

Required Report: Required - Public Distribution

Date: July 03, 2025

Report Number: TU2025-0038

Report Name: Grain and Feed Update

Country: Turkiye

Post: Ankara

Report Category: Grain and Feed

Prepared By: FAS Staff

Approved By: Michael Francom

Report Highlights:

For marketing year (MY) 2025/26, Turkiye's production of wheat and barley, most of which are dry farmed, is forecast lower year-over-year because of drier-than-normal weather conditions. Similarly, rice production is projected lower because of water limitations, especially in the northwestern Marmara region, where a significant amount of the country's rice crop is grown. In contrast, corn production, which is less impacted by the dry weather because most of the crop has access to irrigation, is forecast higher year-to-year as farmers are expected to expand plantings in response to strong prices. Imports of wheat and barley in MY 2025/26 are expected to surge to fill the shortfall in domestic production. Meantime, Turkish flour exporters hope to regain market share lost the prior marketing year after the government limited wheat imports.

Wheat

Production

Owing to dry weather conditions throughout the growing season, Post is cutting its MY 2025/26 wheat production forecast to about 16.3 MMT, down 15 percent from the previous year. Production could fall even lower depending on the extent of the drought damage. In the main wheat growing areas of Central and Southeastern Anatolia there was insufficient rainfall, higher-than-normal winter temperatures, and an unexpected spring frost event that is expected to depress wheat yields on dry wheat farms between 15-30 percent compared to last year.

According to the Turkish meteorological agency, rainfall during [the 2025 water year](#) (Oct '24-May '25) was 23 percent below normal and 27 percent lower than the same period the prior year. Following a dry winter season, farmers were holding out hope for a wet spring. However, spring precipitation was insufficient. As the majority of Turkiye's wheat crop is dry farmed and depends entirely on rainfall, a shortage of precipitation has an immediate and negative impact on wheat yields and overall production volumes.

Meantime, Post predicts a slight year-to-year increase in the wheat area harvested since Turkish farmers reportedly expanded their plantings of winter wheat last fall based on the expectation that it would be more profitable than other row crops. However, this expansion in area is not enough to offset the negative effects of dry weather on wheat production.

Durum wheat is expected to make up about 3.6 MMT of the forecasted wheat production in MY 2025/26. In contrast to wheat for milling, the production of durum wheat is down just slightly year-to-year because a larger share of it is irrigated.

The MY 2025/26 wheat harvest started in mid-May in the southeast part of the country and is on track to finish in the northern latitudes in late-July. As of the third week of June, the harvest was a little less than halfway completed.

At the beginning of June, the Turkish Grain Board (TMO) [announced](#) its MY 2025/26 wheat (and barley) procurement prices. TMO significantly increased its offer prices to help compensate farmers for rising input costs. The prices shown in Table 1 are for first grade or the best quality wheat; reduced prices are offered for lower quality wheat.

Table 1: TMO's Procurement Prices for 1 st Grade Quality Wheat			
Grain Type	2024 (TL/MT) 1/	2025 (TL/MT) 2/	Y-o-Y % Change
Milling Wheat 3/	9,750 (\$304/MT)	13,750 (\$351/MT)	41
Durum Wheat	10,500 (\$328/MT)	13,750 (\$351/MT)	31

1/ Exchange rate: \$1=39.1 TL, as of June 3, 2025

2/ Exchange rate: \$1=32 TL, as of June 7, 2024

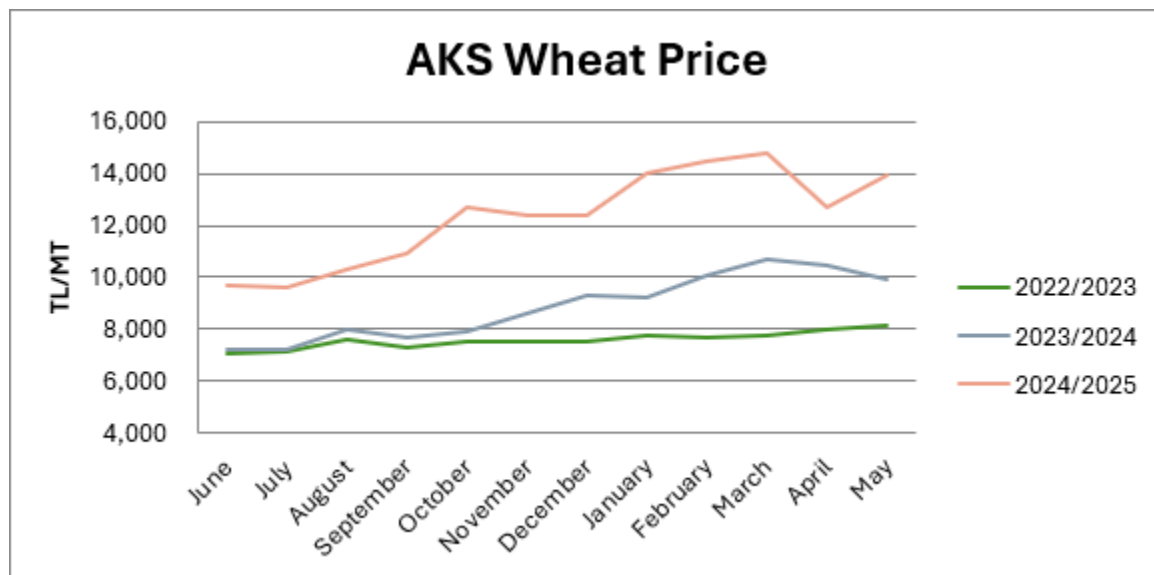
3/Anatolian Hard Red Milling Wheat (AKS)

Consumption

Wheat consumption for MY 2025/26 is forecast at 19.4 MMT as demand for food-grade wheat, which accounts for approximately 90 of consumption, is expected to remain steady. Wheat consumption has

stayed flat for several years because of Türkiye's demographics and changing consumption patterns. Population growth has stagnated, and middle- and upper-income consumers are cutting back on the traditional, bread-heavy diet.

Wheat prices continue to generally trend upward, as shown in the chart below for #1 grade Anatolian Hard Red Wheat (AKS), which is considered the benchmark for wheat prices across the country. In mid-June 2025, the average market price for AKS across all commodity exchanges was about 12,700 TL/MT (\$326/MT). By comparison, the June CIF price for similar quality imported wheat (12.5 protein) was significantly cheaper at about \$240/MT.



Source: Polatli Commodity Exchange. Reported price is for #1 grade milling wheat.

Trade

Imports

To account for the drop in domestic wheat production, Post is ramping up its wheat import forecast for MY 2025/26 to almost 10.3 MMT. The majority of the imported wheat will be used by Turkish flour and pasta exporters with the remainder going to make flour and an assortment of other wheat-based products for the domestic market.

Wheat imports for MY 2024/25 are estimated at 3.2 MMT, down substantially from the prior year because the Turkish government restricted imports to help reduce surplus inventories of domestic wheat. In MY 2024/25 (Jun-Apr), Türkiye imported about 2.8 MMT of wheat, nearly all of which came from Russia. As of March, Turkish flour exporters are no longer required to buy a fixed percentage of domestic wheat before purchasing imported wheat for milling and re-export under the inward processing regime (IPR). In other words, flour exporters can import as much wheat as they need under the IPR.

Exports

Wheat exports for MY 2025/26 are forecast unchanged year-over-year at 7.0 MMT, with the expectation that a larger share of this projected amount will be flour. Turkish flour exporters are confident that they can recover some of their market losses experienced during the previous marketing year. Flour exporters

blame these losses on the government’s decision to curtail wheat imports to drawdown domestic wheat inventories.

Despite its optimism, the flour industry’s ability to regain market share will be tempered by diminishing demand from Iraq, historically one of Türkiye’s biggest export destinations, as that country continues to invest in expanding its flour milling capacity. Additionally, competition from Egyptian flour in markets in Africa and the Middle East could slow down this envisioned recovery.

In MY 2024/25, wheat exports (including wheat products) are estimated at 7.0 MMT, which is made up of 3.2 MMT of wheat flour, 1.8 MMT of pasta, 1.7 MMT of wheat, and 300,000 MT of bulgur on a wheat equivalent basis. Wheat exports (including wheat products) from June through April totaled 6.7 MMT. Iraq (1.9 MT), Syria (555,000 MT) and Somalia (455,000 MT) were the top three destinations. Shipments to Iran were negligible.

Stocks

Wheat stocks for MY 2025/26 are forecast at a level close to last year at about 3.4 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. TMO is expected to remain the leading holder of wheat stocks in the country.

Barley

Production

Due to depressed barley yields resulting from dry weather conditions, Post is slashing its barley MY 2025/26 production forecast down to 5.1 MMT, which is 28 percent lower than last year. Most of the weather-related losses will be concentrated in the main barley growing regions in Central and Southeastern Anatolia. A brief discussion of weather conditions impacting barley production can be found in the wheat production section of this report. In comparison to wheat, barley is at a higher risk to drought because it is almost all dry farmed. The barley harvest kicked off in May and will finish in early July.

Post had previously reduced our barley production forecast in the [April 2025 Grain & Feed Annual](#), based on the expectation that farmers had planted fewer acres in barley last fall because expected returns weren’t as good as other row crops. In other words, the combination of market factors and weather-related losses have intensified the steep year-on-year decline in MY 2025/26 barley production.

At the beginning of June, the Turkish Grain Board (TMO) [announced](#) its MY 2025/26 barley (and wheat) procurement prices. TMO significantly increased its offer prices to help compensate farmers for rising input costs. The prices shown in Table 2 are for first grade or the best quality barley; reduced prices are offered for lower quality barley.

Table 2: TMO’s Procurement Prices for 1 st Grade Quality Barley			
Grain Type	2024 (TL/MT) 1/	2025 (TL/MT) 2/	Y-o-Y % Change
Barley	7,300 (\$228/MT)	11,000 (\$284/MT)	52

1/ Exchange rate: \$1=39.1 TL, as of June 3, 2025

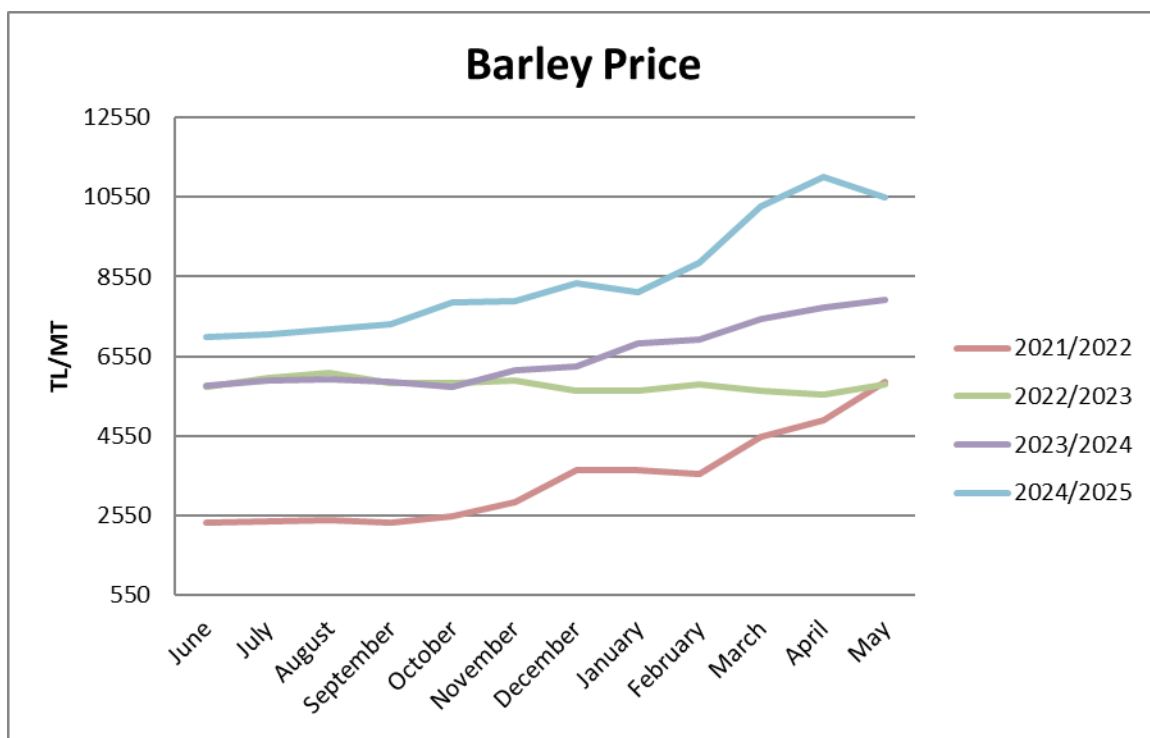
2/ Exchange rate: \$1=32 TL, as of June 7, 2024

Consumption

With the projected contraction in barley production, consumption of barley in MY 2025/26 is forecast to drop year-over-year to about 6.7 MMT. Nonetheless, Post expects barley imports will surge to help meet some of Türkiye's domestic demand requirements, especially for animal feed.

The MY 2024/25 barley consumption estimate is adjusted marginally higher year-on-year to 7.4 MMT following TMO's decision in the last quarter of the marketing year to hold selling off its remaining barley inventories ahead of the harvest of the new MY 2025/26 crop.

Barley prices continue along an upward trajectory. In mid-June 2025, the average market price for barley was 11,000 TL/MT (\$256/MT). The June CIF price for imported barley was \$235/MT.



Source: Average price of the Commodity Exchanges.

Trade

Imports

To compensate for the drop in domestic barley production, Post is predicting MY 2025/26 barley imports to explode up to 1.6 MMT to meet domestic demand requirements. This prediction assumes that the government will intervene in the market, as they have done in the past, by either cutting tariffs, establishing a tariff rate quota (TRQ), or by having TMO import and resale barley to end users.

Exports

Faced with shrinking ending stocks and the need to import barley, Türkiye will not be in a position to export much barley in MY 2025/26. Barley exports for MY 2025/26 are forecast to significantly contract compared to the previous year to just 100,000 MT.

Post's barley export estimate for MY 2024/25 is left unchanged at 1.4 MMT and reflects the latest official trade data. From June 2024 to April 2025, Turkish barley exports totaled about 1.2 MMT of barley. The main export destinations were Iraq (537,000 MT), Saudi Arabia (254,000 MT) and Iran (158,000 MT).

Turkish traders are closely watching developments in Iran and the larger Middle East region. As of writing this report, Turkish grain exports (including transshipments) to Iran continue uninterrupted, according to industry sources.

Stocks

For MY 2025/26, barley stocks are forecast slightly lower year-to-year at 387,000 MT. This forecast assumes that the government and private sector will continue to reduce their inventories to be more in line with historical averages.

MY 2024/25 stocks are forecast at 437,000 MT, down year-over-year by nearly 80 percent as the government attempts to draw down inventories through exports and domestic sales. Market sources indicate that TMO was holding as much as 90 percent of the country's barley stocks.

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 plant more corn since it is considered more profitable than other alternatives such as cotton, vegetables, and other row crops. In line with this expansion, MY 2025/26 corn production is forecast to increase year-over-year by 12 percent to about 7.9 MMT.

This prediction assumes sufficient volumes of irrigation water will be available throughout the growing season. This assumption could be challenged if municipalities decide to restrict water usage in the summer growing season. For the time being, though, access to irrigation doesn't appear to be a major constraint for the country's corn crop.

As reported in the [April 2025 Grain & Feed Annual](#), Aydin province on the country's west coast – which accounts for a modest amount of the country's corn production – has restricted irrigation water use by 50 percent. The minimal impact of this restriction on the country's overall corn production was previously accounted for in Post's MY 2025/26 forecast earlier this year. Additionally, some provinces in the Southeastern Anatolia region reported planting fewer acres in first crop corn because of irrigation-related issues. However, this lost area was offset by increased plantings in the Mediterranean region.

In the future, the Ministry of Agriculture & Forestry (MinAF) hopes its new Agricultural Production Plan ([GAIN TU2025-0012](#)) will help limit the production of water-intensive crops like corn in areas that are struggling to conserve water.

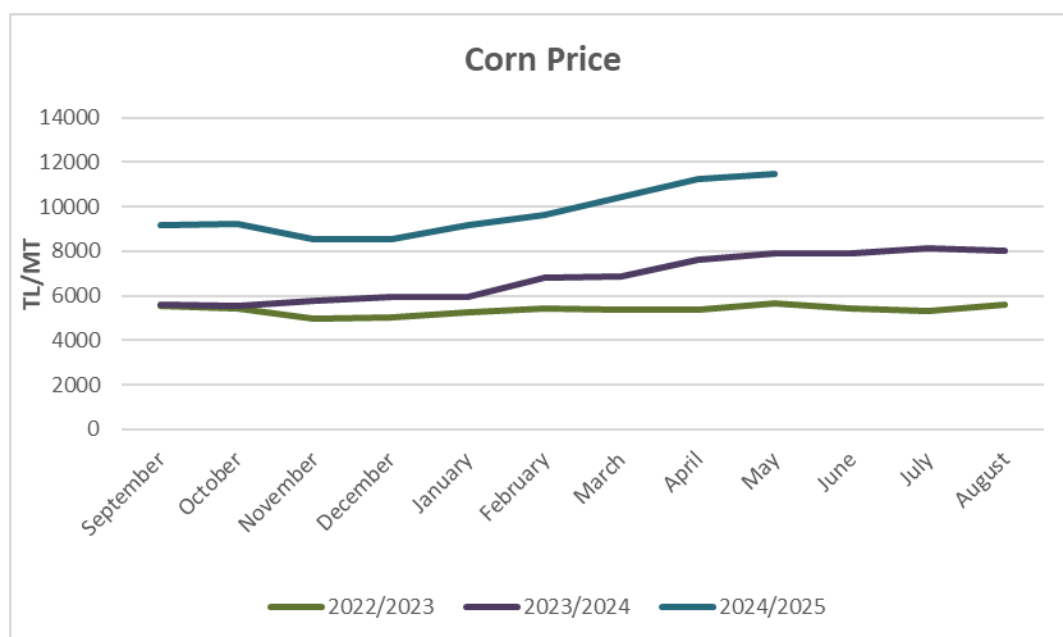
The first corn crop was planted in February in the Southeastern Anatolia with planting continuing in northern latitudes until the end of May.

Consumption

MY 2025/26 corn consumption is forecast to remain almost unchanged year-on-year at 10.2 MMT, based on the steady demand for corn to make compound animal feed and starch. With nearly 85 percent of corn used to make animal feed, overall corn consumption typically parallels trends in the feed sector. Feed demand is expected to remain strong based on growing demand from the poultry sector and steady demand from the livestock sector.

MY 2024/25 corn consumption is revised slightly upward to 10.3 MMT in response to the increased availability of cheaper corn imported under the TRQs.

Corn prices continue to trend higher. In mid-June 2025, the average commercial price for corn was 11,700 TL/MT (\$300/MT). By comparison, the CIF price for imported corn was significantly cheaper at \$255/MT in June 2025.



Source: Average price of the Commodity Exchanges.

Trade

Imports

With an anticipated increase corn production, corn imports in MY 2025/26 are forecast lower year-over-year at 2.9 MMT. This projection assumes stable feed demand and a steady flow of transshipments.

The MY 2024/25 corn import estimate is revised higher to 4.0 MMT, following the government's decision in May to open a third TRQ, bringing the combined amount of all three quotas to 3.0 MMT during this marketing year. For details about the TRQs, refer to [GAIN TU2025-0023](#). Import volumes from September through April of the current marketing year reached 3.3 MMT. Ukraine (2.6 MMT), Russia (306,000 MT) and Romania (186,000 MT) were the main suppliers.

Exports

Corn exports in MY 2025/26 are forecasted unchanged year-over-year at 600,000 MT, assuming most of the corn will originate from Black Sea countries and be transshipped via Türkiye overland to neighboring countries, especially Iraq and Syria.

MY 2024/25 corn exports are estimated at 600,000 MT, which is about one-quarter the amount from the previous year when Türkiye had an excess of competitively priced domestic corn for export. This current estimate is more in line with Türkiye's historical export volumes, most of which are generally transshipments. During the first eight months (Sep-Apr) of the marketing year, corn exports reached 400,000 MT. Major export destinations were Iraq (140,000 MT), Syria (100,000 MT), and Iran (45,000 MT).

Turkish traders are closely watching developments in Iran and the larger Middle East region. As of writing this report, Turkish grain exports (including transshipments) to Iran continue uninterrupted, according to industry sources.

Stocks

For MY 2025/26, corn stocks are forecast to remain unchanged year-to-year at 799,000 MT.

Rice

Production

In response to existing limits on irrigation water use and the potential for more restrictions, MY 2025/26 paddy rice area harvested is projected to decrease year-to-year by about 5 percent to 93,000 hectares. Already, due to existing water restrictions, rice cannot be planted in several districts in the Marmara region – Biga, Hayrabolu, and Edirne – in the northwest part of the country where drought conditions are more pronounced. More than 60 percent of Türkiye's rice is grown in the Marmara region.

In parallel with the reduction in area harvested, MY 2025/26 rice production is forecast lower at 810,000 MT, down 56,000 MT from last year. Rice planting started at the beginning of May and is expected to wrap up by the end of June.

Based on past practice, TMO is expected to announce its purchase price for the MY 2025/26 rice crop sometime in September or October.

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.

The wholesale and retail prices for rice have remained fairly stable in recent months because of ample supplies in the marketplace as both the private sector and TMO try to sell off their stocks before the next rice harvest. 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 (\$1.6/kg). Lower quality Type B varieties are selling between 43.5-48.5 TL (\$1.1-\$1.2/kg). Additionally, TMO is selling paddy rice from its stocks between 25,000-35,000 TL/MT (\$630-880/MT).

Trade

Imports

For MY 2025/26, rice imports are forecast higher year-to-year at 450,000 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 stable domestic and transshipment demand, and shrinking ending stocks. According to the latest trade data, rice imports from September through April of the current marketing year reached about 239,000 MT, which was up about 30 percent compared to the same period a year ago. The major sources of imported rice, most of which was milled, were India (61,000 MT) China (54,000 MT), and the United States (28,000 MT).

The rice imported from the United States was paddy rice and was subject to a 25 percent retaliatory Section 232 tariff plus an MFN duty of 34 percent. The retaliatory duty puts U.S. rice at a competitive disadvantage compared to other foreign suppliers. The USA Rice Federation (USARF) is conducting different in-country marketing activities to promote the sale of U.S. rice at discount grocery outlets.

Exports

For MY 2025/26, rice exports are forecast unchanged year-to-year 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.

MY 2024/25 rice exports are estimated at 250,000 MT, down 45,000 MT from the previous year because the private sector's exportable supplies of foreign rice is shrinking. In the first eight months of MY 2024/25 (Sep-Apr), Türkiye exported about 172,000 MT of rice, which was down about 20 percent year-to-year. The main export destinations were Syria (54,000 MT), Ukraine (26,000 MT), and Libya (20,000 MT).

Stocks

For MY 2025/26, rice stocks are forecast lower year-over-year at 85,000 MT. This forecast assumes that the government and private sector will continue to reduce their inventories to be more in line with historical averages and that the government will not reduce or eliminate tariffs on imported rice that might otherwise cause the private sector to ramp up imports and stockpile rice.

MY 2024/25 rice stocks are revised downward from the previous year to 152,000 as TMO and the private sector continue to drawdown their oversized inventories. According to market sources, TMO's stocks are mostly made up of domestic rice whereas the private sector is holding mostly imported rice.

Production, Supply, and Distribution

Wheat Market Year Begins Turkey	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	7300	7300
Beginning Stocks (1000 MT)	6484	6484	7503	7503	3303	3303
Production (1000 MT)	21000	21000	19000	19000	19000	16250
MY Imports (1000 MT)	9369	9369	3200	3200	7500	10250
TY Imports (1000 MT)	8940	8940	3200	3200	7500	10250
Total Supply (1000 MT)	36853	36853	29703	29703	29803	29803
MY Exports (1000 MT)	9950	9950	7000	7000	7000	7000
TY Exports (1000 MT)	9998	9998	7000	7000	7000	7000
Feed and Residual (1000 MT)	1000	1000	1000	1000	1000	1000
FSI Consumption (1000 MT)	18400	18400	18400	18400	18400	18400
Total Consumption (1000 MT)	19400	19400	19400	19400	19400	19400
Ending Stocks (1000 MT)	7503	7503	3303	3303	3403	3403
Total Distribution (1000 MT)	36853	36853	29703	29703	29803	29803
Yield (MT/HA)	2.9167	2.9167	2.6207	2.6207	2.6027	2.226

(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 Turkey	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	3500	3500
Beginning Stocks (1000 MT)	922	922	1687	2087	337	437
Production (1000 MT)	8000	8000	7000	7000	6650	5100
MY Imports (1000 MT)	142	142	150	150	1000	1600
TY Imports (1000 MT)	127	127	150	150	900	1600
Total Supply (1000 MT)	9064	9064	8837	9237	7987	7137
MY Exports (1000 MT)	77	77	1400	1400	100	100
TY Exports (1000 MT)	149	151	1350	1350	100	100
Feed and Residual (1000 MT)	6400	6000	6200	6500	6400	5750
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	7300	6900	7100	7400	7300	6650
Ending Stocks (1000 MT)	1687	2087	337	437	587	387
Total Distribution (1000 MT)	9064	9064	8837	9237	7987	7137
Yield (MT/HA)	2.1622	2.1622	1.8667	1.8667	1.9	1.4571

(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](#)

Corn Market Year Begins Turkey	2023/2024		2024/2025		2025/2026	
	Sep 2023		Sep 2024		Sep 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	650	650	560	560	610	610
Beginning Stocks (1000 MT)	841	841	699	599	799	799
Production (1000 MT)	8400	8400	7100	7100	7900	7900
MY Imports (1000 MT)	3229	3229	3500	4000	2800	2900
TY Imports (1000 MT)	3307	3307	3700	4000	2800	2900
Total Supply (1000 MT)	12470	12470	11299	11699	11499	11599
MY Exports (1000 MT)	2421	2421	600	600	600	600
TY Exports (1000 MT)	2057	2057	550	600	600	600
Feed and Residual (1000 MT)	8250	8250	8700	9100	8800	9000
FSI Consumption (1000 MT)	1100	1200	1200	1200	1200	1200
Total Consumption (1000 MT)	9350	9450	9900	10300	10000	10200
Ending Stocks (1000 MT)	699	599	799	799	899	799
Total Distribution (1000 MT)	12470	12470	11299	11699	11499	11599
Yield (MT/HA)	12.9231	12.9231	12.6786	12.6786	12.9508	12.9508
(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						

Rice, Milled Market Year Begins Turkey	2023/2024		2024/2025		2025/2026	
	Sep 2023		Sep 2024		Sep 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	94	94	97	97	95	93
Beginning Stocks (1000 MT)	416	416	202	207	137	152
Milled Production (1000 MT)	545	545	580	580	555	543
Rough Production (1000 MT)	813	813	866	866	828	810
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	6700	6700
MY Imports (1000 MT)	351	351	425	425	450	450
TY Imports (1000 MT)	337	337	425	425	450	450
Total Supply (1000 MT)	1312	1312	1207	1212	1142	1145
MY Exports (1000 MT)	295	295	250	250	225	250
TY Exports (1000 MT)	293	300	250	250	225	250
Consumption and Residual (1000 MT)	815	810	820	810	825	810
Ending Stocks (1000 MT)	202	207	137	152	92	85
Total Distribution (1000 MT)	1312	1312	1207	1212	1142	1145
Yield (Rough) (MT/HA)	8.6489	8.6489	8.9278	8.9278	8.7158	8.7097
(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						

Attachments:

No Attachments