

Required Report: Required - Public Distribution

Date: May 02, 2025

Report Number: TU2025-0015

Report Name: Grain and Feed Annual

Country: Turkiye

Post: Ankara

Report Category: Grain and Feed

Prepared By: FAS Staff

Approved By: Michael Francom

Report Highlights:

Turkiye's MY 2025/26 wheat and barley production, most of which are grown without irrigation, are projected to decline year-on-year due to limited rainfall during the fall and winter months and prospects of more dry weather. Rice production is also predicted lower year-over-year due to worries over dry weather conditions and concerns over the availability of irrigation water, especially in the key rice growing area in northwest part of Turkiye. On the other hand, corn production is projected to increase from last year due to strong domestic prices and based on the expectation that farmers in corn-growing parts of the country will have sufficient access to irrigation water. With water resources under increasing pressure, the Turkish government recently instituted a new crop production plan that is designed to boost national food security while conserving water resources. As this program is still very new, it is not expected to have a visible impact on grain production in MY 2025/26.

Wheat

Production

Wheat area harvested for MY 2025/26 is projected to slightly increase year-to-year by 10,000 hectares (HA) to 7.35 million HA. According to industry sources, some farmers planted more winter wheat last fall based on the expectation that it would offer higher and more predictable returns than other row crops, especially cotton and barley. Another contributing factor to the projected increase in area harvested is farmers' expectations that they will be able to sell their wheat to the Turkish Grain Board (TMO) at a competitive price. Winter wheat is generally planted in October-November and harvested in May-June.

Despite the increase in harvested area, MY 2025/26 wheat production is estimated at 18.5 million metric tons (MMT), down slightly from the previous year. This anticipated decline assumes lower yields resulting from very dry weather conditions last fall and winter, especially in some of the major wheat-producing areas in the country. With 80 percent of the country's wheat (and barley) grown on dryland farms, adequate and timely rains are critical to overall production.

In Central and Southeastern Anatolia, which account for half of Türkiye's wheat production, rainfall totals fell by 50 percent from October through February compared to the previous year. Even with favorable spring rains, Post expects that these dry weather conditions will cause wheat yields to drop by as much as five percent in these regions and elsewhere in the country. Wheat growers with access to irrigation have started watering their winter wheat a month ahead of schedule. Yields on these irrigated wheat farms, which only represent a minority of overall production, will be less impacted by the dry weather, assuming they have access to enough irrigation water. However, given water availability challenges in parts of the country, regional governments may restrict the use of irrigation water.

Current soil moisture conditions appear bleak across most of the country after a very dry fall and winter season. According to the [Turkish State Meteorological Service](#), nationwide precipitation amounts from October through February were down 29 percent below the average. There are news reports that dam and reservoir levels in different parts of the country are lower than normal after failing to fully recharge after several years of persistent dry weather. As a result, at least one provincial government in Türkiye's west coast has imposed restrictions on the use of irrigation in 2025. Depending on water availability in other parts of the country, provincial governments, in consultation with farmer groups and other stakeholders, may also decide to impose limits on irrigation water in the coming months.

In the fall of 2024, the Ministry of Agriculture and Forestry announced an Agricultural Production Plan ([GAIN TU2025-0012](#)) to strengthen national food security amid changing climactic conditions. The new production model prioritizes water conservation by incentivizing the production of less water intensive crops in water scarce regions. According to industry contacts, the impact of this plan won't likely be felt in MY 2025/26 since most farmers are still trying to understand how the new program will work.

Figure 1: Comparison of Cumulative Precipitation between October and February with the Long-Term Average (Normal) in the Last Three Years

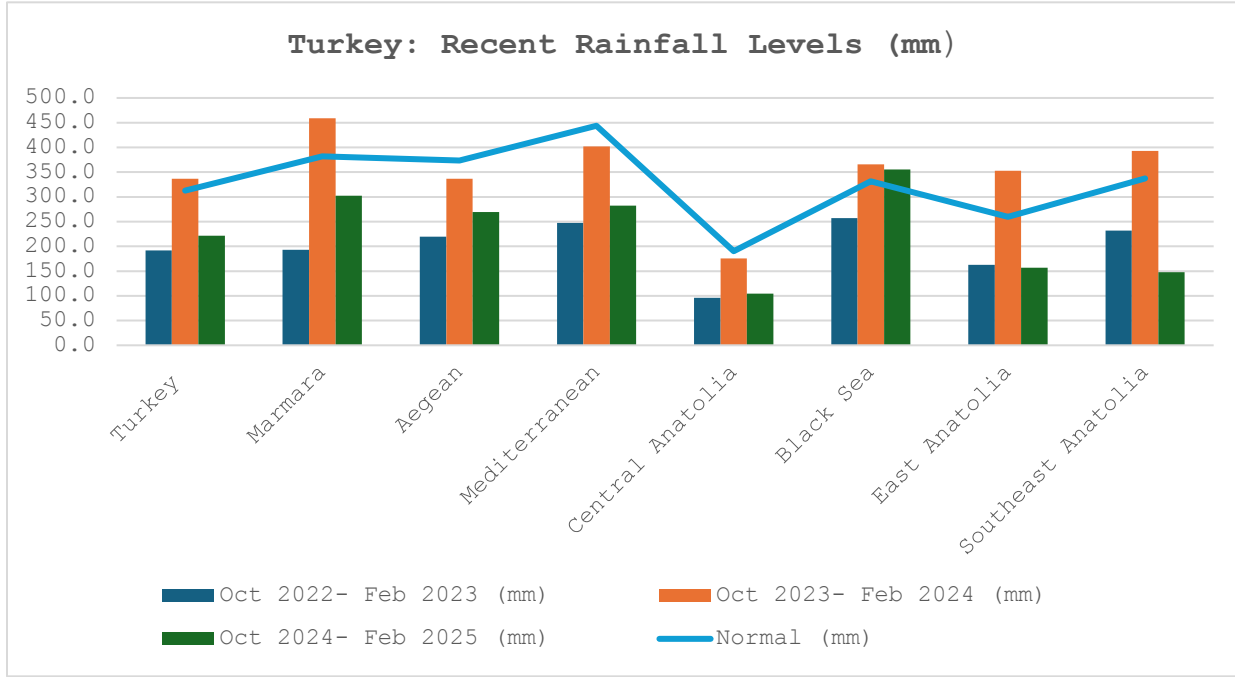
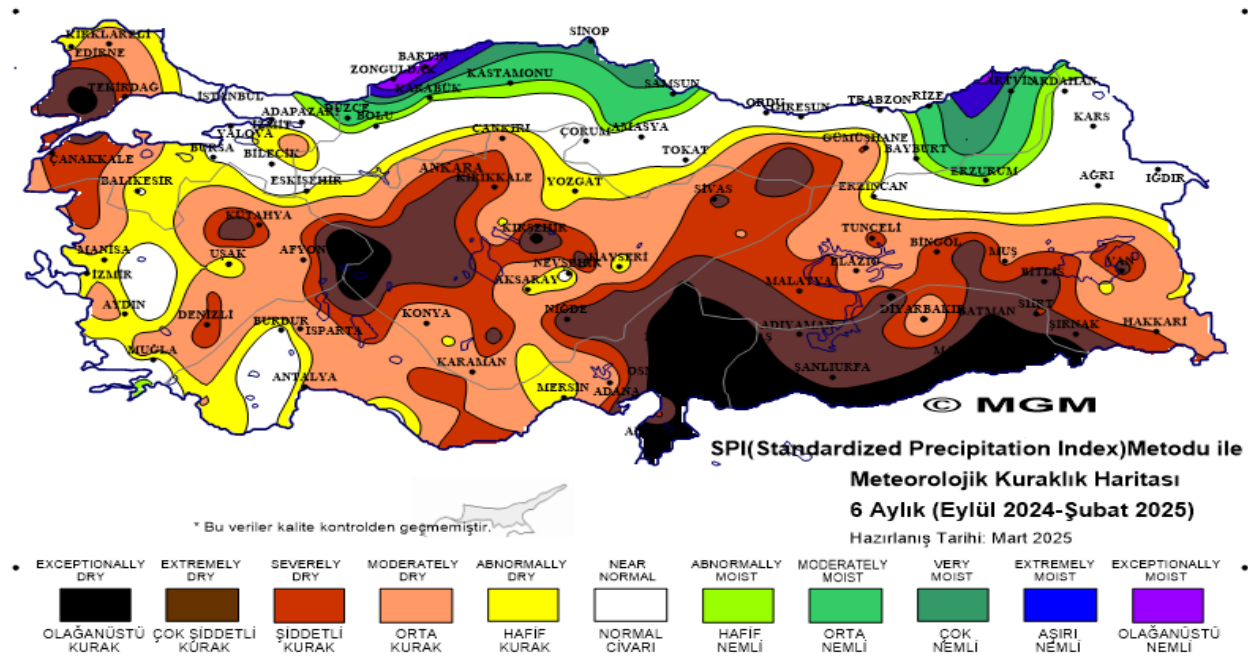


Figure 2: Standard Precipitation Index (SPI) (Sep-Feb)



Source: Turkish National Weather Agency

One of the most important factors farmers consider when making wheat planting decisions is the ability to sell their crops to the Turkish Grain Board (TMO). 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 2024/25 crop year, TMO bought domestic wheat for 9,250 Turkish Lira (TL)/MT (\$289/MT) and durum wheat for 10,000 TL/MT (\$313/MT).

According to industry sources, TMO purchased upwards of 5.0 MMT of domestic wheat, or about one-quarter of the country's total wheat production in the current marketing year. See historical TMO purchase prices in table 1.

Table 1: TMO's Purchase Price for Domestic Milling Wheat*			
Year	Intervention price		Date/Exchange Rate
	TL	USD	
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)
2024	9250 TL	\$289	(As of June 2024, \$1 USD = 32 TL)

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

Note: As of March 2025, the exchange rate was about \$1 to 37 TL.

* The TMO purchase price varies according to product quality. The listed purchase prices in the table are for first class wheat with a max moisture level of 14 percent and protein level of 13 percent.

Consumption

Wheat consumption for MY 2025/26 is forecast unchanged from last year's newly revised estimate of 19.4 MMT, as demand for food-grade wheat, which accounts for approximately 90 of consumption, is expected to remain steady. Feed consumption is expected to stay unchanged from the prior year because of expected competition with competitively priced domestic barley and imported wheat bran.

Wheat consumption has plateaued in the last few years in large part due to the country's demographics and changing consumption patterns. According to Türkiye's [official statistics](#), the population growth rate has tapered off over the last five years when compared to 2010-20 when the population was growing at a faster clip because of incoming refugees from war torn Syria. At the same time, middle and upper-income consumers have changed their eating habits and are consuming less bread than in the past since there are other available food options.

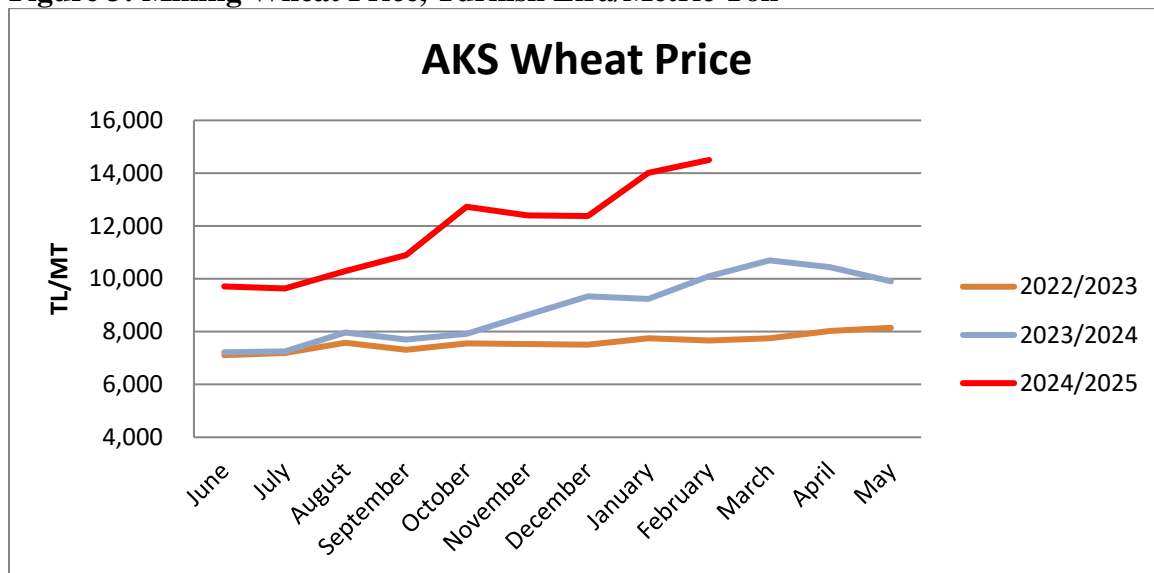
Türkiye is still considered one of, if not the largest, consumers of bread in the world on a per capita basis. Given its importance in the Turkish diet, the government has historically attempted to regulate bread production and prices through different market interventions. However, despite these interventions, the price of a plain loaf of bread (200 grams) in Ankara and Istanbul in January of this year climbed to approximately 12.5 TL (\$0.33), up year-to-year by about 50 percent. According to bread producers, the hike in bread prices is directly linked to the rising cost of energy, transportation, and labor.

Turkiye 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 33.0 MMT. In addition to wheat mills, there are 25 active pasta factories with an annual production capacity of about 2.9 MMT with a capacity utilization rate of about 85 percent. There are also more than 140 factories making bulgur, biscuits/cookies/crackers, and semolina.

In March, the market 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 12,000 TL/MT (\$325/MT). By comparison, the CIF price for imported Russian wheat (12.5 protein) in March was significantly cheaper at about \$260/MT.

Compared to the last couple of years, domestic wheat prices for MY 2024/25 have been climbing at a faster rate as shown in figure 3. According to market sources, wheat prices are up for several reasons, including fears that drought-effects on the upcoming wheat harvest (MY 2025/26) could be larger than expected, declining inventories of domestic wheat, domestic inflationary pressures, and rising prices for Black Sea wheat. Domestic wheat prices are set on the [Polatli Commodity Exchange](#), the [Konya Commodity Exchange](#), and the [Turkish Mercantile Exchange](#).

Figure 3: Milling Wheat Price, Turkish Lira/Metric Ton



Source: [Price Index– Polatlı Ticaret Borsası](#)

Trade

Wheat Imports

MY 2025/26 wheat imports are forecast at 8.0 MMT, up year-over-year by 4.0 MMT based on the expectation that the government will not reinstitute import restrictions and that Turkish millers will resume their previous pace of imports. Russia is expected to remain Türkiye's primary supplier of wheat.

The MY 2024/25 import estimate remains unchanged at 4.0 MMT, but sharply lower from the prior year due to the Turkish government's restrictions on imports. From June through January of the current

marketing year, wheat imports reached about 2.3 MMT with Russia supplying most of the total. Imports from Ukraine have been quite anemic compared to the prior year due to its limited exportable supplies of high-quality milling wheat. See table 2.

During most of the current marketing year, the Turkish government has imposed restrictions on wheat imports to help draw down TMO's massive wheat holdings. A complete ban on wheat imports was enacted from June through October 2024. After the ban was lifted, millers were required to purchase 85 percent of their wheat needs from TMO and were allowed to import the rest duty-free under the government's inward processing regime (IPR). In January of this year, the buying requirement changed, and millers had to purchase 75 percent from TMO and could import the remainder duty-free under the IPR.

In mid-March of this year, according to market sources, TMO said it would no longer sell its wheat stocks to Turkish flour exporters, signaling that importers could bring in as much as they wanted under the IPR. Imports outside the IPR will continue to be subject to a prohibitive MFN tariff of 130 percent. Post believes that TMO stopped selling off its wheat stocks until they have a clearer picture of what the upcoming wheat harvest looks like.

Table 2: Turkish Wheat Imports by Origin (Metric Ton)			
Countries	MY 2022/23	MY 2023/24	MY 2024/25*
Russia	8,276,909	7,500,000	2,200,000
Ukraine	3,263,206	1,526,000	42,000
Moldova	124,545	87,000	-
Kazakhstan	102,942	67,000	1,000
Syria	26,313	64,000	22,000
Other	206,914	121,711	35,000
Total	12,000,829	9,315,000	2,300,000

* June 2024-January 2025

Source: Turkish Statistics Institute

The precipitous drop in wheat imports in MY 2024/25 resulted in less flour being produced, according to sectoral contacts. With less flour being produced there were smaller volumes of bran available for use in producing compound animal feed. As a result, imports of wheat bran (HS 230230) during the first eight months (Jun-Jan) of the marketing year climbed 30 percent year-over-year to 1.2 MMT. (Note: bran is not included in PSD numbers.)

Wheat Exports

Wheat exports in MY 2025/26 are forecast to increase year-to-year to 8.0 MMT, based on the expectation that the government will not re-impose limits on wheat imports for processing and re-export as flour. This projection assumes that Turkiye will be able to regain potentially lost market share from the year before and assumes steady demand from key export destinations, especially Iraq and other Middle Eastern and African markets.

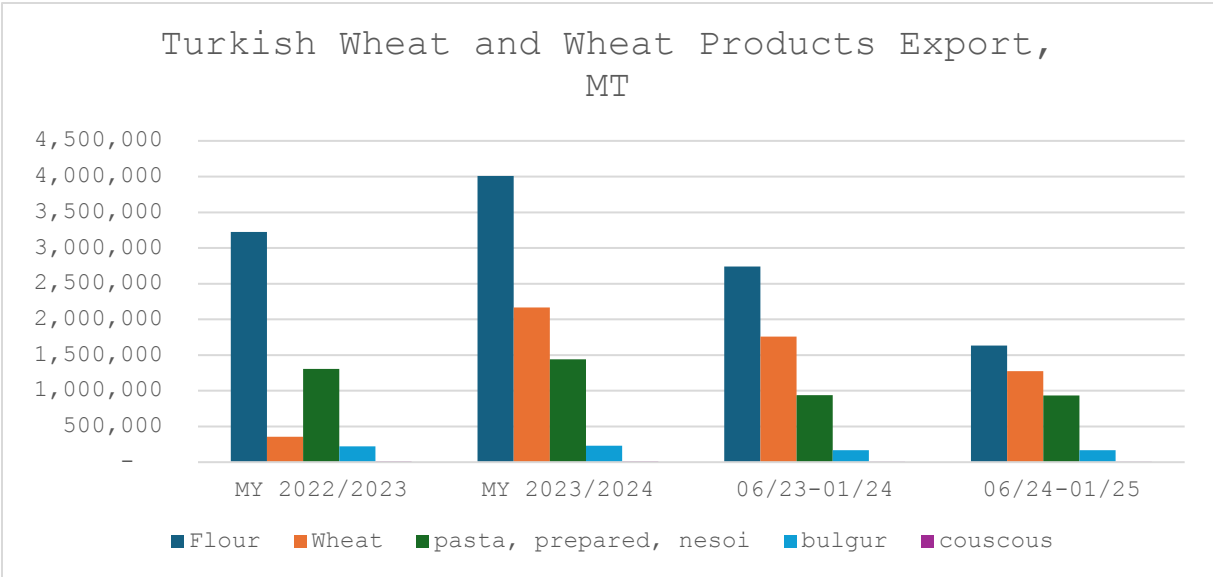
For MY 2024/25, the wheat export estimate is adjusted to 7.3 MMT, down sharply from the prior year mainly because of government limits on imported wheat for processing and re-export as flour. Another

lesser reason for the drop off is the declining volumes of durum wheat exports as Turkish durum is becoming relatively less price competitive on the world market. Meanwhile, pasta exports, which are mostly made from domestic durum wheat, are expected to hold relatively steady. See annex for trade tables.

From June-January of the current marketing, flour exports were down 40 percent year-over-year because of the restrictions on wheat imports. The leading destinations were Iraq, Djibouti, and Somalia. The Turkish flour industry has voiced concerns that they may have lost market share in these and other markets to competitors, like Russia and Egypt. Despite this potential setback, flour exporters celebrated that they still remained the world’s top flour exporter in calendar year 2024. Besides commercial flour exports, Turkiye reportedly exported about 400,000 MT of flour for humanitarian purposes in 2024.

Pasta exports from June through January of MY 2024/25 totaled a little more than 940,000 MT, almost unchanged from the same period the prior year. Leading destinations were Somalia, Ghana, and Togo. To help make the pasta more affordable for African households, some African buyers request Turkish pasta makers to replace some of the durum wheat with cheaper milling wheat.

Figure 4: Turkish Wheat and Wheat Products Export, MT



Source: Turkish Statistical Institute (TUIK)

Stocks

Wheat stocks for MY 2025/26 are forecast lower year-to-year to about 2.9 MMT, based on the assumption that the government and private sector will continue drawing down inventories to be more in line within historical ranges of 3.0-4.0 MMT. Forecasted inventories represent about two months of Turkiye’s wheat consumption needs.

The MY 2024/25 ending stock estimate remains unchanged at 3.8 MMT, but down from the prior year by almost 50 percent. This estimate assumes that TMO, which currently holds about 90 percent of the country’s wheat stocks, sold off significant volumes of its inventories during the first part of the marketing year before suspending sales in March. Post believes that TMO has stopped sales until the

outcome of the upcoming wheat harvest is known. In other words, the government appears to be creating a buffer in case of a bigger-than-expected shortfall in the MY 2025/26 wheat harvest.

According to market sources, there are currently 9.5 MMT of grain, most of which is wheat, that is being held in Türkiye's licensed warehouses. Of this amount, TMO owns 80 percent of the total. In the last two years, TMO has spent 4.9 billion TL to rent licensed storage space.

Barley

Production

Barley area harvested for MY 2025/26 is projected to decrease year-to-year by 7 percent to 3.5 million hectares. According to contacts, farmers planted less barley last fall and instead opted to grow other dryland row crops such as wheat, canola, and sunflowers since these crops were expected to offer relatively higher profit margins. Additionally, some marginal growing areas that were planted the year before in barley were left idle because barley isn't expected to be as profitable as other row crops.

With the projected contraction in area harvested and lower yields resulting from dry weather conditions, barley production for MY 2025/26 is forecast down year-over-year by 11 percent to 6.25 MMT. Please see wheat production section for discussion of the latest weather conditions and the government's new agricultural support program.

Like wheat, one of the most important factors farmers consider when deciding to plant barley is the ability to sell their crops to TMO. For the MY 2024/25 season, TMO's purchase price for domestic barley was 7,250 TL/MT (\$226/MT).¹ Farmers complained that this price was too low compared to TMO's offer price for wheat. Farmers' expectations that this relative price spread between the two grains would continue into the next growing season caused some farmers to switch from growing barley to wheat in MY 2025/26.

Consumption

Barley consumption in MY 2025/26 is projected to remain unchanged from the previous year at 7.4 MMT. With barley consumption flat and production expected to contract, this forecast assumes a significant increase in imports to meet Türkiye's domestic demand requirements, especially for animal feed.

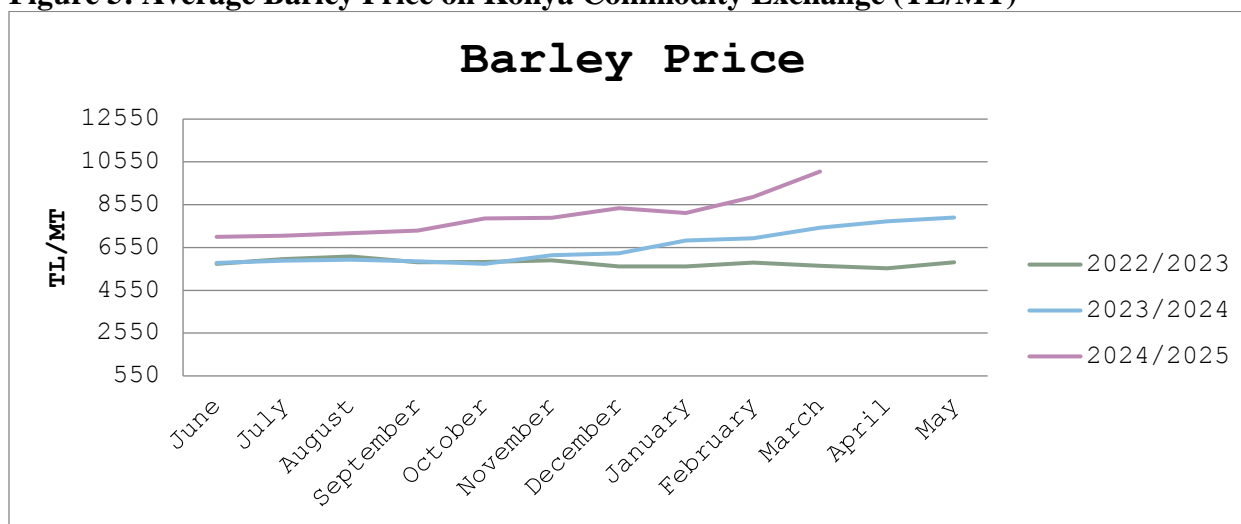
Post is reducing the consumption numbers for MY 2023/24 and MY 2024/25, based on the market's realization that TMO had been holding much bigger ending-stocks of barley than was originally assumed. Market sources also point to the reduced livestock inventories, especially in the 2023 earthquake-affected areas of the country, as another contributing factor to reduced barley consumption during these marketing years.

¹ The exchange rate was \$1 to 32TL as of June 2024.

Barley prices on the open market started off the current marketing year fairly flat in part because of TMO's large carryover stocks from the prior year. As TMO liquidated some of these stocks, prices started to gradually climb higher. See figure 5 below. TMO is currently selling its barley stocks around 10 percent below the current market price at about 9,000 TL/MT (~\$245/MT). By comparison, the CIF price for imported Black Sea origin barley in March was around \$260/MT.

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. Malting barley consumption, which has held steady in recent years, is estimated around 900,000 MT.

Figure 5: Average Barley Price on Konya Commodity Exchange (TL/MT)



Source: Konya Commodity Exchange

Trade

Barley Imports

With barley production forecast down, imports in MY 2025/26 are projected to rocket up to 900,000 MT, based on the projected downturn in barley production and growing domestic feed demand requirements. Post assumes that the government, as it has done in the past, will adjust the current high tariff to facilitate the needed imports.

The MY 2024/25 barley import estimate is adjusted higher to 170,000 MT, based on the latest import numbers for the first eight months (Jun-Jan) of the marketing year. During this period, imports climbed 28 percent year-over-year to 120,000 MT. The leading suppliers were Russia (51,000 MT) and Ukraine (36,000 MT). Post assesses that all barley imports were transshipments since there's currently an oversupply of domestic barley and the current tariff on imports is trade-prohibitive at 130 percent.

In the last decade, Türkiye has become a major transshipment hub for barley and other agricultural products. For more details, please refer to [Türkiye Becomes Global Transshipment Hub for Agricultural Products \(GAIN TU2024-0039\)](#).

Barley Exports

In MY 2025/26, barley exports are forecast steeply down year-to-year to 80,000 MT, assuming TMO will have smaller inventories available for export. Based on Post's analysis, most exports will likely be transshipments from Black Sea countries via Türkiye to Iraq and other markets in the region.

The barley export estimate for MY 2024/25 is revised significantly higher from last year to 900,000 MT, based on the expectation that TMO will continue to export a large portion of its barley stocks throughout the marketing. Exports topped 422,000 MT from June through January of MY 2024/25. Major export destinations were Iraq (287,000 MT) and Cyprus (103,000MT).

Stocks

For MY 2025/26, barley stocks are forecast lower year-to-year at 627,000 MT. This forecast assumes that the government and private sector will continue to reduce their inventories to be more in line with historical averages.

Post is adjusting barley stock levels for MY 2023/24 and MY 2024/25, based on the market realization that TMO – which industry insiders believe controls about 90 percent of the country's total barley stocks – was holding more barley than was originally assumed.

MY 2024/25 stocks are forecast at 957,000 MT, down by more than half from the prior year as TMO attempts to draw down inventories through exports and domestic sales.

Corn

Production

Corn area harvested in MY 2025/26 is expected to increase year-to-year to 610,000 hectares as farmers are expected to grow more corn instead of cotton, vegetables and other row crops. According to market sources, this anticipated switch is due to the strong corn prices, with the price in March exceeding 10,000 TL/MT (\$270/MT). Planting of first crop corn started in February in the southeast where the weather is warmer and will gradually move northward and wrap up in April.

This expansion in area harvested comes at a time when the government is trying to scale back corn production to conserve limited water resources in certain parts of the country where water is in short supply. In the fall of 2024, the Ministry of Agriculture and Forestry announced an Agricultural Production Plan ([GAIN TU2025-0012](#)) to strengthen national food security amid changing climactic conditions. The new production model prioritizes water conservation by incentivizing the production of less water intensive crops in water scarce regions. According to industry contacts, the impact of this plan won't likely be felt in MY 2025/26 since most row crop farmers are still trying to understand how the new program will work.

In line with an increase in harvested area, MY 2025/26 corn production is forecast to increase from last year by 12 percent to about 7.9 MMT. As the corn crop is mostly irrigated, this prediction assumes sufficient volumes of irrigation water will be available throughout the growing season. However, given current water concerns in different parts of the country, the provincial governments in water-stressed areas may decide to enact usage limits on irrigation water. In Aydin province on the westside of

Turkiye, where small quantities of corn are grown, the provincial government has restricted irrigation water usage by 50 percent.

TMO did not purchase any of the MY 2024/25 corn crop as it has done in the past. Post believes this was because TMO already had large inventories of wheat and barley in its warehouses and didn't see a need to incentivize corn production in the current marketing year.

Consumption

MY 2025/26 corn consumption is forecast higher than last year at 9.8 MMT, based on growing compound feed and starch demand. Demand for corn in poultry rations is expected to continue on its upward trajectory as Türkiye, the world's eighth largest chicken meat producer, is set to expand production by 8 percent in 2025, according to the latest USDA PSD numbers.

According to industry contacts and Post analysis, a projected decrease in dairy cow inventories for the third straight year in 2025 is not expected to have a noticeable impact on compound feed demand and by extension corn utilization. The reason is because Türkiye is expected to import large numbers of feeder cattle for slaughter in 2025 that will require compound feed for fattening and will thereby offset any potential declines in reduced demand from the dairy sector.²

With nearly 85 percent of corn used to make animal feed, overall corn consumption typically parallels trends in the feed sector. Industry sources consistently predict steady year-over-year growth in compound feed production based, in large part, on the country's growing demand for meat, poultry, eggs, fish, and other livestock products. Export demand for these products is also cited as a contributing factor for the growth in compound feed production and consumption. Another reason for this purported steady growth is said to be the ongoing registration of farms, some of which have on-farm feed mills, in the government's Farmer Registration System (CKS). Registration allows the government to better account for feed production on these farms, most of which are relatively small, and entitles the farmer to government support.

In 2024, Türkiye's total compound feed production increased by almost 5 percent year-on-year to 29.3 MMT. A large share of compound feed is made from domestic corn and other feed ingredients, some of which are imported like soybeans and distillers' dried grains with solubles (DDGS).

Table 3: Compound Feed Production in Türkiye (MT, Calendar Year)				
Products	2022	2023	2024	23-24 % Change
Broiler Feed	6,023	5,829	6,105	4.7
Layer Feed	3,501	3,525	3,738	6.0
Other Poultry Feed	1,041	996	1,085	8.9
<i>All Poultry Feed</i>	10,565	10,350	10,928	5.6
Calf & Lamb	1,256	1,474	1,677	13.7
Fattening	6,654	6,833	7,359	7.7

² [Türkiye Livestock & Products Annual \(GAIN TU2024-0040\)](#)

Dairy	6,988	7,736	7,894	2.0
Other Ruminants	139	196	236	20.4
<i>All Ruminant Feed</i>	15,036	16,240	17,166	5.7
Other 1/	1,528	1,310	1,234	-5.9
Total	27,130	27,901	29,328	5.1

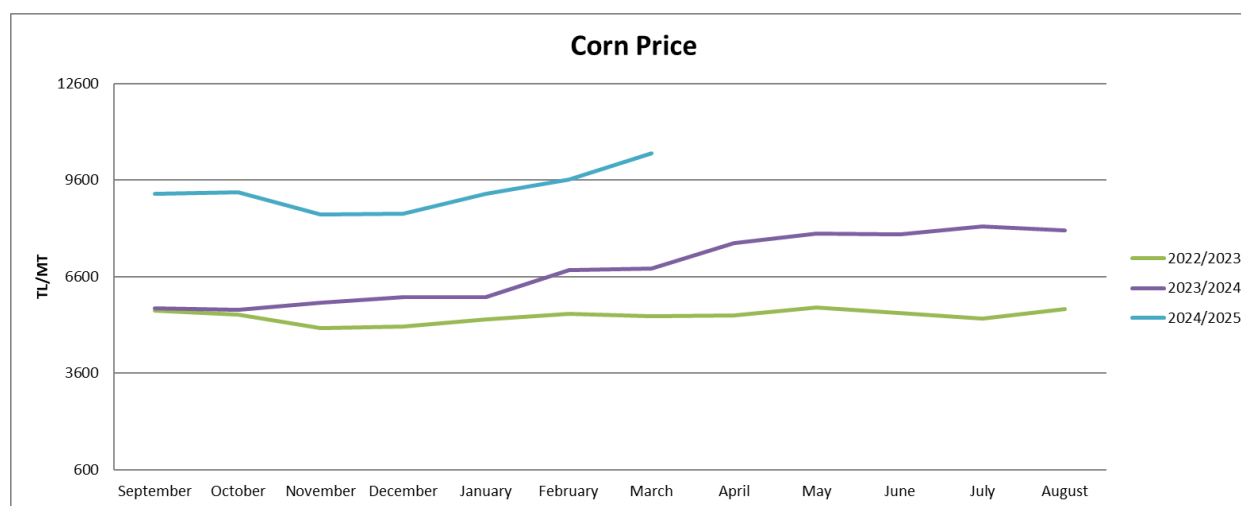
Source: Industry Contacts

1/ Other feed includes aquaculture feed and other feeds.

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 10,040 TL/MT (\$258/MT), up about 50 percent in terms of Turkish Lira from a year ago. By comparison, the CIF price for imported Black Sea corn in March was around \$255/MT.

Figure 6: Average Corn Price on the Main Commodity Exchanges (TL/MT)



Source: Average price of Commodity Exchanges

Trade

Imports

With an anticipated increase in MY 2025/26 corn production, corn imports are forecast lower year-over-year at 2.5 MMT. This projection assumes stable feed demand and a steady flow of transshipments.

The MY 2024/25 corn import estimate is revised noticeably higher above the USDA figure to 3.2 MMT but remains almost unchanged year-to-year. The revision is based on the expectation that Türkiye will import more corn under new tariff rate quotas for 2.0 MMT. Import volumes during the first five months (Sep-Jan) of the marketing year reached 1.9 MMT, with purchases expected to ramp up in the coming

months. The main suppliers were Ukraine (1.4 MMT), Russia (244,000 MT), and Romania (105,000 MT).

In October 2024 and again in March 2025, the Turkish government enacted tariff rate quotas (TRQ) for a total of 2.0 MMT of corn to alleviate upward pressure on domestic corn prices. The applied duty for both quotas is five percent with an out-of-quota duty of 130 percent. The first TRQ was effective from October through December 2024. The second TRQ is effective from late March through the end of June of this year.

For reference, imports of DDGS (HS 230330) during the first five months (Sep-Jan) of the marketing year, quadrupled year-on-year to 240,000 MT. This substantial increase in imports was due to attractive pricing for imported DDGS, growing feed demand, and the reduced availability of domestic corn compared to the prior year.

Exports

Corn exports in MY 2025/26 are forecasted unchanged year-over-year at 600,000 MT, assuming most of the corn will originate in Black Sea countries and be transshipped via Türkiye overland to neighboring countries, especially Iraq and Syria. This forecast also assumes steady transshipment demand from these countries, especially Iraq as it reportedly continues to expand its poultry sector.

MY 2024/25 corn exports are estimated at 600,000 MT, which is about one-quarter the amount compared to the prior year when Türkiye had a surplus of competitively priced domestic corn for export following the harvest. This current estimate is more in line with Türkiye's historical export volumes, most of which are generally transshipments. For September through January of the current marketing year, corn exports reached 237,000 MT. Major export destinations were Iraq (87,000 MT), Syria (54,000 MT), and Egypt (22,000 MT).

In the last decade, Türkiye has become a major transshipment hub for corn and other agricultural products. For more details, please refer to [Türkiye Becomes Global Transshipment Hub for Agricultural Products \(GAIN TU2024-0039\)](#).

Stocks

For MY 2025/26, corn stocks are forecast to remain unchanged year-to-year at 699,000 MT. Forecasted stock levels are within the standard range seen over the last decade and cover a little less than one month of consumption needs.

Rice

Production

MY 2025/26 paddy rice area harvested is projected to decrease year-to-year by about 2 percent to 950,000 hectares. This predicted decrease is based on the expectation that farmers will plant less rice this spring over fears of potential water shortages, especially in the Marmara region (including Thrace) on the west coast where about 70 percent of the nation's rice is grown. The other major rice-growing areas in the Black Sea and Central Anatolia regions are also experiencing water challenges to differing degrees. (See wheat production section for general discussion on weather conditions.)

Within the larger Marmara region, the Thrace region in the northwest part of the country has been exceptionally dry from October through January. Thrace alone accounts for 40 percent of Türkiye's rice production. The limited rainfall in Thrace was reportedly not enough to recharge dams and reservoirs that supply irrigation water to rice fields in the region. Rice farmers also rely on river water for irrigation. Sources report that the flow of the biggest river in Thrace is uncertain given dry weather conditions further upstream where the river originates outside of Türkiye. The Thrace Paddy Planting Commission, which is made up of provincial government officials and farmers, will convene in mid-April to decide how much rice to plant given expected water availability during the growing season. Based on the outcome of this meeting, Post will revise our predictions in our July update report.

MY 2025/26 production is forecast lower year-on-year to 828,000 MT (paddy), based on the projected contraction in area harvested and lower yields resulting from dry weather and soil conditions. Decreased availability of irrigation water could cause predicted yields to decline even further.

In the fall of 2024, the Ministry of Agriculture and Forestry announced an Agricultural Production Plan ([GAIN TU2025-0012](#)) to strengthen national food security amid changing climactic conditions. The new production model prioritizes water conservation by incentivizing the production of less water intensive crops in water scarce regions. According to industry contacts, the impact of this plan won't likely be felt in MY 2025/26 since most farmers are still trying to understand how the new program will work.

TMO purchases domestic paddy rice from farmers to stabilize the market and provide a safety net for farmers. Farmers also consider the expected TMO purchase price when making planting decisions. During the MY 2024/25 season, TMO is buying Osmancik at 25,000TL/MT (\$730/MT) and Baldo rice for 31,000 TL/MT (\$906/MT). TMO has reportedly purchased upwards of 100,000 MT of MY 2024/25 paddy rice.

Türkiye's rice production is mostly spread across several regions, including Marmara, Black Sea, and Central Anatolia. There are more than 25,000 rice farms and 130 rice millers in the country with an annual milling capacity of 2.8 MMT.

Consumption

The consumption of rice in MY 2025/26 is projected to remain unchanged from the previous year's newly revised estimate of 810,000 MT. This forecast is based on the expectation that consumer demand will remain relatively steady as it has for the last several years.

