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Report Highlights:

In marketing year (MY) 2024/25, Turkiye's wheat, barley, and corn production is forecast to contract year-over-year due to drier-than-normal weather conditions during the growing season. Despite this contraction, Turkiye continues to hold large carryover stocks of wheat and barley from last year. The Turkish government has taken different steps to drawdown these surplus inventories. In addition, to conserve water in increasingly dry growing conditions, the government recently instituted a program to incentivize farmers to grow crops that are less water intensive in regions where water is in short supply.

Wheat

Production

The wheat production forecast for MY 2024/25 is left unchanged at 19.0 million metric tons (MMT), though down 2.0 MMT from the previous year due to yield losses resulting from drier-than-normal weather conditions across most of the country.

Limited rainfall during the late fall and winter months (Oct '24-Dec '25) may again impact the production of winter wheat and barley in MY 2025/26. According to the latest weather data from [the Turkish State Meteorological Service](#), precipitation levels across the country from October-December 2024 were down 16 percent from the historical average and 28 percent below the same period the previous year. Considering the persistent dry weather conditions, spring rains will be even more critical for these important winter crops.

In the fall of 2024, in response to increased weather variability and to conserve water resources, the Ministry of Agriculture & Forestry launched (MinAF) the Agricultural Production Planning Model, which is a new crop incentive program to encourage farmers to grow crops that are less water-intensive in regions where water supplies are scarce. This new program may have influenced some wheat and barley farmers' planting decisions last fall, but it's still too early to judge the magnitude. Post will publish a separate GAIN report in the coming weeks to explain some of the details of this new program.

Consumption

Post is raising the MY 2024/25 wheat consumption forecast marginally higher to 20.0 MMT. This anticipated growth in consumption is attributed to the increased amount of favorably priced feed wheat. The supply of feed wheat has grown in recent months because some of the excess wheat stocks that are stored in underground bunkers has reportedly deteriorated in quality. Meantime, the demand for food-grade wheat, which accounts for approximately 90 percent of overall wheat consumption, is expected to hold steady.

In spring 2023, after Türkiye re-embraced orthodox macroeconomic policies, the Turkish government announced that it would no longer sell domestic wheat at a discount. However, this policy seems somewhat flexible as the government now appears to be selling its stocks at a discount in order to liquidate some of its inventories. According to its website and market sources, TMO is selling milling wheat from its reserves to the domestic market at 8,900-11,320 TL/MT (\$250-317/MT), depending on the quality and end use. In addition, in order to encourage sales of its durum and barley stocks, TMO is selling these grains on three-month credit terms.

Trade

Wheat Imports

Wheat imports during the first half of MY 2024/25 (Jun-Nov) were down year-over-year by more than 40 percent, falling to 1.9 MMT. This drop is directly attributed to the Turkish government's decision to suspend the inward processing regime (IPR) for wheat from late June through mid-October. ¹

Despite this slow start, wheat imports are expected to pick up during the second half of the year following the partial renewal of the IPR in October and are projected to stay on track and reach 5.5 MMT. In keeping with past trends, Russian wheat is expected to account for the majority of Türkiye's wheat imports.

In mid-October, after the IPR suspension ended, the Turkish Grain Board (TMO) announced that millers had to purchase 85 percent of their wheat requirements from TMO, which is holding large stocks of domestic wheat. Millers are eligible purchase the remaining 15 percent of their wheat needs under the IPR. In January of this year, these percentages were revised to 75 percent (domestic) and 25 percent (imported). According to market sources, these percentages will likely remain in place until the end of the harvest in May. At present, all wheat imports come in under the IPR because of the prohibitive MFN tariff of 130 percent.

In the meantime, flour exporters are hoping that they can buy at least 50 percent of their wheat requirements under the IPR. This hoped for change would, according to sources, improve their export competitiveness since imported wheat is significantly cheaper than domestic wheat. Currently, imports of Russian wheat are about \$70/MT cheaper than Turkish wheat, which is currently selling for about \$310/MT.

Wheat Exports

The wheat export forecast for MY 2024/25 is trimmed back to 7.0 MMT for a combination of reasons. These reasons include the temporary suspension of the IPR, the domestic purchase requirements to access the partially renewed IPR, and the expected difficulties for Turkish flour exporters to recover lost market share in key export markets in Africa and the Middle East, especially Iraq.

In June 2024, to reduce the country's overflowing wheat and barley inventories, the Turkish government authorized commercial exports of domestic milling wheat, durum wheat, as well as barley. During the first half of the current marketing year (Jun-Nov), Turkey exported about 1.0 MMT of durum wheat and no milling wheat exports since it isn't price competitive on the international market.

During this same six-month period, wheat flour exports plummeted year-over-year by a little more than 40 percent to 1.2 MMT (wheat equivalent 1.7 MMT). The leading export destinations were Iraq (455,000 MT), Syria (149,000 MT), and Somalia (64,000 MT). The pace of exports is expected to pick up in the coming months with the partial renewal of the IPR and prospects for new export opportunities in Syria following the recent regime change in that country.

Meantime, pasta export volumes remained similar year-to-year at 664,000 MT. The top export markets were Somalia (114,000 MT), Ghana (64,000 MT), and Togo (50,000 MT).

Stocks

MY 2024/25 wheat ending stocks are adjusted slightly higher to 2.8 MMT, but are down by almost half from the previous year as TMO and local millers seek to liquidate their excess inventories.

Barley

Production

The MY 2024/25 barley production forecast remains unchanged at 7.0 MMT. Year-to-year production was down by 1.0 MMT because of yield losses resulting from drier-than-normal weather conditions during the growing season.

The planting of the MY 2025/26 winter barley crop finished in November and the harvest will start in the spring. Refer to the wheat production section for information about the potential for drought conditions to impact next year's barley crop.

Consumption

The MY 2024/25 barley consumption forecast remains unchanged at 8.0 MMT. At the beginning of December, TMO announced that it would sell barley from its reserves to domestic buyers at a price between 8,000-8,500 TL/MT (\$228-245/MT). TMO will likely adjust its sales price each month as it continues to sell off its barley stocks until the spring harvest begins.

Trade

Imports

The MY 2024/25 barley import forecast is cut down to 130,000 MT, based on weaker import demand resulting from the large barley carryover stocks at the start of the marketing year. During the first half of the marketing year (Jun-Nov), barley imports fell year-over-year by 7 percent to 77,000 MT. The top suppliers were Russia (40,000 MT) and Ukraine (36,000 MT).

Exports

The MY 2024/25 barley export forecast is adjusted significantly higher to 450,000 MT, based on strong export volumes resulting from the government's earlier decision to allow barley exports to liquidate excess reserves. Last December, TMO issued an export tender for 150,000 MT of barley from its reserves. Post expects that TMO will issue additional tenders through the spring in order to wind down its current stocks to more manageable levels.

During the first half of marketing year (Jun-Nov), barley exports jumped to 141,000 MT, compared to 22,000 MT from the same period the year before. Nearly all barley exports went to Iraq.

Stocks

MY 2024/25 ending stocks for barley are cut in half to 367,000 MT, based on export volumes to date and the expectation that TMO and the private sector will continue drawing down stocks to more normal levels.

Corn

Production

MY 2024/25 corn production is revised marginally higher to 7.1 MMT, but production volumes are down year-over-year because of yield losses resulting from dry weather conditions this year. The forecasted increase is mainly due to a larger-than expected second corn crop in the southeastern part of the country. The second crop is typically harvested in December or January, depending on weather conditions.

Consumption

In line with the increase in production, the corn consumption forecast for MY 2024/25 is revised higher to 8.9 MMT. Year-over-year corn consumption is down because of the decline in corn production and the slowdown in feed corn demand resulting from increased supplies of competitively priced feed wheat. Domestic corn is currently selling on the local exchange for 910 TL/MT (\$260/MT).

Trade

Corn Imports

The MY 2024/25 corn import forecast remains at 2.4 MMT, assuming the government does not reinstitute a tariff rate quota (TRQ) for corn. In October 2024, in order to stabilize corn prices, the Turkish government introduced a 1.0 MMT TRQ with an in-quota duty of 5 percent, effective from early October through the end of 2024. The out-of-quota duty was 130 percent. With the end of the TRQ, the duty on all corn imports has reverted to the MFN rate of 130 percent.

During the first three months of the marketing year (Sep-Nov), corn imports reached about 1.0 MMT. The leading suppliers were Ukraine (735,000 MT) and Russia (185,000 MT).

Corn Exports

The MY 2024/25 corn export forecast remains unchanged at 600,000 MT, most of which will be made of transshipments to neighboring countries. This projection assumes transshipment demand will remain steady.

In the first quarter of MY 2024/25 (Sep-Nov), corn exports totaled 167,000 MT, with Iraq (68,000) and Syria (40,000 MT) as the leading export destinations. Exports were significantly higher during the same period the prior year primarily because of the bumper corn harvest that year.

Stocks

Corn ending stocks in MY 2024/25 are forecast to remain nearly unchanged at 769,000 MT.

Rice

Production

The MY 2024/25 (Sep-Aug) rice production forecast ticked slightly higher to 580,000 MT (milled). Production is up year-over-year because of a minor increase in the area harvested, though yields remain below the long-term average. In contrast to other grains, rice production in MY 2024/25 was less impacted by dry weather conditions since most rice had access to irrigation.

The weather in the Thrace region, which is located in the northeast part of the country and accounts for more than 40 percent of national rice production, has been unseasonably dry and warmer than normal during the fall and winter months (Oct '24-Dec '25). The water resources in this region are reportedly under pressure and spring rains will be critical to replenish irrigation sources needed to produce the MY 2025/26 rice crop. According to market sources, planting decisions this spring will depend on water availability in the region, guidance from the provincial authorities, and feedback from regional rice producer commissions.

Consumption

The MY 2024/25 rice consumption forecast is trimmed slightly back to 810,000 MT, which matches the previous two years. This forecast assumes stable household and restaurant demand.

According to industry sources, local traders have been reluctant to purchase rice because its more attractive for them to invest their money elsewhere because of the persistent high inflation and high interest rates. As a result, TMO has reportedly purchased upwards of 100,000 MT of paddy rice. In early September 2024, TMO announced the MY 2024/25 paddy rice procurement price at 25,000TL/MT (\$730/MT) for Osmancik rice and 31,000 TL/MT (\$906/MT) for Baldo rice.

Trade

Rice Imports

Turkiye's rice imports in MY 2024/25 remains unchanged at 425,000 MT (milled equivalent), though up year-over-year due to steady domestic demand and the rice transshipment business.

During the first three months of the marketing year (Sep-Nov), rice imports were up year-to-year by about 40 percent to 110,000 MT (milled equivalent). The top suppliers were China (44,000 MT) and United States (28,000 MT). This is the first sizeable U.S. shipment, all of which was paddy rice, since 2020. The U.S. rice was subject to the 25 percent retaliatory Section 232 tariff plus an MFN duty on paddy rice of 34 percent. Imports of Chinese rice consisted only of milled rice and was subject to an MFN tariff of 45 percent.

Rice Exports

For MY 2024/25, rice exports are forecast to remain the same at 250,000 MT (milled equivalent), assuming continued transshipment demand. Most rice exports are transshipments to neighboring countries.

During the first three months of the marketing year (Sep-Nov), rice exports were down year-to-year about six percent to 69,000 MT (milled equivalent). The top export destinations were Syria (16,000 MT) and Ukraine (13,500 MT).

Stocks

Rice ending stocks in MY 2024/25 are adjusted slightly higher to 152,000 MT, though down year-over-year as the private sector continues to drawdown inventories in line with the long run average.

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	7250	7250
Beginning Stocks (1000 MT)	2337	2337	4584	4584	5203	5303
Production (1000 MT)	17250	17250	21000	21000	19000	19000
MY Imports (1000 MT)	12072	12072	9369	9369	5500	5500
TY Imports (1000 MT)	12500	12500	8940	8940	5500	5500
Total Supply (1000 MT)	31659	31659	34953	34953	29703	29803
MY Exports (1000 MT)	6875	6875	9950	9950	7500	7000
TY Exports (1000 MT)	6953	6954	9998	9998	7500	7000
Feed and Residual (1000 MT)	1500	1500	1000	1000	1000	1300
FSI Consumption (1000 MT)	18700	18700	18800	18700	18700	18700
Total Consumption (1000 MT)	20200	20200	19800	19700	19700	20000
Ending Stocks (1000 MT)	4584	4584	5203	5303	2503	2803
Total Distribution (1000 MT)	31659	31659	34953	34953	29703	29803
Yield (MT/HA)	2.5368	2.5368	2.9167	2.9167	2.6207	2.6207

(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

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

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	3750	3750
Beginning Stocks (1000 MT)	306	306	922	922	1687	1687
Production (1000 MT)	7400	7400	8000	8000	7000	7000
MY Imports (1000 MT)	2141	2141	142	142	200	130
TY Imports (1000 MT)	1967	1967	127	127	200	130
Total Supply (1000 MT)	9847	9847	9064	9064	8887	8817
MY Exports (1000 MT)	225	225	77	77	150	450
TY Exports (1000 MT)	121	121	151	151	150	450
Feed and Residual (1000 MT)	7800	7800	6400	6400	7100	7100
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	8700	8700	7300	7300	8000	8000
Ending Stocks (1000 MT)	922	922	1687	1687	737	367
Total Distribution (1000 MT)	9847	9847	9064	9064	8887	8817
Yield (MT/HA)	1.9474	1.9474	2.1622	2.1622	1.8667	1.8667

(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

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 2024/2025 = October 2024 - September 2025

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 2024/2025 = January 2025 - December 2025

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Attachments:

No Attachments

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