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Report Highlights:

Rainfall was scarce for most of the winter in the main grain growing regions in Turkey. In MY 2021/22, total wheat planting area is projected down to 7.05 million hectares, with total production at 17.6 million metric tons (MMT). Barley area and production for MY 2021/22 are projected at about 3.8 million hectares and 7.7 MMT. The corn production estimate is 6.2 MMT due to decreased planting area. Turkey struggles with food inflation, which is exacerbated by a weak Turkish Lira and high international commodity prices. Turkey reduced almost all grain tariffs until the new harvest. Some product exports and imports continue to be affected by COVID-19 related issues. The Ministry of Agriculture and Forestry approved new genetically engineered (GE) soybean and corn events for feed use in January and February 2021.

EXECUTIVE SUMMARY

Rainfall was scarce for most of the winter in the main agricultural regions, similar to the previous year. Cumulative rainfall in Turkey from October 2020 through February 2021 was 30 percent lower than the national historical average and 22 percent lower than last year.

Yields for crops will be dependent on spring weather. In MY 2021/22, total wheat planting area is projected down to 7.05 million hectares (ha), with total production at 17.6 million metric tons (MMT), assuming average yields due to sufficient rain and favorable conditions from April to June, which is expected to partly offset loss from the winter drought. Barley area and production for MY 2021/22 are projected at about 3.8 million hectares and 7.7 MMT, down five percent compared to the previous year. In MY 2021/22, the Turkish corn planting area forecast is down about twelve percent to 540,000 hectares and production to 6.2 MMT. Some farmers in the Southeast Region, who used to plant milling wheat as a first crop and corn as a second crop, have switched back to cotton instead of double cropping.

The MY 2020/21 paddy rice area estimate is 97,000 hectares with production forecast of 882,000 metric tons, similar with last year, assuming sufficient rain and favorable conditions.

Despite record exports in pasta between June 2020 and January 2021, high container prices may negatively affect all wheat export products in last quarter of MY 2020/21.

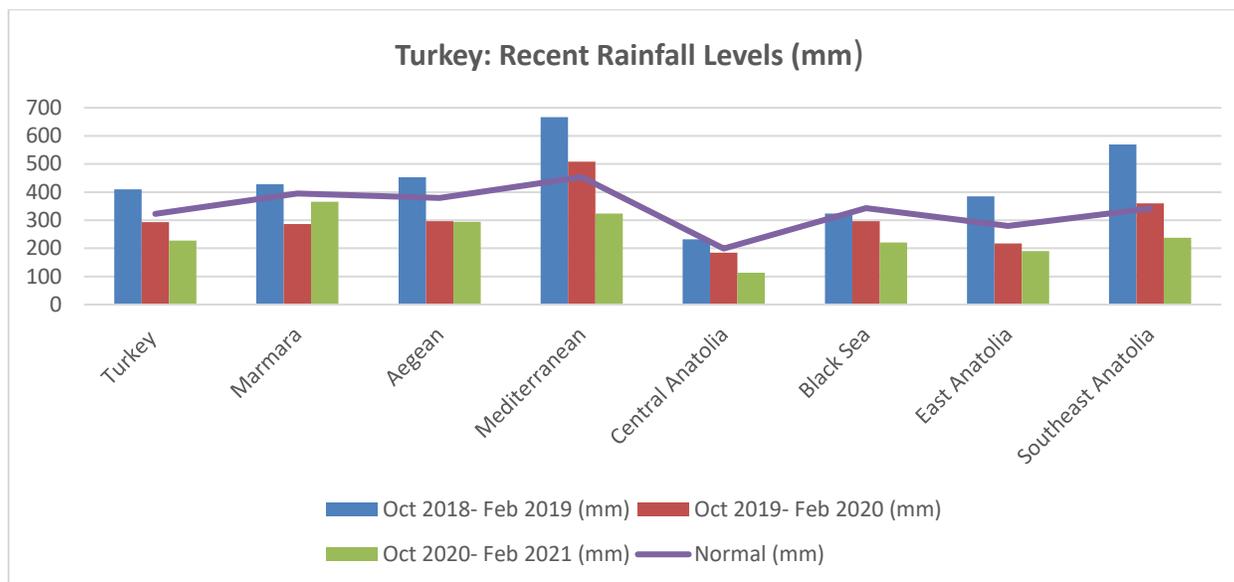
Turkey is still struggling with food inflation, which has been exacerbated by a weak Turkish Lira and high international commodity prices. The Government of Turkey (GoT) has focused many policies specifically on lowering high consumer prices, especially bread which is a staple food. To assist in lowering food prices, Turkey reduced almost all grains tariff until the new harvest, with limited effect. Some product exports and imports continue to be affected by COVID-19 related issues. The Ministry of Agriculture and Forestry approved new genetically engineered (GE) soybean and corn events for feed in January and February 2021.

PRODUCTION

Weather Situation

Rainfall was scarce for most of the winter in the main agricultural regions, similar to the previous year. Warm temperatures were another concern reason that average temperature in Turkey were 5.4 °C (42°F) in January 2021 and 6.2°C (43°F) in February 2021 while long term averages were just 2.7°C (37°F) and 3.4°C (38°F), respectively . According to the accumulated precipitation report of [Turkish State Meteorological Service](#), cumulative rainfall in Turkey from October 2020 through February 2021 was 227.8 millimeters (mm), compared to 291.8 mm during the same period the previous year. This year's rainfall amount is 30 percent lower than the national historical average and it is 22 percent lower than last year. During the same period in 2019, rainfall was 410.0mm.

Figure 1: Turkey: Cumulative Rainfall Levels by Region in Last Three Terms compared with Historical Average (mm)



Source: Turkish State Meteorological Service

As seen in Table 1, the cumulative rainfall from October to February in the Central Anatolia region, the main wheat and barley planting area, was 113.7mm, while the average level for that region is 199.3 mm. This amount of rainfall is 43 percent lower than the national historical average for Central Anatolia region and 38 percent lower than last year.

Table 1: Cumulative Rainfall in Turkey between 1 November 2020 and 28 February 2021

Turkey: Recent Rainfall Levels					
Region	Oct 2019- Feb 2020 (mm)	Oct 2020- Feb 2021 (mm)	Normal (mm)	2020/21 deviation from normal	2021/21 deviation from previous year
Turkey	291.8	227.8	323.2	-30%	-22%
Aegean	297.0	294.2	379.1	-22%	-0.1%
Black Sea	296.6	220.8	343.0	-36%	-26%
Central Anatolia	184.6	113.7	199.3	-43%	-38%
East Anatolia	217.9	190.2	279.3	-32%	-13%
Marmara	286.3	366.1	394.6	-7%	28%
Mediterranean	508.5	324.0	453.5	-29%	-36%
Southeast Anatolia	359.8	237.7	342.5	-31%	-34%

Source: Turkish State Meteorological Service

Planting of the 2021/22 winter barley and wheat crops started in mid-September and concluded in December. An abrupt cold spell at the end of December caused some frost damage to crops in the Thrace and Central Anatolia regions. Also, inadequate rainfall and the warm temperatures caused dry soils since the Fall, which threatens unirrigated area. However, sufficient spring precipitation can partly compensate for the worst effect on the yields.

Wheat

Winter wheat planting finished in December 2020 in Turkey. In MY 2021/22, total wheat planting area projected to decline to 7.05 million hectares, with total production at 17.6 MMT, assuming normal yields due to sufficient rain and favorable conditions from April to June, which will partly offset losses from the winter drought. A decrease in planting area is due to losses mainly in the Southeast region. In the Thrace and Central Anatolia regions, some planted wheat areas experienced frost. Turkish authorities estimate that 1000 ha of the winter wheat crop was damaged so far.

Central Anatolia is the main grain producer of Turkey. Wheat and barley are the traditional products of this high plateau region. Winter wheat planting finished in October 2020 in the region. More than half of the fields are unirrigated, and yields are directly linked to rainfall. So far in MY 2020/21, rainfall in the region is lower than normal levels, as mentioned above, and farmers are waiting for spring rains. Total wheat area in Central Anatolia is about 2.6 million ha and the average yield is about two MT/ha. Of the total 5 MMT of wheat projected to be produced in Central Anatolia in MY 2021/22, 1 MMT is durum wheat.

The Cukurova region planted 260,000 ha of wheat in MY 2020/21, which is similar to last year. So far, wheat germination and plant growth is developing well. However, planting area continued to decrease in unirrigated plateaus but increased in irrigated areas.

In the Thrace region, the wheat planting area will marginally decrease due to better returns for other alternatives like sunflowers and canola. In Thrace, farmers planted about 600,000 ha of wheat. The average yield in the region is 4.5 MT/ha. So far in MY 2021/22, rainfall in the region is below normal levels but much better than last year, and snow cover is favorable for wheat production. Some frost damage was observed in early planted area, but not much.

In the Southeast of Turkey, the provinces of Sanliurfa, Diyarbakir and Mardin are the primary producers of wheat. Farmers in Harran and Akcakale plan to switch partly from wheat and corn to cotton in MY2021/22. As mentioned in the FAS/Turkey Cotton report, GoT promotes crop rotation for soil quality through mandatory regulations. Farmers are unable to get subsidies if they keep planting the same crop in the same soil three years in a row. As some farmers chose to rotate to a different crop in MY 2020/21, which was the third year after the rotation rule was established, they now again qualify for subsidies for cotton production in MY 2021/22. Farmers in Harran, in the Southeast Region, who used to plant milling wheat as a first crop and corn as a second crop, have partly switched back to cotton instead of double cropping. Due to this policy, about 75,000 ha in this region will switch from wheat. Most of the farmers who still planted wheat prefer to plant durum wheat rather than milling wheat due to better returns this year.

In recent years, alternative crops, orchard development, greenhouse development, sesame seeds, onions, and vegetables increase their share of farm area every year in Turkey, which reduces available wheat land. However, total durum wheat area is relatively increasing while milling wheat area is decreasing. High input prices, crop rotation, and fallow fields also affect total planting area. After compound fertilizer prices in Turkey doubled in a few years in parallel with TL depreciation, the GoT increased fertilizer support for wheat to 160 TL/ha from 80 TL/ha in March 2021. Of the total 17.6 MMT of wheat which is expected to be produced in Turkey in MY 2020/21, 2.1 MMT is durum wheat.

The Turkish Grain Board (TMO) was an active player in the grain market in MY 2020/21 in many ways, from farmers to millers. After TMO announced a minimum price for grains, they continued to be involved in the market with domestic sales and import tenders. The 2020 [grain intervention prices](#) were announced in May 2020, as Anatolian Hard Red Milling Wheat (AKS) at 1650 TL/MT (\$235/MT), 1800 TL/MT (\$245/MT) for durum wheat, and 1275 TL/MT (\$182/MT) for barley .(exchange rate of US\$1=7 TL as of May 2020).

TMO offered to buy grains via commodity exchanges and licensed warehouses throughout Turkey. However, TMO’s total procurement was very limited compared to previous years due to strong demand from the private sector amid rapidly increased domestic prices after a tough harvest, and simultaneously high international prices related to Covid-19 demand and transportation.

Domestic wheat prices in Turkey have been abnormally below or same with the international price in recent years. During the marketing year, international prices fluctuated. The wheat CIF import price in Marmara in June 2020 was \$230/MT for 12.5 percent protein; it peaked in January 2021 at \$320/MT and was \$260/MT in March 2021. In July 2020, the Anatolian Hard Red Wheat (AKS) price was about 1690 TL/ton, barley was 1250TL/MT and corn was 1360 TL/MT in the domestic market. In June 2019, the local prices were 1360 TL/MT, 1150 TL/MT, and 1200 TL/MT, respectively (exchange rate of US\$1=6.8 TL as of June 2020).

The GoT also gives support for fertilizer, gasoline, certified seed usage, and soil analysis. The rates of all subsidies increased compared to last year, although the absolute value of the lira decreased by 20 percent from during 2020. (Table 2). Announced supports for 2020 will be paid in calendar year 2021. However, some farmers are asking for additional supports due to increases in the costs of production.

Table 2: Government support program for wheat (TL/MT)

Turkey: Government support for wheat producers					
Year	Certified seed (TL/ha)	Premium (TL/MT)	Soil analysis (TL/ha)	Diesel (TL/ha)	Fertilizer (TL/ha)
2009	50	45	22.5	29.3	38.3
2010	50	50	25	32.5	42.5
2011	60	50	25	37.5	47.5
2012	60	50	25	40	50
2013	75	50	25	43	55
2014	75	50	25	46	60
2015	85	50	25	48.5	66
2016	85	50	110*		
2017	85	50	170		

2018	85	50	190
2019	85	100	270
2020	160	100	350

Source: <https://www.tarimorman.gov.tr/Konular/Tarimsal-Destekler/>

* The GoT paid 110 TL for these three categories combined in 2016

While looking at the historical intervention price in terms of value in dollars, intervention prices decreased from \$303 in MY 2016/17 to \$235 in MY 2020/21 (Table 3), due to the depreciation of the lira.

Table 3: Historic TMO Wheat Intervention Price and Government Premiums

Turkey: TMO milling wheat intervention prices and wheat premiums (TL/MT)

Year	Intervention price	Premium (Same as Table 3)
2016	910	50
<i>(As of July 2016, \$1 USD = 3 TL)</i>	\$303	\$16.6
2017	940	50
<i>(As of July 2017, \$1 USD = 3.5 TL)</i>	\$268	\$14
2018	1050	50
<i>(As of May 2018, \$1 USD = 4.5 TL)</i>	\$233	\$11
2019	1350	50
<i>(As of May 2019, \$1 USD = 5.9 TL)</i>	\$228	\$8.5
2020	1650	
<i>(As of May 2020, \$1 USD = 7 TL)</i>	\$235	

Source: Turkish Grain Board (TMO) www.tmo.gov.tr

Barley

Barley area and production for MY 2021/22 are projected at about 3.8 million hectares and 7.7 MMT, down five percent compared to the previous year, assuming yield losses due to winter drought conditions. Barley fields are generally unirrigated and yields are directly linked to rainfall.

Barley area and production for MY 2020/21 are forecast at about 3.8 million hectares and 8.1 MMT. The barley area increased particularly in unirrigated areas of the Central Anatolia region in recent years, as the high cost of chemicals (such as pesticides and fertilizers) used in production of other crops influenced farmers' planting decisions.

Corn

In MY 2021/22, Turkish corn planting area forecast is down about twelve percent to 540,000 hectares and production to 6.2 MMT, assuming sufficient rain and favorable conditions, similar with the long-term yield average.

The regions of Central Anatolia, the Southeast, Cukurova, and the Aegean are the primary corn producers in Turkey. First crop corn planting is common in the Cukurova, Aegean, and Marmara regions. MY 2021/22 corn planting in Turkey has already started in many regions. The first-crop corn will be planted from the first week of March until mid-April. There are not notable issues in other regions at this time for first-crop corn planting.

Second-crop corn is a common product in Southeast Anatolia, especially in Sanliurfa and Mardin regions. Some farmers in Harran and Akcakale, in the Southeast Region, who used to plant milling wheat as a first crop and corn as a second crop, have switched back to cotton instead of double cropping. Due to increased cotton replacing corn in the Southeast Region, the second-crop corn harvest production expectation is also down. Therefore, first crop corn planted area will be similar with MY 2020/21 levels, but the second-crop corn planted area is expected be lower than last year. The decrease in total corn planting is projected at about 80,000 ha in MY 2021/22.

Rice

The MY 2021/22 paddy rice area forecast is 97,000 hectares with production forecast of 882,000 metric tons, similar with last year, assuming sufficient rain and favorable conditions.

Rice planting will start end of the April 2021 and finish by the end of the May 2021. The Marmara region in the Gonen/Bandirma area and Edirne Province are the main production areas. In Central Anatolia, the regions of Cankiri and Corum produce nearly a quarter of Turkey's paddy rice. According to the Turkish State Water Authority, the cumulative rainfall from October 2020 to February 2021 in the Thrace region was 366.1 mm, which is seven percent below the historical average level for that region of 394.6 mm. However, rainfall was 28 percent higher than last year. Sufficient precipitation and high water levels in the dams will affect planting area, but the exact numbers will be clear after May. The harvest normally begins in September and ends in October.

CONSUMPTION

Wheat

The majority of wheat is utilized for human consumption as flour and pasta (some of which is exported), with the rest of the wheat used as feed. Turkish domestic wheat consumption forecast for MY 2021/22 is 20.3 MMT, up 100,000 MT from the MY 2020/21.

Seed, feed and industrial consumption remains the same, so the increase in consumption is in the food use sector. In MY 2021/22, total food, seed and industrial (FSI) consumption forecast is expected to

increase to 18.6 MMT, up 100,000 MT from the MY 2020/21 year, assuming strong demand for wheat products continue from the households.

Bread

Bread, an iconic symbol of nourishment, is the staple food of the general population. Turkey produces about 100 million 250-gram loaves of fresh bread every day. For reference, Turkey has a population of 81 million and hosts about five million refugees. Bread availability and pricing is at the core of agricultural and economic policy as a strategic product by the ruling and opposition parties..

Because of its political importance, bread is directly affected by government intervention. As a first step, the government announces production supports for wheat and protects the market with high import tariffs to provide sustainability in domestic production. After harvest, the government announces an intervention price and buys wheat from farmers in order to set a fair price in the market to address producers' interests. Then, if there is a wheat shortage in the domestic market and domestic prices sharply increase like in the year 2020, TMO can sell low-cost imported milling wheat to millers for domestic consumption. Or, as was also the case in 2020, the government can eliminate the normally high (45 percent) tariffs on wheat to prevent more dramatic price increases in the domestic market. Moreover, in order to address consumers' interests, all across the country there are bread factories, owned by municipalities, which aim to supply consumers with low priced bread. According to estimates, municipalities produce around 10 million loaves every day in Turkey, which is about ten percent of total bread production.

The largest municipal bread factories are in Istanbul and Ankara. [The Istanbul Municipality Bread Factory](#) (IHA) produces 1.8 million loaves every day with its three bread production factories in Istanbul. The price of a normal white bread loaf at IHA (1 TL/250 grams) is lower than the market price (2 TL/200 grams). [The Ankara Municipality bread factory](#) (AHA) is the second largest municipal bread factory with a production of 1.250 million 250-gram loaves daily. The price of a normal basic white bread loaf at AHA (1.25 TL/250 grams) is lower than the market price (1.5 TL/200 grams). The marketing strategy of municipality bread companies is to franchise into very small bakery shops, which are privately owned. Without government approval, private ovens are not able to increase standard bread's price in Turkey. However, due to the price increases of wheat, as well other increases of inputs like gasoline and electricity costs in recent years, the average bread price has doubled in the last two years, which is higher than the rate of inflation.

On the other hand, flour millers in Turkey, another important part of the bread industry, struggle with several issues from procurement to marketing. The milling sector for the domestic Turkish market is stuck sourcing from a very protected market, which leads to high domestic prices and government-supported bread factories, which bring down the bread price.

Another factor that affects consumption is Turkey's tourism potential. Before the COVID-19 pandemic, the number of foreigners visiting Turkey reached 52 million in 2019 but considerably decreased in 2020. The sector is not optimistic for the upcoming season because of the continuing unclear situation due to COVID-19. Despite less consumption from the hotel and restaurant sector, it is expected that total wheat consumption will increase with higher at-home consumption.

Besides domestic consumption, strong exports are the driving force of the wheat products industry in Turkey. Turkey produces more than 24 MMT of a wide range of wheat products including pasta, flour, and biscuits, etc. and exports them to 160 countries all over the world.

According to market sources, there are 28 active pasta factories in Turkey with more than two MMT/year production capacity total. Capacity use rate is around 85 percent. According to the Turkish pasta manufacturing industry, pasta consumption was about eight kilograms per person in 2019. Durum wheat demand has been very strong due to high levels of pasta products exports. There are also more than 140 factories for bulgur, biscuit/cookie/crackers, and semolina production in Turkey (Table 4).

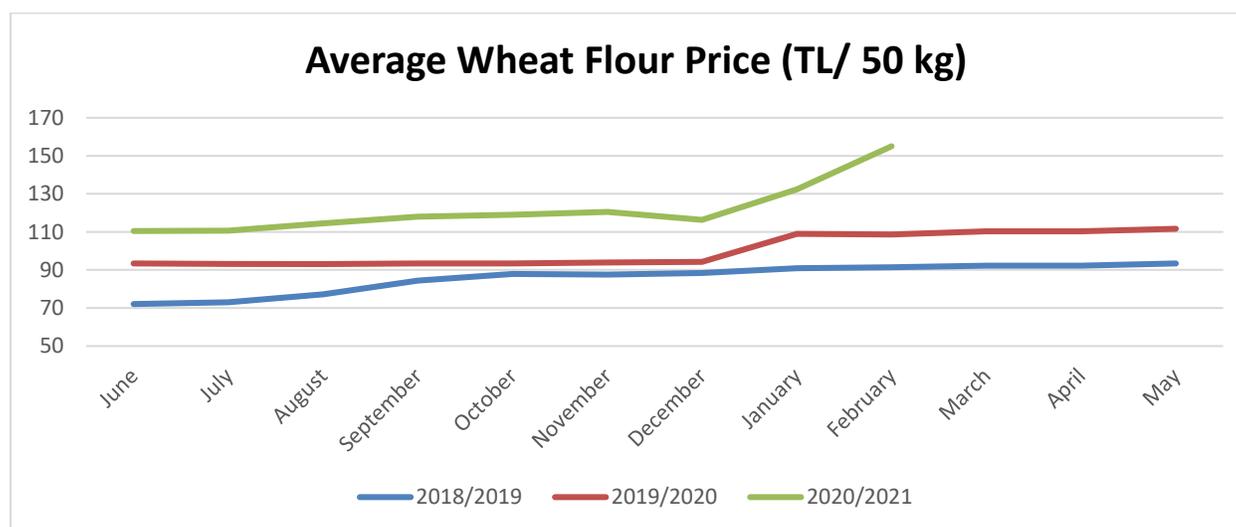
Table 4: Wheat Products Industry Statistics

Wheat Products Industry			
Type of Product	Active Factories	Production Capacity/ Year (MMT)	Capacity use rate/ Year (percent)
Wheat Flour	640	35	50
Pasta	28	2.2	80
Bulgur	103	1.8	65
Biscuit/Cracker	32	1.8	60
Semolina	13	0.8	75

Sources: Industry Sources

The domestic wheat flour price increased about 40 percent year-on-year, when compared to the price in February 2020, as seen in Figure 2. It also increased 43 percent compared to the last year. TMO's limited domestic sales of wheat for the flour producers in the scope of combating food inflation seems to have partly prevented sharp price increases in the domestic wheat flour market, despite the depreciation of Turkish Lira and high international commodity prices.

Figure 2: Average Wheat Flour Price



Source: Polatli Commodity Exchange, Turkey

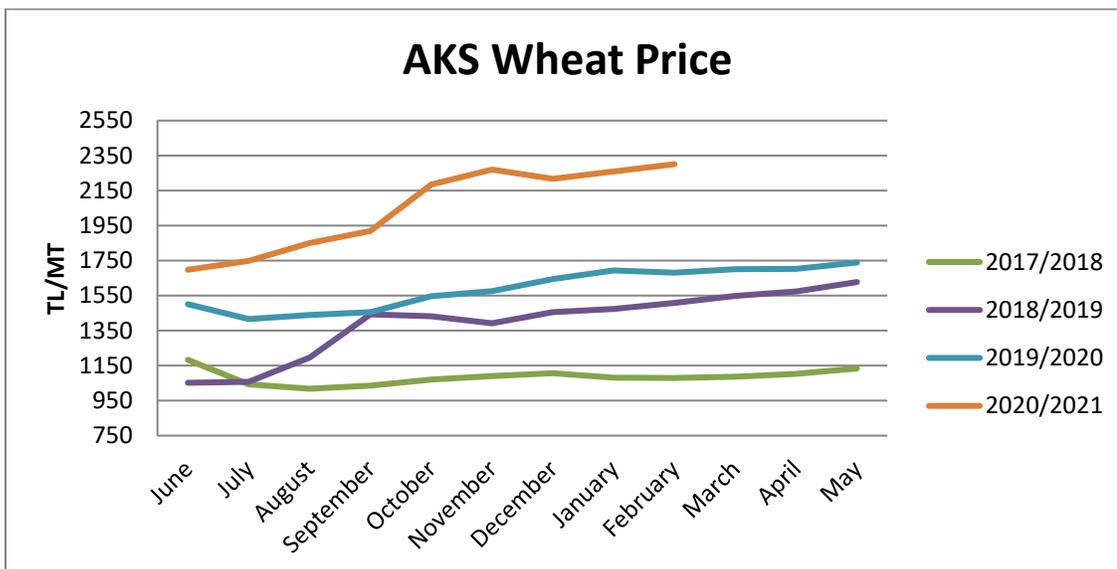
The wheat CIF import price in Marmara in the first week of March 2021 was \$260/MT for 12.5 percent protein, which was \$230/MT for 12.5 last year. The price peaked in January at \$330/MT.

TMO has been very active in the market so far in MY 2020/21. In order to stabilize domestic prices during the year, TMO opened several tenders after the harvest until March 2021 for about 2.5 MMT of wheat in order to supply high quality wheat to the domestic market.

TMO started its domestic sales after the harvest in October 2020. TMO [announced](#) that it was willing to sell domestic and imported milling wheat and barley stocks (12.5 and 13.5 percent protein content) to domestic flour producers in October 2020 at a price of 1750-1850 TL/MT (\$221/ MT- \$234/ MT), excluding VAT and handling charges, to provide stability to the internal wheat market. TMO updated regularly its price and available stocks during the year with announcements. (As of October 2020, \$1 USD = 7.9 TL)

The Polatli CME is one of the main commodity market exchange for red milling wheat in Turkey. High quality red milling wheat on the Polatli CME was about 2,300 TL/MT (\$306/MT) in February 2021 and was 1,690 TL/MT (\$278/MT) in February 2020.

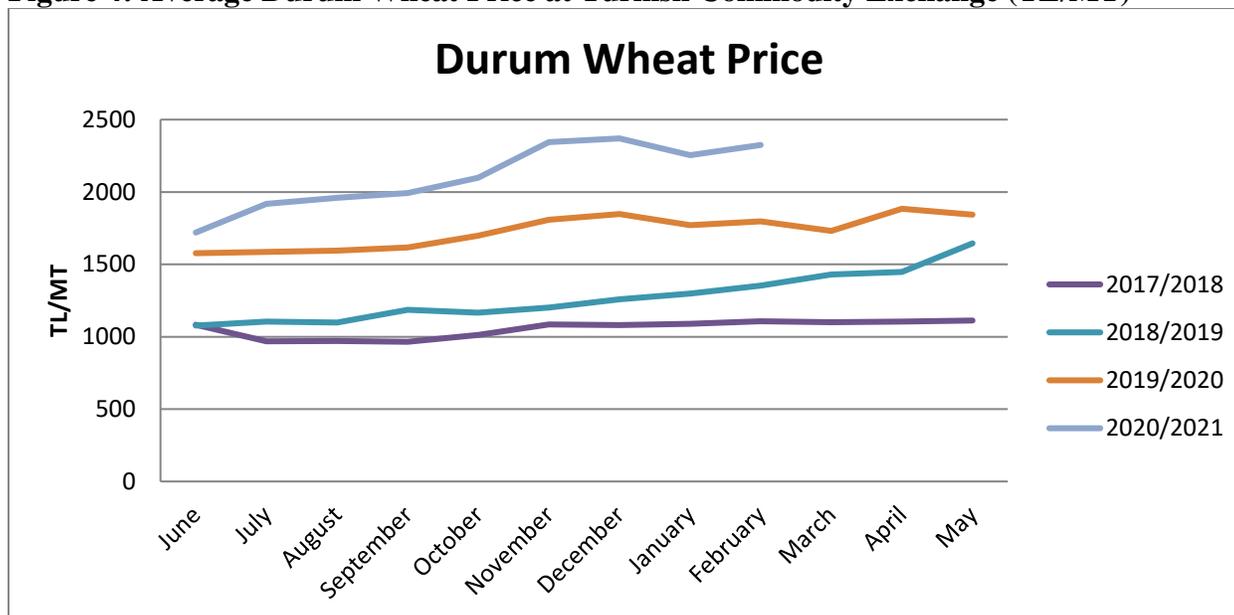
Figure 3: Average Red Milling Wheat Price at Commodity Exchange in Turkey



Source: Polatli commodity exchanges in Turkey

TMO also has been selling its domestic and imported durum wheat stocks to pasta and semolina producers since October 2020 at a price of 2,000 TL/MT (around \$253/ MT), excluding VAT and handling charges. Average milling wheat price at the main commodity exchanges was around in 2,300 TL/MT (~\$306/MT) February 2021, which was 1790 TL/MT (~\$294/MT) February 2020

Figure 4: Average Durum Wheat Price at Turkish Commodity Exchange (TL/MT)



Source: Konya commodity exchanges in Turkey

Turkish wheat prices can be followed by using the major Commodity Exchanges' websites:

- 1) <http://www.polatliborsa.org.tr/>;
- 2) <http://www.ktb.org.tr>
- 3) <http://www.adanatb.org.tr/>
- 4) <http://www.esktb.org.tr/>
- 5) Also TMO's [Daily Market and Commodity Exchange Prices Bulletin](#) states recent commodity prices.

Barley

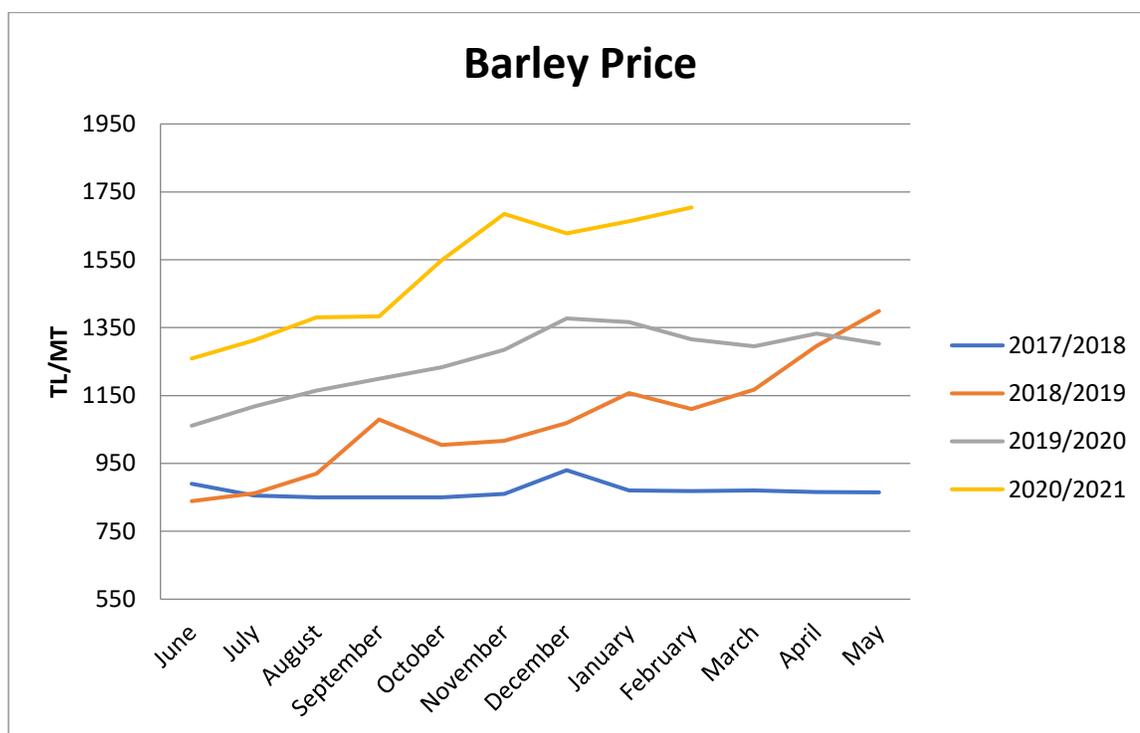
Barley consumption for Turkey in MY 2021/22 is projected at 7.7 MMT, in parallel with lower domestic production expectations.

Barley consumption estimates for Turkey in MY 2020/21 was 8.1 MMT tons, up about 7 percent from MY 2019/20, due to high production compared to the previous year and competitive prices relative to corn.

There are two major sectors using barley in Turkey. One is the malting and beer industry and the other is the feed sector. Malting barley consumption, which is estimated at 900,000 MT, has been steady in recent years. Barley traditionally has been preferred as a feed grain in Turkey, especially for ruminants, and barley consumption for feed use is directly linked with price. Feed companies can compensate for any reductions in barley availability by using residual and waste products from the food industries, such as bran. However, the feed sector continues to grow, and this also drives continued demand for barley.

The barley price at the Polatli CME in February 2021 was 1704 TL/MT (~\$227/MT) compared to around 1,316 TL/MT (~\$210/MT) a year before. As of February 2021, the price of imported barley was CIF Marmara \$238/MT, compared with \$208/MT a year ago.

Figure 5: Average Barley Price at Commodity Exchange in Turkey (TL/MT)



Source: Price average from Polatli commodity exchanges in Turkey

Corn

There are two main users of corn in Turkey: the feed industry and the corn starch industry. Corn consumption moves in line with developments in the domestic feed sector. Alternative crop prices imported feed sources, production, and the sector’s demand for corn all impact corn consumption. As mentioned in the feed section, domestic feed production is expected to remain the same or increase marginally in CY 2021, according to sector representatives. MY 2020/21 consumption is estimated to be about 7.5 MMT and will rise to 7.9 MMT in MY 2021/22, assuming a possible increased in demand from the feed sector in parallel with normalization after COVID-19.

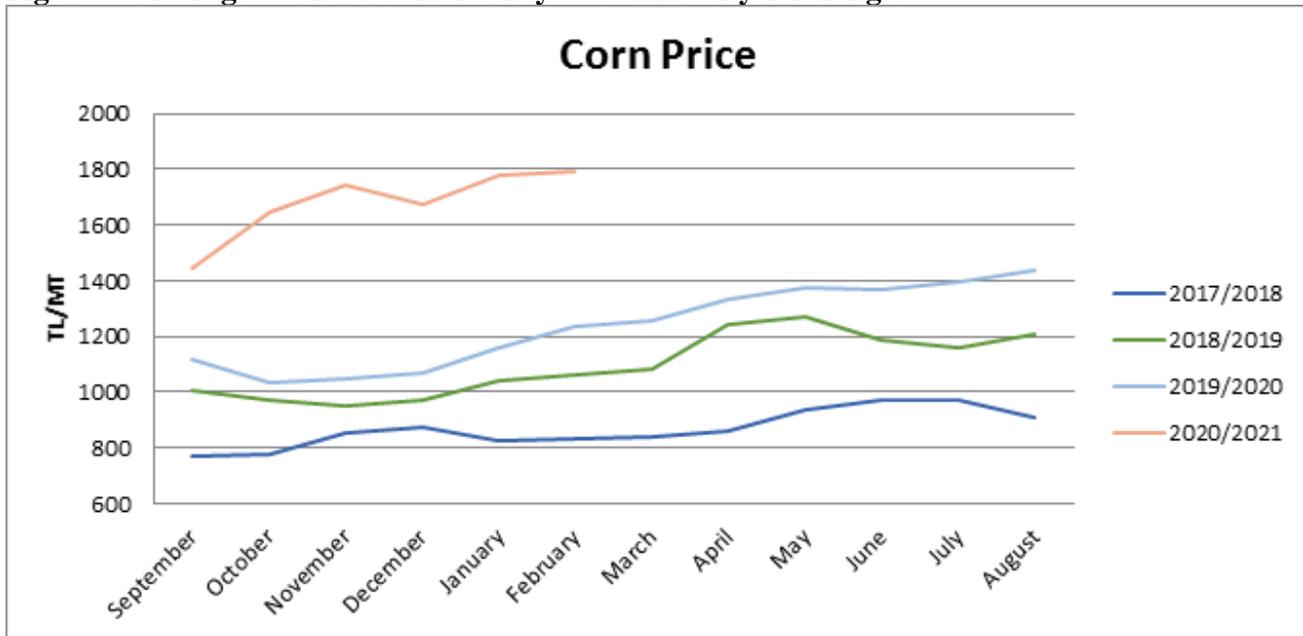
The other corn related industry, the starch-based sugar sector, is controlled by the government through production quota allocations, which also govern beet sugar production. The total production capacity of the starch-based sugar industry is about 1.5 MMT. The sector typically has used 900,000 MT of domestic corn annually. The Turkish government announces quotas each year and is expected to decrease the quota allocations for starch-based sugar in the coming days. For detailed information,

please see latest Turkey Sugar Annual Report 2021. According to the starch industry, corn use for industrial purposes such as cardboard box production and disinfectant increased due to pandemic while demand from the bakery sector in decreased.

TMO announced the MY 2020/21 corn procurement price on July 29, 2020 at 1325 TL/MT (\$184/MT), compared to the announcement price at 950 TL/MT in MY 2019/20 (which was \$201/MT, when \$1 = 5.8 TL as of the announcement date in August 2019).

The corn price in the domestic market is about 1,800 TL/MT (~\$240/MT) in February 2021, which was 1,250 TL/MT (~\$208/MT) a year ago. Meanwhile, international corn prices increased about 40 percent in a year.

Figure 6: Average Corn Price in Turkey at Commodity Exchanges



Source: Price average from multiple commodity exchanges in Turkey

Feed Sector

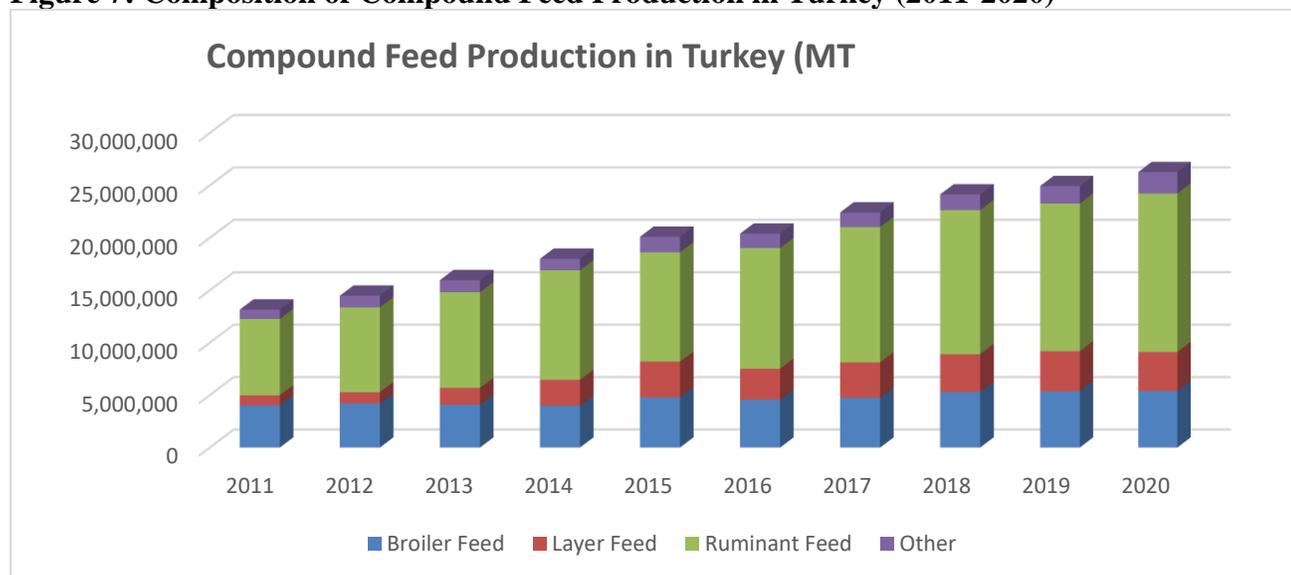
According to industry sources, even during the pandemic, the feed sector achieved growth in calendar year 2020. Total feed production for 2020 is estimated at about 26.1 MMT, which is 5.2 percent higher than 2019. There were increases in all types of feed except layer feed. According to industry sources in CY 2020, poultry, broiler, and layer feed production was about 10 MMT, livestock feed production was about 15 MMT and other feed (fish feed and other) was 1.1 MMT.

The feed sector has been growing at a remarkable speed with investments in new, modern mills, which doubled capacity over the last decade, although growth slowed in 2019 and 2020.

There are about 525 active feed mills in Turkey with an estimated total capacity of 18.2 MMT. There are also on-farm feed mills where total production is estimated at about 3 MMT per year.

This consistent growth of the feed industry over the last decade can be seen in Figure 7 below.

Figure 7: Composition of Compound Feed Production in Turkey (2011-2020)



Source: Ministry of Agriculture and Forestry

Grappling with a serious increase in international commodity prices and the Turkish Lira’s depreciation against other currencies, the cost of imported goods has been increasing in Turkey, which has had large effects on domestic food and feed prices. Due to the negative impact of COVID-19 on domestic consumption and poultry exports and high feed prices, which limit production despite a growing population, the feed sector projects to increase marginally in CY2021.

Table 5: Compound Feed Production in Turkey by Sectors (Thousand MT)

Feed Production	2016	2017	2018	2019	2020	% Change 2019/20
Broiler Feed	4,566	4,754	5,306	5,363	5,398	0.6%
Layer Feed	2,958	3,370	3,601	3,828	3,717	-2.9%
Other Broiler Feed	785	759	860	843	920	9.1%
Broiler Sector Total	8,309	8,883	9,767	10,035	10,034	0.0%
Ruminant Feed	11,502	12,906	13,742	14,076	15,115	7.4%

Other Feed	591.025	629.621	635.578	828.11	1123.45	35.7%
Total	20,402	22,418	24,144	24,939	26,272	5.3%

The feed sector in Turkey is dynamic and always seeks new alternatives for better rations. Oilseeds and their byproducts are also widely used in the feed sector. Depending on international price levels and the availability of products, domestic raw feed material prices change from year to year. For instance, the Turkish feed industry also imported 6 MMT of by-products in CY2020, as seen Table 6. For detailed information, please see most recent Turkey Oilseeds and Products and Poultry Reports.

Table 6: Turkish Other Feed Materials Imports (Thousand MT)

S HS Code	Description	Calendar Year				
		2016	2017	2018	2019	2020
23	Residues And Waste From The Food Industries; Prepared Animal Feed	5,308	7,033	5,326	5,911	6,001
2302	Bran, Sharps And Other Residues (In Pellets Or Not), Derived From The Sifting, Milling Or Other Working Of Cereals Or Leguminous Plants	1,494	1,984	1,617	1,661	1,834
2306	Oilcake And Other Solid Residues (In Pellets Or Not), Resulting From The Extraction Of Vegetable Fats Or Oils (Except From Soybeans Or Peanuts), Nesoi	916	1,106	1,086	1,497	1,278
2303	Residues Of Starch Manufacture And Other Residues And Waste Of Sugar Manufacture, Brewing Or Distilling Dregs And Waste, Whether Or Not In Pellets	1,691	2,351	1,389	1,177	1,271
2304	Soybean Oilcake And Other Solid Residues Resulting From The Extraction Of Soy Bean Oil, Whether Or Not Ground Or In The Form Of Pellets	939	1,229	915	1,177	1,073
2308	Vegetable Materials And Waste, Vegetable Residues And By-Products (In Pellets Or Not), Used In Animal Feeding, Nesoi	31	134	69	71	210
2301	Flours, Meals And Pellets, Of Meat Or Meat Offal, Of Fish Or Of Crustaceans Etc., Unfit For Human Consumption; Greaves (Cracklings)	145	141	164	222	190
2309	Preparations Of A Kind Used In Animal Feeding	90	90	85	105	144

Source: TDM Calendar year data: January – December

The Turkish feed sector significantly benefits from imported raw materials. The price changes for feed move in parallel with the U.S. Dollar-Lira exchange rates as well as FOB prices. Average feed prices increased more than 40 percent over the past year while the Turkish Lira continued to depreciate against other currencies. The cost of boiler feed increased the most, by 58 percent. Broiler feed prices were 2,255 TL/MT (\$375) in December 2020 and 2,000 TL/MT (\$370) in December 2019.

Table 7: Average Compound Feed Prices in Turkey, By Type of Feed

	Dec-19	Mar-20	Jun-20	Sep-20	Dec-20	% Dec 19 / Dec 20
Broiler Feed	2150	2410	2490	2880	3400	158%
Layer Feed	1800	2010	2070	2331	2450	136%
Dairy Cattle Feed	1490	1560	1650	1836	2150	144%
Beef Cattle Feed	1390	1460	1550	1695	1970	142%

Another prominent development that will affect the feed sector relates to the January 23, 2021, Biosafety Decisions on imports of genetically engineered (GE) soybean and corn events in the Official Gazette. The Ministry of Agriculture and Forestry (MinAF) approved two soybean events and one corn event for feed. In addition, on February 27, 2021, the Turkish government published Biosafety Decisions on imports of GE soybean and corn events in [the Official Gazette](#). MinAF approved four soybean events and one corn event for feed. With these approvals, Turkey ensured the continuation of feed imports from South America and the ability to import soy from North America.

Rice

Rice consumption in Turkey in MY 2021/22 is projected to grow marginally to 817,000 tons. Demand is driven by the growing population and assuming normalization after COVID-19 in 2022. Rice consumption in Turkey in MY 2020/21 is estimated at 815,000 tons. According to market sources, rice consumption, as well as pulses, prepared at home increased considerably, which offset losses in the food service sector.

Paddy rice prices differ by variety in Turkey. Despite the fact that some varieties have better yields and milling rates, prices are set according to consumer preferences. Paddy rice prices increased around 30 percent compared to last year.

TMO announced the MY 2020/21 paddy rice procurement price on September 3, 2020 at between 3200 TL/MT and 4500 TL/MT, an increase of about 18 percent compared to last year.

TMO also continues to sell Type A (Baldo, Cammeo, Fortuna, Yerua) milled rice variety at 9 TL/Kg, Osmancik at 7.3 TL/Kg, and Luna, Ronaldo at 6.25 TL/Kg in TMO's retail stores.

TRADE

Wheat

In October 2020, the Government of Turkey (GoT) announced tariff reductions on grains for all importers. The GoT reduced the import tariff on wheat (45 percent), barley (35 percent) and corn (25 percent) to zero through a decree published in the Official Gazette on October 21, 2020. The new tariffs were initially valid between October 21 - December 31, 2020. On December 17, 2020, the Turkish government extended the tariff reductions until April 30, 2021.

According to the official statistics of Turkey, during the first eight months of MY 2020/21 (between June 2020 and January 2021), total wheat imports were about 6.2 MMT and are expected to reach to 8.2 MMT until the new harvest. For MY 2021/22, total wheat imports into Turkey are projected to increase to 8.5 MMT, due to lower crop expectations and strong domestic demand.

Table 8: Turkish Wheat Imports (MT) (Origin)

Countries	MY 2018/19	MY 2019/20	MY 2020/21*
Russia	4,941,149	6,890,934	4,875,459
Ukraine	335,141	1,311,864	642,871
Canada	260,172	960,374	80,365
Mexico	57,187	547,543	166,157
Lithuania	239,861	266,616	212,039
Bulgaria	34,751	152,818	39,189
Latvia	184,058	85,758	31,477
Syria	-	3,432	131,787
Other	328,766	601,954	88,186
Total	6,381,085	10,821,293	6,267,530

* June 2020-January 2021

Source: Turkish Statistics Institute

Russia (6.89 MMT), Ukraine (1.31 MMT) and Canada (960,374 MT) were the largest wheat suppliers for Turkey in MY 2019/20. Russia is the main supplier of milling wheat to Turkey with 4.87 MMT in MY 2020/21 so far, followed by Ukraine with about 642,871 MT of milling wheat during the same period. Turkey imported 309,000 MT of durum wheat during the first eight months of MY 2020/21. Mexico, Canada, and Syria are the main durum wheat suppliers exporting 166,156 MT, 80,365 MT and 53,017 MT, respectively, so far.

Table 9: Wheat foreign trade data in MY2019/20 and MY2020/21

TURKEY: WHEAT FOREIGN TRADE (excluding wheat products)				
MONTH	IMPORT	IMPORT	EXPORT	EXPORT
	MY 2019/20	MY 2020/21	MY 2019/20	MY 2020/21
	(MT)	(MT)	(MT)	(MT)
June	245,741	481,455	16,400	3,064
July	749,495	232,665	2,872	2,075
August	1,283,413	745,506	11,286	40,214
September	1,115,619	1,203,723	5,948	3,239
October	1,211,884	750,507	26,508	11,096
November	1,184,528	979,612	17,473	24,469
December	939,697	1,174,807	5,067	2,409
January	869,710	699,255	9,837	15,369
<i>Sub-total (June-Jan.)</i>	7,600,087	6,267,530	95,391	101,935
February	622,756		2,425	
March	632,960		15,399	
April	1,050,359		10,416	
May	915,131		1	
MY TOTAL	10,821,293	8,200,000*	123,632	140,000*

*forecast, does not include wheat products

Source: Turkish Statistics Institute

For MY 2020/21, wheat exports (including wheat products, such as flour) from Turkey are expected to be 6.35 MMT assuming a slowdown in last four months of marketing year due to logistic issues. Traders are suffering from extremely high container prices as of March 2021, which has caused a slowdown in trade.

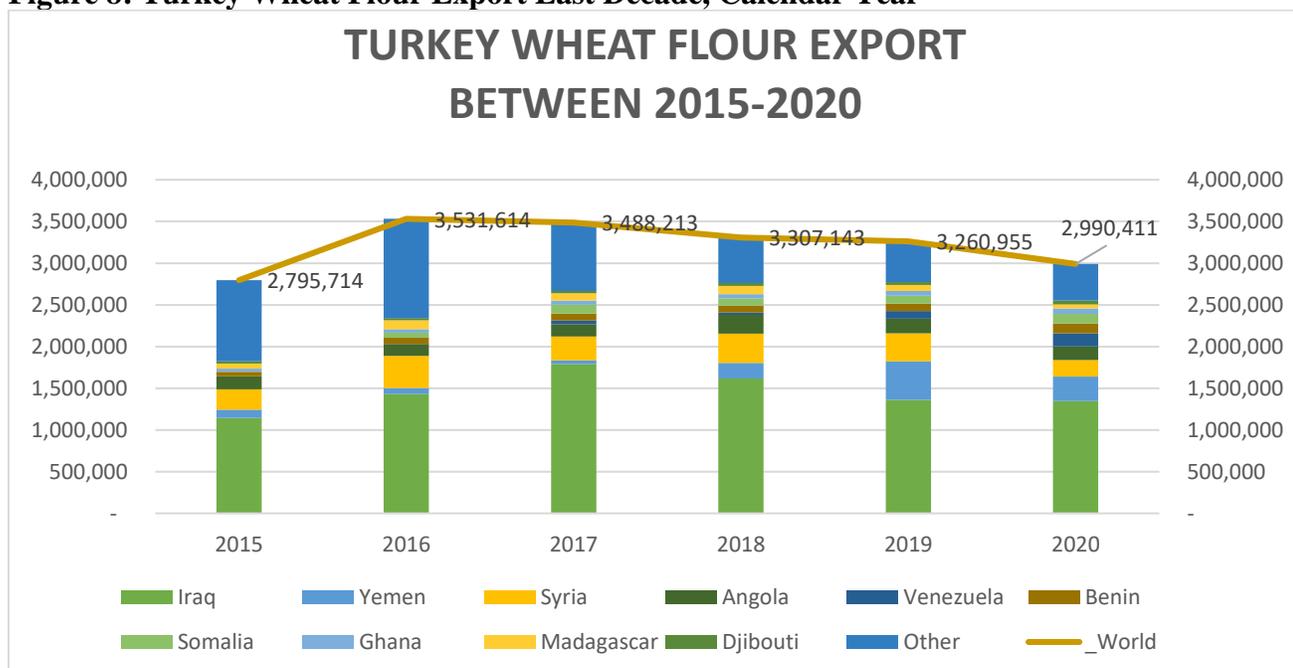
For MY 2021/22, total wheat exports from Turkey, including wheat products, are forecast at 6.5 MMT, up 150,000 MT from 2020/21, assuming the world's trade situation returns to a more favorable situation and exporters will keep their market share in key markets.

Turkey has ranked as the top wheat flour exporter in the world in recent years with access to comparably cheap wheat from the Black Sea region and a strategic location, acting as a hub for trade with neighboring countries. Turkish flour exports have surged, reaching almost \$1 billion in 2014 and surpassing two million metric tons, making Turkey the world's largest exporter of flour for the first time. While Turkey exported more than 3.5 MMT of flour in 2016, exports in calendar year 2020 reached just under 3 MMT.

Turkish millers struggle with domestic and international procurement issues. Volatility in international prices, border and transportation issues, and foreign governments' measures against COVID-19,

including export taxes on wheat, have increased their risks during the year. The growth in Turkish flour exports over time and the recent slowdown can be seen in Figure 8. These in statistics do not include flour supports provided by the United Nations Organization for humanitarian aid. According to exporters, Turkey is the prominent country engaged in the supply of flour through this channel.

Figure 8: Turkey Wheat Flour Export Last Decade, Calendar Year



Source: TDM Calendar year data: January – December

In MY 2019/20, Iraq (1.3 MMT), Yemen (390,000 MT) and Syria (258,000 MT) were the main consumers of Turkish wheat flour. Neighboring countries are still the largest markets, making up over 50 percent of exports. In the first eight months of MY 2020/21, Turkey exported about 2 MMT of flour. During the initial effects of COVID-19, flour exports decreased slightly. In June, July, August, and September, when trade adapted to the COVID-19 pandemic, flour exports started to rise again in terms of both quantity and value. However, with subsequent waves of cases in October and the implementation of protective policies in several countries, exports were again affected. As of March 2020, according to market source, Turkish exporters are having difficulties with high container prices, which will more dramatically affect exports in the coming months.

Table 10: Quantity of Flour Exports from Turkey (MT of Flour)

Quantity of Flour Exports			
Month	MY 2018/19	MY 2019/20	MY 2020/21
June	254,062	168,949	199,988
July	353,574	263,764	267,999
August	312,606	289,417	305,796
September	202,473	285,197	303,781
October	312,338	309,881	259,699
November	279,992	291,196	215,807

December	251,958	276,282	257,663
January	278,151	275,346	253,406
<i>Sub, Total Jun-Jan</i>	2,245,154	2,160,032	2,064,139
February	270,176	246,565	
March	303,676	247,108	
April	266,591	217,415	
May	257,675	193,245	
<i>MY TOTAL</i>	3,343,272	3,064,365	2,700,000 *

*forecast; Source:TUIK

After flour, pasta production is the most important industry in Turkey's wheat products sector. Turkey's pasta exports doubled in five years with strategic planning and high-quality domestic durum wheat. Pasta exporters imported just 300,000 MT of durum wheat in MY2020/21, compared to over 1 MMT in the previous year.

Table 11: Quantity of Pasta Exports from Turkey (MT of Pasta)

Quantity of Pasta Exports			
Month	MY 2018/19	MY 2019/20	MY 2020/21
June	87,137	73,879	116,512
July	103,866	130,799	131,169
August	85,428	103,920	101,115
September	105,256	97,553	130,262
October	103,220	121,286	160,334
November	109,407	105,660	98,276
December	112,468	101,597	142,220
<i>January</i>	98,999	111,639	86,988
<i>Sub, Total Jun-Jan</i>	805,781	846,333	966,876
February	95,242	117,080	
March	105,277	107,245	
April	115,351	133,269	
May	124,295	123,540	
<i>MY TOTAL</i>	1,245,946	1,327,467	1,500,000

*forecast; Source: TUIK

Somalia (121,000 MT), Venezuela (120,000 MT), and Ghana (69,000 MT) were the main buyers of Turkish pasta in the first eight months of MY 2020/21. Total pasta exports are up 15 percent compared to the same period in 2019/20. In the last two years, the market with the biggest increase was Venezuela due to a bilateral trade agreement.

According to official figures, Turkish pasta exports increased to 1.32 MMT in MY 2019/20, up about six percent compared to MY 2017/18. Turkey is expected to export 1.5 MT of pasta in MY 2020/21 due to expanded markets in African countries and Venezuela, accounting for a likely slowing of exports in the last four months of the marketing year.

Another wheat product popular in export markets is bulgur. Bulgur is a cereal food made from the cracked parboiled groats of several different wheat species, most often from durum wheat. [During the production process](#), whole wheat yields more than 72 percent bulgur and the rest is a byproduct (bulgur flour (8 percent), bulgur bran (10 percent), feed (8 percent), etc.) There are about 100 bulgur facilities in Turkey with 1.8 MMT annual capacity. According to official figures, Turkish bulgur exports were 167,004 MT in the first eight months of MY 2020/21, lower compared to last year, in relation to high domestic demand for bulgur and procurement issues for domestic durum wheat. Turkey is forecast to export 255,000 MT of bulgur in MY 2020/21 due to stable demand from neighboring countries and is projected to continue the same number of exports in MY 2021/22. Iraq, Syria, and other Middle Eastern countries are the main costumers of Turkish bulgur.

Table 12: Quantity of Bulgur Exports from Turkey (MT of Bulgur)

Quantity of Bulgur Exports			
Month	MY 2019/20	MY 2019/20	MY 2020/21
June	16,696	11,226	19,628
July	22,330	21,077	11,348
August	18,005	21,679	14,122
September	31,851	30,507	22,450
October	29,184	26,519	26,150
November	36,690	30,081	30,002
December	23,223	25,778	27,005
January	18,923	23,325	16,299
<i>Sub, Total Jun-Jan</i>	196,902	190,192	167,004
February	16,302	17,548	
March	19,813	23,178	
April	18,052	40,119	
May	22,935	28,152	
MY TOTAL	274,004	299,189	255,000

*forecast; Source: TUIK

Barley

For MY 2021/22, barley imports into Turkey are projected to increase to 850,000 MT, due to lower crop expectation and stable domestic demand.

TMO, a governmental affiliated body that is authorized through a presidential decree to import grain at a zero tariff, completed a series of tenders between August 2020 and January 2021 for about 350,000 MT of barley in order to meet sectoral demand and regulate domestic prices.

Table 13: Turkish Barley Imports (Origin)

Countries	MY 2018/19	MY 2019/20	MY 2020/21*
Russia	265,227	256,903	147,877

Ukraine	14,352	250,836	11,952
Syria	-	127,861	275,702
Romania	4	70,064	18,010
Latvia	-	67,069	-
Belarus	-	58,499	-
France	46,810	48,448	11,507
Other	62,575	23,245	19,850
<i>Total</i>	<i>388,968</i>	<i>902,925</i>	<i>484,898</i>

* June 2020-January 2021 (partial year)

Source: TUIK, including transshipments

For MY 2020/21, barley imports into Turkey are expected to reach 800,000 MT due to TMO's imports and private sector imports with the current zero tariff rate. Syria is the main supplier of barley to Turkey with 275,702 MT in MY 2020/21 so far, followed by Russia with about 147,877 MT of barley during the same period.

Table 14: Turkey Barley Trade

TURKEY: BARLEY FOREIGN TRADE				
MONTH	IMPORT MY 2019/20	IMPORT MY2020/21	EXPORT MY2019/20	EXPORT MY 2020/21
June	1	14,550	238	43
July	12,959	52,481	1,217	7,474
August	22,765	40,510	-	55
September	17,534	49,999	75	495
October	90,256	112,258	164	2,771
November	149,800	44,751	72	314
December	100,848	66,006	574	2,922
January	153,878	104,343	10	8,745
<i>Sub, Total Jun-Jan</i>	<i>548,041</i>	<i>484,898</i>	<i>2,350</i>	<i>22,819</i>
February	216,055		-	
March	66,325		23	
April	40,087		23	
May	32,418		-	
MY TOTAL	902,926	800,000	4,746	30,000

* Forecast

Source: TUIK, including transshipments

Turkey exported 22,819 MT of barley in the first eight months of MY 2020/21. The main destinations are Cyprus (12,000 MT), Israel (7,500 MT), and Lebanon (2,500 MT). Post forecasts barley exports at 20,000 MT, assuming continued demand from neighboring countries.

Corn

For MY 2021/22, corn imports into Turkey are expected to remain high and are forecast at 3.1 MMT, due to insufficient domestic supply and assuming increased demand from the feed sector during the second part of the marketing year in parallel with normalization as the COVID-19 situation improves.

Due to food inflation issues, TMO received authorization through a presidential decree published in the [Official Gazette](#) on January 16, 2019 to import up to 2.6 MMT of wheat, barley, corn, pulses and rice with zero customs duties, in order to stabilize domestic prices during the year. According to the authorization, this quota automatically renews every calendar year.

Table 15: TMO's zero duty quotas

HS code	Product	Tariff Quotas (MT)	Tariff (%)
07.13	Pulses	100,000	0
10.01	Wheat	1,000,000	0
10.03	Barley	700,000	0
10.05	Corn	700,000	0
10.06	Rice	100,000	0

In this regard, TMO issued four tenders for about 850,000 MT of corn on November 24, 2020, January 2021, February 2021, and March 2021.

In addition to the TMO quotas, GoT announced tariff reductions on all imports of grain, private as well as public. The GoT reduced the import tariff on corn (25%) to zero through a decree published in the Official Gazette on October 21, 2020. The new tariffs are valid until April 30, 2021.

According to official statistics, total corn imports during the first five months of MY 2020/21 were just about 559,000 MT, which is much lower than compared to previous years. Post revised downward the corn import forecast to 2.2 MMT in MY 2020/21 assuming a lessening of demand after record domestic production.

Table 16: Turkey's Foreign Trade of Corn by Month (MT)

MONTH	IMPORT MY2019/20	IMPORT MY2020/21	EXPORT MY2019/20	EXPORT MY2020/21
September	94,269	8,376	59,611	36,208

October	342,962	60,011	53,962	41,472
November	314,423	96,110	52,401	21,138
December	382,274	178,979	41,980	19,325
January	315,829	215,857	39,408	11,989
<i>Sub-total (Sep-Jan.)</i>	1,449,757	559,333	247,362	130,132
February	357,646		39,555	
March	283,756		14,410	
April	261,417		22,968	
May	273,493		24,817	
June	250,133		27,878	
July	189,023		53,984	
August	24,842		63,703	
MY TOTAL	3,090,067	2,200,000*	494,677	400,000*

*Forecast

Source: Turkish Statistical Institute, including transshipments

Ukraine (926,676 MT) and Romania (869,676 MT) were the largest corn suppliers for Turkey in MY 2019/20. Turkey also imported 559,333 MT of corn between September 2020 and January 2021. According to market sources, at least 200,000 additional MT of corn is also on its way to Turkey.

Turkey exported about 495,000 MT of corn in MY 2019/20, including transshipments, which is about 450,000 MT. The Turkish seed industry exported about 14,000 MT of seed in this period. For MY 2020/21, the corn export forecast is 400,000 MT paralleling a slowdown in transshipments.

Rice

For MY 2021/22, the forecast for rice imports to Turkey is 450,000 MT, milled equivalent, similar to the previous year, assuming transshipments will remain same level.

Table17: Rice imports; classified by process

		2018/19	2019/20	2020/21*
100610	Rice In The Husk	61,303.9	124,775.7	34,588
100620	Rice, Husked (Brown)	10,146.4	8,491.1	2,684
100630	Rice, Semi-Milled Or Wholly Milled, Whether Or Not Polished Or Glazed	324,410	440,560	101,638
100640	Rice, Broken	169	39	5
Total Rice (milled equivalent)		396,029	573,866	138,915

*September 2020-January 2021 (partial year)

Source: Turkish Statistical Institute (TUIK), including transshipments

In the first five months of MY 2020/21 (September 2021- January 2021), Turkey imported about 138,915 MT of rice, milled equivalent. It is expected that for MY 2020/21, total rice imports to Turkey will be 450,000 tons, milled equivalent.

For MY 2021/22, the forecast for rice exports from Turkey is 230,000 MT, milled equivalent, an increase, assuming some domestically produced rice will be exported.

Table 18: Turkey's Foreign Trade of Rice, milled equivalent by Month (MT)

Turkey's Foreign Trade of Rice, milled equivalent by Month (MT)				
	2019/20	2020/21	2019/20	2020/21
September	75,166	9,857	17,114	13,245
October	27,565	28,836	17,130	20,246
November	12,632	22,861	20,760	16,748
December	36,550	46,089	16,780	20,430
January	28,201	31,272	20,432	18,370
Sub-total (Sep-Jan.)	180,114	138,915	92,215	89,040
February	36,782		17,881	
March	68,177		26,859	
April	31,521		33,202	
May	83,208		22,150	
June	57,210		12,164	
July	70,798		18,082	
August	46,056		12,555	
MY TOTAL	573,866	450,000*	235,109	200,000*

*Forecast

Source: Turkish Statistical Institute, including transshipments

Stocks

Turkey has preferred to keep more stocks than usual in this marketing year as a part of government policy paralleling an aggressive import agenda in MY 2020/21. In MY 2021/22, ending stocks for wheat are forecast at a marginal decrease to about 4.6 MMT, assuming stocks will be decreased in the latter half of the year as part of the normalization procedure after the pandemic improves, banking on high international wheat production projection.

In MY 2021/22, corn stocks are forecast at 625,000 MT, lower compared to the previous year, accounting for the decrease in production expectation.

In MY 2021/22, barley ending stocks are forecast at 566,000 MT, in parallel with an expected decrease in production.

In MY 2021/22, rice stocks are forecast at 201,000 MT, marginally lower compared to the previous year.

POLICY

The GoT continues to support agricultural production according to the concept of varying “agricultural basins,” based on climate and soil conditions, and will subsidize 21 strategic crops, with a specific set of crops for each basin. On November 5, 2020, agricultural subsidies for 2020 were announced in the [Official Gazette](#). The total subsidies for 2020 will be 22 billion TL (\$2.6 billion) which remained the same as the previous year. Producers will be able to benefit from the 2020 subsidies in CY2021. Certified seeds and saplings are the most subsidized items in 2020 among agricultural products. Fuel, fertilizer, and livestock subsidies have not been increased, which has frustrated producers since they are struggling with high input costs for items which are mostly imported.

In the scope of the Basin System, The Turkish government provides production premiums for many agricultural products. In MY 2019/20, no crop received any additional increases in production support (though the premiums prices carried over from the previous year remained unchanged), but fuel support was increased about ten percent. <https://www.tarimorman.gov.tr/Konular/Tarimsal-Destekler/>

Table 19: Grain Premiums Turkey (TL/MT)

Grain Premiums Turkey: Grain Premiums (TL/MT)						
Products	2015	2016	2017	2018	2019	2020
Wheat	50	50	50	50	100	100
Barley, Oats, Rye	50	50	50	50	50	100
Paddy Rice	100	100	100	100	100	100
Chickpeas, Lentils, Dry beans	200	300	300	500	500	500
Corn	40	20	30	30	30	30

Source: Official Gazette

Table 20: Government support program for wheat (TL/HA)

	Diesel (TL/ha)	Fertilizer (TL/ha)
Wheat, Barley, Rye, Oats	190	160
Rice, Cotton	620	80
Pulses	220	80
Corn	250	80
Soybean, Sunflower	260	80
Canola, safflower, forage plants	170	80

Source: <https://www.tarimorman.gov.tr/Konular/Tarimsal-Destekler/>

New licensed warehouse systems for grain storage are developing in Turkey. As of February 2021, there were 235 active licensed warehouse operations (LWO) with a capacity of 7 MMT. Turkey plans to increase its capacity with ongoing new investments to 16 MMT in the following years.

In October 2020, the GoT zero tariffs on wheat, barley, and corn for all importers until April 30, 2021. The GoT also reduced the import tariffs on paddy rice to 5 percent from 34 percent and milled rice to 15 percent from 45 percent on December 23, 2020. This amendment will also be valid until April 30, 2021. However, this amendment does not cover imports from the United States. In response to U.S. tariffs on Turkish steel and aluminum, Turkey levied additional tariffs on several United States-origin products,

including rice in August 2018. For detailed information, please see Grain and Feed Update October 2018.

On February 27, 2021, the GoT published Biosafety Decisions on the import of genetically engineered (GE) soybean and corn events in the Official Gazette. The Ministry of Agriculture and Forestry approved four soybean events and one corn event for feed, ensuring continued access to feed sources from South America and new access to feed from North America. See the most recent FAS/Turkey biotechnology voluntary [report](#) for additional details.

Production, Supply and Distribution

Wheat Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Jun 2019		Jun 2020		Jun 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	7000	7000	7100	7100	0	7050
Beginning Stocks (1000 MT)	3445	3445	5771	5396	0	5296
Production (1000 MT)	17500	17500	18250	18250	0	17600
MY Imports (1000 MT)	10851	10851	8200	8200	0	8500
TY Imports (1000 MT)	11087	11087	8200	8200	0	8500
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	31796	31796	32221	31846	0	31396
MY Exports (1000 MT)	6125	6500	6700	6350	0	6500
TY Exports (1000 MT)	6212	6500	6700	6350	0	6500
Feed and Residual (1000 MT)	1800	1800	1700	1700	0	1700
FSI Consumption (1000 MT)	18100	18100	18500	18500	0	18600
Total Consumption (1000 MT)	19900	19900	20200	20200	0	20300
Ending Stocks (1000 MT)	5771	5396	5321	5296	0	4596
Total Distribution (1000 MT)	31796	31796	32221	31846	0	31396
Yield (MT/HA)	2.5	2.5	2.5704	2.5704	0	2.4965

(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 2021/2022 = July 2021 - June 2022

Barley Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Jun 2019		Jun 2020		Jun 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3800	3800	3800	3800	0	3800
Beginning Stocks (1000 MT)	465	465	766	766	0	636
Production (1000 MT)	7900	7900	8100	8100	0	7700
MY Imports (1000 MT)	903	903	800	800	0	850
TY Imports (1000 MT)	1007	1007	800	800	0	850
Total Supply (1000 MT)	9268	9268	9666	9666	0	9186
MY Exports (1000 MT)	2	2	30	30	0	20
TY Exports (1000 MT)	9	9	30	30	0	20
Feed and Residual (1000 MT)	7600	7600	8100	8100	0	7700
FSI Consumption (1000 MT)	900	900	900	900	0	900
Total Consumption (1000 MT)	8500	8500	9000	9000	0	8600
Ending Stocks (1000 MT)	766	766	636	636	0	566
Total Distribution (1000 MT)	9268	9268	9666	9666	0	9186
Yield (MT/HA)	2.0789	2.0789	2.1316	2.1316	0	2.0263

(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 2021/2022 = October 2021 - September 2022

Corn Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Sep 2019		Sep 2020		Sep 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	520	520	620	620	0	540
Beginning Stocks (1000 MT)	929	929	825	825	0	925
Production (1000 MT)	6000	6000	7100	7100	0	6200
MY Imports (1000 MT)	3091	3091	2500	2200	0	3100
TY Imports (1000 MT)	3004	3004	2500	2200	0	3100
Total Supply (1000 MT)	10020	10020	10425	10125	0	10225
MY Exports (1000 MT)	495	495	400	400	0	400
TY Exports (1000 MT)	471	471	400	400	0	400
Feed and Residual (1000 MT)	7500	7500	8000	7500	0	7900
FSI Consumption (1000 MT)	1200	1200	1100	1300	0	1300
Total Consumption (1000 MT)	8700	8700	9100	8800	0	9200
Ending Stocks (1000 MT)	825	825	925	925	0	625
Total Distribution (1000 MT)	10020	10020	10425	10125	0	10225
Yield (MT/HA)	11.5385	11.5385	11.4516	11.4516	0	11.4815

(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 2021/2022 = October 2021 - September 2022

Rice, Milled Market Year Begins Turkey	2019/2020		2020/2021		2021/2022	
	Sep 2019		Sep 2020		Sep 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	100	100	97	97	0	97
Beginning Stocks (1000 MT)	42	42	181	181	0	207
Milled Production (1000 MT)	610	610	591	591	0	591
Rough Production (1000 MT)	910	910	882	882	0	882
Milling Rate (.9999) (1000 MT)	6700	6700	6700	6700	0	6700
MY Imports (1000 MT)	574	574	450	450	0	450
TY Imports (1000 MT)	500	500	450	450	0	450
Total Supply (1000 MT)	1226	1226	1222	1222	0	1248
MY Exports (1000 MT)	235	235	200	200	0	230
TY Exports (1000 MT)	225	225	200	200	0	230
Consumption and Residual (1000 MT)	810	810	815	815	0	817
Ending Stocks (1000 MT)	181	181	207	207	0	201
Total Distribution (1000 MT)	1226	1226	1222	1222	0	1248
Yield (Rough) (MT/HA)	9.1	9.1	9.0928	9.0928	0	9.0928

(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 2021/2022 = January 2022 - December 2022

Attachments:

No Attachments