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Report Name: Oilseeds and Products Update

Country: Turkiye

Post: Ankara

Report Category: Oilseeds and Products

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Report Highlights:

Sunflowerseed production in marketing year (MY) 2024/25 is forecast to drop to its lowest level in almost a decade due to extremely dry weather conditions in the northeast part of the country, where more than half of the production is concentrated. To offset this expected decline, imports of sunflower seed, oil, and meal are all forecast higher. From January-April 2025, a lower-duty quota for sunflowerseed and crude sunflowerseed oil will come into effect to facilitate the country's import requirements needed to avoid a potential shortfall in cooking oil and meal.

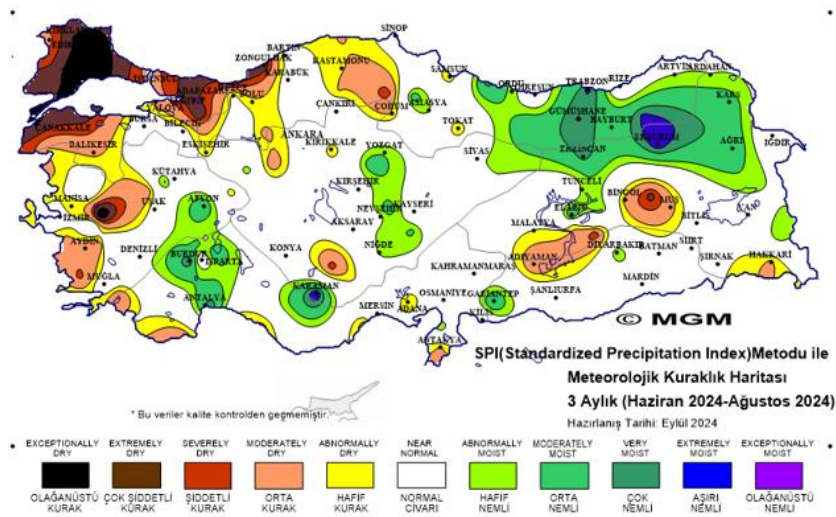
Production – Sunflowerseed:

MY 2024/25 (Sep-Aug) sunflowerseed area harvested is projected to remain unchanged from the USDA official forecast of 690,000 hectares. Of the forecasted area harvested, approximately 610,000 hectares will be sunflowerseeds for crushing, 50,000 hectares of confectionary sunflowerseeds, and 30,000 hectares of sunflowerseeds for planting purposes.

Post is cutting its MY 2024/25 sunflowerseed production forecast by 300,000 metric tons to 1.25 million metric tons (MMT), due to yield-related losses resulting from extreme dry weather in the northeast province of Thrace. (See map below.) Production hasn't been this low since MY 2015/16. Farmers from Thrace, which normally accounts for half of the country's sunflower production, are reporting yield losses of up to 50 percent compared to the long-term average. Meanwhile, the growing conditions in the other major sunflower growing areas – Central Anatolia and Cukurova region – in the center of the country appear normal and production levels in these locations are expected to be in line with historical averages.

The MY 2024/25 sunflowerseed production forecast (1.25 MMT) consists of 1.1 MMT for crushing, 100,000 MT for confectionary, and 50,000 MT for planting purposes.

Figure 1 Standardized Precipitation Index (SPI) (Jun-Aug)



Source: [Turkish State Meteorological Service](https://www.mgm.gov.tr/)

Consumption – Sunflowerseed:

The MY 2024/25 sunflowerseed consumption is revised lower to about 1.7 MMT, down 200,000 MT from the official USDA figure. This projected decrease largely parallels the anticipated downturn in sunflowerseed production.

Trade – Sunflowerseed:

Imports

Sunflowerseed imports in MY 2024/25 are projected at 550,000 MT, up 100,000 MT from the USDA official number. This forecasted increase in imports is to partially compensate for the drop in domestic production and assumes continued availability of sunflower seeds from Black Sea suppliers. The increase in sunflowerseed

imports is not expected to completely offset the decline in production because of Black Sea suppliers' continued preference to ship value-added sunflowerseed meal and crude oil.

The MY 2023/24 import estimate is adjusted slightly downward to 380,000 MMT in line with the latest trade numbers. Imports during the first eleven months of MY 2023/24 (September-July) totaled 308,000 MT. The leading suppliers were Moldova (87,000 MT), Ukraine (59,000 MT), and Romania (58,000 MT).

Exports

Sunflowerseed exports in MY 2024/25 are trimmed back from the USDA official figure to 100,000 MT, which mirrors the previous year's amount. This prediction assumes stable export demand for both confectionary and planting sunflowerseeds. Approximately 20,000 MT of the export forecast is expected to be transshipments.

Stocks – Sunflowerseed:

The sunflowerseed stock levels for MY 2024/25 are forecast at 104,000 MT, which is roughly in line with previous year's amount.

Sunflowerseed Production, Supply and Distribution

Oilseed, Sunflowerseed Market Year Begins	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	790	790	750	750	690	690
Area Harvested (1000 HA)	790	790	700	700	690	690
Beginning Stocks (1000 MT)	101	101	168	168	116	106
Production (1000 MT)	1900	1900	1550	1550	1550	1250
MY Imports (1000 MT)	941	941	400	380	450	550
Total Supply (1000 MT)	2942	2942	2118	2098	2116	1906
MY Exports (1000 MT)	102	102	100	100	125	100
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	2450	2450	1700	1690	1700	1500
Food Use Dom. Cons. (1000 MT)	220	220	200	200	200	200
Feed Waste Dom. Cons. (1000 MT)	2	2	2	2	2	2
Total Dom. Cons. (1000 MT)	2672	2672	1902	1892	1902	1702
Ending Stocks (1000 MT)	168	168	116	106	89	104
Total Distribution (1000 MT)	2942	2942	2118	2098	2116	1906
Yield (MT/HA)	2.4051	2.4051	2.2143	2.2143	2.2464	1.8116
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production – Sunflowerseed Meal:

The MY 2024/25 sunflowerseed meal production forecast is adjusted lower to 817,000 MMT, which is down nearly 110,000 MT from the USDA number because of a steep decline in sunflowerseed production.

The MY 2023/24 sunflowerseed meal production estimate remains nearly unchanged from the USDA official figure at 920,000 MT.

Consumption – Sunflowerseed Meal:

MY 2024/25 sunflowerseed meal consumption is projected at 2.15 MMT, up 375,000 MT from the USDA forecast but nearly unchanged year-to-year. This prediction assumes steady demand for meal in animal feed rations.

Trade – Sunflowerseed Meal:

Imports

MY 2024/25 sunflower meal imports are forecast to increase about 500,000 MT year-over-year to 1.36 MMT. Assuming steady feed demand for meal, this predicted increase in imports will offset the slowdown in the domestic sunflowerseed crush resulting from a smaller harvest this year.

The MY 2023/24 import estimate for sunflowerseed meal is adjusted fractionally higher to 1.25 MMT, based on the latest available trade numbers. From September through July of MY 2023/24, sunflowerseed meal import volumes totaled about 1.2 MMT, up 50 percent compared to the same period the previous year to compensate for a smaller domestic crush. Russia (827,00 MT), Ukraine (372,500 MT), and Bulgaria (20,700 MT) were the main suppliers during this period.

For the last two years, Turkiye has been crushing smaller volumes of sunflowerseed and importing more sunflowerseed meal and crude oil. The reason for this ongoing trend is Black Sea countries prefer to capture the value add in the meal and oil instead of shipping sunflowerseed.

Exports

MY 2024/25 sunflower meal export forecast is adjusted to 40,000 MT, which is in line with previous year's volume. Most meal exports are transshipments from Black Sea countries.

Stocks – Sunflowerseed Meal:

For MY 2024/25, sunflowerseed meal stocks are forecast to remain unchanged from the USDA number at 140,000 MT.

Sunflowerseed Meal Production, Supply and Distribution

Meal, Sunflowerseed Market Year Begins	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Turkey						
Crush (1000 MT)	2450	2450	1700	1690	1700	1500
Extr. Rate, 999.9999 (PERCENT)	0.5445	0.5445	0.5447	0.5444	0.5447	0.5447
Beginning Stocks (1000 MT)	113	113	223	223	159	153
Production (1000 MT)	1334	1334	926	920	926	817
MY Imports (1000 MT)	879	879	1225	1250	850	1360
Total Supply (1000 MT)	2326	2326	2374	2393	1935	2330
MY Exports (1000 MT)	78	78	40	40	20	40
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
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)	2025	2025	2175	2200	1775	2150
Total Dom. Cons. (1000 MT)	2025	2025	2175	2200	1775	2150
Ending Stocks (1000 MT)	223	223	159	153	140	140
Total Distribution (1000 MT)	2326	2326	2374	2393	1935	2330
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production – Sunflowerseed Oil

MY 2024/25 sunflowerseed oil production is forecast at 653,000 MMT, down from the USDA number by 87,000 MT due to the projected decline in sunflowerseed production.

Consumption – Sunflowerseed Oil

MY 2024/25 sunflower oil consumption is forecast to remain unchanged from the USDA number at 1.3 MMT. Meanwhile, MY 2024/25 sunflower oil consumption is expected to slightly contract because of increased availability of olive oil since this will be an “on-year” for olive production in Turkiye. Notwithstanding this minor change, sunflowerseed oil is the most widely consumed cooking oil in Turkiye because of its affordability.

Trade – Sunflowerseed Oil

Imports

MY 2024/25 sunflowerseed oil imports are forecast at about 1.75 MMT, up from the USDA projection by 650,000 MT. This forecasted increase will compensate for the losses in domestic sunflowerseed production and assumes growing re-exports and transshipments. Year-to-year exports will also increase because of growing re-exports and transshipments.

MY 2023/24 sunflower oil imports are estimated unchanged at 1.5 MMT. From September to July in MY 2023/24, sunflowerseed oil imports reached nearly 1.43 MMT, down 13 percent compared to the same period last year. Ukraine (757,000 MT) was the leading supplier followed by Russia (597,000 MT). Roughly one-third of imports are for domestic consumption, one-third for refining and re-export, and one-third is transshipments.

Exports

The MY 2024/25 sunflowerseed oil export forecast is revised higher to 1.1 MMT, which is an increase of 500,000 MT over the official USDA projection. This adjustment brings exports back in line with the amounts exported over the last couple of years.

The MY 2023/24 sunflowerseed oil export estimate remained same at nearly 1.18 MT. From September through July of MY 2023/24, sunflowerseed meal import volumes totaled about 1.12 MMT, up nine percent compared to the same period the previous year, of which about 700,000 MT of refined oil and 32,000 MT of crude oil.

Stocks

MY 2024/25 sunflowerseed oil stocks are forecast at 214,000 MT, which is almost double the USDA projection but consistent with current market expectations. The MY 2023/24 sunflowerseed oil stock estimate is revised higher to 251,000 MT.

Sunflowerseed Oil Production, Supply and Distribution

Oil, Sunflowerseed Market Year Begins Turkey	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	2450	2450	1700	1690	1700	1500
Extr. Rate, 999.9999 (PERCENT)	0.4351	0.4343	0.4353	0.4355	0.4353	0.4353
Beginning Stocks (1000 MT)	226	226	611	555	211	251
Production (1000 MT)	1066	1064	740	736	740	653
MY Imports (1000 MT)	1711	1711	1500	1500	1100	1750
Total Supply (1000 MT)	3003	3001	2851	2791	2051	2654
MY Exports (1000 MT)	1102	1102	1175	1175	600	1100
Industrial Dom. Cons. (1000 MT)	25	25	25	25	25	25
Food Use Dom. Cons. (1000 MT)	1250	1300	1425	1325	1300	1300
Feed Waste Dom. Cons. (1000 MT)	15	15	15	15	15	15
Total Dom. Cons. (1000 MT)	1290	1340	1465	1365	1340	1340
Ending Stocks (1000 MT)	611	555	211	251	111	214
Total Distribution (1000 MT)	3003	2997	2851	2791	2051	2654

(1000 MT) ,(PERCENT)

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Oilseed Policy

Like other agricultural products in Türkiye, the government intervenes in the market for sunflowerseeds and derivative products to stabilize domestic supplies and prices. These interventions typically come as changes to tariffs or the introduction of tariff quotas. In general, the government aims to keep tariffs high for these products during the harvest season to protect domestic farmers. Depending on the market situation, the government may decide to temporarily relax import duties after the harvest. With the sunflower harvest underway, the current duties on imported sunflowerseed, meal, and oil are at the maximum MFN rate. However, next year after the harvest is completed, Türkiye has already made plans to adjust its tariffs.

In August 2024, by way of Presidential Decree, Türkiye [announced](#) a lower-duty quota for 1.0 MMT of sunflower seed or sunflower oil equivalent between January and April of next year. The within quota import tariff will be 8 percent for sunflowerseed and 20 percent for sunflower oil. Quota holders will have the option to import either seed, oil, or a combination of both. A [communiqué](#) published in September of this year provides details on how the quota will be allocated and managed.

Turkish companies wishing to apply for a quota allocation from the Ministry of Trade (MoT) are required to first purchase an equivalent amount of domestic sunflowerseed between July and November 2024. Some Turkish crushers and vegetable oil refiners that are located far from the main sunflower-growing regions in the country are complaining that the purchase requirement gives an unfair advantage to companies that are located closer to the sunflower production areas.

Table 1: In-Quota Tariff Rates for 1 MMT of Sunflower seed or Crude Oil Equivalent from January-April 2025*

HS Codes	Commodity	MFN Rate	Reduced Tariff	Period for Quota
120600990019	Sunflower Seed	27	8	1/1/2025-
151211910000	Crude Sunflower Oil	36	20	4/30/2025

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

Attachments:

No Attachments