Turkish households prefer to eat the well-known, high-quality medium grain varieties such as Baldo, Osmancik, and Calrose (imported) in traditional rice dishes, especially pilaf. According to market sources, because domestic production is insufficient, there is continued demand for imports of high-quality rice, like Calrose. Calrose rice is currently being sold under the Hasata



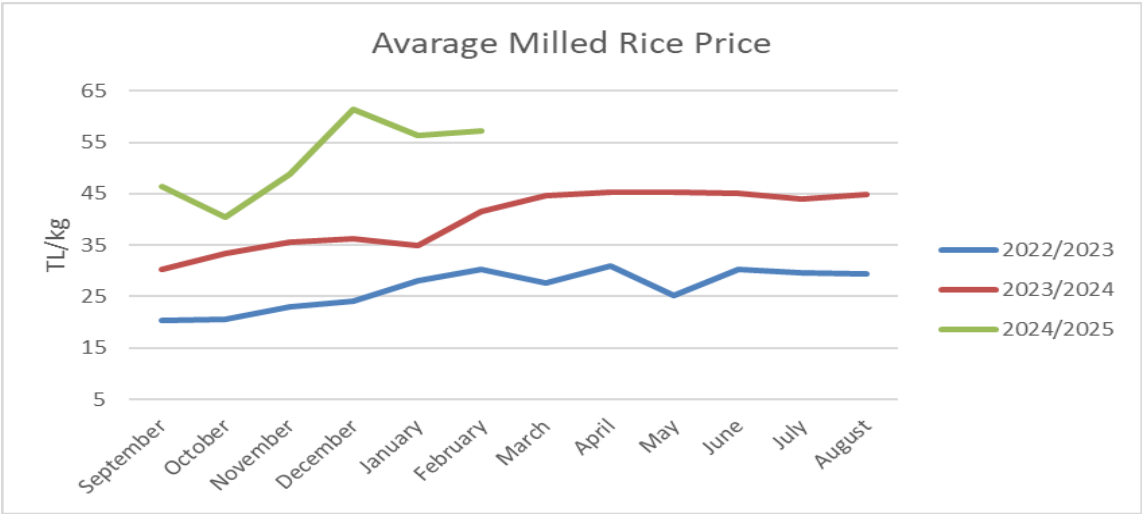
U.S. Calrose Rice for Sale in Ankara Grocery Store, March 2025

brand with a price tag of almost 72 TL /kg (\$1.9/kg), just slightly below the price for the local rice variety Osmancik.

TMO sells both imported and domestic rice through a handful of discount retail outlets. TMO’s current retail price for the highest quality rice, Type A milled rice (e.g. Baldo) is 61.5 TL/kg (\$1.7/kg). Lower quality Type B varieties are selling between 43.5-48.5 TL (\$1.2-\$1.3/kg).

Cheap imported rice from China and Southeast Asian countries has recently gotten a foothold in the market, especially in the HRI (Hotel, Restaurant, and Institutional) sector as food establishments seek to offer competitive menu prices to their clientele. Sector contacts report that this imported rice is also sometimes blended with higher-quality domestic rice for sale on retail store shelves.

Figure 7: Average Milled Rice Price on Edirne Commodity Exchange (TL/KG)



Source: Edirne Commodity Exchange

Trade

Imports

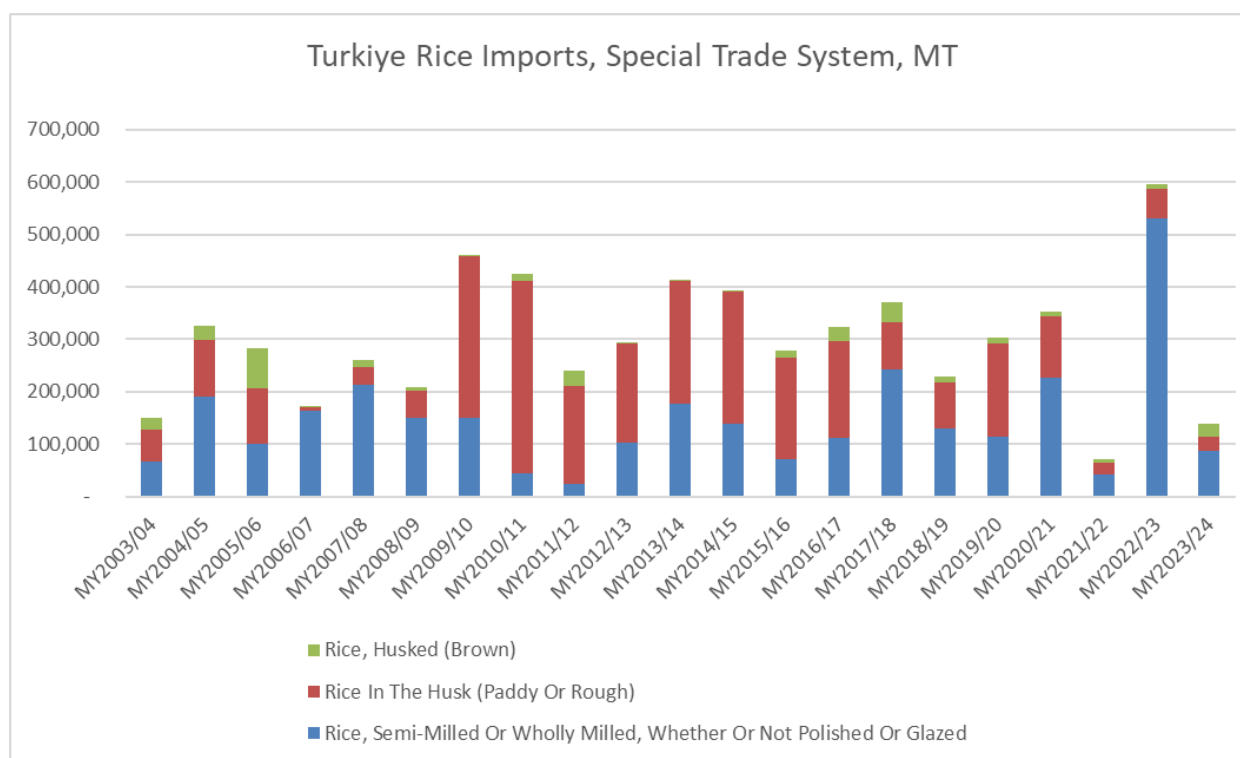
For MY 2025/26, rice imports are forecast higher year-to-year at 475,000 MT, about half of which will likely be transshipments. This projection assumes greater import demand resulting from a decline in domestic rice production and steady transshipment demand.

MY 2024/25 rice imports are expected to increase year-on-year to 425,000 MT, based on the latest import trends. In the first five months of MY 2023/24 (Sep-Jan), Turkiye imported about 146,000 MT of rice, which was up about 10 percent year-to-year. Most rice imports were milled. The major sources of imported rice were China (43,000 MT), India (24,000 MT), and the United States (20,000 MT).

Turkiye imported U.S. rice in MY 2024/25 for the first time in several years. The U.S. rice was subject to the 25 percent retaliatory Section 232 tariff plus an MFN duty on paddy rice of 34 percent. By comparison, imports of Chinese rice, which was only milled rice, was subject to an MFN tariff of 45 percent.

Over the last two decades, Türkiye has predominantly imported paddy rice for domestic use because it wanted to capture the value-added business in milling the paddy into milled rice. However, in the last few years this trend has changed and Türkiye is now importing more milled rice. See chart below. Post assesses this change is the result of evolving phytosanitary conditions in rice supplying countries that have made it difficult for them to send paddy rice that complies with Turkish requirements.

Figure 8: Türkiye Rice Imports, Special Trade System, MT



Source: Turkish Statistical Institution (TUIK) Note: Special Trade System covers only nationalized imports; excludes transshipments.

Exports

For MY 2025/26, rice exports are forecast at 250,000 MT, assuming steady transshipment demand. Based on Post's analysis of prior year trade volumes, the majority of Türkiye's rice exports are transshipments to regional markets. The minority amount of Turkish-origin rice is only shipped in consumer-ready packages.

The MY 2024/25 rice export estimate is modestly down year-to-year to 250,000 MT, based on a slowdown in exports to date and the expectation that ending stocks, some of which were destined for export, will continue to contract. In the first five months of MY 2024/25 (Sep-Jan), Türkiye exported about 118,000 MT of rice, which was down about 10 percent year-to-year. The main export destinations were Syria (33,000 MT), Ukraine (33,000 MT), and Libya (12,000 MT).

In the last decade, Türkiye has become a major transshipment hub for rice and other agricultural products. For more details, please refer to [Türkiye Becomes Global Transshipment Hub for Agricultural Products \(GAIN TU2024-0039\)](#).

Stocks

In MY 2025/26, rice stocks are forecast lower at 122,000 MT, which is in line with historical amounts and equates to about two months of consumption.

The rice stock estimate for MY 2024/25 is reduced from the previous year to 152,000 MT, based on the government and private sectors' interest in reducing the size of their larger-than-normal inventories. These large inventories were originally created a couple years ago in MY 2022/23 due to a large influx of imports after the government lowered import duties to ensure there was sufficient volumes of affordable rice available on the local market.

Production, Supply and Distribution

Wheat Market Year Begins Turkiye	2023/2024		2024/2025		2025/2026	
	Jun 2023		Jun 2024		Jun 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	7200	7200	7250	7250	0	7350
Beginning Stocks (1000 MT)	6484	6484	7403	7503	0	3803
Production (1000 MT)	21000	21000	19000	19000	0	18500
MY Imports (1000 MT)	9369	9369	4000	4000	0	8000
TY Imports (1000 MT)	8940	8940	4000	4000	0	8000
Total Supply (1000 MT)	36853	36853	30403	30503	0	30303
MY Exports (1000 MT)	9950	9950	7000	7300	0	8000
TY Exports (1000 MT)	9998	9998	7000	7300	0	8000
Feed and Residual (1000 MT)	1000	1000	1000	1000	0	1000
FSI Consumption (1000 MT)	18500	18400	18600	18400	0	18400
Total Consumption (1000 MT)	19500	19400	19600	19400	0	19400
Ending Stocks (1000 MT)	7403	7503	3803	3803	0	2903
Total Distribution (1000 MT)	36853	36853	30403	30503	0	30303
Yield (MT/HA)	2.9167	2.9167	2.6207	2.6207	0	2.517

(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 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Barley Market Year Begins Turkiye	2023/2024		2024/2025		2025/2026	
	Jun 2023		Jun 2024		Jun 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3700	3700	3750	3750	0	3500
Beginning Stocks (1000 MT)	922	922	1687	2087	0	957
Production (1000 MT)	8000	8000	7000	7000	0	6250
MY Imports (1000 MT)	142	142	150	170	0	900
TY Imports (1000 MT)	127	127	150	170	0	900
Total Supply (1000 MT)	9064	9064	8837	9257	0	8107
MY Exports (1000 MT)	77	77	450	900	0	80
TY Exports (1000 MT)	149	151	450	450	0	80
Feed and Residual (1000 MT)	6400	6000	7100	6500	0	6500
FSI Consumption (1000 MT)	900	900	900	900	0	900
Total Consumption (1000 MT)	7300	6900	8000	7400	0	7400
Ending Stocks (1000 MT)	1687	2087	387	957	0	627
Total Distribution (1000 MT)	9064	9064	8837	9257	0	8107
Yield (MT/HA)	2.1622	2.1622	1.8667	1.8667	0	1.7857

(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 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

(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 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

(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 2025/2026 = January 2026 - December 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Annex

Table 4: Grain Tariffs for Calendar Year 2025		
HTS	Product	Tariff Rate
1001	Wheat	130%
1003	Barley	130%
1005	Corn	130%
101610	Paddy Rice	34%
101620	Brown Rice	36%
101630	Milled Rice	45%

Source: Ministry of Trade, [Notice in the Official Gazette](#)

Table 5: Turkish Flour Export by Origin (Non-Grain Basis, MT)					
Destination	MY 2022/23	MY 2023/24	06/23-01/24	06/24-01/25	%Δ
Iraq	1,272,538	1,230,075	868,573	588,742	-32
Syria	327,408	279,876	165,197	221,820	34
Somalia	168,606	314,588	231,726	113,432	-51
Ghana	52,849	97,453	60,179	70,617	17
Eritrea	52,774	61,033	31,400	45,164	44
Venezuela	201,066	204,677	135,361	44,195	-67
Sierra Leone	38,014	49,053	27,762	43,243	56
Indonesia	29,852	78,740	40,654	42,829	5
Other	1,080,087	1,692,089	1,177,657	462,268	-61
Total	3,223,194	4,007,584	2,738,509	1,632,310	-40

Table 6: Turkish Pasta Export by Origin (Non-Grain Basis, MT)					
Destination	MY 2022/23	MY 2023/24	06/23-01/24	06/24-01/25	%Δ
Somalia	169,332	200,785	142,232	142,057	0
Ghana	64,565	102,113	63,964	95,158	49
Togo	63,604	102,708	74,965	70,147	-6
Benin	95,129	50,725	43,321	51,258	18
Japan	60,752	67,152	41,866	50,236	20
Iraq	61,984	75,965	45,210	37,607	-17
Niger	62,736	27,435	17,703	33,373	89
Venezuela	185,638	238,818	147,260	29,098	-80
Cameroon	17,798	33,103	22,808	27,152	19
Other	538,281	540,517	539,272	557,073	3
Total	1,319,819	1,453,512	949,509	942,257	-1

* June 2024-January 2025

Source: Turkish Statistics Institute

Attachments:

No Attachments