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Report Highlights:

Turkiye's production of wheat and barley in marketing year (MY) 2025/26 are forecast to tumble year-on-year because of drought conditions during the growing season. In contrast, corn production is expected to increase compared to last year with the help of irrigation and an expansion in the area harvested but production levels will still not be enough to meet the growing demand from the livestock sector. Facing a projected shortfall in the domestic supply of grain, the Turkish government has intervened in the marketplace to facilitate grain imports during the current marketing year.

Wheat

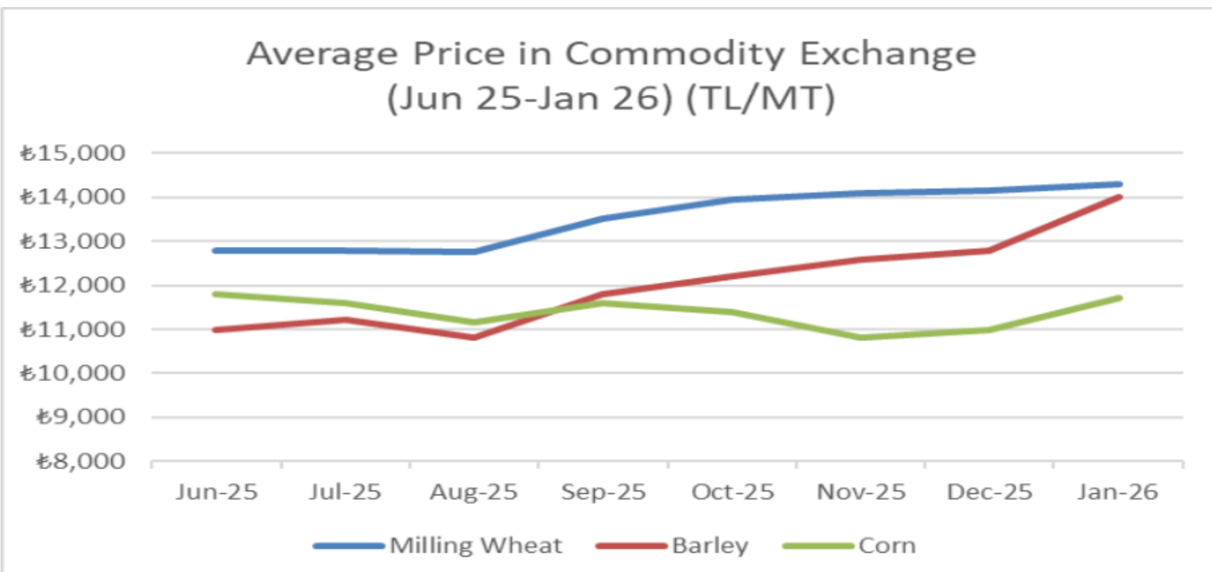
Production

Although the MY 2025/26 wheat harvest area has remained almost unchanged compared to last year, wheat production is expected to decline by approximately 15 percent year-on-year to around 16.5 million metric tons (MMT) due to dry weather conditions during the growing season. Despite the dry conditions, industry sources report that this year's crop will be good quality wheat. Consequently, most of the wheat crop will be milling grade, with a smaller share of feed grade wheat.

In June, at the beginning of the current marketing year, TMO announced a baseline purchase price for domestic milling wheat at 13,500 Turkish Lira (TL) per metric ton ($338/MT).[1] TMO has already purchased an undisclosed amount of the MY 2025/26 wheat crop from local farmers. TMO is currently selling this wheat to millers at an average price of 13,850 TL/MT ($321/MT) as of January 2026.[2]

From June through January, the average price of wheat traded on the commodity exchange climbed 12 percent to 14,300 TL/MT ($332/MT). At the same time, the price for barley charged higher by 27 percent to 14,000 TL/MT ($325/MT), while the price of corn stayed relatively flat at 12,000 TL/MT ($278/MT). See figure 1.

Figure 1. Average Wheat Prices on Commodity Exchanges



Consumption

With the decline in production, wheat consumption for MY 2025/26 is forecast lower year-to-year at 18.5 MMT. This predicted decline in consumption will exclusively come from reduced feed wheat availability, while the demand for milling wheat is expected to stay unchanged from last year.

