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Report Name: Sugar Semi-annual

Country: Turkiye

Post: Ankara

Report Category: Sugar

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Report Highlights:

The Marketing Year (MY) 2026/27 area harvested for sugar beets remains the same as the previous marketing year, while production is estimated to show a slight increase. Harvesting is underway across the country. Centrifugal sugar production is forecast to increase year-on-year to 3.05 million metric tons (MMT).

PRODUCTION

Sugar Beets

The Marketing Year (MY) 2026/27 area harvested for sugar beets remains the same as the previous marketing year at 320,000 hectares (ha). Sugar beets remain popular among farmers because they generally pose few marketing challenges and offer higher returns compared to alternative crops. Nationwide, there are approximately 80,000 sugar beet growers. This year's harvest starts in September and will end in October. After a winter and spring without the severe weather that reduced yields last year, sugar beet production is expected to reach 21.5 million metric tons (MMT). This estimate, based on average yields, represents a slight increase from the previous year

Türkşeker, the government-affiliated sugar company, has not yet announced the MY 2026/27 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, in October 2025, Türkşeker updated the MY 2025/26 beet purchase price to 3,100 Turkish Lira (TL) per metric ton (\$73.5/MT), up from the previous year's purchase price of 2,375 TL per metric ton (\$69.5/MT).

Turkiye produces sugar from sugar beets in most regions, and most of the production comes from the Central Anatolia region near the cities of Ankara, Konya, Eskisehir, Afyon, Tokat, and Yozgat. Sugar beet fields are rotated with corn, wheat, barley, potatoes, sunflowers, and more recently, canola. Sugar beets are planted in April, and the harvest begins in October. However, these periods vary slightly according to climate conditions. From a historical perspective, the sugar beet area harvested has stayed relatively steady, only increasing in years when the government announces an increase in the beet sugar production quota.

Centrifugal Sugar

With the anticipated slight increase in sugar beet production in MY 2026/27, production of centrifugal sugar is forecast to increase slightly to 3.05 MMT.

Sugar production for the 2025/26 marketing year is estimated at 2.9 MMT, in line with a decline in beet production due to drought and [adverse weather conditions](#).

Historically, like many sectors in Türkiye, sugar factories were once all government-owned and operated. In recent years, however, many sugar factories were privatized, except for the state-run Türkşeker, which is now the largest sugar company in the country. There are currently 33 beet sugar factories, of which 15 are owned by Türkşeker and produce nearly a third of the country's sugar. The remaining factories are either privately owned or owned by sugar beet cooperatives. The combined production capacity of all beet sugar factories is approximately 3.7 MMT per year.

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. On 21 November 2025, the government announced the MY 2026/27 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 Türkiye'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 which 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.

	2024/2025 MY			2025/2026 MY			2026/2027 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/2025/11/20251121-9.pdf>

CONSUMPTION

Sugar consumption in MY 2026/27 is projected to be slightly higher than last year, reaching about 3.1 MMT. This assumes increased demand from the food and beverage industry and stable household consumption, alongside higher production. The MY 2025/26 sugar consumption estimate is adjusted lower to about 2.8 MMT with a parallel decrease in domestic production and demand from the food and beverage industry.

Türkşeker, private sugar companies, grocery wholesalers, and retailers handle the marketing, sales, and distribution of sugar in the local marketplace. As of September 2026, the retail price of crystal sugar is 39 TL/kg (\$0.8/kg), a slight increase compared to last year. In an environment where the annual consumer price index is around 30 percent, sugar prices have a negative impact on food inflation. However, sugar mills argue that this price level is risky in terms of the sustainability of production.

In addition to beet sugar, Türkiye 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 7,000 metric tons of these sweeteners

are used annually, which is equivalent to about 700,000 metric tons of beet sugar. (Note: These sweeteners are not included in the PSD.)

TRADE

Imports

For MY 2026/27, sugar imports are projected to increase year-on-year to 150,000 MT, assuming import restrictions will be lifted in the scope of the [Inward Processing Regime](#). As mentioned in our [previous report](#), in late May 2025, the Ministry of Trade (MOT) informed companies using imported sugar that the IPR was being suspended and encouraged them to purchase domestic sugar. Sugar companies use their stocks, as defined under Category C, for this purpose and sell them to companies importing under the IPR. Industry sources suggest that the MOT, as it has in the past, took this action to avoid a potential oversupply of domestic sugar. As of September 2026, imports are suspended under the IPR.

The import estimate for MY 2025/26 is 50,000 MT (raw sugar equivalent), down year-on-year about 180,000 MT due to the import restriction. Sugar imports during the first ten months (Oct-July) of the current marketing year were down 85 percent to about 30,000 MT. Brazil (9,500 MT), Ukraine (7,000 MT), and France (4,000 MT) were the top suppliers.

Exports

Sugar exports in MY 2026/27 are forecast to remain the same as the previous year at 130,000 MT. This projection assumes that the government will not impose any unexpected restrictions on exports and transshipment demand will remain steady.

For MY 2025/26, the export estimate was updated to 130,000 MT based on the latest trade data. Exports during the first ten months of the current marketing year increased to about 120,000 MT, which is about 40 percent higher than the same period a year ago. Iran (53,000 MT), Afghanistan (37,000 MT), and Syria (8,000 MT) were the main destinations for Turkish sugar. About 10,000 MT of exported sugar were transshipments.

STOCKS

MY 2026/27 ending stocks are forecast unchanged year-over-year at 10,000 MT. The government's sugar production quota system discourages companies from holding excess stocks.

Production, Supply and Distribution Data Statistics

Sugar Beets Market Year Begins Turkey	2024/2025		2025/2026		2026/2027	
	Sep 2024		Sep 2025		Sep 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	330	330	0	320	0	320
Area Harvested (1000 HA)	330	330	0	320	0	320
Production (1000 MT)	22000	22000	0	20500	0	21500
Total Supply (1000 MT)	22000	22000	0	20500	0	21500
Utilization for Sugar (1000 MT)	22000	22000	0	20500	0	21500
Utilizatn for Alcohol (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	22000	22000	0	20500	0	21500
(1000 HA) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Sugar, Centrifugal Market Year Begins Turkey	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	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)	3100	3100	2900	2900	3050	3050
Cane Sugar Production (1000 MT)	0	0	0	0	0	0
Total Sugar Production (1000 MT)	3100	3100	2900	2900	3050	3050
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	237	237	125	50	150	150
Total Imports (1000 MT)	237	237	125	50	150	150
Total Supply (1000 MT)	3347	3347	3035	2960	3210	3210
Raw Exports (1000 MT)	0	0	0	0	0	0
Refined Exp.(Raw Val) (1000 MT)	115	115	50	130	75	130
Total Exports (1000 MT)	115	115	50	130	75	130
Human Dom. Consumption (1000 MT)	3222	3222	2975	2820	3125	3070
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	3222	3222	2975	2820	3125	3070
Ending Stocks (1000 MT)	10	10	10	10	10	10
Total Distribution (1000 MT)	3347	3347	3035	2960	3210	3210
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments