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Report Name: Grain and Feed Update

Country: Turkiye

Post: Ankara

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Report Highlights:

In marketing year (MY) 2025/26, Turkiye's production of wheat and barley, which is mostly dry farmed, is forecast lower year-to-year because of unseasonably dry weather conditions. Amid these dry conditions, corn production is predicted to grow since much of the crop has access to irrigation and owing to an expansion in the corn harvested area, especially second crop corn in the southeast. With the predicted contraction in wheat and barley output, imports of these commodities are forecast to increase from last year, while U.S. rice imports will benefit from the recent removal Turkiye's 25 percent retaliatory duty. On the export front, Turkish flour exporters continue to struggle to regain market share lost last year.

Wheat

Production

Although the MY 2025/26 wheat area harvested remains nearly unchanged from last year, wheat production is forecast 15 percent lower year-to-year to 16.3 million metric tons (MMT) due to dry weather conditions throughout the growing season. Wheat quality, though, is considered to be very good, according to industry contacts. In other words, most of the wheat produced will go for milling, meaning there will be less for animal feed.

Approximately 3.5 MMT or roughly a quarter of overall wheat production is expected to be durum wheat. Durum is primarily used to make pasta for domestic and export markets.

Consumption

Wheat consumption for MY 2025/26 is forecast at 18.7 MMT, down year-over-year because of an expected decline in the availability of feed wheat. At the same time, the demand for food-grade wheat is expected to hold steady from the prior year's newly revised estimate.

Post is reducing its MY 2024/25 consumption estimate to 19.1 MMT, based on sectoral information that suggests demand softened due to demographic shifts and changing eating habits.

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 7.3 MMT, which is more than double the amount from the prior year. While up significantly year-to-year, this projected import amount is more in line with historical average for the last decade. For reference, import volumes in MY 2024/25 cratered because of the government's decision to temporarily halt the country's inward processing regime (IPR) in order to down the country's record-sized inventory of domestic wheat. The IPR, which has since been reinstated, allows millers to import duty-free wheat for processing and re-export as flour.

Approximately two-thirds of imports in MY 2025/26 will be used to make flour and pasta for the export market, and the remainder will be used to make flour and an assortment of other wheat-based products for the Turkish market.

The forecasted import amount for MY 2025/26 would have even be bigger if Turkish flour exporters were not confronted with slowing demand from Iraq, traditionally its top buyer, while also struggling to regain lost market share from the year before. The sector blames the Turkish government's temporary suspension of the IPR as the leading reason for their lost market share.

Wheat imports from June-August of the current marketing year have gotten off to a very slow start and are down 35 percent year-on-year to roughly 600,000 MT. The leading suppliers during this three-month period were Russia (562,000 MT) and Ukraine (11,000 MT). Post predicts that the pace of imports will accelerate in the second half of the marketing year as stocks of domestic wheat start to contract.

Exports

The MY 2025/26 wheat export forecast to fall to its lowest level in almost a decade to 6.0 MMT, which is down year-over-year by almost 1.3 MMT. This forecast assumes a slowdown in durum wheat exports, continued struggles to regain lost market share, and a slowdown in Iraq's demand for Turkish flour.

Turkiye's wheat exports from June-August totaled about 1.32 MMT, down about 340,000 MT compared to the same time last year. The top export destinations for Turkish flour during this period were Syria (148,000 MT) and Iraq (95,000 MT). Notably, flour exports to Iraq plummeted by 64 percent due to higher tariffs and new flour mills in Iraq coming online.

Stocks

In parallel with the expected decline in domestic wheat production, MY 2025/26 ending stocks for wheat are revised sharply lower to about 2.3 MMT.

Barley

Production

Due to depressed barley yields resulting from dry weather conditions throughout the growing season, Post is slashing its MY 2025/26 production forecast sharply lower to 5.1 MMT, which is down almost 2.0 MMT compared to last year.

Consumption

With the huge downturn in production, barley consumption in MY 2025/26 is forecast lower at 6.9 MMT, down year-to-year by 500,000 MT. At the same time, Post expects barley imports will surge to help meet some of Turkiye's domestic demand requirements, especially for animal feed.

Trade

Imports

To compensate for the drop in domestic barley production and meet domestic demand requirements, Post is predicting MY 2025/26 barley imports to explode up to 1.7 MMT. During the first three months of the marketing year (Jun-Aug), barley imports climbed nearly threefold to 147,000 MT. The top suppliers were Bulgaria (92,000 MT) and Russia (45,000 MT). Additionally, in July and August, the Turkish Grain Board (TMO) issued tenders for imported barley and purchased approximately 500,000 MT. The first shipments are believed to have started arriving in September and will continue over the coming months.

Barley Exports

With the projected decline in barley production, exports for MY 2025/26 are likewise forecast to contract compared to the previous year to just 150,000 MT. This forecast assumes that the majority of exported barley will be transshipments to neighboring countries.

During the first three months of the marketing year (Jun-Aug), barley exports totaled 46,000 MT. The top destinations were Iraq (23,000 MT) and Cyprus (14,000 MT), and Syria (8,700 MT).

Stocks

MY 2025/26 ending stocks for barley are forecast lower year-to-year at 437,000 MT.

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 second crop corn since it is considered more profitable than other alternatives such as cotton, vegetables, and other row crops. This switch was especially true in the southeastern part of the country where farmers switched from cotton to double cropping wheat and corn in hopes of earning higher profits.

In line with this expansion in area harvested, MY 2025/26 corn production is forecast to increase year-over-year by 12 percent to about 7.9 MMT. Most corn has access to irrigation and isn't expected to be impacted as much by the dry weather. The first-crop corn harvest, which accounts for the bulk of total production, has finished in the Cukurova and Southeastern regions but continues in Central Anatolia. The second-crop corn harvest will start in the Southeastern part of the country in November.

In mid-August, the Turkish Grain Board (TMO) announced its MY 2025/26 procurement price for domestic corn at 11,300 TL/MT (\$275/MT). By comparison, the last time TMO announced a purchase price was MY 2023/24 when the price was lower at 6,000 TL/MT (\$230/MT).

Consumption

The corn consumption forecast for MY 2025/26 is adjusted lower year-to-year to 11.0 MMT, following the previous year's newly revised record. This projection assumes continued and stable demand from the animal feed and starch industries.

Post is adjusting its MY 2024/25 corn consumption estimate to a record of 11.8 MMT, up more than 2.0 MMT year-to-year due to an increase in the availability of cheaper imported feed corn and strong domestic demand. The imported corn was mostly shipped under a series of zero or lower-duty tariff rate quotas (TRQs).

With the increased availability of corn, animal feed makers began to substitute more corn in place of barley, especially later in the MY 2024/25 season when domestic barley prices began to increase. At the same time, the starch sector has increased its consumption of food-grade corn compared to the previous year.

Trade

Imports

The MY 2025/26 corn import forecast is scaled back to 3.3 MMT, down about 2.4 MMT from the previous year due to the projected increase in domestic corn production.

MY 2024/25 corn imports are estimated at about 5.7 MMT. Ukraine was largest source, supplying over 4.0 MMT of imported corn followed by Russia (571,000 MT) and Romania (400,000 MT). The government announced four zero or lower-duty TRQs throughout MY 2024/25, with the last

announcement occurring in early July, to help fuel imports needed to bridge the gap in domestic corn production. The total amount of the four TRQs was 3.5 MMT.

Table 1: Announced Corn TRQs in MY 2024/25

HS Code	Quota (Metric Tons)	MFN Rate	Reduced Tariff	Start Date	End Date
1005.90.00.00.19	500,000	130	0	7/15/2025	7/31/2025
	1,000,000		0	5/1/2025	7/31/2025
	1,000,000		5	3/19/2025	6/30/2025
	1,000,000		5	10/10/2024	12/31/2024

Exports

Corn exports in MY 2025/26 are forecasted higher year-over-year at 600,000 MT, assuming most of the corn will originate in Black Sea countries and be transshipped via Turkiye 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.

Turkiye exported about 550,000 MT of corn in MY2024/25. Iraq (202,000MT), Syria (125,000 MT) and Iran (46,000 MT) were the leading export destinations.

Stocks

MY 2025/26 corn ending stocks are revised lower to 641,000 MT, down year-over-year and more in line with historical averages. MY 2024/25 ending corn stocks are estimated at about 1.0 MMT, up significantly year-to-year because of increased corn demand resulting from the TRQs.

Rice

Production

MY 2025/26 (Sep-Aug) rice production is forecast at 560,000 MT (milled), which is only slightly down year-to-year and better than original predictions since the rice crop had sufficient access to irrigation water during the growing season.

Despite limited rainfall, farmers are predicting average yields in Thrace, the main rice-growing region in northwest Turkiye, because they were able to access sufficient amounts of irrigation water at the right time during the growing cycle. Other rice-growing regions are reporting yields near the average.

This past spring, many farmers in the Thrace region reportedly planted a medium grain, weed-resistant rice variety that was shorter in length than the traditional Baldo or Osmancik varieties. According to market sources, this shorter medium-grain variety probably won't compete as well in the marketplace with the more traditional varieties and may even increase the need for imported rice.

As of mid-October, TMO is more than a month behind schedule in announcing its purchase price for domestic rice. One possible reason for this delay is that TMO's is still sitting on sizeable rice inventories.

Consumption

MY 2025/26 rice consumption is projected to remain unchanged from the previous year's newly revised estimate of 790,000 MT. This forecast is based on the expectation that consumer demand will remain relatively steady as it has for the last several years. Market sources report that household rice consumption will remain flat and out-of-home consumption will continue to be the main driver for future growth.

Trade

Imports

For MY 2025/26, rice imports are forecast higher year-to-year at 425,000 MT, about half of which will likely be transshipments. This projection assumes greater import demand resulting from a year-to-year decline in domestic rice production and steady transshipment demand.

Rice imports in MY 2024/25 reached 358,000 MT (milled equivalent), of which an estimated 65 percent were transshipments. The leading rice suppliers were China (93,000 MT), India (91,000 MT), Argentina (37,000 MT), and the United States (24,000 MT).

On September 22, 2025, Turkiye lifted its longstanding retaliatory duties on certain U.S. agricultural products, including rice (25 percent), tree nuts (10 percent), distilled spirits (70 percent), and other products. The added tariffs had been in place since 2018 and had resulted in significant export losses. See [GAIN TU2025-0051](#) for more details. The removal of the retaliatory tariff now allows U.S. rice to compete on a level playing field with rice from other origins. For reference, Turkiye continues to apply a Most-Favored Nation (MFN) import tariff on rough (34 percent), brown (36 percent), and milled rice (45 percent) from all origins.

Exports

For MY 2025/26, rice exports are forecast to remain nearly unchanged year-to year at 250,000 MT (milled equivalent), assuming continued transshipment demand. Most rice exports are transshipments to neighboring countries. Rice exports in MY 2024/25 reached roughly 250,000 MT (milled equivalent). The leading destinations were Syria, Ukraine and Libya.

Stocks

Rice ending stocks in MY 2025/26 are revised lower year-to-year to 122,000 MT, based on the expectation that TMO will draw down its large rice inventories.

Production, Supply and Distribution

Wheat Market Year Begins	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	7484	7484	3120	3420
Production (1000 MT)	21000	21000	19000	19000	19000	16300
MY Imports (1000 MT)	9350	9350	3318	3318	7500	7250
TY Imports (1000 MT)	8921	8921	2985	2985	7500	7250
Total Supply (1000 MT)	36834	36834	29802	29802	29620	26970
MY Exports (1000 MT)	9950	9950	7282	7282	7000	6000
TY Exports (1000 MT)	9998	9998	7148	7148	7000	6000
Feed and Residual (1000 MT)	1000	1000	1000	900	1000	500
FSI Consumption (1000 MT)	18400	18400	18400	18200	18400	18200
Total Consumption (1000 MT)	19400	19400	19400	19100	19400	18700
Ending Stocks (1000 MT)	7484	7484	3120	3420	3220	2270
Total Distribution (1000 MT)	36834	36834	29802	29802	29620	26970
Yield (MT/HA)	2.9167	2.9167	2.6207	2.6207	2.6027	2.2329

(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	2087	2087	687	687
Production (1000 MT)	8000	8000	7000	7000	6100	5100
MY Imports (1000 MT)	142	142	154	154	1300	1700
TY Imports (1000 MT)	127	127	250	250	1000	1600
Total Supply (1000 MT)	9064	9064	9241	9241	8087	7487
MY Exports (1000 MT)	77	77	1154	1154	100	150
TY Exports (1000 MT)	149	151	1250	1250	100	150
Feed and Residual (1000 MT)	6000	6000	6500	6500	6400	6000
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	6900	6900	7400	7400	7300	6900
Ending Stocks (1000 MT)	2087	2087	687	687	687	437
Total Distribution (1000 MT)	9064	9064	9241	9241	8087	7487
Yield (MT/HA)	2.1622	2.1622	1.8667	1.8667	1.7429	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	1099	1041
Production (1000 MT)	8400	8400	7100	7100	7900	7900
MY Imports (1000 MT)	3229	3229	5800	5657	3300	3300
TY Imports (1000 MT)	3307	3307	5900	5600	3400	3300
Total Supply (1000 MT)	12470	12470	13599	13356	12299	12241
MY Exports (1000 MT)	2421	2421	400	515	600	600
TY Exports (1000 MT)	2057	2057	450	450	600	600
Feed and Residual (1000 MT)	8250	8250	10900	10400	9600	9600
FSI Consumption (1000 MT)	1100	1200	1200	1400	1200	1400
Total Consumption (1000 MT)	9350	9450	12100	11800	10800	11000
Ending Stocks (1000 MT)	699	599	1099	1041	899	641
Total Distribution (1000 MT)	12470	12470	13599	13356	12299	12241
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	93	95
Beginning Stocks (1000 MT)	466	466	277	277	212	177
Milled Production (1000 MT)	545	545	580	580	545	560
Rough Production (1000 MT)	813	813	866	866	813	836
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	6700	6700
MY Imports (1000 MT)	351	351	400	358	450	425
TY Imports (1000 MT)	337	337	375	425	450	425
Total Supply (1000 MT)	1362	1362	1257	1215	1207	1162
MY Exports (1000 MT)	295	295	250	248	225	250
TY Exports (1000 MT)	293	300	250	250	225	250
Consumption and Residual (1000 MT)	790	790	795	790	800	790
Ending Stocks (1000 MT)	277	277	212	177	182	122
Total Distribution (1000 MT)	1362	1362	1257	1215	1207	1162
Yield (Rough) (MT/HA)	8.6489	8.6489	8.9278	8.9278	8.7419	8.8
(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