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Report Highlights:

Turkiye's MY 2025/26 sunflowerseed crop is suffering from extreme drought and production levels are forecast to fall more than 10 percent from last year. To compensate for this expected decline, sunflower seed and oil imports are forecast higher. The government has instituted lower tariffs to spur imports of these commodities throughout the marketing year.

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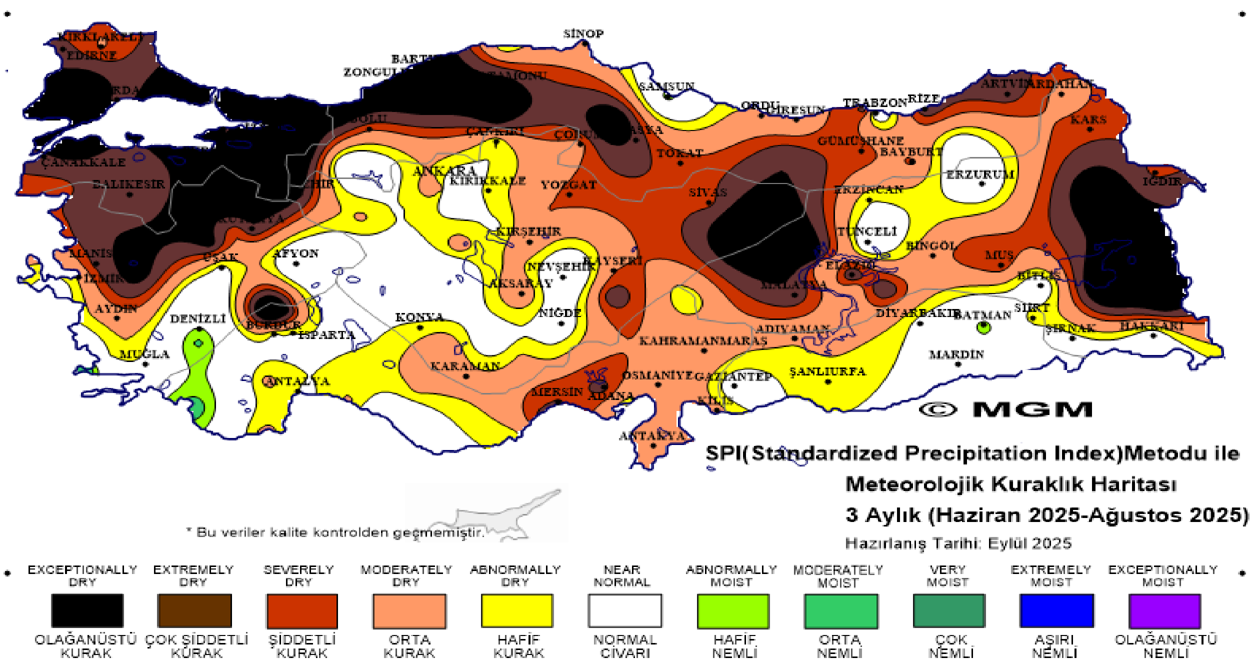
Production – Sunflowerseed:
MY 2025/26 (Sep-Aug) sunflowerseed area harvested is projected at 760,000 hectares, which is up year-over-year by about 10 percent because farmers increased their spring plantings in response to strong prices, especially for sunflowerseeds for crushing.

However, despite the expansion in area harvested, sunflowerseed production is revised lower to 1.2 million metric tons due to yield-related losses resulting from extreme dry weather throughout most of the country. See map below showing precipitation levels for the last several months of the growing season. The MY 2025/26 production forecast is broken down between seed for crushing (1.05 MMT), confectionary (110,000 MT), and planting (40,000 MT).

Farmers from the Thrace region in the northwest part of Turkiye, which normally accounts for half of the country's sunflower production, are grappling with serious drought conditions. Yield losses are reported upwards of 50 percent compared to the long-term average and production in the region will reportedly drop by more than 100,000 MT compared to last year. Given these losses and the continued threat of drought, farmers in the Thrace region are expected to switch away from sunflowers in the coming years and start growing more drought-resistant crops like canola and barley.

Similarly, the country's other major sunflower-growing regions, Central Anatolia and the Çukurova region, have also faced drought-related setbacks that have pushed yields lower than normal. However, losses in these regions are not expected to be as severe as those in Thrace.

Figure: Standardized Precipitation Index (SPI) (June -August 2025)



Source: Kuraklık Analizi - Meteoroloji Genel Müdürlüğü

Consumption – Sunflowerseed:
Despite the contraction in MY 2025/26 sunflowerseed production, consumption is expected to remain nearly unchanged from the previous year's newly revised number at about 2.1 MMT. This projection assumes an increase in sunflowerseed imports to help offset the drop in production.

The MY 2024/25 consumption estimate is adjusted slightly higher year-to-year to nearly 2.1 MMT, because of an increase in crush activity reported during the last quarter in response to higher sunflowerseed prices that were stoked by fears of a potential shortfall in domestic and regional sunflowerseed production.

Trade – Sunflowerseed:
Imports
To compensate for the expected decline in domestic sunflowerseed production in MY 2025/26, imports are forecast higher year-to-year at 1.0 MMT, up 200,000 MT from the prior year. This forecast assumes continued availability of sunflowerseeds from Black Sea countries, which have historically been the main source for Turkiye's sunflowerseed imports. According to trade sources, importers have already contracted deliveries for 300,000 MT for the first three months (Sep-Nov) of the MY 2025/26 season.

MY 2024/25 sunflowerseed imports are estimated at 800,000 MT. Imports during the first eleven months (September-July) totaled 785,000 MT, with the majority of shipments coming from Romania (309,000 MT), Moldova (283,000 MT), and Bulgaria (167,000 MT).

In June of this year, anticipating the need to import more sunflowerseed (and oil), the government announced that it would open a lower-duty quota for 1.0 million metric tons of sunflower seed and/or 400,000 metric tons of crude sunflower oil from January to May 2026.
For details, please refer to GAIN TU2025-0041.

In August, the government took an additional step to guard against a shortfall in sunflowerseed and derivative products and announced that it was lowering the tariff on imported sunflowerseed to 12 percent from October 2025-May 2026 and to 20 percent from June-September 2026. See table 1. The 12 percent tariff will in effect be the out-of-quota tariff during the effective period of the TRQ, as noted in Table 2.

According to contacts, the government announced in August that it was cutting its reference price for sunflowerseed imports from $700 to $580 per metric ton. The government uses the reference price as a floor when calculating the applied tariff rate. This reduction is intended to lower the applied tariff importers have to pay, assuming the CIF price of imported sunflowerseeds does not go below $580/MT.

Table 1: Tariff Rates for Sunflower Seed and Oil from Oct-Sep			
HS Code	**Commodity**	**Bound MFN Rate**	**Applied MFN**
1206.00.99.00.19	Sunflower seed	27	12 (Oct-May) 20 (Jun-Sep)
1512.11.91.00.00	Crude Sunflower oil	36	30 (Oct-Sep)

Table 2: In-Quota Tariff Rates for Sunflower Seed and Oil from Jan-May 2026						
HS Code	**Commodity**	**Quota Amount**	**Bound MFN Rate**	**In-Quota Tariff**	**Out of Quota Tariff**	**Period for Quota**
1206.00.99.00.19	Sunflower seed	1 MMT*	27	0	12	1/12/2026-5/31/2026
1512.11.91.00.00	Crude Sunflower oil	400,000 MT	36	20	30	

*1 MMT of sunflower seed is equivalent to 400,000 MT of crude sunflower oil.

Exports
Sunflowerseed exports in MY 2025/26 are forecasted at 100,000 MT, which is unchanged from the USDA figure for this period but down year-over-year because of the expected downturn in production. This projection is mostly made up of confectionary and planting sunflowerseeds originating in Turkiye with a smaller amount of transshipments of seeds for crushing.

The MY 2024/25 sunflowerseed export estimate is revised to 180,000 MT, which is up significantly from the prior year due to larger volumes of confectionary seed exports. Confectionary seed exports climbed higher on the back of an increase in production of these kinds of seeds.

Stocks – Sunflowerseed:
The sunflowerseed stock levels for MY 2025/26 are forecast at 110,000 MT. The sunflowerseed stock estimate for MY 2024/25 is revised lower to 60,000 MT, due to the reported uptick in crush demand during the last quarter in response to fears over a potential shortage of sunflowerseeds in the marketplace.

Sunflowerseed Production, Supply and Distribution

Oilseed, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	750	750	690	690	750	760
Area Harvested (1000 HA)	700	700	690	690	760	760
Beginning Stocks (1000 MT)	168	168	142	142	140	60
Production (1000 MT)	1550	1550	1350	1350	1600	1200
MY Imports (1000 MT)	328	328	800	800	500	1000
Total Supply (1000 MT)	2046	2046	2292	2292	2240	2260
MY Exports (1000 MT)	102	102	200	180	100	100
Crush (1000 MT)	1600	1600	1750	1850	1800	1850
Food Use Dom. Cons. (1000 MT)	200	200	200	200	200	200
Feed Waste Dom. Cons. (1000 MT)	2	2	2	2	2	0
Total Dom. Cons. (1000 MT)	1802	1802	1952	2052	2002	2050
Ending Stocks (1000 MT)	142	142	140	60	138	110
Total Distribution (1000 MT)	2046	2046	2292	2292	2240	2260
Yield (MT/HA)	2.2143	2.2143	1.9565	1.9565	2.1053	1.5789
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production – Sunflowerseed Meal:

The MY 2025/26 sunflowerseed meal production forecast is expected to stay unchanged year-to-year at nearly 1.0 MMT.

The MY 2024/25 sunflowerseed meal production estimate was revised slightly higher to almost 1.0 MMT, due to an increase in crush demand during the last quarter in response to fears over a potential shortage of sunflowerseeds in the marketplace.

Consumption – Sunflowerseed Meal:
MY 2025/26 sunflowerseed meal consumption is projected at slightly more than 2.0 MMT, nearly unchanged year-to-year. About half of this amount is expected to be imported meal. This consumption projection assumes steady demand for meal in animal feed rations.

Trade – Sunflowerseed Meal:
Imports
MY 2025/26 sunflower meal imports are forecast at about 1.05 MMT, unchanged year-to-year, assuming stable demand from the local feed sector.

Based on the latest trade data, Post is lowering its MY 2024/25 import estimate to 1.05 MMT. From September through July, sunflowerseed meal import volumes totaled about 983,000 MT, which was down about 20 percent compared to the same period the previous year. Russia (883,000 MT), Ukraine (80,500 MT), and Romania (15,000 MT) were the top suppliers. According to Post's analysis of Turkish trade statistics, these imports were for domestic consumption, not transshipments.

Stocks – Sunflowerseed Meal
In MY 2025/26, sunflowerseed meal stocks are forecast at 164,000 MT, down slightly from the previous year.

Sunflowerseed Meal Production, Supply and Distribution

Meal, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1600	1600	1750	1850	1800	1850
Extr. Rate, 999.9999 (PERCENT)	0.545	0.545	0.5451	0.5449	0.5444	0.5449
Beginning Stocks (1000 MT)	223	223	187	187	186	186
Production (1000 MT)	872	872	954	1008	980	1008
MY Imports (1000 MT)	1312	1312	1100	1050	1050	1050
Total Supply (1000 MT)	2407	2407	2241	2245	2216	2244
MY Exports (1000 MT)	45	45	55	55	50	55
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	2175	2175	2000	2004	2000	2025
Total Dom. Cons. (1000 MT)	2175	2175	2000	2004	2000	2025
Ending Stocks (1000 MT)	187	187	186	186	166	164
Total Distribution (1000 MT)	2407	2407	2241	2245	2216	2244
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production – Sunflowerseed Oil
MY 2025/26 sunflowerseed oil production is forecast at 805,000 MMT, which matches the previous year's newly revised estimate. Meantime, the MY 2024/25 sunflower oil production estimate was adjusted higher because crushers scaled up operations during the last quarter when sunflowerseed prices temporarily spiked as much as 25 percent due to fears of a potential shortfall in domestic and regional sunflowerseed production.

Consumption – Sunflowerseed Oil
MY 2025/26 sunflower oil consumption is forecast higher year-to-year at about 1.4 MMT, because there will be less olive oil available in the marketplace since the olive production cycle will be an off-year in MY 2025/26. This projection also assumes stable vegetable oil demand in the domestic market.

MY 2024/25 sunflower oil consumption is forecast at nearly 1.2 MMT, down around 200,000 MT year-to-year because more domestic olive oil was available in the marketplace. Notwithstanding this minor downturn, sunflower oil remains the most widely consumed cooking oil in Turkiye because of its affordability.

During the summer months in the current calendar year, the retail price of sunflower oil shot up from 60 to 80 Turkish Liras per liter (~$2/liter) over concerns of a potential shortage resulting from lower sunflowerseed output in Turkiye and some Black Sea countries. In order to mitigate some of this price increase and ensure sufficient domestic supplies, the government-owned Turkish Grain Board (TMO) in September issued an international tender for 18,000 MT of crude sunflower oil. The government also announced a TRQ and lower tariffs to incentivize sunflower oil imports.

Trade – Sunflowerseed Oil
Imports
MY 2025/26 sunflowerseed oil imports are forecast at 1.55 MMT, which is up 300,000 MT year-over-year to help offset the expected decline in production of vegetable oil made from domestic sunflowerseeds. This projection assumes stable re-exports and transshipments. Additionally, the government's recent decision to lower the tariff to 30 percent on imported sunflower oil, starting at the beginning of October, will help encourage imports. See sunflowerseed import section for more information about tariffs.

MY 2024/25 sunflower oil imports are revised lower to 1.25 MMT, based on the latest available trade data. From September to July, sunflower oil imports fell 19 percent from the same period last year to nearly 1.2 MMT. Russia (685,000 MT) and Ukraine (348,000 MT) were main suppliers. Imports are down year-to-year because of crushers were scouring the domestic market for sunflowerseed when domestic and Black Sea supplies were thought to be running thin in the last quarter of the marketing year.

Exports
The MY 2025/26 sunflowerseed oil export is forecast down year-to-year to 900,000 MT, assuming steady demand from traditional customers and increasing competition from other vegetable oil exports (e.g. soy oil).

The MY 2024/25 sunflowerseed oil export estimate remained same at 950,000 MT. From September through July, sunflowerseed oil export volumes fell 17 percent year-to-year to 920,000 MT, the majority of which consisted of refined oil. According to sector sources, the main reason for the year-to-year decline was because some foreign buyers switched from Turkish sunflower oil to Turkish soybean oil because it was more price competitive. A large share of this oil was made from U.S. soybeans.

Turkiye imported a record 846,000 MT of U.S. soybeans from September-July of MY 2024/25. However, the oil from these beans had to be exported since it couldn't be used in the local market because of Turkiye's prohibition on using GE soy oil in food or feed production. The import record primarily stems from growing demand from domestic end-users, especially the feed sector, and re-exports as vegetable oil.

Stocks

MY 2025/26 sunflowerseed oil stocks are forecast significantly higher from last year at 124,000 MT. Stocks during the prior marketing year fell to just 34,000 MT as crushers scoured the domestic market in search for sunflowerseeds in the last quarter when fears emerged over a potential sunflowerseed shortage.

Sunflowerseed Oil Production, Supply and Distribution

Oil, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1600	1600	1750	1850	1800	1850
Extr. Rate, 999.9999 (PERCENT)	0.435	0.435	0.4354	0.4351	0.4356	0.4351
Beginning Stocks (1000 MT)	611	611	169	169	141	34
Production (1000 MT)	696	696	762	805	784	805
MY Imports (1000 MT)	1491	1491	1300	1250	1300	1550
Total Supply (1000 MT)	2798	2798	2231	2224	2225	2389
MY Exports (1000 MT)	1189	1189	950	950	725	900
Industrial Dom. Cons. (1000 MT)	25	25	25	25	0	25
Food Use Dom. Cons. (1000 MT)	1400	1400	1100	1200	1325	1325
Feed Waste Dom. Cons. (1000 MT)	15	15	15	15	15	15
Total Dom. Cons. (1000 MT)	1440	1440	1140	1240	1340	1365
Ending Stocks (1000 MT)	169	169	141	34	160	124
Total Distribution (1000 MT)	2798	2798	2231	2224	2225	2389
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments