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Prepared By: Kubilay Karabina

Approved By: Michael Francom

Report Highlights:

Production volumes of wheat and barley in marketing year (MY) 2024/25 are forecast to remain unchanged compared to last year, while corn production is expected to drop year-to-year by 1.2 million metric tons (MMT) as farmers switch to growing more profitable crops, such as cotton and other row crops. With corn production projected to shrink, corn export volumes will likewise fall significantly lower. Imports of wheat are projected to decrease by 1.0 MMT from last year because of larger-than-normal carryover stocks. Meantime, despite disruptions in the Red Sea, flour exports are on pace to reach a record in MY 2023/24.

Wheat

Production

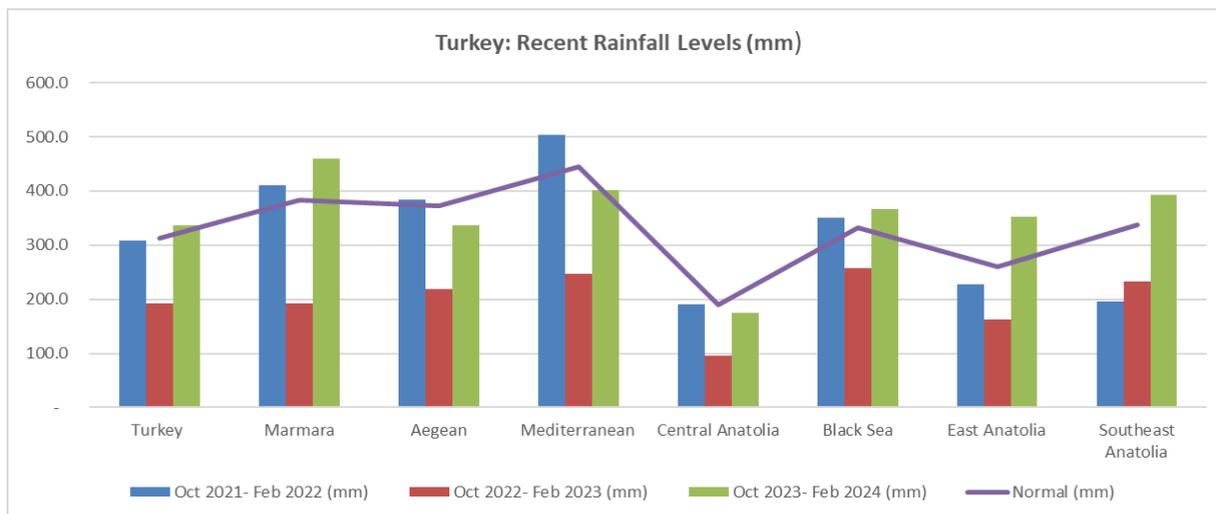
Wheat area harvested for MY 2024/25 is projected to slightly increase year-to-year by 50,000 hectares (HA) to 7.25 million HA. This predicted increase in area harvested is based on the expectation that relatively stronger domestic wheat prices will prompt farmers to plant a little more wheat instead of cotton and sunflowers.

However, even with the minor increase in area harvested, wheat production in MY 2024/25 is forecast to remain unchanged from the previous year's newly revised estimate of nearly 19.8 million metric tons (MMT). This is because yields are expected to go down slightly in line with more normal weather conditions compared to the above-average rainfall during the spring of last year. Of this total projected amount, nearly 4.4 MMT will be durum wheat, which is up year-to-year by 10 percent as farmers seek to export a larger share of production to take advantage of relatively strong global prices for durum wheat.

With 80 percent of the country's wheat and barley grown under dryland farming, adequate and timely rains are critical to production. Irrigation is limited in much of the wheat-growing parts of the country, and farmers with access to irrigation generally prefer to plant crops with higher yields, such as corn and vegetables.

Rainfall levels from October 2023 through February of this [year](#) were above average and significantly higher than the same period last year, which was one of the driest periods on record. While precipitation totals were up during this six-month period, rainfall in the month of February was down by more than 40 percent compared to the long-term average. The dry [February](#) weather forced some farmers with access to irrigation in Central Anatolia, one of the main wheat growing areas in the country, to start watering their crops. Many farmers are concerned that this one-month of dry weather may continue through the spring and end up reducing overall yields. For now, though, Post's MY 2024/25 grain production forecasts assumes that normal weather patterns will prevail throughout the year.

Figure 1: Water Year Precipitation (October to February)



Source: Turkish Meteorological Service

The Turkish Grain Board (TMO) purchases domestic and imported wheat and other commodities on behalf of the government to stabilize the market and provide a safety net for farmers. For the MY 2023/24 crop year, TMO bought domestic wheat for 8,250 Turkish Lira (TL)/MT (\$358/MT) and durum wheat for 9,000 TL/MT (\$391/MT). According to industry sources, TMO purchased upwards of 9.0 MMT of domestic wheat in the current marketing year. One of the reasons for TMO’s massive purchases was to stabilize domestic wheat prices at a time when international wheat prices were bearish and trending downward.

The gap between domestic and international wheat prices in dollar terms has continued to widen. The current price for Anatolian hard red winter wheat (AKS), which is the domestic benchmark for milling wheat and comparable to U.S. hard red wheat, is 10,000 TL/MT (\$310/MT). By comparison, as of March, the CIF price for imported wheat (12.5 protein) is about \$100/MT. In response to the widening price gap and to protect against cheaper imports, the government raised the tariff on imported wheat to 130 percent in May of last year.

The Ministry of Agriculture and Forestry (MinAF) incentivizes wheat and other grain production through different payments to farmers. This support is briefly discussed in the policy section at the end of the report.

Table 1: TMO’s Purchase Price of Domestic Wheat

Year	Intervention price		Date/Exchange Rate
	TL	USD	
2016	910 TL	\$303	(As of July 2016, \$1 USD = 3 TL)
2017	940 TL	\$268	(As of July 2017, \$1 USD = 3.5 TL)
2018	1050 TL	\$233	(As of May 2018, \$1 USD = 4.5 TL)
2019	1350 TL	\$228	(As of May 2019, \$1 USD = 5.9 TL)
2020	1650 TL	\$235	(As of May 2020, \$1 USD = 7 TL)
2021	2250 TL	\$268	(As of May 2021, \$1 USD = 8.4 TL)
2022	6450 TL	\$391	(As of June 2022, \$1 USD = 16.5 TL)
2023	8250 TL	\$358	(As of June 2023, \$1 USD = 23 TL)

Source: Turkish Grain Board (TMO) www.tmo.gov.tr

Note: As of March 2024, the exchange rate was about \$1 to 32 TL.

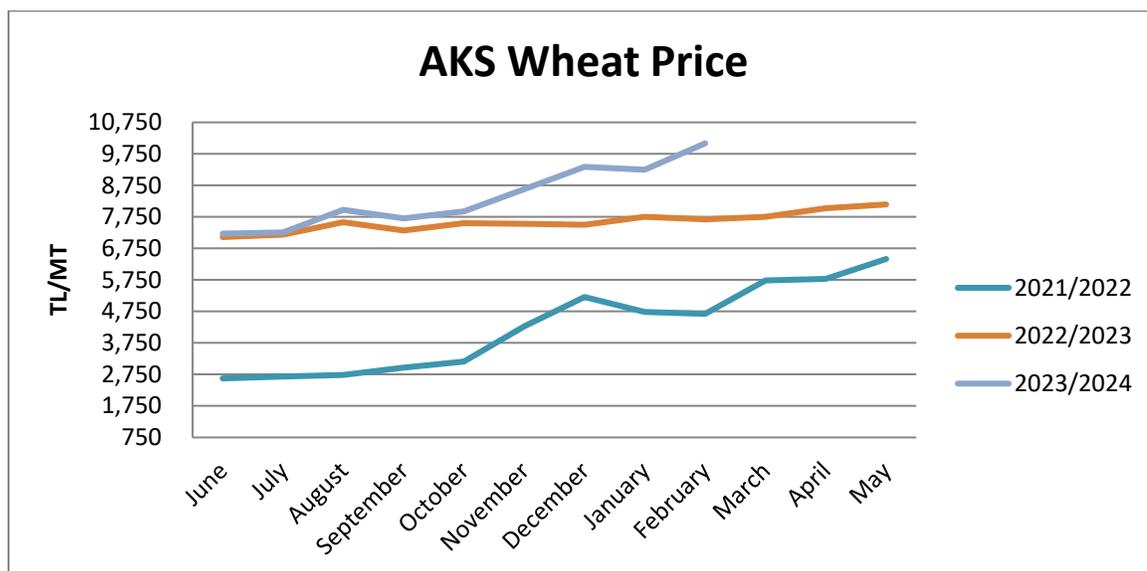
Consumption

Wheat consumption for MY 2024/25 is forecast unchanged from last year’s newly revised estimate of 20.6 MMT, as demand for food-grade wheat, which accounts for approximately 90 of consumption, is expected to remain steady.

Even though domestic wheat prices remained relatively flat in TL terms for the first part of MY 2023/24, prices have started to climb higher in the last few months as wheat supplies, 90 percent of which are controlled by TMO, have become relatively tighter during the last quarter of the marketing year. General inflation and the weakening of the TL against the USD has also contributed to rising prices. In contrast, the USD price of domestic wheat is actually going down.

For March, the Anatolian Hard Red Wheat (AKS) price on the Polatli Commodity Exchange, one of the main exchanges in the country, was about 10,000 TL/MT (\$310/MT) in March, up from 6,800 TL/MT (\$400/MT) from the same month last year. Domestic prices in Turkey can also be followed on [the Konya Stock Exchange](#) and the [Turkish Mercantile Exchange](#).

Figure 2: AKS Wheat Price (TL/MT)



Source: Polatli Commodity Exchange

Turkey is considered one of, if not the largest, consumer of bread in the world on a per capita basis. Given its importance in the Turkish diet, the government subsidizes a portion of the country's bread production using imported and domestic wheat. The government also attempts to control bread prices. However, despite these interventions, the price of a plain loaf of bread (200 grams) in Ankara and Istanbul in January of this year climbed to approximately 8 TL (\$0.25), up about 33 percent from the prior month.

While plain bread became more expensive, the government doubled down in its attempt to control food inflation when it reversed the bakery industry's attempt in January to raise the price of the traditional Turkish bagel, known locally as simit, from 10 to 15 liras. At that time, according to [Turkish media](#), market analysts predicted that the price increase was only being postponed to avoid a public backlash ahead of the local elections at the end of March. This prediction largely aligns with the prevailing sentiment that the prices of foods and other consumables will climb higher after the elections.

However, in mid-March, the government unexpectedly announced a new regulation in [the official gazette](#) that now requires simit producers to receive advance approval from the Ministry of Trade before raising prices. This appears to be a first-of-its-kind intervention to clamp down on rising food prices.

Turkey produces more than 24.0 MMT of a wide range of wheat products including flour, pasta, and biscuits, etc. There are 550 active wheat milling operations with an annual capacity of about 33 MMT. In addition to wheat mills, there are 24 active pasta factories with an annual production capacity of about 2 MMT. There are also more than 140 factories making bulgur, biscuits/cookies/crackers, and semolina.

Trade

Wheat Imports

MY 2024/25 imports of wheat are forecast at 9.0 MMT, down year-over-year by 1.0 MMT because of larger-than-normal carryover stocks of wheat.

The MY 2023/24 import estimate remains the same at 10.0 MMT, based on the latest available trade data. From June through January of the current marketing year, wheat imports reached about 6.5 MMT, most of which was imported from Russia (5.3 MMT) and Ukraine (0.9 MMT). According to market sources, imports of Ukrainian are down from the previous year because Ukraine reportedly has limited exportable supplies of high-quality milling wheat.

In a break from the huge purchases it made during the last few years, TMO has not imported any wheat in MY 2023/24 because of ample domestic stocks of wheat. TMO has, however, continued buying domestic wheat to stabilize the local market.

Because of the trade prohibitive tariff of 130 percent on imported wheat, which has been in place since last May, wheat imports this year are only being used by the pasta and flour re-export business. These imports come in at zero duty under the inward processing regime.

Countries	MY 2021/22	MY 2022/23	MY 2023/24*
Russia	6,285,214	8,276,909	5,334,546
Ukraine	1,982,980	3,263,206	893,792
Moldova	406,342	124,545	69,952
Kazakhstan	75,580	102,942	66,895
Syria	20,730	26,313	47,486
Other	602,024	206,914	37,672
Total	9,372,870	12,000,829	6,450,343

* June 2023-January 2024

Source: Turkish Statistics Institute

For reference, imports of wheat bran during the first eight months (Jun-Jan) of the marketing year, climbed to 900,000 MT, an increase of 11 percent from the same period the previous year. The bran is used as an ingredient in animal feed.

Wheat Exports

Wheat exports in MY 2024/25 are forecast to hold steady year-to-year at 9.0 MMT, assuming available supplies of imported wheat for processing and re-export as flour and pasta. This projection also assumes stable export demand in key export destinations, especially Iraq and other Middle Eastern and African markets. This forecasted amount includes about 2.0 MMT of durum wheat, which assumes the government will once again authorize the export of excess durum wheat.

For MY 2023/24, the wheat export estimate is lowered to 9.0 MMT, which is down 300,000 MT from the official USDA figure due to a slowdown in pasta and wheat product exports (excluding flour) resulting from trade disruptions in the Red Sea. This estimate also accounts for durum wheat exports, which reached nearly 1.5 MMT from June-January of the current marketing year.

Pasta exports for this period are estimated lower year-to-year at 1.2 MMT (non-grain basis) because of the disruption of containerized cargo shipments through the Red Sea. From June through January of MY 2023/24, pasta exports totaled about 950,000 MT. Leading destinations were Venezuela, Somalia, and Togo.

Despite the shipping challenges in the Red Sea, wheat flour exports for MY 2023/24 are on pace to reach a record amount of 3.8 MMT (non-grain basis). With containerized cargoes disrupted, exporters switched to bulk carriers when shipping through the Red Sea. Based on official statistics from June-January and market reports for the month of February, Turkey has exported upwards of 3.0 MMT of flour. Leading export destinations were Iraq, Djibouti, and Somalia. According to industry sources, Turkey exported about 400,000 MT of flour for humanitarian purposes in calendar year 2023.

In MY 2023/24, bulgur exports are forecast at 250,000 MT (non-grain basis). Bulgur exports were nearly 170,000 MT from June through January of the current marketing year. Iraq (54,000 MT), Syria (11,000 MT), and Germany (11,000 MT) were the main destinations for Turkish bulgur.

Turkey's wheat exports are predominantly made up of flour, pasta, and bulgur; exports of these products must be made from imported wheat per government regulation. Turkey is the world's leading flour exporter and one of the biggest exporters of pasta.

Countries	MY 2020/21	MY 2021/22	MY 2022/23*
Iraq	1,313,964	1,272,538	869,615
Djibouti	127,430	72,002	266,574
Somalia	76,004	168,606	232,801
Sudan	1,741	3,130	202,054
Syria	330,660	327,408	165,197
Other	1,163,403	1,379,510	1,005,205
Total	3,013,202	3,223,194	2,741,446

* June 2023-January 2024

Source: Turkish Statistics Institute

Countries	MY 2020/21	MY 2021/22	MY 2022/23*
Venezuela	167,900	185,638	147,260
Somalia	204,336	169,332	142,232
Togo	83,433	63,604	74,965
Ghana	96,487	64,565	63,964
Iraq	23,314	61,984	45,368
Benin	110,432	95,129	43,321
Japan	55,659	60,752	41,866
Other	630,111	618,815	390,719
Total	1,371,672	1,319,819	949,695

* June 2023-January 2024

Source: Turkish Statistics Institute

Stocks

Stocks for MY 2024/25 are forecast lower year-to-year at about 3.4 MMT, based on the assumption that the government and private sector will reduce inventories to be more in line with historical averages.

MY 2023/24 ending stocks for wheat are revised significantly higher to a record of 4.2 MMT, assuming that TMO will sell less than expected to the domestic millers.

Barley

Production

Barley area harvested for MY 2024/25 is projected to marginally increase year-to-year by 50,000 hectares (HA) to 3.75 million HA. This increase in area is based on the expectation that farmers in the Southeastern Anatolia region, where most of the nation's barley is grown, will plant more due to relatively strong barley prices.

Even though area harvested is projected to increase, barley production for MY 2024/25 is forecast unchanged from the previous year at 8.0 MMT because yields are expected to go down slightly in parallel with more normal weather conditions. Please see wheat production section for discussion of the latest weather conditions.

Like wheat, TMO purchases domestic barley to stabilize the market and provide a safety net for farmers. For MY 2023/24, TMO's purchase price for domestic barley was 7,000 TL/MT (\$304/MT).¹ Besides TMO purchases, MinAF provides support payments to farmers to incentivize barley production. More detail on the specific payments is briefly covered in the policy section at the end of this report.

¹ The exchange rate was \$1 to 23TL as of June 7, 2023.

Consumption

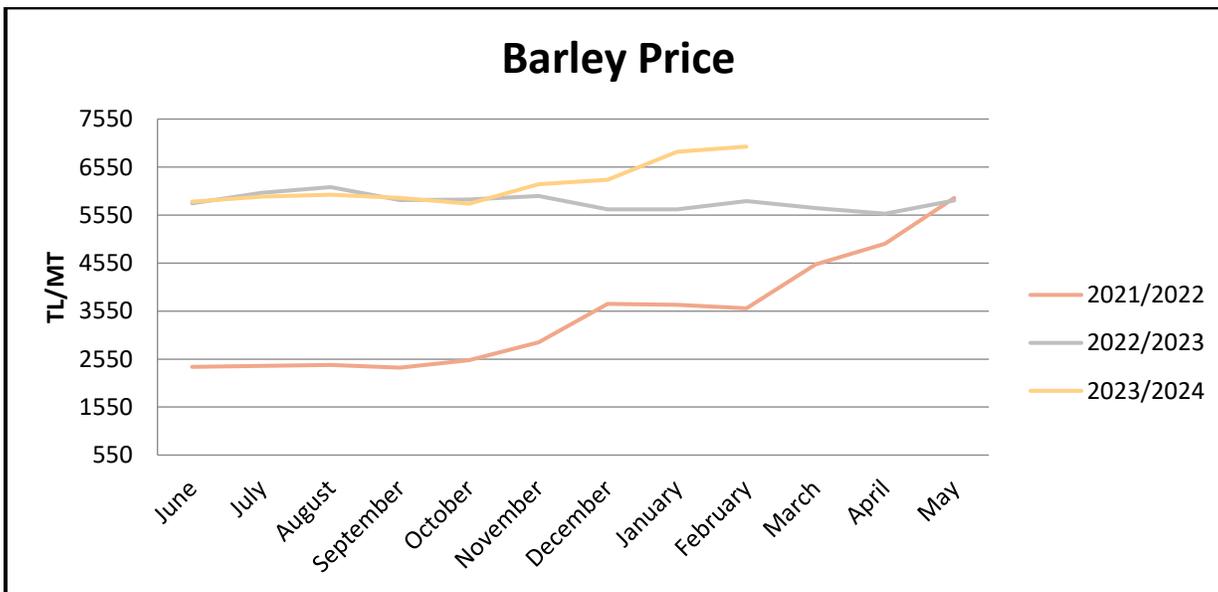
Barley consumption in MY 2024/25 is projected to hold steady from the previous year at 8.5 MMT. This prediction is based on the expectation that TMO will not return to importing feed barley and selling it to local end-users at a discount as they have done in the past.

Like wheat, barley prices were flat for the first part of the current marketing year and have since started to climb higher over the last few months as supplies become relatively tighter in the last quarter of the marketing year. General inflation and the weakening of the TL against the USD has also contributed to rising prices. At the same time, the USD price of domestic barley is actually falling.

TMO is currently selling its stocks of imported and local feed barley at 7,750 TL/MT (~\$242/MT). The TMO sale price is slightly higher than the current market price of about 7,000 TL/MT (~\$218/MT). Part of the reason for this price difference is because TMO can no longer sell below cost per a government directive in the current marketing year and because TMO is trying to ensure that market prices remain attractive enough to encourage farmers to continue growing barley in the future.

Feed manufacturers and, to a lesser extent, the malting and beer industries are the leading end users of barley. Feed use accounts for about 90 percent of total barley consumption and is predominantly used in ruminant feed. Depending on the price and availability of barley, feed makers may decide to switch to alternative ingredients such as wheat bran. Malting barley consumption, which has held steady in recent years, is estimated around 900,000 MT.

Figure 3: Average Barley Price on Konya Commodity Exchange (TL/MT)



Source: Konya Commodity Exchange

Trade

Barley Imports

For MY 2024/25, barley imports are projected to shoot up to 750,000 MT, which is almost five times higher than the previous year's newly revised estimate. This forecasted increase is in response to the expected drop in carryover stocks and assumes stable demand from domestic end-users and for transshipments.

The barley import estimate for MY 2023/24 is slashed lower to 160,000 MT, based on the latest trade data for the first eight months (Jun-Jan) of the marketing year. Imports during this period were just 93,000 MT, which is just a fraction of the amount compared to the same period a year ago. The leading suppliers were Russia (62,000 MT) and Ukraine (29,000 MT). Given the trade prohibitive tariff of 130 percent on imported barley, which has been in place since May 2023, all imports are transshipments to neighboring countries.

Barley Exports

In MY 2024/25, barley exports are forecast at 200,000 MT, up year-to-year by a little more than one-third, assuming continued demand from neighboring countries.

The barley export estimate for MY 2023/24 remains unchanged at 150,000 MT. While exports have been slow during the first half of the marketing year, export volumes are expected to pick up later in the year. From June through January of MY 2023/24, exports were just at 42,000 metric tons, down 77 percent compared to same period last year. Major export destinations were Iraq (33,000 MT) and Cyprus (6,000MT).

Stocks

For MY 2024/25, barley stocks are forecast higher year-to-year at 292,000 MT. Barley stocks for MY 2023/24 are cut by 100,000 MT to 242,000 MT, which parallels the industrywide trend to hold smaller inventories of barley.

Corn

Production

Corn area harvested in MY 2024/25 is expected to significantly contract year-to-year to 560,000 hectares as farmers switch to growing more cotton, sugar beets, potatoes, and other row crops. According to market sources, nearly one-quarter of farmers in Konya, one of the main corn growing areas in the central part of the country, will switch to different crops. At the same time, a significant percentage of farmers in Sanliurfa and other areas in the southeast, where farmers typically grow corn as a second crop, will likely switch to cotton.

With this reduction in acreage, corn production will fall to about 7.3 MMT, which is down nearly 1.2 MMT from the previous year. For the corn growing season, Post is currently assuming favorable

weather conditions and sufficient volumes of irrigation water. In comparison to wheat and barley, corn production is generally less affected by inadequate rainfall since a large share of it is irrigated.

Planting of the MY2024/25 crop is currently underway. The primary corn-growing regions are Central Anatolia, Southeast Anatolia, Cukurova, and the Aegean.

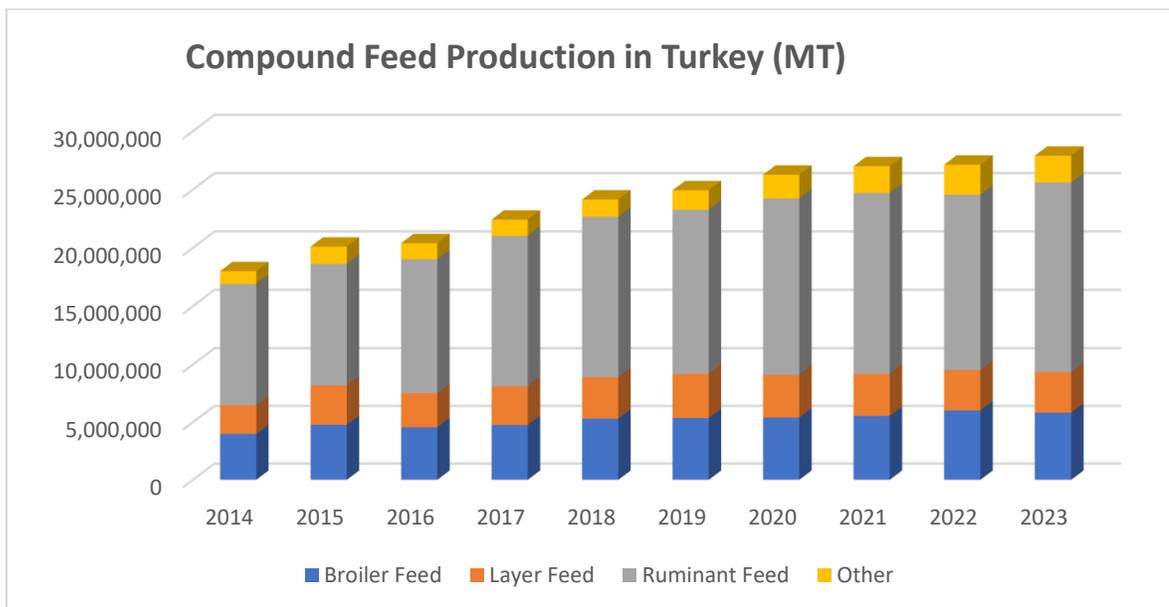
Consumption

MY 2024/25 corn consumption is forecast unchanged from last year at 8.7 MMT, based on the expectation that demand for corn in compound feed and starch production will remain steady.

With nearly 85 percent of corn used to make animal feed, overall consumption typically parallels trends in the feed sector. At the same time, feed corn consumption is influenced by prices of alternative feed ingredients.

Turkey's total compound feed production in 2023 increased by almost 3 percent compared to the previous year, reaching 27.9 MMT. A large share of compound feed is made from domestic corn and other feed ingredients. Because of the dependence on imported feed ingredients, the price of compound feed tends to move in parallel with the FOB price of the raw materials and the USD-TL exchange rate.

Figure 4: Compound Feed Production in Turkey (MT)



Source: Industry contacts

Corn starch-based sugar production is regulated by the government through production quotas; beet sugar production is likewise regulated through quotas. The government announces annual starch production quotas which are expected to decrease in size this year. Starch producers use about 1.2 MMT of domestic corn each year to make product for the local and export markets. The industry's annual production capacity is 1.5 MMT.

In March, the domestic corn price was about at 6,850 TL/MT (\$214/MT), up about 30 percent in terms of Turkish Lira from a year ago. TMO is currently selling feed [corn](#) between 6,250-6,750 TL/MT (\$195-211/MT). In contrast to wheat and barley, the price gap between domestic and international corn prices is considerably smaller. Because Turkish corn was competitively priced, traders were able to export sizeable volumes to Iran and other countries, especially during the fall months when prices dipped below \$200/MT.

Table 5: Average Domestic Corn Price (TL/MT and \$/MT)

	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	March 2024
TL/MT	5400	5500	5300	5525	6000	6200	6700	6850
\$/MT	204	204	196	194	203	203	216	214

Source: Adana Commodity Exchange and TMO Daily Bulletin

Trade

Imports

MY 2024/25 corn imports are forecast remain to 2.4 MMT, assuming stable demand from the feed sector and transshipments.

The MY 2023/24 corn import forecast is adjusted higher to 2.4 MMT, an increase of 400,000 MT from the USDA figure. This revision is based on the expectation that Turkish traders will import corn to offset the amount of Turkish corn that was exported last fall. While import volumes during the first five months (Sep-Jan) of the marketing year are a paltry 242,000 MT, purchases are expected to ramp up in the coming months. The main suppliers were Russia (156,000 MT), Ukraine (40,000 MT), and Argentina (28,000 MT).

For reference, from September 2023 to January 2024, imports of DDGS totaled 262,000 MT, up 22 percent compared to the same period last year. The United States is the top supplier of DDGS to Turkey.

Exports

Corn exports in MY 2024/25 are forecasted lower at 850,000 MT, which is in line with the anticipated decrease in domestic production.

Corn exports in MY 2023/24 are adjusted higher to 2.4 MMT, an increase of 500,000 MT due to better-than-expected demand from neighboring countries and transshipments. For September through January of MY 2023/24, corn exports reached 190,000 MT, nearly half of which was transshipments. Major export destinations were Iran (1.0 MMT), Iraq (516,000 MT), and Oman (292,000 MT).

Stocks

For MY 2024/25, corn stocks are forecast to increase year-to-year at 497,000 MT.

Rice

Production

Even though rice area harvested for MY 2024/25 remains nearly unchanged from the previous year, production is forecast higher at 570,000 MT. This projected increase assumes an increase in available irrigation water coming from nearby dams which were partially refilled from rains during the past year. Looking ahead, rice farmers are increasingly concerned about drier weather resulting from climate change and worry about shortages of irrigation water in the future.

Turkey's rice growing areas are spread throughout the country, with more than 25,000 rice farms. The Marmara region accounts for about 70 percent of total rice production, while Central Anatolia in the middle part of the country and provinces along the Black Sea account for nearly one-quarter of production. Commodity exchanges for rice are located in these major growing areas. There are 130 rice millers in the country with an annual milling capacity of 2.8 MMT.

Consumption

The consumption of rice in MY 2024/25 is projected to remain unchanged from the previous year's newly revised estimate of 810,000 MT.

In addition to household consumption, rice is preferred in catering, restaurants, and hotels. Although it sometimes competes with bulgur and pasta, rice is an indispensable part of traditional Turkish cuisine. Meantime, to lower their retail prices for packaged rice, some companies are blending lower-priced imported rice with domestic varieties.

Turkish households prefer to eat the well-known medium grain varieties such as Baldo, Osmancik, and Calrose. However, over the last year, other imported varieties from China and southeast Asia have invaded store shelves and are selling for one-third the price of local rice. According to market sources, there is a continued need for high quality milled rice imports, such as Calrose, to meet market demand that cannot be met by local production.

[TMO](#) sells both imported and domestic rice through its retail outlets at normal market prices. The current retail price for the highest quality rice, Type A milled rice (Baldo, Cammeo, Fortuna, Keshan, Perla), is 44 TL/kg (\$1.35/kg). Lower quality Type B varieties (Groski, Luna, Ronaldo, Osmancik) are selling between 38-42 TL (\$1.2-\$1.3/kg). TMO also occasionally sells rice through other channels to end users.

Trade

Imports

For MY 2024/25, rice imports are forecast at 400,000 MT, up 100,000 MT compared to the previous year. This increase in import volumes assumes stronger transshipment demand.

The MY 2023/24 rice import estimate is cut to 300,000 MT, based on the latest trade numbers and high stocks. In the first five months of MY 2023/24 (Sep-Jan), Turkey imported about 134,000 MT of rice, most of which was milled rice. The major sources of imported rice were China (70,000 MT), Vietnam (31,000 MT), and India (12,000 MT).

To curb inflation, the government has periodically adjusted tariffs on imported rice (and other grains). The tariff was zero from December 2022 through August 2023. Between September and December 2023, tariffs reverted to double digits at which time the price of domestic rice doubled. In response to these high prices, the government cut tariffs to 10 percent from January through the end of August of this year.

Table 6: Historical Tariffs on Imported Rice

HS Code	Product	Dec 2022-Aug 2023	Sep-Dec 2023	Jan-Aug 2024	After Sep 1, 2024
1006.10	paddy rice	0%	34%	10%	34%
1006.20	brown rice	0%	36%	10%	36%
1006.30	milled rice	0%	45%	15%	45%

Exports

For MY 2023/24, rice exports are forecast at 250,000 MT, assuming steady transshipment demand.

The MY 2022/23 rice export estimate is revised higher to 280,000 MT, based on the latest trade data. In the first five months of MY 2022/23 (Sep-Jan), Turkey exported about 130,000 MT of rice, which was up about 54 percent year-to-year. The main export destinations were Syria (27,000 MT), Ukraine (15,000 MT), and Algeria (12,000 MT).

Stocks

In MY 2024/25, rice stocks are forecast lower at 77,000 MT, which is in line with historical amounts.

The rice stock estimate for MY 2023/24 is revised higher to 167,000 MT since traders were unable to work through the larger-than-usual inventories from the prior year.

Policy

There have been some major developments in the grain sector over the last year. There was an unexpected oversupply of grain on the market due to the better-than-expected MY 2023/24 harvest and record imports. Grain silos were filled at or near capacity. To help alleviate the situation, the government authorized exports of domestic corn and durum.

After the 2023 presidential election, the government reversed course and adopted a more orthodox approach to managing the country's economy and sought to reduce expenditures after spending billions of dollars on earthquake recovery efforts. In response to a governmentwide mandate to reduce spending, TMO surprisingly ended its practice of subsidizing grain sales.

In September of last year, the government published a regulation in the [Official Gazette](#) announcing its intention to impose greater control over the nation's agricultural production starting in 2024. The overriding idea behind this central-planning model is to more efficiently balance the supply and demand of crops, livestock, and aquaculture. Based on a news interview with the [Minister of Agriculture](#), the

initial focus of this scheme will be grains and oilseeds. To date, however, concrete actions have yet to be taken.

According to the regulation, technical committees made up of government and industry representatives in each province will prepare a three-year plan that considers water/irrigation resources, environmental factors, the market situation, international trade dynamics, and other factors. The plan, which is subject to the approval from the Ministry of Agriculture & Forestry (MinAF), will spell out what crops are to be produced, the minimum and maximum amounts to be produced, and include a crop rotation schedule. Once approved, provincial authorities will issue crop production permits to farmers and will follow up later in the growing season to verify that farmers are following the terms of the permit.

The government provides support payments as part of its larger support program for 21 strategic crops grown in certain geographical “agricultural basins.” There are two kinds of support payments given to grain farmers. The first is a premium payment for the amount of grain produced. This production payment rate in 2023 has remained fixed for at least the last five years. The second is an acreage payment to offset diesel and fertilizer costs. The government increased the area payment in 2023 to help offset some of the increased costs for these inputs.

As announced last September in [the Official Gazette](#), overall support for the entire farming sector in CY2024 was nearly 91.0 billion TL (\$2.8 billion) compared to about 63.0 billion TL (\$3.3 billion) the previous year.

Commodity	2019	2020	2021	2022	2023
Wheat	1000	1000	1000	1000	1000
Barley, Oats, Rye	500	500	500	500	500
Paddy Rice	1000	1000	1000	1000	1000
Chickpeas, Lentils, Dry beans	500	500	500	500	500
Corn	300	300	300	300	300

Source: Official Gazette

Commodity	Diesel (TL/ha)	Fertilizer (TL/ha)
Wheat, Barley, Rye, Oats	1030	460
Rice, Cotton	2500	210
Pulses	1030	210
Corn	860	210
Soybean	1720	210
Sunflower	1210	210
Canola, safflower	880	210
Forage Plants	940	210

Source: <https://www.tarimorman.gov.tr/Konular/Tarimsal-Destekler/>

Production, Supply and Distribution

Wheat Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Jun 2022		Jun 2023		Jun 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6800	6800	7200	7200	0	7250
Beginning Stocks (1000 MT)	2237	2237	4084	4084	0	4234
Production (1000 MT)	17250	17250	19500	19750	0	19750
MY Imports (1000 MT)	12072	12072	10000	10000	0	9000
TY Imports (1000 MT)	12500	12500	10000	10000	0	9000
Total Supply (1000 MT)	31559	31559	33584	33834	0	32984
MY Exports (1000 MT)	6875	6875	9300	9000	0	9000
TY Exports (1000 MT)	6953	6954	9300	9000	0	9000
Feed and Residual (1000 MT)	1500	1500	1700	1500	0	1500
FSI Consumption (1000 MT)	19100	19100	19200	19100	0	19100
Total Consumption (1000 MT)	20600	20600	20900	20600	0	20600
Ending Stocks (1000 MT)	4084	4084	3384	4234	0	3384
Total Distribution (1000 MT)	31559	31559	33584	33834	0	32984
Yield (MT/HA)	2.5368	2.5368	2.7083	2.7431	0	2.7241

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025

Barley Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Jun 2022		Jun 2023		Jun 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3800	3800	3700	3700	0	3750
Beginning Stocks (1000 MT)	316	316	732	732	0	242
Production (1000 MT)	7400	7400	8000	8000	0	8000
MY Imports (1000 MT)	2141	2141	400	160	0	750
TY Imports (1000 MT)	1967	1967	500	400	0	750
Total Supply (1000 MT)	9857	9857	9132	8892	0	8992
MY Exports (1000 MT)	225	225	150	150	0	200
TY Exports (1000 MT)	121	200	250	250	0	200
Feed and Residual (1000 MT)	8000	8000	7600	7600	0	7600
FSI Consumption (1000 MT)	900	900	900	900	0	900
Total Consumption (1000 MT)	8900	8900	8500	8500	0	8500
Ending Stocks (1000 MT)	732	732	482	242	0	292
Total Distribution (1000 MT)	9857	9857	9132	8892	0	8992
Yield (MT/HA)	1.9474	1.9474	2.1622	2.1622	0	2.1333

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Barley begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Corn Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	530	530	650	650	0	560
Beginning Stocks (1000 MT)	647	647	697	697	0	397
Production (1000 MT)	6800	6800	8400	8400	0	7250
MY Imports (1000 MT)	2658	2658	2000	2400	0	2400
TY Imports (1000 MT)	2388	2658	2000	2400	0	2400
Total Supply (1000 MT)	10105	10105	11097	11497	0	10047
MY Exports (1000 MT)	808	808	1900	2400	0	850
TY Exports (1000 MT)	1181	1181	1900	2400	0	850
Feed and Residual (1000 MT)	7500	7500	7600	7500	0	7500
FSI Consumption (1000 MT)	1100	1100	1200	1200	0	1200
Total Consumption (1000 MT)	8600	8600	8800	8700	0	8700
Ending Stocks (1000 MT)	697	697	397	397	0	497
Total Distribution (1000 MT)	10105	10105	11097	11497	0	10047
Yield (MT/HA)	12.8302	12.8302	12.9231	12.9231	0	12.9464

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Corn begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Rice, Milled Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	99	99	94	94	0	95
Beginning Stocks (1000 MT)	78	78	145	412	0	167
Milled Production (1000 MT)	600	600	545	545	0	570
Rough Production (1000 MT)	896	896	813	813	0	851
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	0	6700
MY Imports (1000 MT)	525	777	450	300	0	400
TY Imports (1000 MT)	475	475	450	300	0	400
Total Supply (1000 MT)	1203	1455	1140	1257	0	1137
MY Exports (1000 MT)	233	233	250	280	0	250
TY Exports (1000 MT)	258	258	250	280	0	250
Consumption and Residual (1000 MT)	825	810	800	810	0	810
Ending Stocks (1000 MT)	145	412	90	167	0	77
Total Distribution (1000 MT)	1203	1455	1140	1257	0	1137
Yield (Rough) (MT/HA)	9.0505	9.0505	8.6489	8.6489	0	8.9579

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2024/2025 = January 2025 - December 2025

Attachments:

No Attachments