Trade

Imports

To account for the drop in domestic wheat production, the wheat import forecast for MY 2025/26 is expected to more than double from last year to 7.5 MMT, which is more in line with the historical average over the last decade. This substantial year-to-year increase is due to the government's decision during the prior marketing year to restrict imports in order to liquidate large inventories held by the government affiliated Turkish Grain Board (TMO). The MY 2025/26 projection is based on two key assumptions: (1) compared to last year, Turkish wheat millers will consume more imported wheat for processing and re-export as flour; and (2) TMO will continue to import wheat through the end of the marketing year.

Wheat imports in the first six months of MY2025/26 (Jun-Nov) amounted to approximately 2.5 MMT. According to market sources, TMO procured 300,000 MT of Russian wheat that arrived in Turkiye at the end of 2025. The leading suppliers during this period were Russia (2.4 MT) and Ukraine (88,000 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 is projected to fall to its lowest level in almost a decade to 6.3 MMT, which is down year-over-year by almost 850,000 MT. This forecast is based on several factors: a slowdown in durum wheat exports due to smaller available supplies for export; a downturn in Iraq's demand for Turkish flour; and continued challenges to regain lost flour sales in traditional export markets.

Turkiye's wheat exports for the first six months of MY 2025/26 (Jun-Nov) totaled about 3.4 MMT, down about 12 percent compared to the same time last year. The top export destinations for Turkish flour during this period were Syria (500,000 MT) and Iraq (161,000 MT). Notably, flour exports to Iraq plummeted by 74 percent compared to the same time last year because of higher tariffs and a slowdown in demand resulting from new flour mills in Iraq coming online.

Despite the slump in flour exports, there has been some bright spots for the Turkish flour industry, with rising exports to select markets, such as Indonesia, Somalia, Sierra Leone, and Ghana. In addition, Turkish pasta exports also increased ticked up over this period, reaching 700,000 MT.

Stocks

In parallel with the expected decline in domestic wheat production, MY 2025/26 ending stocks for wheat are revised lower to about 3.0 MMT. At the same time, sectoral contacts report that the private sector is trying to sell off excess wheat holdings as quickly as possible in order to invest the cash from the sale in higher-returning financial investments.

Barley

Production

Due to lower-than-expected 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

The huge downturn in MY 2025/26 barley production has pushed barley prices higher, making corn, which is currently about 20 percent cheaper, a more attractive option in feed rations. As a result, the MY 2025/26 barley consumption is forecast lower at 6.7 MMT, which is down year-to-year by 700,000 MT. Post expects barley imports will surge to partially cover some of Turkiye's domestic demand requirements for livestock feed.

As of January 2026, TMO is selling imported barley to end users in the livestock sector at 11,300 TL/MT ($262/MT). This barley was imported earlier in the marketing year under a zero-duty tariff rate quota.

Trade

Imports

To compensate for the drop in domestic barley production and in order to meet domestic demand requirements, Post is predicting MY 2025/26 barley imports to explode up to 1.5 MMT. On November 8, 2025, in order to jumpstart imports, the Turkish government announced it was instituting a zero-duty tariff rate quota (TRQ) for 1.0 MMT of barley (and 1.0 MMT of corn) through July of this year. Out-of-quota imports will be subject to the bound MFN rate of 130 percent.

According to contacts, TMO was assigned to manage the TRQ and has conducted a series of tenders over the last couple months for approximately 900,000 MT of total quota. As noted in the consumption section above, TMO has already started selling the imported barley to end-users in the livestock sector.

During the first six months of the marketing year (Jun-Aug), barley imports reached nearly 500,000 MT, more than six times higher compared to the same period last year. The top sources were Russia (200,000 MT), Bulgaria (100,000 MT) and Ukraine (53,000MT).

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 six months of the marketing year (Jun-Nov), barley exports totaled 111,000 MT. The top destinations were Iraq (262,000 MT), Cyprus (25,000 MT), and Syria (23,000 MT).

Stocks

MY 2025/26 ending stocks for barley are forecast lower year-to-year at 387,000 MT, based on a parallel decline in domestic production. Additionally, the private sector's interest in minimizing inventories is helping to drive stock levels lower. Sectoral contacts report that it is more profitable to sell off inventories and invest the cash in higher-returning financial investments.

Corn

Production

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 compared to wheat and barley. The first-crop corn harvest, which accounts for the bulk of total production, finished last fall. The second-crop corn harvest finished in the southeastern part of the country in December.

In mid-August, TMO announced its MY 2025/26 procurement price for domestic corn at 11,300 TL/MT ($275/MT). Contacts estimated that TMO has purchased upward of 1.5 MMT of domestic corn. The domestic corn market price is still around 12,000 TL/MT.

Post lowered its corn production estimate for MY 2024/25 to 6.8 MMT. This reduction was due to lower-than-expected corn production in the Central Anatolia region, based on reports from regional contacts.

Consumption

Corn consumption in MY 2025/26 is revised higher to a record of 11.6 MMT, based on growing demand from both the animal feed and starch industries. Based on current market observations, feed manufacturers are increasingly switching from barley to corn since it is cheaper and more widely available.

With the downward revision to corn production in MY 2024/25, Post is slightly trimming its MY 2024/25 corn consumption estimate to 11.5 MMT, which is still the second highest level on record. Year-to-year, consumption was up almost 2.0 MMT due to an increase in the availability of cheaper imported feed corn and strong domestic demand.

Trade

Imports

With the anticipated increase in MY 2025/26 corn production, the import forecast is scaled back to 4.0 MMT, down year-to-year by about 1.6 MMT. On November 8, 2025, the Turkish government announced it was instituting a zero-duty TRQ for 1.0 MMT of corn (and 1.0 MMT of barley) through the end of July of this year. Out-of-quota imports will be subject to the bound MFN rate of 130 percent.

TMO was assigned to handle the TRQ. However, according to market sources, TMO has not yet made any international corn purchases this year. Depending on market conditions in the coming months, TMO is expected to start tendering for imported corn.

During the first three months of the marketing year (Sep-Nov), corn imports totaled 320,000 MT. The top suppliers were Ukraine (320,000 MT) and Russia (46,000 MT). Imports are expected to accelerate in the second half of the season in line as domestic stocks start to become thin.

Exports

Corn exports in MY 2025/26 are forecasted higher year-over-year at around 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.

During the first three months of the marketing year (Sep-Nov), corn exports totaled 100,000 MT. The top destinations were Iraq (39,000 MT) and Syria (10,000 MT). According to market sources, transit trade is expected to increase in the coming months to meet growing demand in these neighboring markets.

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. Additionally, the private sector's interest in minimizing inventories is helping to drive stock levels lower. Sectoral contacts report that it is more profitable to sell off inventories and invest the cash in higher-returning financial investments.

MY 2024/25 ending corn stocks are estimated at about 1.0 MMT, up significantly year-to-year due as traders rushed to fill the zero-duty corn TRQs and hold this imported amount for future sale.

Rice

Production

MY 2025/26 rice production is forecast at 560,000 MT (milled), down slightly year-to-year but better than originally expected 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.

Unlike previous years, TMO did not announce its MY 2025/26 procurement price for domestic paddy rice in September when the harvest began, because farm gate prices were strong at that time and TMO was also carrying sizeable rice stocks from the previous year. However, farmgate prices have started softening in recent months. In order to stabilize prices paid to farmers, TMO announced in January its procurement price for Osmancik paddy rice at 32,000TL/MT ($739/MT) and for Baldo paddy rice at 40,000 TL/MT ($923/MT).

Consumption

Rice consumption in MY 2025/26 is projected to remain unchanged from last year's newly revised estimate of 790,000 MT. According to market sources, household rice consumption will remain flat, while out-of-home consumption will continue to be the main driver of future growth.

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 year-to-year decline in domestic rice production and steady transshipment demand.

During the first three months of the marketing year (Sep-Nov), rice imports totaled 161,000 MT (milled equivalent), up 60 percent compared to same period of last year. The top suppliers were China (50,000 MT), South Korea (25,000 MT), and India (22,000 MT).

In recent years, Turkiye has generally imported milled rice (HS code 100630). However, starting in the first quarter of MY 2025/26, Turkiye imported 42,000 MT of brown rice (HS code 100620) from Russia and Greece. Contacts report that the lower tariff rate on brown rice (36 percent) in comparison to the tariff on milled rice (42 percent) may have motivated this trade. Post will monitor the situation to see if this becomes a trend.

Exports

For MY 2025/26, rice exports are forecast to decrease to 225,000 MT (milled equivalent), down 25,000 MT year to year. This prediction, based on information from market sources, assumes a decrease in transshipment demand from neighboring markets, some of which are seeking to import directly.

During the first three months of the marketing year (Sep-Nov), rice exports totaled 56,000 MT, down 11 percent during the same period of the last year. The top destinations were Libya (16,000 MT) and Syria (14,000 MT).

Stocks

Rice ending stocks in MY 2025/26 forecasted at 172,000 MT, similar with last year.

Production, Supply and Demand

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jun 2023		Jun 2024		Jun 2025	
Turkey	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	7684	3320	3820
Production (1000 MT)	21000	21000	19000	19000	18000	16500
MY Imports (1000 MT)	9350	9350	3318	3318	7500	7500
TY Imports (1000 MT)	8921	8921	2985	2985	7500	7500
Total Supply (1000 MT)	36834	36834	29802	30002	28820	27820
MY Exports (1000 MT)	9950	9950	7282	7282	6500	6300
TY Exports (1000 MT)	9998	9998	7148	7148	6500	6300
Feed and Residual (1000 MT)	1000	1000	1000	900	1000	500
FSI Consumption (1000 MT)	18400	18200	18200	18000	18200	18000
Total Consumption (1000 MT)	19400	19200	19200	18900	19200	18500
Ending Stocks (1000 MT)	7484	7684	3320	3820	3120	3020
Total Distribution (1000 MT)	36834	36834	29802	30002	28820	27820
Yield (MT/HA)	2.9167	2.9167	2.6207	2.6207	2.4658	2.2603

(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	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jun 2023		Jun 2024		Jun 2025	
Turkey	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	1500
TY Imports (1000 MT)	127	127	371	371	1000	1500
Total Supply (1000 MT)	9064	9064	9241	9241	8087	7287
MY Exports (1000 MT)	77	77	1154	1154	200	200
TY Exports (1000 MT)	149	151	1170	1170	200	200
Feed and Residual (1000 MT)	6000	6000	6500	6500	6300	5800
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	6900	6900	7400	7400	7200	6700
Ending Stocks (1000 MT)	2087	2087	687	687	687	387
Total Distribution (1000 MT)	9064	9064	9241	9241	8087	7287
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	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	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	961	1041
Production (1000 MT)	8400	8400	7100	6800	7900	7900
MY Imports (1000 MT)	3229	3229	5654	5657	3300	4000
TY Imports (1000 MT)	3307	3307	5587	5587	3400	4000
Total Supply (1000 MT)	12470	12470	13453	13056	12161	12941
MY Exports (1000 MT)	2421	2421	392	515	600	600
TY Exports (1000 MT)	2057	2057	375	450	600	600
Feed and Residual (1000 MT)	8250	8250	10900	10100	9600	10200
FSI Consumption (1000 MT)	1100	1200	1200	1400	1200	1400
Total Consumption (1000 MT)	9350	9450	12100	11500	10800	11600
Ending Stocks (1000 MT)	699	599	961	1041	761	741
Total Distribution (1000 MT)	12470	12470	13453	13056	12161	12941
Yield (MT/HA)	12.9231	12.9231	12.6786	12.1429	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	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	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	172	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	358	358	450	450
TY Imports (1000 MT)	337	337	450	425	450	450
TY Imp. from U.S. (1000 MT)	22	22	0	0	0	0
Total Supply (1000 MT)	1362	1362	1215	1215	1167	1187
MY Exports (1000 MT)	295	295	248	248	225	225
TY Exports (1000 MT)	293	300	250	250	225	225
Consumption and Residual (1000 MT)	790	790	795	790	800	790
Ending Stocks (1000 MT)	277	277	172	177	142	172
Total Distribution (1000 MT)	1362	1362	1215	1215	1167	1187
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