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Report Highlights:

The Marketing Year (MY) 2026/27 sugar beet planting area is forecast to remain the same as last year, while production is projected to show a slight increase. Centrifugal sugar production is forecast to increase year-on-year to 3.1 million metric tons (MMT) assuming favorable weather conditions. While planting is underway across the country, the government announced the sugar beet production quota for MY 2026/27 at approximately 3 MMT, the same as the previous marketing year.

PRODUCTION

Sugar Beets

The MY 2026/27 area harvested for sugar beets is forecast to remain 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.

Sugar beet production in MY 2026/27 is projected to reach 21,5 million metric tons (MMT), representing a slight increase compared to last year. Post anticipates that adequate spring rainfall, favorable weather conditions, and sufficient irrigation (nearly all sugar beets are irrigated) will contribute to stable production during this growing season.

Turkiye produces sugar from sugar beets in most regions, and most 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.

Sugar beet production, and consequently sugar production, is limited by quotas set by the government. The government's Agricultural Production Plan (GAIN TU2025-0012), which came into effect last year and aims to encourage the production of drought-resistant crops in regions experiencing water scarcity, is not expected to further limit sugar production areas.

The state-run sugar company Türkşeker typically announces the annual purchase price for sugar ahead of planting in April to incentivize production and serve as a market reference for private sugar companies. Production is carried out based on contracts with farmers in the vicinity of production plants. Companies that benefit from the quota sign a contract with farmers from their region. Türkşeker adjusts the purchase price throughout the year depending on market conditions. However, as of this report Türkşeker has not yet announced the government purchase price for the MY 2026/27 growing season. 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), the year before.

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 Turkiye, 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.

CONSUMPTION

Sugar consumption in MY 2026/27 is projected to be slightly higher than the previous year at about 3.1 MMT, assuming increased demand from the food and beverage industry and stable household demand with parallel increased in production. The MY 2025/26 sugar consumption estimate is adjusted lower to just under 3 MMT with a parallel decrease in domestic production and demand from the food and beverage industry.

With a population of around 85 million, Turkiye is a major consumer of sugar, a trend driven by factors such as increasing urbanization and changing dietary habits. The country's modern food, beverage, and confectionery industry accounts for around 80 percent of sugar consumption and uses it to produce a wide variety of products for both domestic and export markets. Turkiye's annual per capita consumption is estimated at 35 kilograms, around a quarter of the level in the United States. While exports influence industrial demand for sugar, domestic economic conditions and expectations also affect household demand, leading to year-on-year fluctuations in sugar consumption.

In the domestic market, sugar companies can set different retail prices based on their inventory levels and financial needs. As seen in a photo taken at a supermarket in Ankara in March 2026, prices for 5-kilogram packages range from 180 TL ($4.1) to 220 TL ($5). This year, it has been observed that Türkşeker is selling its products at more competitive prices.

Photo: Prices for 5-kilogram packages in Retail Market

Source: FAS Ankara

The prices for bulk and retail packages of sugar have increased slightly in terms of TL in the last year. As of April 2025, a 50-kilogram bag of Türkşeker sugar costs about 1,850 TL ($42), compared to 1,725 TL ($45) a year ago. The year-on-year increase in bulk sugar prices is in part due to rising inflation. Türkşeker offers a price of 37,000 TL/MT ($840/MT) for domestic sales and 21,750 TL/MT ($488/MT) for exports in the scope of Turkiye's Inward Processing Regime (IPR). While the FAO sugar index fell by 27 percent compared to last year, sugar prices on the London Stock Exchange dropped from $500/MT to $430/MT.

In addition to 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. (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 IPR.

The import estimate for MY 2025/26 is 125,000 MT (raw sugar equivalent), down year-on-year about 110,000 MT. Sugar imports during the first five months (Oct-Feb) of the current marketing year were up 90 percent to about 12,000 MT. Brazil (7,500 MT), France (2,000 MT), and Ukraine (1,000 MT) were the top suppliers.

Imported sugar mostly enters the market duty free for use in confectionary products that are re-exported, under the parameters of the IPR.https://www.trade.gov.tr/customs-formalities/frequently-asked-questions/inward-processing -
:~:text=Answer%3A%20The%20inward%20processing%20procedure,as%20a%20result%20of%20processing
Given the prohibitively high tariff of 135 percent on imported sugar, nearly all sugar imports are thought to be coming in under the IPR. Because of this high tariff, only specialty sugar that is not domestically produced (e.g., medical, laboratory use) is imported outside these duty-free channels.

However, in late May 2025 the Ministry of Trade (MOT) 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 MOT, as it has in the past, took this action to avoid a potential oversupply of domestic sugar. As of April 2026, imports are suspended under the IPR, but post expects that the IPR will be reinstated sometime in MY 2025/26 once the oversupply is liquidated.

Exports

Sugar exports in MY 2026/27 are forecast to increase slightly from the previous year to 75,000 MT, in parallel with the increase 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 2025/26, the export estimate was updated to 50,000 MT based on the latest trade data. A significant decline in exports is being observed due to the decrease in both transit trade and production. Exports during the first five months of the current marketing year decreased to about 14,000 MT, which is about 67 percent lower than the same period a year ago. Syria (9,000 MT) and Iraq (3,000 MT) were the main destinations for Turkish sugar. About 20,000 MT of exported sugar was transshipments.

Other Sugar and Confectionary Exports
Turkiye exports starch-based sugar (SBS) made from corn. In recent years, while SBS exports have increased as the government has gradually reduced the amount companies can sell in the domestic market, a slight decline has been observed this year. Additionally, a slight decline has been noted in exports of confectionery products, an area in which Turkiye is particularly strong. Confectionary sugar exports during the first five months (Oct-Feb) of the current marketing year were about 125,700 MT, down nearly 10 percent compared to the same period a year ago. According to industry sources, one reason for the decline in manufactured goods exports is the restriction on imports under the IPR.

Table 1: Turkye's Exports of Sugars Nesoi, and Sugar Confectionary Products (MT)

Commodity	Description	Marketing Year		
		MY2023/24 (Oct-Sep)	MY2024/25 (Oct-Sep)	MY2025/26* (Oct-Feb)
1702	sugars nesoi, including chemically pure lactose, maltose, glucose, and fructose in solid form; sugar syrups (plain); artificial honey; caramel	347,245	339,500	117,000
1704	Sugar Confectionary (Including White Chocolate), Not Containing Cocoa	320,251	306,356	125,700

Source: Trade Data Monitor Inc
*Note: MY 2025/26 only covers October through February.

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.

POLICY

Centrifugal Sugar
The sugar sector is heavily regulated. The government, under presidential decree, sets production quotas and fixes certain prices. The Sugar Department under the Ministry of Agriculture and Forestry (MinAF) regulates and monitors the market.

The GoT regulates sugar production through a quota system that is typically announced at the beginning of each marketing year. The MY 2026/27 quota for beet sugar production was almost 3.0 MMT. The quota system is made up of A, B, and C quotas. The A quota is the amount 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 government allocates the A and B quotas among the current 15 sugar producers, of which Türkşeker is allocated approximately one-third of the total.

Companies unable to sell their individual A quota allocations will typically export the sugar under the C quota (unspecified amount) or sell it to companies producing food and beverage products for export. Otherwise, the unsold amount will be deducted from the sugar factory's quota for the following year.

The beet sugar and starch-based sugar (SBS) quotas for the 2025/26 marketing year were published in the Official Gazette on November 21, 2025. As shown in the table below, both quotas remained the same as the previous year. The beet sugar quota was nearly 3.0 MMT and the quota for SBS was nearly 73,000 MT.

Table 2:Sugar Quotas (Thousand MT)

	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

Starch-Based Sugar (SBS)

The MY 2026/27 SBS quota was set at 2.5 percent of the national sugar quota of 72,750 MT, which is up incrementally from the previous year. Half of the quota is required to be glucose, which is equivalent to about 54,000 MT of HFCS. SBS that is sold on the domestic market must be made from locally grown corn.

Over the last decade, the SBS quota has been cut in favor of beet sugar production. In fact, the MY 2026/27 quota is about 80 percent smaller than the average quota amount between 2003-2016.

There are five SBS producers under the quota system, all of which are privately owned and have a combined annual processing capacity of about 1.1 MMT. In addition, there are five other SBS companies outside the quota system which have annual processing capacity of about 340,000 MT, and they are only allowed to export.

Table 3: Historical SBS Quota Volumes (Thousand MT) / Percentage of Total Sugar Quota								
2003-	**2017-**	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**	**2026/27**

2016	**2020**							
313-407 (avg)	134-135	67.5	67.5	68.75	72.75	72.75	72.75	72.75
15%	5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%

Source: Official Gazette

Table 4: Starch-Based Sugar Companies and Quotas for MY 2026/27 (Metric Tons)

Company Name	**Quota (MT)**
Cargill Tarim ve Gida Sanayi ve Ticaret a.ş.	31,891
Amylum Nişasta Sanayi ve Ticaret a.ş.	22,631
Pns Pendik Nişasta Sanayi a.ş.	10,332
Tat Nişasta Inşaat Sanayi ve Ticaret a.ş.	4,684
Sunar Misir ent. Tes. Sanayi ve ticaret a.ş.	3,212
Total	**72,750**

Source: Official Gazette

Table 5: Beet Sugar Quotas for Producers for MY 2026/2027(Metric Tons)

Beet Sugar Producers	**A Quota**	**B Quota**
Türkiye Şeker Fabrikaları A.Ş. (TURKSEKER)	1,009,930	35,348
Kayseri Şeker Fabrikası A.Ş.	474,080	16,593
Konya Şeker San. ve Tic. A.Ş.	457,280	16,005
Dogus Yiyecek Icecek Uretim San.	131,980	4,619
Keskinkılıç Gıda San. ve Tic. A.Ş.	112,360	3,933
Corum Şeker Fabrikası A.Ş.	107,500	3,763
SukkarTurizm Seyehat A.S.	79,750	2,791
Amasya Şeker Fabrikası A.Ş.	77,280	2,750
Tutgu Gida Turizm (Kirsehir)	75,600	2,646
Adapazarı Şeker Fabrikası A.Ş.	71,410	2,499
Bor Şeker Fabrikası A.Ş.	71,350	2,497
Mutulucan Seker Uretim AS	52,290	1,830
Kütahya Şeker Fabrikası A.Ş.	47,670	1,668
Mus Şeker Fabrikası A.Ş.	41,510	1,453
Binbir Gida Tarim urunleri A.Ş.	27,260	954
Total	**2,910,000**	**141,863**

Source: Official Gazette

Production, Supply and Distribution Data Statistics

Sugar Beets	2024/2025		2025/2026		2026/2027	
Market Year Begins	Sep 2024		Sep 2025		Sep 2026	
Turkey	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	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	10	10	10	10	0	10
Beet Sugar Production (1000 MT)	3100	3100	2900	2900	0	3050
Cane Sugar Production (1000 MT)	0	0	0	0	0	0
Total Sugar Production (1000 MT)	3100	3100	2900	2900	0	3050
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	237	237	300	125	0	150
Total Imports (1000 MT)	237	237	300	125	0	150
Total Supply (1000 MT)	3347	3347	3210	3035	0	3210
Raw Exports (1000 MT)	0	0	0	0	0	0
Refined Exp.(Raw Val) (1000 MT)	115	115	125	50	0	75
Total Exports (1000 MT)	115	115	125	50	0	75
Human Dom. Consumption (1000 MT)	3222	3222	3075	2975	0	3125
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	3222	3222	3075	2975	0	3125
Ending Stocks (1000 MT)	10	10	10	10	0	10
Total Distribution (1000 MT)	3347	3347	3210	3035	0	3210
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments