60-100 TL per kg ($1.26-$2.09), while nectarines retail for 70-100 TL per kg ($1.47-$2.09/kg). Despite food inflation rising by approximately 37% and the dollar exchange rate increasing by around 18%, both peaches and nectarine prices fell by nearly 50% compared to last year, driven by the high volume of production.

Trade

For MY 2026/27, Post forecasts fresh peach and nectarine exports to increase to 200,000 MT, in line with higher production. While the record production volume could support even higher export figures, Turkish producers—like those in other stone fruit markets—remain constrained by high input costs and an exchange rate that has failed to keep pace with inflation, eroding their competitiveness in international markets.

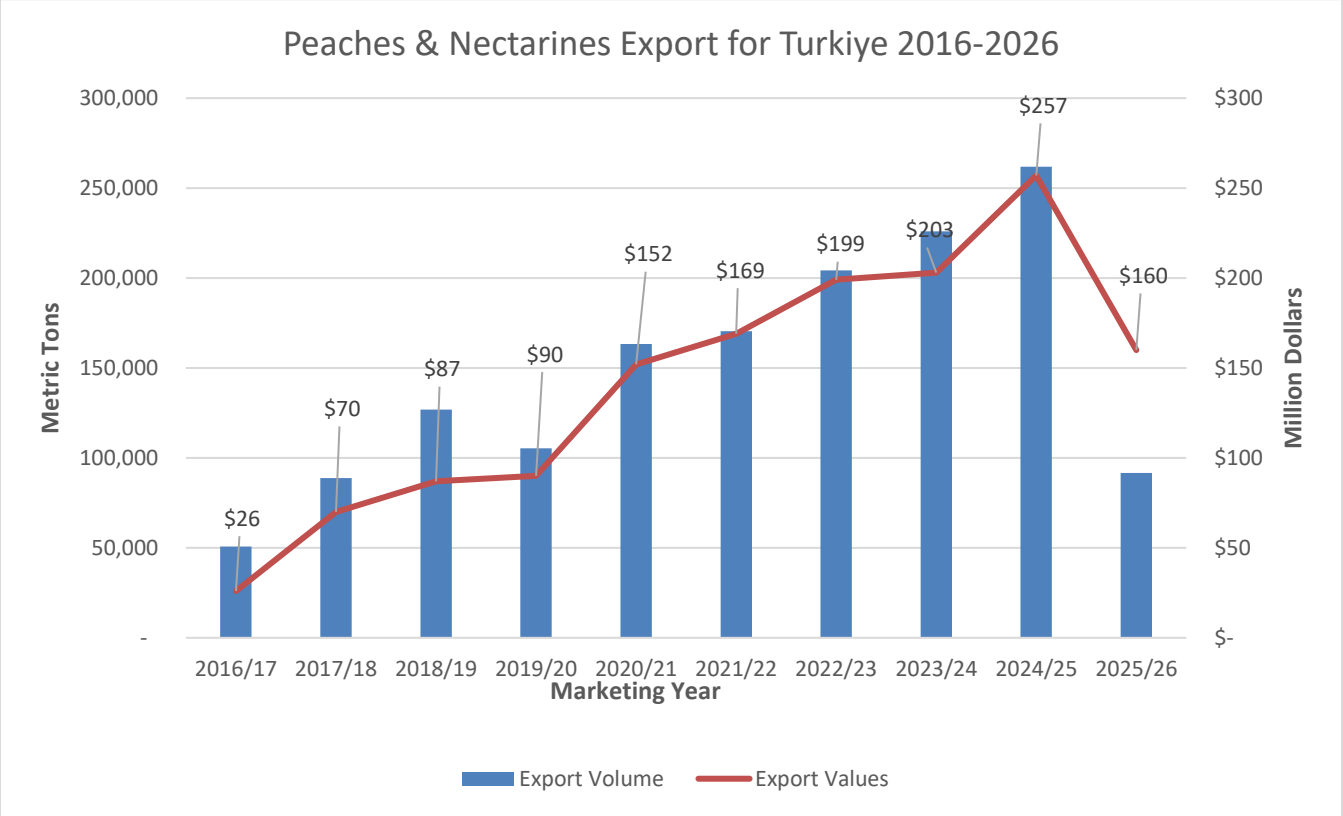
Farmers report that production costs for peaches and nectarines run approximately 18–20 TL per kilogram, while farmgate prices range from only 15–20 TL per kilogram, leaving little to no profit margin. The Central Bank of the Republic of Turkey (CBRT) offers a 3 percent Foreign Exchange Conversion Support to all exporters—including those in the fruit, vegetable, and industrial sectors—when they convert foreign currency earnings into Turkish Lira. However, this support falls far short of offsetting the losses exporters incur due to the Turkish Lira's suppressed value against the U.S. dollar.

For the past decade, Türkiye's exports of fresh peaches and nectarines have steadily climbed higher except for the MY 2025/26 season due to the extreme weather conditions (Figure 12). 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, Romania, Ukraine and Iraq were the main destinations for Turkish peaches and nectarines in MY 2025/26 (Table 2). Türkiye continues to be among the top ten exporters in the world for fresh peaches and nectarines.

In MY 2026/27, production of fresh peaches and nectarines rose sharply across Türkiye's key trade competitors, including Spain, Greece, and Italy, posing an additional barrier to Turkish exports. Compounding this challenge, countries such as Uzbekistan and Azerbaijan have invested heavily in

peach and nectarine production in recent years, gradually capturing a growing share of Türkiye's traditional export markets.

Figure 12. Türkiye's Peach and Nectarine Export Volume and Value (2016-2026)



Source: Trade Data Monitor, LLC, 2026

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

Türkiye's Fresh Peaches and Nectarines Exports to World 221-2025 (MT)					
Partner	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**
Russia	118,407	153,352	148,396	161,627	62,454
Romania	9,697	5,466	14,110	19,185	9,829
Ukraine	13,149	6,837	13,394	13,892	6,324
Iraq	12,484	14,841	20,725	29,502	5,930
Cyprus	937	969	1,317	1,495	1,268
Syria	3,611	6,946	5,260	8,811	800
Germany	1,712	1,007	1,668	1,475	618
Belarus	1,445	2,758	2,739	3,107	493
Latvia	304	566	1,115	1,281	483
Georgia	148	127	591	1,305	379
Others	8,523	11,341	16,649	20,156	3,095
World	170,417	204,210	225,964	261,680	91,673

Source: Trade Data Monitor, LLC, 2026

Marketing

Although production was higher this year, elevated domestic market prices combined with comparatively lower international prices—driven by the Turkish Lira's suppressed value against the U.S. dollar—made the local market more attractive than export markets for peach and nectarine producers. This year stands out as exceptional in terms of production volume, pricing, and export performance. As a result, traders have shifted their focus away from export markets, prioritizing domestic consumption instead.

Stone Fruit Policy

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 the 2026 budget, the agricultural support allocation has been set at approximately 167.6 billion TL ($3.5 million) with the basic support coefficient for crop production determined at 310 TL per decare. In 2026 MinAF also announced a subsidy for saplings. According to the program, a grower will receive a subsidy of 620 TL TL/acre ($13.56) for a regular sapling and 1.550 TLTL/acre ($32.35) 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 is still not enough to make ends meet.

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

Cherries (Sweet&Sour), Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	96800	96753	95000	95000	0	95000
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	26900	26866	26000	29400	0	30000
Non-Bearing Trees (1000 TREES)	6300	6311	6000	7437	0	7000
Total Trees (1000 TREES)	33200	33177	32000	36837	0	37000
Commercial Production (MT)	933200	933200	400000	288800	0	1000000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	933200	933200	400000	288800	0	1000000
Imports (MT)	0	0	10	0	0	0
Total Supply (MT)	933200	933200	400010	288800	0	1000000
Domestic Consumption (MT)	866600	866574	390010	282456	0	920000
Exports (MT)	66600	66626	10000	6344	0	80000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	933200	933200	400010	288800	0	1000000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Peaches & Nectarines, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	58000	58000	59200	58600	0	58600
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	22900	22900	23300	24684	0	25000
Non-Bearing Trees (1000 TREES)	5400	5368	5200	5700	0	5000
Total Trees (1000 TREES)	28300	28268	28500	30384	0	30000
Commercial Production (MT)	1179041	1179041	649000	642300	0	1200000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1179041	1179041	649000	642300	0	1200000
Imports (MT)	30	0	300	0	0	0
Total Supply (MT)	1179071	1179041	649300	642300	0	1200000
Domestic Consumption (MT)	917271	917205	504300	550627	0	1000000
Exports (MT)	261800	261836	145000	91673	0	200000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1179071	1179041	649300	642300	0	1200000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments