

Voluntary Report – Voluntary - Public Distribution

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Report Name: Turkiye Becomes Global Transshipment Hub for Agricultural Products

Country: Turkiye

Post: Ankara

Report Category: Agricultural Situation, Grain and Feed, Oilseeds and Products, Tree Nuts

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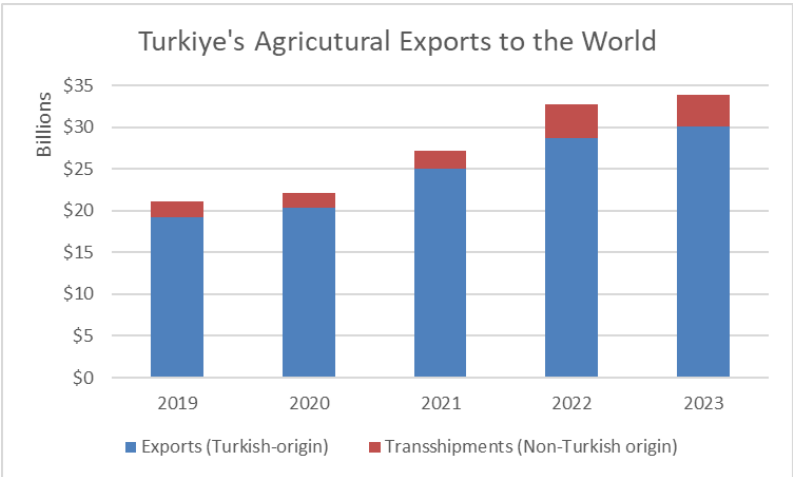
Report Highlights:

Over the last decade, with investments in domestic port infrastructure and storage and owing to Turkiye's deeper integration in regional and global trade networks, the country has become a major hub for transshipped agricultural products, such as oilseeds, grain, pulses, tree nuts, and juice. In 2022, the value of transshipped agricultural products doubled from just a few years earlier to an estimated record of \$4.0 billion. Turkiye's transshipment trade has a bright future ahead and is expected to keep growing.

Turkiye Handled Record \$4 Billion in Agricultural Product Transshipments in 2022

Over the last decade, with the development of a sophisticated network of seaports and adjoining storage facilities, Türkiye has become a major transshipment hub for third country agricultural products going to markets in the Middle East, Central Asia, and Africa. At the same time, Türkiye has likewise become a global giant in the re-export business, especially in flour and pasta made from Russian and Ukrainian wheat. This report is only focused on transshipments and a separate report will look at Türkiye’s re-exports.

The value of transshipped agricultural products through Türkiye reached an estimated record of \$4.0 billion in 2022, nearly double the levels reported in 2019 and 2020. In 2023, the value of transshipments slipped slightly lower year-over-year to an estimated \$3.8 billion. Based on Post’s analysis, the top five transshipped products by value and volume that year were oilseeds, grains, pulses, tree nuts, and juice. These transshipped products originated from a range of different countries, some relatively close in proximity like Ukraine and Russia, and others further away like the United States and Argentina.



Source: Estimated figures derived from Turkish trade data, as reported in Trade Data Monitor, LLC.

Table 1: Top Transshipped Ag Products in 2023		
Commodities	\$ million	Percent of Total
Oilseeds	1,106	29%
Grain	444	12%
Pulses	473	12%
Tree Nuts	402	11%
Juice	174	5%
Other	1,217	32%
Total	3,817	100%

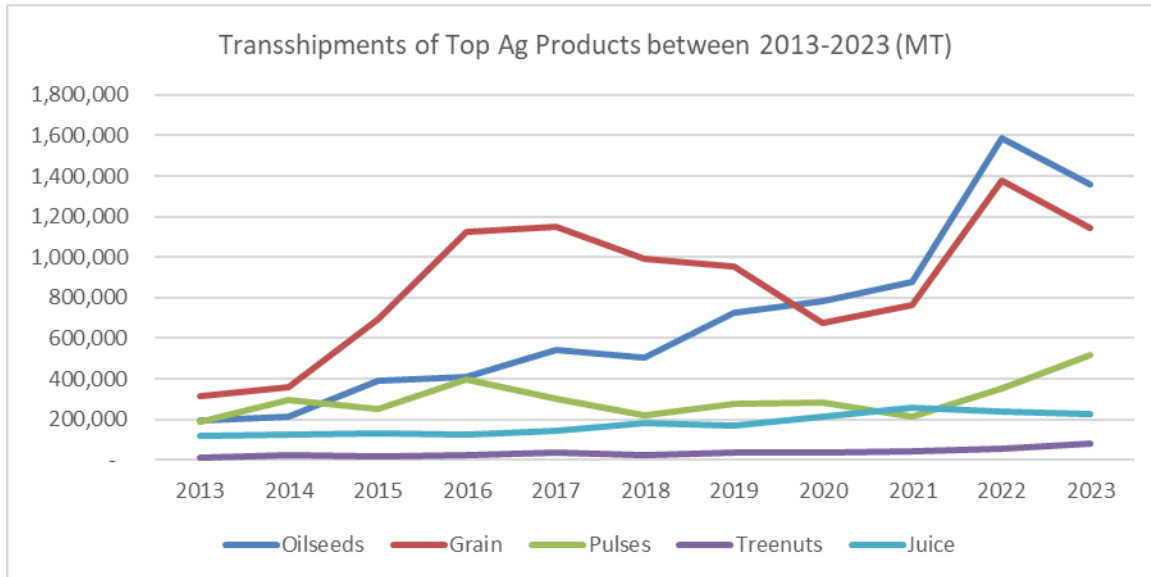
Note: Estimated figures derived from Turkish trade data, as reported in Trade Data Monitor, LLC.

Transshipments of Grain & Oilseeds Blossom

Over the last decade, the volume of transshipments has grown in parallel with the expansion in Türkiye’s logistical infrastructure and increased Black Sea capacity to export grain and oilseeds. From 2013-2023, transshipments of these bulk commodities increased five times from about 500,000 metric tons to 2.5 million metric tons.

In the last couple years, with the war in Ukraine and uncertainty in the Black Sea, Türkiye has become an even more important transshipment hub for oilseeds and grains from both Russia and Ukraine. Recent troubles in the Red Sea have also reinforced Türkiye as a center for handling transshipped cargoes going to the Middle East and Africa.

Looking ahead, the value and volume of transshipments are set to expand as Türkiye has positioned itself as a critical trade linkage in the [Trans-Caspian East-West-Middle Corridor](#) and [China's Belt & Road Initiative](#). Türkiye's integral connection within these trade networks builds upon the country's historical legacy as the crossroads of trade between Europe, Asia, and the Middle East.



Source: Estimated figures derived from Turkish trade data, as reported in Trade Data Monitor, LLC.

U.S. Chicken and Tree Nut Shipments Capitalize on Türkiye as a Transshipment Hub

Some U.S. agricultural products, like tree nuts, pulses, and frozen chicken meat, are transshipped through Türkiye to third countries. For example, U.S. chicken meat is shipped to the port of Mersin, located on Türkiye's southern Mediterranean coast, where it is then loaded onto trucks for transport to neighboring countries like Iraq. Of note, Türkiye prohibits transshipments of poultry products originating from U.S. states affected by highly pathogenic avian influenza.¹ In a similar fashion, American pistachios are transshipped via Türkiye to third markets in the region.

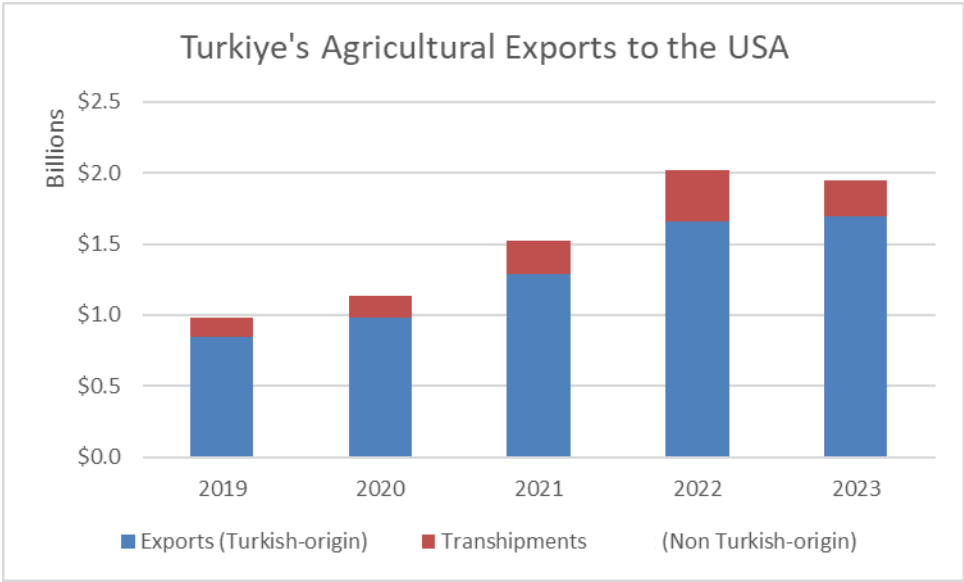
In these two examples, it is important to note that while transshipments of these two products are allowed, Türkiye forbids U.S. chicken meat and pistachios from entering the country for domestic consumption because of protectionist pressures.

Third Countries Ship Apple Juice and Soymeal Via Türkiye to the United States

Over the last decade, Türkiye's agricultural exports to the United States have steadily climbed higher, reaching a record of \$2.0 billion in 2022. Türkiye's single biggest export (includes transshipments) by value to the United States is apple juice.

¹ For more details, please refer to [Transit Regulations Summary for HPAI-Restricted Poultry](#) (TU2024-0002).

Transshipments as a share of Turkiye’s total exports to the United States have likewise grown over the last few years, hitting a record of \$125 million in 2022. The two leading transshipped products from Turkiye to the United States are apple juice and soy meal. Pinpointing the exact origin of these products, however, is difficult because of data limitations.



Source: Estimated figures derived from Turkish trade data, as reported in Trade Data Monitor, LLC.

Attachments:

No Attachments.