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Post: Ankara

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Prepared By:

Approved By: Rishan Chaudhry

Report Highlights:

Favorable weather and above-average rainfall are driving record wheat production (22.5 MMT) and a sharp rebound in barley output (8.1 MMT), though heavy spring rains delayed harvests and caused quality issues in southern and southeastern regions. Wheat consumption is expected to rise largely due to increased feed use, while Turkiye's wheat imports and exports remain substantial, supported by TMO's newly doubled intervention prices for the 2026 harvest. Corn production is forecast to fall to 7.1 MMT as farmers shift toward wheat, oilseeds, and vegetables in Central Anatolia and the Aegean due to weak cotton prices. Rice area and production are set to grow modestly, with imports easing as domestic supply improves, though industry concerns persist that current tariffs are insufficient to protect local producers from cheaper imports. Across all four crops, stocks are generally rising in tandem with strong harvests, except for rice, which is expected to see a modest stock decline.

Wheat

Production

Total wheat production is forecast to reach a record high of 22.5 million metric tons (MMT) due to favorable weather conditions which prevailed across much of the country during the growing season.

A significant portion of wheat fields are not irrigated (though barley remains primarily unirrigated) and yields are directly linked to rainfall. Rainfall for the 2026 water year, covering the period from October 1, 2025, to May 31, 2026, was well above average. In the 2026 water year, Turkiye's national average precipitation was 25.6 inches. The historical water year average is 19.1 inches, and last year's precipitation was 14.6 inches. While precipitation across the region exceeded both historic averages and last year's levels, the largest increase—49 percent—occurred in the Southeastern Anatolia Region.

Due to unrelenting rains in May and June, the harvest is running about three weeks behind schedule. As of the last week of June, the harvest had not yet reached about 25 percent nationwide, but it is concentrated in the Mediterranean and Southeastern Anatolia regions and continues to accelerate in the Marmara and Central Anatolia regions. While high yields are expected, quality issues are anticipated in the southern and southeastern parts of the country that received excessive rainfall, particularly during the spring. However, regions in the western part of the country, which received relatively less spring rainfall, are showing high quality and yields.

Although there is a shift toward milling wheat rather than durum wheat in the Central Anatolia region, the Southeastern Anatolia region continues to dominate durum wheat production.

Consumption

Wheat consumption for marketing year (MY) 2026/27 is forecast to reach 18.7 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, regarding demand for food-grade wheat, a decline has been observed in Turkey in recent years, due to both consumer preferences and demographic trends.

Trade

For MY 2026/27 Turkiye's wheat import forecast is 5 MMT based on stable demand from wheat product producers and exporters and an expected increase in domestic production. Total wheat exports from Turkiye for MY 2026/27, including wheat products, are forecast at 6 MMT, assuming the government does not implement any export limitations on wheat products.

Turkiye imported about 6.4 MMT of wheat in MY 2025/26. The main supplier was Russia with 6.2 MMT of wheat, supplied over 90 percent. In MY 2025/26, wheat exports from Turkiye (including flour and wheat products) are estimated to be 6.5 MMT (wheat equivalent basis), of which about 3.1 MMT is wheat flour, about 1 MMT is wheat, about 1.9 MMT is pasta, and about 300,000 MT is bulgur, down about 11 percent year over year.

The Turkish Grain Board (TMO) announced the 2026 grain intervention prices on June 1, 2026. Remarkably, the prices announced are more than double the previous year. TMO is offering an intervention price of 16,750 TL/MT ($363/MT) for Anatolian Hard Red Milling Wheat (AKS), 13,750 TL/MT ($363/MT) for durum wheat, and 13,000 TL/MT ($282/MT) for barley (based on an exchange rate of $1=46 TL as of June 1 ,2026). These prices are offered for the highest-quality products and can drop to as low as 1,470 TL/MT for wheat and 1,275 TL/MT for barley depending on quality. Unlike in previous years, TMO also announced the prices at which it will sell the products it has purchased, effective October 1, 2026. It announced that it will sell wheat 2,000 TL/MT higher than the purchase price and barley 1,000 TL/MT higher. Diesel fuel and fertilizer support provided in previous years will be implemented as "Basic Support" and, if production planning is followed, as "Planned Production Support" in the agricultural production plan. Additional support for those using certified seeds will be provided in the same manner in the new model.

TMO Procurement Price for 1st grade quality	2025 (TL/MT)	2026 (TL/MT)	% year to year
Milling Wheat	13,750 ($351/MT)	16,750 ($363/MT)	22
Durum Wheat	13,750 ($351/MT)	16,750 ($363/MT)	22
Barley	11,000 ($284/MT)	13,000 ($282/MT)	18

In addition to the announced prices, the Ministry of Agriculture and Forestry (MinAF) will provide producers with a total support payment of 3,000 TL/MT (based on average yield) for basic support, planned production support, and certified seed usage support. However, this support price is also expected to be updated.

In the second week of June 2026 in the main Turkish commodity exchanges, the average Anatolian Hard Red Wheat (AKS) commercial price was about 15,000 TL/ton ($326/MT), barley was 12,000 TL/MT ($260/MT), and corn was 13,400 TL/MT ($291/MT). Last year, the local prices were 12,700 TL/ton ($326/MT), 11,000 TL/MT ($256/MT), 11,700 TL/MT ($300/MT), respectively. The CIF price for imported wheat (12.5 protein) was about $240/MT, barley $260/MT, and corn $245/MT in June 2026.

Stocks

Wheat stocks for MY 2026/27 are forecast at 5.8 MMT, up 2.8 MMT year over year in parallel with a record wheat harvest.

Barley

Production

Barley fields are generally not irrigated, and yields are directly linked to rainfall. Barley is the crop most affected by the favorable weather that has significantly impacted Turkiye's winter crop production this year, as detailed in the wheat section. As a result, the barley production estimate for MY 2026/27 has increased to 8.1 MMT from 5.1 MMT level in MY 2025/26. The harvest began in May and was completed by the end of June. There was a slight delay compared to previous years due to weather conditions.

Consumption

Barley consumption for MY 2026/27 is forecast to increase about 1 MMT compared to last year to 7.5 MMT, especially for animal feed. The barley consumption estimate for MY 2025/26 is revised to 6.5 MMT in line with a slight increase in TMO's domestic sales to the feed sector during the last quarter of marketing year.

Trade

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. MY 2025/26 barley imports are adjusted to 1.4 MMT. The leading suppliers were Russia (567,000 MT), Ukraine (104,000 MT) and Bulgaria (102,000 MT).

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 since grain production in those countries is expected to improve due to favorable growing conditions. Based on Post's analysis, most exports will likely be transshipments from Black Sea countries via Turkiye to Iraq and other markets in the region. The MY 2025/26 barley export estimate is about 300,000 MT. The top destinations were Iraq (86,000MT), Syria (48,000MT), and Cyprus (83,000MT).

Stocks

For MY 2026/27, barley stocks are forecast higher year-over-year at about 1 MMT, in parallel with a record domestic crop. MY 2025/26 stocks are forecast at 387,000 MT, down slightly due to TMO's strong sales to domestic market in the last quarter of marketing year.

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. Instead of corn, farmers in these regions are expected to grow more wheat, oilseeds, and vegetables. While down nationally, corn area harvested is expected to expand 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. This regional expansion, though, will not offset the downturn in corn area harvested in other parts of the country. In line with this contraction in area harvested, MY 2026/27 corn production is forecast to decrease year-over-year by 10 percent to about 7.1 MMT, assuming favorable weather conditions and sufficient volumes of irrigation water.

First crop planting began throughout Turkiye at the end of February and was completed by the end of May, except for some regions in the south that were hit by heavy rains. Overall, there do not appear to be any major issues that will significantly impact crop development following planting.

Consumption

With nearly 85 percent of corn used to make animal feed, overall corn consumption typically parallels trends in the feed sector. MY 2026/27 corn consumption is forecast at 11.5 MMT, with a sightly decrease compared to previous year in parallel with record barley and wheat production. For more details, please see our last annual report.

Trade

Corn imports are forecast to remain constant compared to last year at 4.8 MMT. This projection assumes stable feed demand and a steady flow of transshipments. The MY 2025/26 corn import estimate is 4.8 MMT, with parallel tariff rate quotas for 3.0 MMT announced in the official gazette in April 2026. Import volumes from September through May of the current marketing year reached 4 MMT. Ukraine (3 MMT), Russia (700,000 MT), and Romania (167,000 MT) were the main suppliers.

Corn exports in MY 2026/27 are forecast to slightly increase year-over-year to 600,000 MT, assuming most of the corn will originate in Black Sea countries and be transshipped via Turkiye overland to neighboring countries, especially Iraq and Syria. This forecast also assumes steady transshipment demand from these countries, especially Iraq as it reportedly continues to expand its poultry sector.

MY 2025/26 corn exports are estimated at 500,000 MT, which is about one-quarter the amount compared to the prior year when Turkiye had an excess of competitively priced domestic corn for export. This current estimate is more in line with Turkiye's historical export volumes, most of which are generally transshipments. During the first eight months (September-April) of the current marketing year corn exports reached 400,000 MT. Major export destinations were Iraq (170,000 MT) and Syria (73,000 MT).

Stocks

MY 2026/27 corn stocks are forecast at 841,000 MT, down 200,000 MT year-over-year.

Rice

Production

The MY 2026/27 rice area harvested is forecast to reach 97,000 ha, an increase of approximately 2 percent compared to the previous year. With the expected expansion in area harvested, and assuming favorable weather conditions persist throughout the growing season, rice production in MY 2026/27 is forecast slightly higher compared to last year at 866,000 MT (paddy).

Planting began the first week of May and completed across Turkiye by the end of June. More than 60 percent of Turkiye's paddy rice production is in the Marmara region, while the Black Sea region is the second most important production area at 30 percent. Wetter than usual weather has helped to partially recharge rivers and dams in rice-growing areas and other parts of the country.

Consumption

The consumption of rice in MY 2026/27 is projected to remain unchanged from the previous year's newly revised estimate of 790,000 MT. This forecast is based on the expectation that consumer demand will remain relatively steady as it has for the last several years.

Trade

For MY 2026/27, rice imports are forecast lower year-to-year at 425,000 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. For MY 2025/26, rice imports are forecast higher year-to-year at 450,000 MT, about half of which will likely be transshipments. Import volumes from September through May of the current marketing year reached about 340,000 MT of rice (milled rice equivalent), which was up about 30 percent compared to last year. Most rice imports were milled. The major sources of imported rice were India (61,000 MT), China (102,000 MT), and Uruguay (36,000 MT).

As mentioned in the most recent annual report, there have been growing concerns that the current 45 percent MFN tariff applied to commercial rice imports is insufficient to protect domestic rice producers from the onslaught of cheaper, lower-quality imported rice. According to the latest trade data, despite the large stock of domestic rice held by the TMO, the amount of rice imported by the private sector and nationalized exceeds 200,000 MT. Some industry sources assert that TMO would not have to buy as much domestic rice if the tariff was increased to make imported rice less price competitive.

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 Turkiye's rice exports are transshipments to regional markets. A small amount of Turkish-origin rice is shipped in consumer-ready packages.

The rice export estimate for MY 2025/26 is forecast to decrease to 225,000 MT (milled rice equivalent), down 25,000 MT year-over-year. This prediction is based on information from market sources and assumes a decrease in transshipment demand from neighboring markets, some of which are seeking to import directly. In the first nine months of MY 2025/26 (September-May), Turkiye exported about 159,000 MT of rice, which was down about 13 percent compared to the previous year. The main export destinations were Syria (39,000 MT), Iraq (29,000 MT), and Libya (22,000 MT).

Stocks

In MY 2026/27, rice stocks are forecast lower at 162,000 MT, which is in line with historical amounts and equates to about two months of consumption. It is assumed that a significant portion of the stock will be held by the TMO.

Production, Supply and Demand

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
Turkey	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	2920	3070
Production (1000 MT)	19000	19000	16800	16800	22500	22500
MY Imports (1000 MT)	3318	3318	6500	6400	5500	5000
TY Imports (1000 MT)	2985	2985	6800	6400	5500	5000
Total Supply (1000 MT)	30002	30002	27620	27520	30920	30570
MY Exports (1000 MT)	7282	7282	6500	6500	6000	6000
TY Exports (1000 MT)	7148	7148	6500	6500	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	2920	3070	5720	5820
Total Distribution (1000 MT)	30002	30002	27620	27520	30920	30570
Yield (MT/HA)	2.6207	2.6207	2.3014	2.3014	3.0201	3.0201

(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	
Turkey	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	587	387
Production (1000 MT)	7000	7000	5100	5100	8800	8100
MY Imports (1000 MT)	154	154	1500	1400	150	150
TY Imports (1000 MT)	371	371	1300	1400	150	150
Total Supply (1000 MT)	9241	9241	7287	7187	9537	8637
MY Exports (1000 MT)	1154	1154	300	300	50	150
TY Exports (1000 MT)	1170	1170	250	300	150	150
Feed and Residual (1000 MT)	6500	6500	5500	5600	7600	6600
FSI Consumption (1000 MT)	900	900	900	900	900	900
Total Consumption (1000 MT)	7400	7400	6400	6500	8500	7500
Ending Stocks (1000 MT)	687	687	587	387	987	987
Total Distribution (1000 MT)	9241	9241	7287	7187	9537	8637
Yield (MT/HA)	1.8667	1.8667	1.4571	1.4571	2.3467	2.16

(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	
Turkey	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	1041	961	1041
Production (1000 MT)	6800	6800	7900	7900	7100	7100
MY Imports (1000 MT)	5654	5657	4800	4800	4800	4800
TY Imports (1000 MT)	5587	5587	4900	4800	4900	4800
Total Supply (1000 MT)	13153	13156	13761	13741	12861	12941
MY Exports (1000 MT)	392	515	600	500	600	600
TY Exports (1000 MT)	375	450	600	500	600	600
Feed and Residual (1000 MT)	10300	10200	10800	10800	10100	10000
FSI Consumption (1000 MT)	1400	1400	1400	1400	1400	1500
Total Consumption (1000 MT)	11700	11600	12200	12200	11500	11500
Ending Stocks (1000 MT)	1061	1041	961	1041	761	841
Total Distribution (1000 MT)	13153	13156	13761	13741	12861	12941
Yield (MT/HA)	12.1429	12.1429	12.9508	12.9508	12.9091	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	
Turkey	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	157	172
Milled Production (1000 MT)	580	580	560	560	580	580
Rough Production (1000 MT)	866	866	836	836	866	866
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	6700	6700
MY Imports (1000 MT)	358	358	450	450	450	425
TY Imports (1000 MT)	438	438	450	450	450	425
Total Supply (1000 MT)	1215	1215	1182	1187	1187	1177
MY Exports (1000 MT)	248	248	225	225	225	225
TY Exports (1000 MT)	228	250	225	225	225	225
Consumption and Residual (1000 MT)	795	790	800	790	805	790
Ending Stocks (1000 MT)	172	177	157	172	157	162
Total Distribution (1000 MT)	1215	1215	1182	1187	1187	1177
Yield (Rough) (MT/HA)	8.9278	8.9278	8.8	8.8	8.9278	8.9278

(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