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Report Name: Sugar Semi-annual

Country: Turkiye

Post: Ankara

Report Category: Sugar

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Report Highlights:

Turkiye’s beet sugar production in marketing year (MY) 2025/26 is forecast to decline year-over-year to about 2.9 million metric tons due to adverse weather conditions in the country’s beet growing areas. Imports are projected to increase to help compensate for some of the shortfall in domestic production. However, this anticipated increase is contingent on the government reinstating duty-free sugar imports under the inward processing regime (IPR).

Production - Sugar Beets

The sugar beet area harvested in MY 2025/26 remains unchanged year-to-year at 330,000 hectares (ha). However, sugar beet production is scaled back to 21.0 million metric tons (MMT) due to lower-than-expected yields resulting from adverse weather conditions during the growing season. Sources report that the lower yields are directly attributed to a cold snap and frost in April, significant day-night temperature swings during the summer months, and drier-than-normal weather conditions in some beet growing areas that have insufficient irrigation water. This year's harvest kicked off in September and will end in October.

Turkseker, the government-affiliated sugar company, has not yet announced the MY 2025/26 sugar beet procurement price, which is typically released at the start of each harvest season. The sugar factories pay the farmers based on the sugar content of the beets with a baseline polarity rate of 16. For reference, last year's baseline procurement price was 2,375 TL ($69.5/MT).

Production - Centrifugal Sugar

In parallel with the forecasted decrease in beet production, the output of centrifugal sugar is projected to decline to 2.9 MMT in MY 2025/26, down 200,000 MT compared to the previous year. Some farmers are not only concerned about the drop in production, but lower polarity rates resulting from adverse weather conditions.

In addition to setting a reference procurement price for sugar beets, the Turkish government also uses a quota system to regulate the production of sugar made from beets and corn. In August 2025, the government announced the MY 2025/26 quota at 3.05 MMT, which has remained unchanged for the past two years. Besides weather-related impacts on production, there is generally very little change year-to-year in Turkiye's sugar complex because the sector is highly regulated by the government.

The quota amount consists of 2.98 MMT of beet sugar and the remainder is starch-based sugar (SBS) made from corn. The quota is divided into smaller quotas by sugar type and are known as the A, B, and C quotas.

The **A quota** is the amount to be sold on the domestic market within a given marketing year.

The **B quota** is a small amount to be kept in reserve as a buffer. The B quota is generally around 5 percent of the larger A quota.

The **C quota** is the unsold amount of the A quota that is exported. The C quota amount is not predefined.

Table 1:Sugar Quotas

	2023/2024 MY			2024/2025 MY			2025/2026 MY		
	A Quota	B Quota	*TOTAL*	A Quota	B Quota	*TOTAL*	A Quota	B Quota	*TOTAL*
Beet Sugar	2,837.25	141.863	2,979.113	2,837.25	141.863	2,979.113	2,837.25	141.863	2.979.113
Starch-Based Sugar	72.75	-	72.75	72.75	-	72.75	72.75	-	72.75
Total Quota	2,910.00	141.863	3,051.863	2,910.00	141.863	3,051.863	2,910.00	141.863	3,051.863

Source: Official Gazette https://www.resmigazete.gov.tr/eskiler/2025/08/20250828-7.pdf

Consumption

In line with the projected drop in sugar production, consumption is adjusted lower year-to-year to 3.26 MMT. This forecast assumes steady demand from the food and beverage industries as well as households.

Turkseker, private sugar companies, grocery wholesalers and retailers handle the marketing, sales, and distribution of sugar in the local marketplace. As of September 2025, the retail price of crystal sugar is 39 TL/kg ($0.95/kg), compared to 28.2 TL/kg ($0.8/kg) a year ago.

In addition to beet sugar, Turkiye consumes small amounts of starch-based sweeteners. These sweeteners are derived from corn and are used by the food and beverage industry as an ingredient in the production of a variety of confectionary products and beverages.

Imported high-intensity sweeteners are also widely used in the food and beverage sector since they are cheaper than sugar. According to industry sources, approximately 6,000 MT of these sweeteners are used annually, about two-thirds of which are imported duty-free under the inward processing regime (IPR). The IPR allows Turkish companies to import certain inputs duty free as long as it is used in a product that will be exported. (Note: these sweeteners are not included in the PSD.)

Trade

Imports

For MY 2025/26, sugar imports are projected at 450,000 MT (raw sugar equivalent), up 120,000 MT year-to-year to compensate for some of the loss in domestic sugar production. This projection assumes that the government will reinstate the IPR in MY 2025/26. The IPR was suspended in May 2025, as explained below, to address an oversupply of domestic sugar.

Sugar imports in MY 2024/25 are estimated at 330,000 MT (raw sugar equivalent), which is up from last year. During the first ten months of MY 2024/25 (Oct-Jul), imports totaled nearly 234,000 MT. The leading suppliers were Brazil (129,000 MT), Ukraine (34,000 MT), and France (24,000 MT).

Generally, sugar is imported under the IPR because of the trade prohibitive customs duty. However, in late May of the current calendar year, the Ministry of Trade sent a letter to companies using imported sugar to inform them that the IPR was being suspended and encouraged them to purchase domestic sugar. Industry sources suggest that the Trade Ministry, as it has in the past, took this action to avoid a potential oversupply of domestic sugar. Post expects that the IPR will be reinstated sometime in MY 2025/26 once the oversupply is liquidated. Th

Exports

MY 2025/26 sugar exports are forecast at 90,000 MT, (raw sugar equivalent), down from last year due to the anticipated decrease in domestic production. This projection assumes that the government will not impose any unexpected restrictions on exports and transshipment demand will remain steady.

For MY 2024/25, sugar exports are adjusted lower from last year to 110,000 MT, based on the latest trade data and on account of a decline in domestic sugar production for this period. Exports during the first ten months of the current marketing year fell to about 84,000 MT, which is down almost 50 percent from the same period last year. Syria (39,000 MT) and Iraq (27,000 MT) were the main destinations for Turkish sugar. About 20,000 MT of exported sugar was transshipments.

In recent years, Turkiye has exported limited volumes of sugar because Turkish sugar is not competitively priced vis-à-vis other international suppliers. Most of Turkiye’s sugar exports go to neighboring countries where Turkish suppliers have a competitive logistical advantage that helps offset some of the higher costs of the sugar.

Stocks

MY 2025/26 ending stocks are forecast unchanged year-over-year at 10,000 MT. The suspension of the IPR is aimed at reducing an oversupply of domestic sugar in the marketplace before this year’s harvest. Turkseker will sell domestic sugar to IPR-eligible companies at the current world price to clear out the excess stocks.

Production, Supply and Distribution Data Statistics

Sugar Beets	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 Planted (1000 HA)	325	325	330	330	0	315
Area Harvested (1000 HA)	325	325	330	330	0	315
Production (1000 MT)	23000	23000	22000	22000	0	21000
Total Supply (1000 MT)	23000	23000	22000	22000	0	21000
Utilization for Sugar (1000 MT)	23000	23000	22000	22000	0	21000
Utilizatn for Alcohol (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	23000	23000	22000	22000	0	21000
(1000 HA) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Sugar, Centrifugal	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	10	10	10	10	10	10
Beet Sugar Production (1000 MT)	3400	3400	3100	3100	3100	2900
Cane Sugar Production (1000 MT)	0	0	0	0	0	0
Total Sugar Production (1000 MT)	3400	3400	3100	3100	3100	2900
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	214	214	380	330	360	450
Total Imports (1000 MT)	214	214	380	330	360	450
Total Supply (1000 MT)	3624	3624	3490	3440	3470	3360
Raw Exports (1000 MT)	0	0	0	0	0	0
Refined Exp.(Raw Val) (1000 MT)	176	176	110	110	110	90
Total Exports (1000 MT)	176	176	110	110	110	90
Human Dom. Consumption (1000 MT)	3438	3438	3370	3320	3350	3260
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	3438	3438	3370	3320	3350	3260
Ending Stocks (1000 MT)	10	10	10	10	10	10
Total Distribution (1000 MT)	3624	3624	3490	3440	3470	3360
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments