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Expanding Opportunities for U.S. Agricultural Exports to Türkiye and Regional Markets

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Executive Summary

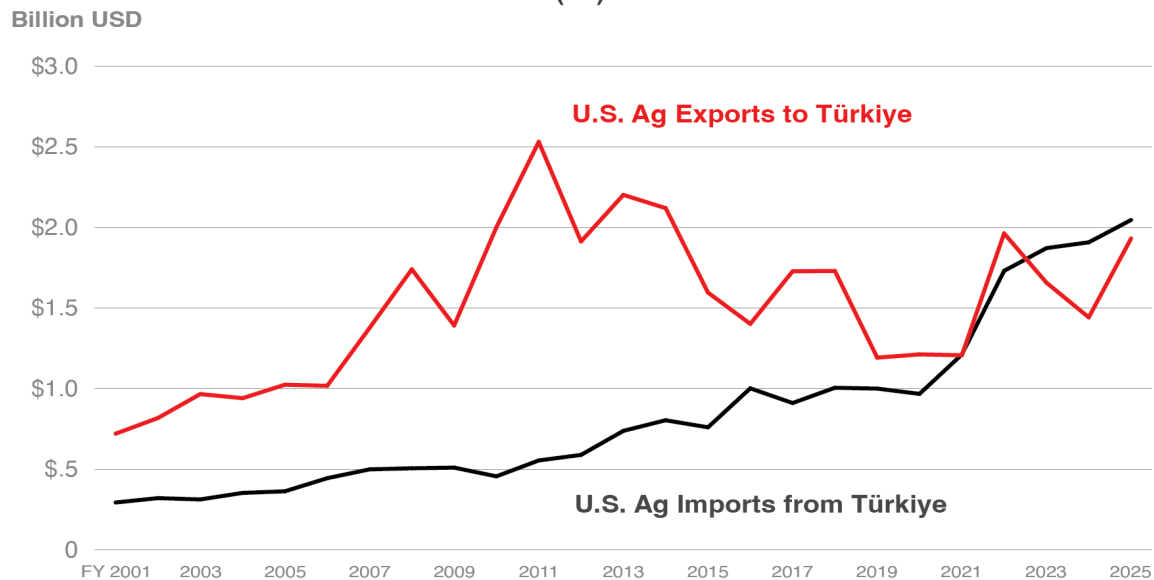
Türkiye is an important destination for U.S. agricultural exports and a strategic gateway to regional markets. As a Group of 20 economy with a young and expanding middle class and a population of more than 86 million people, Türkiye offers sustained demand for imported agricultural products. Although Türkiye is an agricultural exporter, it relies on imported inputs, including cotton, feed grains, oilseeds, and food ingredients as intermediate inputs, in producing food for domestic and export channels. During the past 5 fiscal years (FY)¹, Turkish agricultural imports from the world have fluctuated moderately, ranging from \$19.1 billion in FY 2021 to \$26.3 billion in FY 2025. Despite inflationary pressures and the depreciation of the Turkish lira, Turkish consumers continue to demand higher-value food and beverage products from home and abroad. Most recently, the Government of Türkiye lifted its retaliatory tariffs on certain U.S. agricultural products, helping to level the playing field and facilitating new export sales to Türkiye. Promising opportunities for U.S. exporters include tree nuts, cotton, soybeans, distilled spirits, live animals and livestock genetics, pulses, and rice.

Markets near Türkiye, including Ukraine, Georgia, Uzbekistan, Kazakhstan, and Armenia, present additional opportunities for U.S. agricultural products. While market conditions vary across these countries, many are import-dependent and show demand for U.S. value-added agricultural exports, including bovine genetics, tree nuts, distilled spirits, and agricultural-related exports like seafood.

¹ In contrast to calendar year, fiscal year runs from October through September.

Prospects for U.S. Agricultural Exports to Türkiye and Regional Markets

Chart 1: U.S. Agricultural Trade with the Türkiye
Fiscal Years (FY) 2001 - 2025



Source: U.S. Census Bureau Trade Data

Türkiye is the 17th-largest destination for U.S. agricultural exports, totaling \$1.9 billion in FY 2025. As shown in Chart 1, exports were up 34 percent from the previous period and reached the fifth-largest level on record. The top U.S. agricultural exports to Türkiye in FY 2025 were cotton (\$665 million), tree nuts (\$431 million), and soybeans (\$441 million). Since the post-COVID-19 recovery, U.S. agricultural exports to Türkiye have rebounded steadily, and analysts expect them to continue growing. In September 2025, Türkiye lifted the Section 232 retaliatory tariffs on several U.S. agricultural products, including tree nuts, rice, and distilled spirits, improving U.S. price competitiveness ([GAIN Report: Türkiye Drops its Retaliatory Tariffs on US Ag Products, TU2025-0051](#)). As the fifth-largest agricultural supplier in Türkiye, the United States has an 8-percent market share and competes with the European Union (EU) (top supplier with 23 percent market share), Russia (11 percent), Brazil (11 percent), and Ukraine (8 percent).

For the nearby markets, U.S. agricultural exports to Ukraine, Georgia, Kazakhstan, Uzbekistan, and Armenia totaled \$201 million, up 2 percent from the previous year. While leading U.S. export products vary by market, several countries share common top U.S. products, including frozen poultry products and prepared foods. In Uzbekistan, the top U.S. agricultural exports include prepared foods and planting seeds, and miscellaneous food ingredients used in food manufacturing. Top exports to Ukraine include prepared foods and tree nuts; to Kazakhstan, prepared foods and frozen poultry products; to Georgia, poultry and tree nuts; and to Armenia, essential oils and prepared foods.

Several indicators point to expanding opportunities for U.S. agricultural products across these markets. The Government of Armenia expressed interest in diversifying its import sources for a range of agricultural commodities. Kazakhstan serves both as a regional trendsetter and a logistical hub for Central Asia. Georgia, an upper-middle-income country, is strategically positioned at the crossroads of Europe and Asia. Despite the ongoing Russia-Ukraine war, Ukraine's retail, food processing, and food service sectors continue to function and demand both affordable and high-value food imports. Since the start of the war, most U.S. agricultural exports to Ukraine have been transshipped through the EU, creating data discrepancies between official U.S. trade statistics and figures from Ukraine's State Statistics Service. As the war evolves, Ukraine has resumed bulk shipments from its seaports, although the recovery of containerized trade remains limited. For Uzbekistan, its young and growing urban population, combined with the highest gross domestic product (GDP) growth among the markets, further supports prospects for U.S. agricultural exports.

Top Prospects for U.S. Agricultural Exports to Türkiye and Regional Markets

Türkiye's removal of retaliatory tariffs in September 2025, improving macroeconomic conditions, and record U.S. export performance in several categories have improved prospects for U.S. agricultural exports. Turkish consumers and food processors continue to favor high-quality and reliable food products from the United States. Top prospects for U.S. agricultural products in Türkiye and regional markets include tree nuts, cotton, soybeans, distilled spirits, live animals and livestock genetics, pulses, and rice. Elsewhere in the nearby regional markets, prospects for U.S. agricultural products vary by market. Ukrainian consumers continue to demand more consumer-oriented products, including tree nuts and whiskey. Central Asian countries are typically net agricultural importers.

Tree Nuts: In FY 2025, U.S. tree nut exports to Türkiye totaled \$431 million, down 15 percent from the previous year. Major products include almonds, pistachios, and walnuts. Türkiye ranks as the sixth-largest export destination for U.S. tree nuts, following the EU, India, China, Canada, and the United Arab Emirates. With the removal of tariffs on U.S. tree nuts, U.S. exporters now compete on a more level playing field ([GAIN Report: Tree Nuts Annual, TU2025-0052](#)). The United States holds a 33-percent market share, followed by Iran (16 percent), Vietnam (15 percent), and China (13 percent).

Usage patterns vary by tree nut product in Türkiye. People consume roughly 35 percent of pistachios as snacks, while producers use the remainder in confectionery products. People primarily consume almonds as snack foods, with almonds having limited use in confectioneries and cosmetics. The demand for walnuts rises during the pistachio off-season. Walnut usage includes both direct consumption and traditional confectionary products, such as baklava.

Tree nuts are also in demand in the regional markets. Kazakhstan, Georgia, Ukraine, Uzbekistan, and Armenia imported an estimated \$443 million of tree nuts from all sources in FY 2025. The United States is the leading supplier in the regional markets, followed by Iran and China. Tree nuts, including almonds and pistachios, are among the main food processing sector imports, and manufacturers use them in confectionary and consumer-friendly retail products ([GAIN Report: Central Asia - Exporter Guide, KZ2024-0007](#)).

Cotton: In FY 2025, U.S. cotton exports to Türkiye rose to \$665 million, up 92 percent from the previous year. Türkiye is the third-largest export destination for U.S. cotton, following Vietnam and Pakistan. Experts predict Türkiye to rely on imports due to a decline in domestic cotton production ([GAIN Report: Cotton and Products Update, TU2025-0063](#)). As the leading supplier, the United States has 35 percent market share and competes with Brazil (34 percent), the EU (10 percent), and Azerbaijan (9 percent). Elsewhere, Uzbekistan is a potential market for U.S. cotton.

Soybeans: In FY 2025, U.S. soybean exports to Türkiye reached a record of \$411 million, up 188 percent from the previous year. Experts predict Turkish soybean imports to reach a record in marketing year 2025/26 due to increasing demand in the animal feed sector, especially for the poultry and aquaculture industries ([GAIN Report: Oilseeds and Products Annual, TU2025-0014](#)). Türkiye continues to utilize large amounts of soybeans in manufacturing animal feed. The main suppliers of soybeans include Brazil (top supplier with a market share of more than 40 percent), Ukraine, and the United States.

Distilled Spirits and Wine Products: Retaliatory tariff removal has improved prospects for U.S. distilled spirit exporters, particularly for whiskies, cordial liqueurs, and vodka. In FY 2025, Türkiye imported a record \$534 million of distilled spirits from the world. Although about 99 percent of the Turkish population identifies as Muslim, the hospitality and tourism sectors support a sizable market for distilled spirits. The United States competes with the United Kingdom (the top supplier with 72 percent market share), the EU (16 percent), and Mexico (5 percent). Opportunities for U.S. wine exporters remain limited due to competition from neighboring countries, including the EU. In FY 2025, the United States exported approximately \$56,000 of wine products to Türkiye.

In other markets, Uzbekistan and Kazakhstan imported a combined estimate of \$228 million of distilled spirits and wine products from the world in FY 2025 and offer stronger growth potential for U.S. exporters ([GAIN Report: Central Asia - Exporter Guide, KZ2024-0007](#)). In Central Asia, young consumers continue to seek innovative drinks and unique flavors. In Ukraine, the United States nearly doubled its market share in Ukrainian wine imports in the last decade ([GAIN Report: Wine Market Overview, UP2025-0028](#)), supported by favorable representation in Ukrainian supermarkets and specialized wine stores. The United States competes with the EU and United Kingdom for market share in Ukraine. EU wine exporters have benefitted from geographic proximity, historical ties, low pricing, and lower trade barriers under the Deep and Comprehensive Free Trade Agreement.

Live Animals and Livestock Genetics: Opportunities for live animal exports remain limited in the Turkish market. While U.S. live cattle exports to Türkiye had been on track for a record year in calendar year 2024, Türkiye placed a ban on livestock imports from the United States, following the discovery of highly pathogenic avian influenza (HPAI) in some lactating dairy cattle herds. Engagement between the USDA's Animal and Plant Health Inspection Service (APHIS) and Turkish authorities remains ongoing. However, Turkish cattle importers continue to show strong interest in U.S. live cattle, and experts predict significant exports to resume once the market reopens. The United States competes with Brazil (top supplier) and Uruguay for live animal market share.

In FY 2025, the United States exported \$7 million of bovine semen products to Türkiye, marking its second-highest record, though still about \$200,000 below last year's peak. Türkiye is the 10th-largest market destination. Constraints include limited use of artificial insemination and shortages of veterinarians, particularly in eastern and southeastern Anatolia ([GAIN Report: Livestock and Products Annual, TU2024-0040](#)). The United States is the top supplier of bovine semen products, followed by the EU and Canada.

Elsewhere in the proximity markets, the genetics industry views the Caucasus and Central Asia as an emerging growth market for U.S. cattle genetics and high resale potential. Kazakh importers have expressed interest in purchasing cattle from the United States. Additionally, Kazakh and Uzbek cattle ranchers are looking to buy specialty breeds that will improve the genetics ([GAIN Report: Central Asia - Exporter Guide, KZ2024-0007](#)). For Ukraine, engagement between USDA APHIS and Ukrainian authorities remains ongoing regarding bovine embryos. Ukraine has a strong need to rebuild its cattle herd following Russian attacks on the sector.

Pulses: In FY 2025, U.S. pulse exports to Türkiye were \$5 million, up 64 percent from the previous year. Consumers continue to demand U.S. chickpeas, kidney beans, lentils, and green beans. In most cases, Türkiye imports pulses and re-exports them to markets in the Middle East and Africa ([GAIN Report: Turkish Pulses Market Overview, TR6008](#)). Additionally, Turkish exporters are also a supplier of international humanitarian aid, which largely consists of wheat flour made from Black Sea wheat and pulses. The top suppliers of pulses in Türkiye are Russia (a 28-percent market share), Canada (24 percent), and Kazakhstan (16 percent). The United States is the 10th-largest supplier of pulses.

Rice: In FY 2025, U.S. rice exports to Türkiye were at \$571,000, compared to \$15 million in the previous year. Turkish rice imports from the United States have experienced significant year-to-year swings during the past decade. Along with U.S. tree nuts, Türkiye lifted retaliatory tariffs on September 22, 2025. Historically, paddy rice has accounted for most of the rice exports; however, according to a USDA GAIN report on rice ([GAIN Report: Grain and Feed Annual, TU2025-0015](#)), Türkiye's rice import patterns shifted towards milled rice due to evolving phytosanitary requirements. Domestic rice production remains insufficient to meet demand, supporting continued reliance on imported rice. Consumers favor high-quality rice, including the Calrose type. Additionally, low-priced imported rice from China and Southeast Asia recently gained presence in the Turkish hotel, restaurant, and institutional sector because food establishments have competed for menu prices. In the rice import market, India is the main supplier of rice (with a 24-percent market share), followed by China (23 percent), and the EU (17 percent).

Rice is also in demand in the regional markets, with imports reaching \$142 million from all sources in FY 2025. In the same year, Ukraine, Georgia, Armenia, and Uzbekistan imported an estimated \$2 million from the United States. Central Asian traditional meals involve a stew of meat and vegetables over thick noodles or rice served with tea ([GAIN Report: Central Asia - Exporter Guide, KZ2024-0007](#)). India, Pakistan, and China are the main rice suppliers in Central Asia and Ukraine.

Top Prospects for U.S. Agricultural Related Exports

Beyond agricultural commodities, forest and seafood products also present good opportunities in Türkiye. In FY 2025, U.S. forest product exports to Türkiye were \$72 million, down 20 percent from the previous year. Türkiye primarily imports processed forest products, including sawn or chipped wood products, veneer sheets for plywood, and wood charcoal. The top suppliers of forest products are the EU, Russia, Ukraine, and the United States.

In the same fiscal year, U.S. seafood exports to Türkiye reached \$13 million, up 66 percent from the previous year. Most of these exports consisted of fish products and fish oil. Top suppliers of seafood products are Norway, Morocco, and Georgia. Türkiye both exports and imports seafood, and its trade volume has been rising alongside the growing aquaculture industry ([GAIN Report: Seafood Products Report, TU2024-0033](#)). Growing demand for fish and by-products used in fish feed production has driven higher imports. U.S. exporters may find opportunities in exporting high-end seafood products.

Elsewhere, Ukrainian seafood imports from the United States reached \$79 million, up 11 percent from the previous fiscal year. The United States is the fourth-largest supplier of seafood products in Ukraine, following Norway, the EU, and Iceland. Ukraine is a net importer of seafood products and relies heavily on imports of white fish products to meet demand ([GAIN Report: US Seafood Exports to Ukraine Reach 10-Year High, UP2025-0012](#)). Salmon roe is also extremely popular, eaten as a traditional holiday food. Ukrainian seafood import levels depend on foreign catch volume and price, the impacts of Russia's full-scale invasion of Ukraine, and the macroeconomic developments.

U.S. seafood exporters can also find opportunities in Georgia. In FY 2025, U.S. seafood exports to Georgia increased to \$5 million, up 32 percent from the previous year. Top U.S. seafood exports include Pacific hake, chum salmon, and Chinook salmon. Georgian seafood imports from the world have risen steadily since FY 2021, increasing from \$35 million in FY 2021 to \$82 million in FY 2025. The top suppliers of seafood products are the EU, Norway, and Türkiye, with imports largely concentrated in mackerel, hake, and salmon.

Macroeconomics and Demographic Trends in Türkiye

Table 1: Türkiye's Economic Indicators

	2024	2025	2026	2027	2028	2029	2030
Real GDP Growth (%)	3.3	3.5	3.7	3.7	3.8	3.8	3.8
Inflation Rate (%)	58.5	34.9	24.7	19.5	16.2	15.0	15.0
Population (millions)	85.5	86.0	86.4	86.9	87.3	87.6	88.0

Source: International Monetary Fund (IMF).

Türkiye's economy has begun to stabilize following tighter monetary policies and efforts to stabilize prices. As shown in Table 1, the IMF projects real GDP growth at 3.5 percent in 2025, with moderate acceleration over the medium term. Additionally, the IMF reported that inflation declined from 49

percent in September 2024 to 35 percent in October 2025 ([IMF Web Article: Republic of Türkiye: Staff Concluding Statement of the 2025 Article IV Mission](#)), and the IMF expects it to decline even further to 15 percent by 2030. Fiscal conditions have also improved, with the country's budget deficit narrowing from 4.7 percent of GDP in 2024 to a projected 3.6 percent of GDP this year. Despite these gains, Türkiye continues to grapple with inflation and the ongoing weakness of the lira. If the disinflation moves too slowly, Türkiye will remain vulnerable to shocks from investor sentiment, global risk factors, and energy prices.

The IMF projects Türkiye's population to increase by approximately 2 million by 2030, though growth remains relatively slow. The northwestern Bosphorus region is among the most densely populated areas, with Istanbul alone accounting for about 20 percent of the national population. The median age is 34 years old, which is relatively lower than its neighboring counterparts, except Ukraine (28.9 years) and Kazakhstan (31.9 years). Demographically, Türkiye is overwhelmingly Muslim, with 99.8 percent of the population, while small Christian and Jewish communities make up the remainder.

Macroeconomics and Demographic Trends in Regional Markets

In Table 2, the IMF projects the regional markets' economies to sustain real GDP growth between 4 and 5 percent. Inflation rates remain moderate across most markets, with Kazakhstan expected to experience gradual disinflation over the medium term. Population growth is strongest in Kazakhstan and Uzbekistan, supporting long-term food demand.

Table 2: Regional Markets' Economic Indicators

Real GDP Growth	2024	2025	2026	2027	2028	2029	2030
Georgia	9.4	7.2	5.3	5.0	5.0	5.0	5.0
Armenia, Republic of	5.9	4.8	4.9	5.5	4.8	4.5	4.5
Kazakhstan, Republic of	4.8	5.9	4.8	4.2	3.0	3.4	3.4
Ukraine	2.9	2	4.5	4.8	4.3	4.2	4.1
Uzbekistan, Republic of	6.5	6.8	6.0	5.7	5.7	5.7	5.7
Inflation Rate	2024	2025	2026	2027	2028	2029	2030
Armenia, Republic of	0.4	3.3	2.8	2.9	3.2	2.9	3.0
Georgia	1.1	3.9	3.4	3.0	3.0	3.0	3.0
Kazakhstan, Republic of	8.7	11.4	11.2	10.5	9.1	7.7	5.9
Uzbekistan, Republic of	9.6	9.1	7.3	6.3	5.0	5.0	5.0
Ukraine	6.5	12.6	7.6	5.3	5.0	5.0	5.0
Population	2024	2025	2026	2027	2028	2029	2030
Armenia, Republic of	3.1	3.1	3.1	3.0	3.1	3.1	3.1
Georgia	3.7	3.7	3.7	3.7	3.7	3.7	3.7

Kazakhstan, Republic of	20.2	20.3	20.6	20.8	21.0	21.2	21.4
Ukraine	33.3	32.9	33.4	34.0	34.0	34.0	33.9
Uzbekistan, Republic of	36.9	37.7	38.5	39.3	40.1	41.0	41.8

Source: IMF.

Challenges and Risks

U.S. exporters face several risks in Türkiye and surrounding markets. Although Türkiye can be a useful transit point, challenges can severely constrain a U.S. exporter's ability to reach markets.

Inflation: As previously mentioned, Türkiye experiences high inflation and significant depreciation of the Turkish lira against the U.S. dollar. The depreciation can suddenly affect the affordability of U.S. goods in the Turkish market. This depreciation shifts consumers to purchase private-label or economy-priced products instead of branded products ([GAIN Report: Food Processing Ingredients Annual, TU2025-0009](#)).

Agricultural Biotechnology: Türkiye has traceability requirements for products of agricultural biotechnology ([2025 National Trade Estimate Report on Foreign Trade Barriers](#)). Obtaining biotech regulatory approvals from the Turkish government can be difficult due to liability requirements, unclear assessment procedures, and concerns for safekeeping applicants' confidential information.

Phytosanitary and Sanitary Barriers: The Turkish Ministry of Agriculture and Forestry closely follows a pesticide reduction schedule similar to the EU, and in some cases, it is not science-based and/or aligned with international standards. Türkiye does not provide regionalization at the county level for the United States. Türkiye has banned all poultry and poultry-related products from the United States and allows transshipments from the states without HPAI. Regarding plant health, Türkiye rejects imports of U.S. unmilled rice (rough or paddy) if it detects white tip nematodes.

Tariff Disadvantages and EU Suppliers: Türkiye's average Most-Favored-Nation (MFN) applied tariff rate was 16.2 percent in 2023, up from 9.4 percent in 2019. According to the World Trade Organization, in 2023 Türkiye's average MFN-applied tariff rate for agricultural products was 41.6 percent and 13 percent for non-agricultural products in 2023. Türkiye holds many trade agreements, participates in a customs union with the EU, and offers duty-free access to U.S. competitors on some agricultural products, including those from the EU and the United Kingdom. Additionally, a free trade agreement between Türkiye and Ukraine is in the process of ratification.

Elsewhere in the markets, the Russia-Ukraine war raises distribution and logistics costs and results in longer delivery timelines. The population has been shrinking in Ukraine and Armenia, limiting the market for U.S. agricultural products. Russian, Chinese, and EU suppliers have advantages in transportation in comparison to U.S. exporters. Additionally, Central Asian consumers have limited knowledge of U.S. brands and food products ([GAIN Report: Central Asia - Exporter Guide, KZ2024-0007](#)). Despite these challenges, targeted outreach to agricultural importers can help U.S. exporters reinforce their market position, particularly through participation in trade missions and major regional exhibitions such as Gulfood and Anuga.

Conclusion

Table 3: Prospective U.S. Agricultural and Related Exports to Türkiye and Regional Markets

U.S. Agricultural Exports	Türkiye	Armenia	Ukraine	Georgia	Uzbekistan	Kazakhstan
Tree Nuts	Yes	Yes	Yes	Yes	Yes	Yes
Rice	Yes	Yes	Yes	Yes	Yes	
Distilled Spirits and Wine Products	Yes		Yes	Yes	Yes (distilled spirits)	Yes (distilled spirits)
Live Animals and Livestock Genetics	Yes	Yes		Yes	Yes (livestock genetics)	Yes (livestock genetics)
Cotton	Yes				Yes	
Soybeans	Yes			Yes	Yes	Yes
Pulses	Yes					
Forest Products (*)	Yes					
Seafood Products (*)	Yes		Yes	Yes		

Legend:

* = Agricultural related

Yes = Good prospect for expansion

As shown in Table 3, Türkiye remains a strategically important market for U.S. agricultural products. Recent policy developments, strong U.S. export performance, and sustained demand for high-quality agricultural products support a positive outlook. Nearby regional markets also present additional opportunities for U.S. agricultural exports, supported by import demand and favorable demographic and consumption trends. By focusing on competitive product categories, U.S. exporters can expand their presence in Türkiye and nearby markets while navigating ongoing macroeconomic and geopolitical risks.

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