

The Frost Report - April 2015

There was a significant frost on the night of the 23rd April in the growing regions. The frost was widespread, and temperatures dropped between -1 to -3 degrees between 4.00 and 6.00 am. There was already some dew on the vines at this time, which resulted in a negative effect, combined with the frost and this effectively burnt the developing bunches and leaves.

The damage is very severe, with some vineyards losing 90% of their bunches. Although this is in extreme cases, very few vineyards have escaped and the extent of the damage is different throughout the growing regions.



All the brown leaves and bunches are frost damaged



In the regions of Ahmetli, Turgutlu, and Sahili, the damage is around 50% on average. In Alasehir, the damage is lower around 15 -20%. In the region of Saruhanli, Akisar and Golmamara, the damage is in the region of 60%.

The above is an estimate and, in some cases, one vineyard has no damage and some have 100%.

There had been another frost a week prior to the frost of the 23rd April, which did some limited damage, but critically hampered new births on the vines. This, combined with the already developing bunches being damaged, has made a huge impact. It is now very unlikely that the vines will have a significant number of new births, and those that are developing are male flowers and will not go on to develop fruit.

On speaking to growers, their view is now more about damage limitation to the vines. In most cases they have written off the crop from this year, and will prune back the dead stems and treat the soil for the 2016 crop in order to protect the vines they have.

As you tour the various areas, it is clear to see where the frost has damaged the vines as they have all turned brown. In the coming days there will be more new vine leaf growth and it will look like that the vines are more healthy again, however this is leaf development and not fruit, so although you can see healthy green vines, the fruit has already been damaged and will not recover.



Good bunch



Frost damaged



Typically the yields from a decare of vines would be 500kg. Last season this was much higher as it was a bumper crop, so we were seeing yields of up to 700kg. This year in the severely damaged vineyards, they will not get more than 100kg.

The growing area is approximately 900,000 hectares, of which we estimate that 360,000 hectare has lost at least 50% due to frost damage. This is effectively 90,000mt of fruit. Those areas less affected, such as Alasehir, which also produce for fresh grape exports, typically 35% would be sold as fresh grapes. With losses of 20% this area, it will now account for half of its production as Fresh as this will take priority, so the availability for dried will be less from this area.

Last year the crop was approximately 320,000 mt. This year, based on an assessment of early development, the crop was not looking as good and was estimated to be around 270,000mt, as well the birth rates were lower.

Using this as a starting point, and applying the level of damage, we do not expect to see a crop greater than 180,000 mt and this is an optimistic figure. We are expecting to see a carry in of around 35,000mt, so the total available quantity will be around 215,000mt.

The industry, particularly that in Turkey, has been much maligned for exaggerating the situation in the past, but this year there are very genuine reasons why we can expect a tough season.



Bunch Damage



Leaf and Bunch damage



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Based on the area size last years and the yields, and what we have seen, we have tried to estimate what the total crop will be. It has to be stressed that this our assessment and is only estimated.

2014 Crop				2015 Crop				
Area	KG/DA	Yield	Tonnage		Area	Yield	KG/DA	Tonnage
Menemen	30450	352	10718		Menemen	30450	175	5328.75
Kemelpasa	28750	200	5750		Kemelpasa	28750	175	5031.25
Toprbali	7900	300	2370		Toprbali	7900	150	1185
Manisa	85638	355	30401		Manisa	85638	200	17128
Suruhanli	85585	465	39797		Suruhanli	85585	200	17117
Turgutlu	76800	385	29568		Turgutlu	76800	200	15360
Ahmetli	50000	418	20900		Ahmetli	50000	205	10250
Golmarmara	23200	544	12621		Golmarmara	23200	200	4640
Akhisar	18000	500	9000		Akhisar	18000	250	4500
Salhili (1)	108215	490	50374		Salhili	108215	300	16232.25
Alasehir (2)	182500	520	61685		Alasehir	182500	426	50158.06
Sarigol (3)	81523	688	28044		Sarigol	81523	344	18093
Ruldan (4)	31700	640	8115		Ruldan	31700	320	4610.909
Cal (5)	123000	174	14981		Cal	123000	75	9225
Bekilli (6)	9940	174	1211		Bekilli	9940	150	1146.923
Denizli (7)	41858	326	2631		Denizli	41858	150	1255.74
Total	985059	328166		Total	985059		181261.3

- (1) 50% deducted for Fresh Grape production
- (2) 35% deducted for Fresh Grape production
- (3) 50% deducted for Fresh Grape production
- (4) 60% deducted for Fresh Grape production
- (5) 33% deducted for Fresh Grape production
- (6) 30% deducted for Fresh Grape production
- (7) 80% deducted for Fresh Grape production



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