Required Report: Required - Public Distribution **Date:** October 23, 2026

Report Number: TU2026-0026

Report Name: Grain and Feed Update

Country: Turkiye

Post: Ankara

Report Category: Grain and Feed

Prepared By: FAS Staff

Approved By: Karisha Kuypers

Report Highlights:

Türkiye has entered the new season with record wheat and barley production. Developments that have been hindering trade in the Black Sea region since August continue to be watched with concern. The Turkish Grain Board (TMO) is trying various methods to reduce its stocks. High yields are expected for the rice harvest in Türkiye.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Wheat

Production

Total wheat production is forecast to reach a record high of 23 million metric tons (MMT) due to favorable weather conditions that prevailed across much of the country during the growing season. Approximately 4 MMT of overall wheat production is expected to be durum wheat. Durum is primarily used to make pasta for domestic and export markets.

Consumption

Wheat consumption for marketing year (MY) 2026/27 is forecast to reach about 18.8 MMT, four percent higher than the previous year. This is partly due to a projected rise in animal feed consumption. It is anticipated that due to quality issues with the harvest in some regions this year, there will be a higher supply of feed wheat. On the other hand, a slight decline in demand for food-grade wheat has been observed in Türkiye in recent years, due to both consumer preferences and demographic trends. However, wheat products, especially bread, are still consumed in large quantities because they remain the most affordable and accessible option compared to other alternatives.

Trade

Imports

Türkiye's wheat import forecast for the 2026/27 marketing year has been revised downward sharply to 2.8 MMT. Developments in the Black Sea, Türkiye's most important wheat import source, that have brought shipping traffic to a standstill since early August, along with the TMO's sales policies in line with record production, contributed to this change.

Wheat imports for the June-August 2026 period of the current marketing year got off to a strong start, rising by 20 percent compared to the same period last year to reach approximately 700,000 metric tons. The main suppliers during this three-month period were Russia (630,000 MT) and Ukraine (53,000 MT). However, imports declined sharply in August due to a near-complete halt in shipments from the Black Sea and the TMO's aggressive sales policy.

To reduce the TMO's wheat stocks, which exceeded 10 MMT following a record harvest, TMO began offering wheat from its stocks for sale to flour and pasta exporters operating under the Inward Processing Regime beginning in September 2026. In an informational letter to exporters, TMO stated that discounted prices were set around $300/MT depending on the sales region/branch and type.

In addition, TMO announced in October that it had made 5.5 MMT of products available for open sale to all buyers through the Turkish Mercantile Exchange (TURIB).

Under a new regulation issued by the Ministry of Agriculture and Forestry's Plant Quarantine Regulation, a "zero-tolerance" policy for certain fungal diseases has been implemented for imported wheat shipments, effective August 2026. Market sources report that importers are concerned that this policy could lead to unexpected problems during periods when Türkiye needs to import more actively in the future.

Record production of wheat and barley, coupled with high inventory levels, is increasing Türkiye's resilience against potential external supply shocks. However, domestic prices for wheat byproducts such as wheat bran are rising sharply, as domestic flour production for the export market declines and imported products from the two most important suppliers, Russia and Ukraine, face disruption. Meanwhile, the search for alternative suppliers continues for other feed raw materials, particularly corn, of which Türkiye is a net importer.

Exports
Total wheat exports from Türkiye for MY 2026/27, including wheat products, are forecast at 6 MMT. This forecast assumes that while Türkiye's market share in global flour exports continues to decline, there will be a slight increase in pasta exports compared to last year.

Türkiye's wheat exports including wheat products from June-August totaled about 1.44 MMT wheat grain equivalent (WGE), down about 14 percent compared to the same time last year. While flour exports decreased by about 20 percent compared to the same period last year, reaching 617,000 metric tons, pasta exports appear to have increased by 22%, reaching 560,000 metric tons. A significant decline is also being observed in the transit trade of wheat.

Stocks
Wheat stocks for MY 2026/27 are forecast at 4 MMT, in parallel with a record wheat harvest, assuming that the TMO will continue to implement aggressive sales policies to reduce its excess stocks.

Barley

Production
Barley production is forecast to reach a record high of 9 million metric tons (MMT) due to favorable weather conditions which prevailed across much of the country during the growing season.

Consumption
Barley consumption for MY 2026/27 is forecast to increase about 1.9 MMT compared to last year to 8.3 MMT, especially for animal feed, in line with record domestic production and assuming stable demand from feed sector.

As mentioned in our previous report, The Turkish Grain Board (TMO) announced the 2026 grain intervention prices on June 1, 2026, and offered 13,000 TL/MT ($282/MT) for barley. It is estimated that the TMO has a significant amount of barley in stock, and this barley is currently being offered for sale on TURIB at a price of 14,300 TL/MT.

Trade

Imports
With barley production forecast higher, imports in MY 2026/27 are forecast to significantly contract year-to-year to 150,000 MT. This projection assumes that all imported barley will be transshipped to third countries since domestic supplies will be ample and the current, trade-prohibitive tariff rate of 130 percent will remain in place.

Exports
In MY 2026/27, barley exports are forecast slightly down year-over-year to 150,000 MT, based on industry reports that demand in neighboring markets will soften, as grain production in those countries is expected to improve due to favorable growing conditions.

Stocks
For MY 2026/27, barley stocks are forecast higher year-over-year at about 1 MMT, in parallel with a record domestic crop, assuming TMO will reduce its stocks with domestic sales.

Corn

Production
Corn area harvested in MY 2026/27 is expected to contract year-over-year by 10 percent to 550,000 ha, especially in water-scarce regions like Central Anatolia and the Aegean. This reduction is partly offset by expansion in Southeastern Anatolia, where many farmers who are frustrated with depressed cotton prices are expected to switch from cotton to growing more corn and other row crops. MY 2026/27 corn production is forecast to decrease year-over-year by 10 percent to about 7.1 MMT.

The first-crop corn harvest, which accounts for the bulk of total production, has finished in the Cukurova and Southeastern regions but continues in Central Anatolia. Due to wetter than usual weather, the moisture content in the corn is high and quality issues are being observed in some areas. The second-crop corn harvest will start in the Southeastern part of the country in November.

Unlike other grain products, the Turkish Grain Board (TMO) has not announced a separate corn purchase price for 2026. However, corn prices, which were around 12,600 TL/MT in July 2026, are now selling for 15,300 TL/MT as of October, partly due to developments in the Black Sea region.

Consumption
The corn consumption forecast for MY 2026/27 is adjusted lower year-to-year to 11.5 MMT.
This forecast assumes that demand from the animal feed and starch industries will continue, while predicting that a portion of the demand for animal feed will shift to barley, which is experiencing a record harvest.

Post is adjusting its MY 2025/26 corn consumption estimate to a record of 13.2 MMT, up more than 2.0 MMT year-to-year due to an increase in the availability of cheaper imported feed corn and strong domestic demand. The imported corn was mostly shipped under a series of zero or lower-duty tariff rate quotas (TRQs).

Trade

Imports
The MY 2026/27 corn import forecast is at 4.8 MMT. This projection assumes stable feed demand and a steady flow of transshipments. Although official import data for the new marketing year has not yet been released, the fact that shipping from the Black Sea region, where the most important supplier countries are located, has come to a virtual standstill is forcing Turkish importers to seek alternative suppliers. According to market sources, Turkish importers who are unable to source goods from deep-

water ports in the Black Sea are primarily trying to source goods from the river ports of other neighboring countries in the Black Sea region.

MY 2025/26 corn imports are estimated at about 6 MMT. Ukraine was the largest source, supplying over 4.4 MMT of imported corn followed by Russia (1.1 MMT) and Romania (265,000 MT).

Exports
Corn exports in MY 2025/26 are forecast higher year-over-year at 600,000 MT, assuming most of the corn will be transshipped overland via Türkiye to neighboring countries, especially Iraq and Syria. The current situation in the Black Sea makes it necessary to find alternative sources of supply for transit trade. This forecast also assumes steady transshipment demand from these countries, especially Iraq, as it reportedly continues to expand its poultry sector.

Stocks
MY 2026/27 corn stocks are forecast at 1.06 MT, down 200,000 MT year-over-year. With the latest TRQ announced in April 2026, the new season began with a somewhat higher inventory of carryover stock, in line with the increase in imports during the summer months.

Rice

Production
The MY 2026/27 (Sep-Aug) rice production is revised higher to 615,000 MT (milled), a year-over-year increase because of better yield resulting from favorable weather conditions this year.

The harvest began in September and is continuing throughout Türkiye. Yields are reported to be higher than in previous years both in the Marmara region, which accounts for 60% of Türkiye's rice production, and in the Central Black Sea region. Yield figures close to the average are also being reported from other rice-growing regions.

Last spring, many farmers in the Thrace and Central Black Sea regions began cultivating a rice variety that is shorter in stature, has medium-sized grains, and is more resistant to weeds than the traditional Baldo or Osmancık varieties. According to market sources, this shorter, medium-grain rice variety will not be able to compete on an equal footing with more traditional varieties in the market and may even increase demand for high-quality imported rice. It is reported that large-grain Baldo varieties are selling at higher-than-usual prices in the market.

In order to stabilize prices paid to farmers, on October 13, 2026, TMO announced its procurement price for Osmancik paddy rice at 38,000TL/MT ($775/MT), Cammeo paddy rice at 43,000 MT/TL ($877/MT), and for Baldo paddy rice at 45,000 TL/MT ($918/MT).

Consumption
The consumption of rice in MY 2026/27 is projected to remain unchanged from the previous year's newly revised estimate of 800,000 MT. This forecast is based on the expectation that consumer demand will remain relatively steady as it has for the last several years.

Trade

Imports
For MY 2026/27, rice imports are forecast lower year-to-year at 375,000 MT, about half of which will likely be transshipments. This projection assumes lower import demand resulting from an increase in domestic rice production and steady transshipment demand.

Rice imports in MY 2025/26 reached 524,000 MT (milled equivalent), of which an estimated 60 percent were transshipments. The leading rice suppliers were China (102,000 MT), India (95,000 MT), Thailand (63,000 MT), and the Uruguay (62,000 MT).

As noted in our most recent reports, there are growing concerns that the current 45 percent Most-Favored-Nation (MFN) tariff on commercial rice imports is insufficient to protect domestic rice producers from a flood of cheaper, lower-quality imported rice. According to the latest trade data, like in the previous season and despite the large domestic rice stockpile held by the TMO, the amount of rice imported and nationalized by the private sector exceeds 200,000 metric tons. As expected, a circular prepared by the Ministry of Trade, published in the Official Gazette and effective as of October 9, 2026, established that import surveillance would be applied to certain rice and paddy products. This administrative oversight mechanism is designed to protect domestic producers and prevent tax revenue loss. The Ministry of Trade sets a minimum price per unit (surveillance price) for products with specific HS (Harmonized System) codes. For reference, Türkiye continues to apply a Most-Favored Nation (MFN) import tariff on rough (34 percent), brown (36 percent), and milled rice (45 percent) from all origins.

Exports
For MY 2026/27, rice exports are forecast at 225,000 MT, assuming steady transshipment demand. Based on Post's analysis of prior year trade volumes, the majority of Türkiye's rice exports are transshipments to regional markets. A small amount of Turkish-origin rice is shipped in consumer-ready packages.

Rice exports in MY 2025/26 reached 210,000 MT (milled equivalent). The leading destinations were Syria (51,000 MT), Iraq (49,000MT), and Libya (23,000MT).

Stocks
Rice ending stocks in MY 2026/27 are revised lower year-to-year to 216,000 MT, based on the expectation that TMO will draw down its large rice inventories with the help of the newly announced import surveillance of certain rice and paddy rice products.

Rice ending stocks in MY 2025/26 are revised upward to 251,000 MT, due to the private sector's imports that exceeded expectations and the TMO's relatively high carryover stock.

Production, Supply and Distribution

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
Türkiye	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	7250	7250	7300	7300	7450	7450
Beginning Stocks (1000 MT)	7684	7684	4320	4320	2773	3023
Production (1000 MT)	19000	19000	16800	16800	23000	23000
MY Imports (1000 MT)	3318	3318	6321	6321	4500	2800
TY Imports (1000 MT)	2985	2985	6648	6648	4500	2800
Total Supply (1000 MT)	30002	30002	27441	27441	30273	28823
MY Exports (1000 MT)	7282	7282	6468	6468	6000	6000
TY Exports (1000 MT)	7148	7148	6476	6476	6000	6000
Feed and Residual (1000 MT)	900	900	700	700	1500	1500
FSI Consumption (1000 MT)	17500	17500	17500	17250	17700	17250
Total Consumption (1000 MT)	18400	18400	18200	17950	19200	18750
Ending Stocks (1000 MT)	4320	4320	2773	3023	5073	4073
Total Distribution (1000 MT)	30002	30002	27441	27441	30273	28823
Yield (MT/HA)	2.6207	2.6207	2.3014	2.3014	3.0872	3.0872
(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 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Barley	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
Türkiye	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3750	3750	3500	3500	3750	3750
Beginning Stocks (1000 MT)	2087	2087	687	687	579	379
Production (1000 MT)	7000	7000	5100	5100	8800	9000
MY Imports (1000 MT)	154	154	1375	1375	150	150
TY Imports (1000 MT)	371	371	1200	1375	150	150
Total Supply (1000 MT)	9241	9241	7162	7162	9529	9529
MY Exports (1000 MT)	1154	1154	283	283	50	150
TY Exports (1000 MT)	1170	1170	250	283	150	150
Feed and Residual (1000 MT)	6500	6500	5400	5600	7600	7400
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	7400	7400	6300	6500	8500	8300
Ending Stocks (1000 MT)	687	687	579	379	979	1079
Total Distribution (1000 MT)	9241	9241	7162	7162	9529	9529
Yield (MT/HA)	1.8667	1.8667	1.4571	1.4571	2.3467	2.4
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Sep 2024		Sep 2025		Sep 2026	
Türkiye	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	560	560	610	610	550	550
Beginning Stocks (1000 MT)	699	699	1061	1061	1361	1261
Production (1000 MT)	6800	6800	7900	7900	7400	7100
MY Imports (1000 MT)	5654	5654	6100	6030	4500	4800
TY Imports (1000 MT)	5587	5587	6100	6030	4500	4800
Total Supply (1000 MT)	13153	13153	15061	14991	13261	13161
MY Exports (1000 MT)	392	392	500	530	600	600
TY Exports (1000 MT)	375	375	500	530	600	600
Feed and Residual (1000 MT)	10300	10300	11800	11800	10100	10100
FSI Consumption (1000 MT)	1400	1400	1400	1400	1400	1400
Total Consumption (1000 MT)	11700	11700	13200	13200	11500	11500
Ending Stocks (1000 MT)	1061	1061	1361	1261	1161	1061
Total Distribution (1000 MT)	13153	13153	15061	14991	13261	13161
Yield (MT/HA)	12.1429	12.1429	12.9508	12.9508	13.4545	12.9091
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Sep 2024		Sep 2025		Sep 2026	
Türkiye	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	97	97	95	95	97	97
Beginning Stocks (1000 MT)	277	277	172	177	236	251
Milled Production (1000 MT)	580	580	560	560	580	615
Rough Production (1000 MT)	866	866	836	836	866	918
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	6700	6700
MY Imports (1000 MT)	358	358	524	524	450	375
TY Imports (1000 MT)	438	438	475	475	450	375
Total Supply (1000 MT)	1215	1215	1256	1261	1266	1241
MY Exports (1000 MT)	248	248	210	210	225	225
TY Exports (1000 MT)	228	250	225	225	225	225
Consumption and Residual (1000 MT)	795	790	810	800	820	800
Ending Stocks (1000 MT)	172	177	236	251	221	216
Total Distribution (1000 MT)	1215	1215	1256	1261	1266	1241
Yield (Rough) (MT/HA)	8.9278	8.9278	8.8	8.8	8.9278	9.4639
(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 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments