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**Date:** 1/29/2010

## **Turkey**

**Post:** Ankara

### **Poultry Situation**

**Report Categories:**

Poultry and Products

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**Report Highlights:**

Turkish poultry production capacity is 1.5 MMT/year. In 2009 production reached an estimated 1.25 MMT. Exports of poultry and poultry product rose 44% in 2009 to 115,000 MT. Turkey gained permission to export processed poultry to the EU in August 2009, but shipped only 60 MT. On February 2, Russian and Turkish officials agreed on a veterinary certificate for poultry products. Although Russia announced it could import 500,000 MT of poultry meat from turkey, producers estimate that Turkey could supply Russia with no more than 55,000 MT of chicken meat annually. Biotechnology legislation that restricts feed imports could slow growth of production and exports.

## **General Information:**

### **Summary**

Turkish poultry production capacity is 1.5 MMT/year. In 2009 production reached an estimated 1.25 MMT. Exports of poultry and poultry product rose 44% in 2009 to 115,000 MT.

Turkish Prime Minister Erdogan visited Russia on January 12-13, 2010. During this visit, Russian authorities declared that Russia was interested in importing up to 500,000 MT of poultry meat from Turkey. Turkish producers estimate that Turkey could supply Russia with no more than 55,000 MT of chicken meat annually.

Russian Veterinary and Plant Quarantine Service (FVBKS) inspectors visited 17 poultry plants in Turkey in August and September 2009. FVBKS approved six of these plants to export poultry meat to Russia. Russian and Turkish veterinary authorities on February 2 agreed on a health certificate that could be used by the approved establishments. It is not clear whether Turkish companies will need to wait for Russia to establish a quota in order to export.

Despite ambitious hopes after obtaining approval from the European Union to export processed poultry products to the EU in July, 2009, sales were negligible because of technical problems. Iraq remains the primary market for Turkish poultry exports.

One factor that could affect Turkey's ability to export poultry competitively is availability of feed ingredients. Feed prices have increased since a biotechnology regulation issued on October 26, 2009, banned imports of most feed raw materials into Turkey. The Turkish Parliament is currently discussing a Biosafety Law that is expected to be approved in the next few months. The scope and details of this law could drastically reduce supplies of soy and corn products, consequently raise both the price of feed and poultry production costs.

Currently, the poultry sector in Turkey uses feed that is made from 40% corn, 20% soybean, 5-10% soybean oil and 30% other feed material. The cost of feed represents 70% of the total cost of production in the Turkish poultry sector.

Total production of mixed feed in Turkey increased to 9.8 MMT in 2009 from 9.5 MMT in 2008. Turkey imported 3.17 MMT of feed raw materials in 2008 and 4.9 MMT in 2008. Due to the new biotechnology regulation introduced at the end of October, Turkish soybean imports decreased from 1.23 MMT in 2008 to 855,000 MT in 2009. As a result, the price of feed ingredients has jumped.

Soybean and soybean meal prices increased 40% and DDGS and corn gluten feed also increased dramatically.

The market price of chicken meat in local currency increased 34% in 2009, after rising 22% in 2008.

Turkey increased its poultry and poultry product exportation by 44% overall in 2009, reaching 115,000 MT. Turkey gained permission to export processed poultry to the EU in August 2009, and sent 60 MT of processed poultry products to EU countries.

## **Production**

Turkey has 66 industrial integrated poultry slaughterhouses which have a total capacity of 220,000 head/hour and 13 slaughterhouses which have a total capacity of 7,500 head/hour. The daily capacity of the Turkish poultry sector is almost 5,000 MT and the yearly capacity for poultry meat is 1.5 MMT.

Turkish total domestic poultry meat consumption in 2009 is estimated at 1.2 MMT. Per capita poultry meat consumption is estimated at 17 kg/year in 2009, up from 15 kg/year in 2008.

The EU approved the import of Turkish processed poultry in March 2009 and Turkey started exporting in August 2009 with great publicity. Total exports to the EU in 2009, however, reached only 60 MT. The EU's FVO conducted an inspection of Turkish facilities in November 2009; the report has not yet been published. Reportedly, Turkish producers complain that the EU regulations are overly bureaucratic and slow moving.

The Russian Veterinary and Plant Quarantine Service (FVBKS) inspected Turkish poultry establishments in August and September 2009. The FVBKS approved six factories as eligible to export to Russia: Banvit Bandirma, Beypilic, Erpilic, Sen Pilic, Seker Pilic and Keskinoglu.

Keskinoglu has a maximum capacity of 19,000 head/hour and runs 16 hours a day. Keskinoglu recently upgraded its factory operations and now has two lines of operation. Its target is to export 150 MT processed poultry per month to Germany, Sweden, Finland, Austria and Italy.

Beypilic recently invested \$30 million to increase its capacity from 265,000 head/day to 300,000 head/day, or 24,000 head/hour. Beypilic has a poultry house that holds 600,000 head and produced 130,000 MT of poultry meat in CY 2009.

Banvit has a capacity of 300,000 head/day, but hasn't exported to the EU yet.

Erpilic, with a capacity of 300,000 head/day, is the number four poultry producer in Turkey.

Senpilic, which is located in Sakarya province, has a capacity of 145,000 MT of poultry meat per year and 200,000 head/day.

Sekerpilic, which has a production capacity of 60,000 MT/year and mainly focuses on processed chicken meat, will increase its capacity from 6,000 MT to 12,000 MT in 2010.

Turkish commercial egg production was 10.5 billion eggs in 2007, 11.5 billion in 2008 and 12 billion in 2009.

**Table 1: Turkey: Laying Hens**

| <b>Turkey: Laying Hen Numbers</b> |                   |             |                              |                     |
|-----------------------------------|-------------------|-------------|------------------------------|---------------------|
| Year                              | Number of poultry | Slaughtered | Spent hen meat produced (MT) | Eggs produced (000) |
| 2003                              | 60,399,520        | 6,642,439   | 9,463                        | 12,666,782          |
| 2004                              | 58,774,172        | 6,825,627   | 9,912                        | 11,055,557          |
| 2005                              | 60,275,674        | 7,200,133   | 10,797                       | 12,052,455          |
| 2006                              | 58,698,485        | 5,172,191   | 7,432                        | 11,733,572          |
| 2007                              | 64,286,383        | 6,361,000   | 8,970                        | 12,724,959          |
| 2008                              | 63,364,818        | 13,663,482  | 17,985                       | 13,190,696          |
| 2009*                             | NA                | NA          | NA                           | 14,500,000          |

Source: TUIK

\*\*Estimate

**Table 2: Turkey: Broiler Chicken**

| <b>Turkey: Broiler Chicken Numbers</b> |                   |             |                            |
|--|-------------------|-------------|----------------------------|
| Year                                   | Number of poultry | Slaughtered | Poultry meat produced (MT) |
| 2003                                   | 217,133,076       | 506,107,632 | 862,956                    |
| 2004                                   | 238,101,895       | 505,412,926 | 866,862                    |
| 2005                                   | 257,221,440       | 531,700,102 | 925,900                    |
| 2006                                   | 286,121,360       | 490,394,162 | 910,226                    |
| 2007                                   | 205,082,159       | 598,474,659 | 1,059,483                  |
| 2008                                   | 180,915,558       | 604,322,129 | 1,069,696                  |
| *2009                                  | NA                | 705,120,000 | 1,250,000                  |
| **2010                                 | NA                | 760,000,000 | 1,300,000                  |

Source: TUIK

\*Estimated

\*\*Forecast

## Trade

Turkey increased poultry and poultry products exports by 44% in 2009 as exports rose from 79.852 MT in 2008 to 115,000 MT in 2009.

**Table 3: Poultry exports**

| Turkey: Poultry Exports        |        |           |        |           |        |           |         |           |
|--------------------------------|--------|-----------|--------|-----------|--------|-----------|---------|-----------|
| Year                           | 2006   |           | 2007   |           | 2008   |           | 2009    |           |
| Quantity/Value                 | MT     | USD (000) | MT     | USD (000) | MT     | USD (000) | MT      | USD (000) |
| Total poultry meat exportation | 38,130 | 27,640    | 51,707 | 44,367    | 79,852 | 87,269    | 115,099 | 152,594   |
| Chicken meat and offal         | 18,718 | 16,728    | 24,749 | 22,465    | 47,895 | 58,889    | 81,632  | 121,050   |
| Chicken Paw                    | 19,087 | 10,708    | 26,151 | 21,631    | 30,659 | 26,752    | 32,511  | 30,330    |
| Turkey meat                    | 319    | 201       | 807    | 539       | 1,296  | 1,630     | 953     | 1,193     |
| Other fresh poultry meat       | 5.7    | 2.4       | 0.1    | 0.7       | 0      | 0         | 3       | 21        |

Source: BESD-BIR

The main reason for the overall increase in Turkish poultry exports is an increase in the amount of chicken meat and offal exportation to Iraq, which went from 9,143 MT in 2008 to 50,647 MT in 2009. In 2009 Turkey also resumed shipments of poultry to China, which had been banned in 2008 due to avian influenza worries. However at the same time, Turkey's exports of chicken meat to Azerbaijan decreased almost 50% for Turkey.

Despite the publicity surrounding the Russian announcement during Prime Minister Erdogan's visit that it was willing to buy up to 500,000 tons of Turkish poultry, currently the Middle East market is more attractive than the Russian market for Turkish poultry exporters. Also, many Turkish companies have lost interest in exporting to the EU due to past technical problems.

**Table 4: Poultry exports to top three destinations**

| Turkey: Poultry exports to top three countries |        |           |        |           |        |           |        |           |
|--|--------|-----------|--------|-----------|--------|-----------|--------|-----------|
| Year   | 2006   |           | 2007   |           | 2008   |           | 2009   |           |
| Quantity/Value                                 | MT     | USD (000) | MT     | USD (000) | MT     | USD (000) | MT     | USD (000) |
| <i>Chicken meat and offal</i>                  | 18,718 | 16,728    | 24,749 | 22,465    | 47,895 | 58,889    | 81,632 | 121,050   |
| • Iraq   | 2,175  | 3,495     | 619    | 1,183     | 9,143  | 16,657    | 50,647 | 92,629    |
| • Tajikistan                                   | 1,756  | 833       | 5,470  | 2,999     | 8,328  | 5,432     | 10,082 | 6,175     |
| • Azerbaijan                                   | 9,539  | 9,344     | 7,629  | 10,022    | 8,338  | 15,114    | 4,805  | 8,271     |
| <i>Chicken feet</i>                            | 19,087 | 10,708    | 26,151 | 21,631    | 30,659 | 26,752    | 32,511 | 30,330    |
| • Vietnam                                      | 14,965 | 8,652     | 20,840 | 18,416    | 29,542 | 25,815    | 24,638 | 23,444    |
| • Rep. of China                                | 2,066  | 1,059     | 4,459  | 2,135     | 110    | 84        | 2,770  | 2,784     |
| • Hong Kong                                    | 72     | 51        | 696    | 645       | 880    | 722       | 2,572  | 2,166     |
| <i>Turkey meat</i>                             | 319    | 201       | 807    | 539       | 1,296  | 1,630     | 953    | 1,193     |
| • Tajikistan                                   | 278    | 143       | 562    | 301       | 579    | 400       | 517    | 269       |
| • Azerbaijan                                   | 39     | 50        | 46     | 79        | 292    | 798       | 206    | 588       |
| • Guinea                                       | 0      | 0         | 0      | 0         | 50     | 23        | 100    | 48        |

Source: BESD-BIR

Turkey imported \$15 million of live poultry in 2008, mostly breeding stock from the United Kingdom, Netherlands and Germany. .

**Table 5: Turkish poultry imports**

| Turkey: Poultry import values (\$US) |           |           |            |            |
|--------------------------------------|-----------|-----------|------------|------------|
|                                      | 2006      | 2007      | 2008       | 2009*      |
| <b>Total</b>                         | 9,080,734 | 8,294,390 | 15,170,216 | 12,765,103 |
| <b>United Kingdom</b>                | 3,630,034 | 3,349,509 | 5,650,790  | 2,890,213  |
| <b>Netherlands</b>                   | 388,499   | 1,164,926 | 3,254,210  | 4,077,497  |
| <b>Germany</b>                       | 2,885,278 | 2,007,597 | 3,170,568  | 2,338,055  |
| <b>Hungary</b>                       | 198,233   | 0         | 967,564    | 555,908    |
| <b>France</b>                        | 404,429   | 265,896   | 909,290    | 829,069    |

Source: GTS

\*January-November

## Prices

Broiler producer prices increased 3.4% and reached 6.7 TL per head in 2008. The laying hen price increased 4.1% reaching 8.2 TL per head.

**Table 6: Producer prices of poultry (TL/head)**

| <b>Turkey: Producer prices of poultry (TL/head)</b> |             |             |             |             |             |             |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
|   | <b>2003</b> | <b>2004</b> | <b>2005</b> | <b>2006</b> | <b>2007</b> | <b>2008</b> |
| <b>Hens</b>   | 5.98        | 6.93        | 6.42        | -           | -           |             |
| <b>Broilers</b>                                     | 5.94        | 6.85        | 6.17        | 6.40        | 6.50        | 6.72        |
| <b>Laying hens</b>                                  | 6.06        | 7.27        | 7.48        | 7.57        | 7.85        | 8.18        |
| <b>Turkeys</b>                                      | 19.79       | 23.45       | 22.82       | 23.84       | 25.02       | 29.27       |
| <b>Ducks</b>  | 9.04        | 10.96       | 10.61       | 11.21       | 12.47       | 13.86       |
| <b>Geese</b>  | 13.78       | 16.33       | 17.79       | 18.46       | 23.02       | 27.97       |

Source: TUIK

**Table 7: Producer prices of poultry products (TL/kg)**

| <b>Turkey: Producer prices of poultry products (TL/kg)</b> |             |             |             |             |             |             |
|--|-------------|-------------|-------------|-------------|-------------|-------------|
|  | <b>2003</b> | <b>2004</b> | <b>2005</b> | <b>2006</b> | <b>2007</b> | <b>2008</b> |
| <b>Chicken meat</b>  | 2.20        | 2.37        | 2.43        | 2.72        | 3.61        | 3.69        |
| <b>Turkey meat</b>   | 5.02        | 4.59        | 4.78        | 5.44        | 5.66        | 5.11        |
| <b>Duck meat</b>   | 2.85        | 3.12        | 3.10        | 4.09        | -           | -           |
| <b>Goose meat</b>  | 3.41        | 6.00        | 5.17        | 6.82        | -           | -           |
| <b>Hen eggs*</b>   | 2.19        | 2.37        | 2.43        | 2.62        | 2.83        | 3.04        |

\*16 eggs=1 kg

Source: TUIK

**Table 8: Total value of poultry production (Million TL)**

| <b>Turkey: Total producer values of poultry products (million TL)</b> |                |                |                       |
|---|----------------|----------------|-----------------------|
| <b>Products name</b>  | <b>CY 2007</b> | <b>CY 2008</b> | <b>Percent Change</b> |
| <b>Poultry meat, (all)</b>  | 4,035          | 4,200          | 4.1                   |
| <b>Chicken meat</b>   | 3,857          | 4,019          | 4.2                   |
| <b>Turkey meat</b>  | 178            | 181            | 1.7                   |
| <b>Hen eggs</b>   | 2,252          | 2,509          | 11.4                  |

Source: TUIK

The total output value of the poultry sector reached 4.2 billion TL in 2008 and is forecast to reach 4.5 billion TL in 2009.

**Table 9: Poultry producer price index in 2009**

| <b>Turkey: 2009 Poultry producer price (TL/head)</b> |            |            |            |            |                 |                  |             |            |                  |            |            |            |
|--|------------|------------|------------|------------|-----------------|------------------|-------------|------------|------------------|------------|------------|------------|
| <b>Product</b>                                       | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Apr</b> | <b>Ma<br/>y</b> | <b>Jun<br/>e</b> | <b>July</b> | <b>Aug</b> | <b>Sep<br/>t</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> |

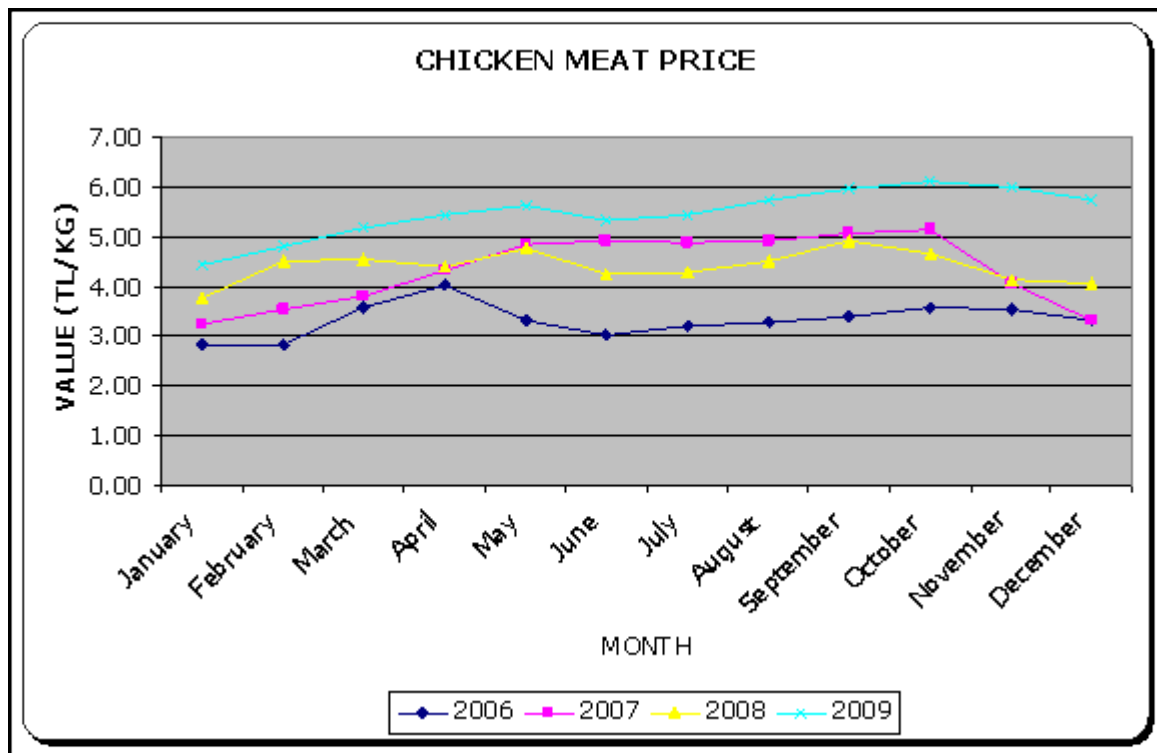
|                    |       |       |       |       |       |       |       |       |       |       |       |       |
|--------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>Broiler</b>     | 5.27  | 5.39  | 5.44  | 5.37  | 5.75  | 6.28  | 6.12  | 6.07  | 5.80  | 6.13  | 7.86  | 6.46  |
| <b>Laying hens</b> | 8.57  | 8.59  | 8.61  | 8.61  | 8.65  | 8.68  | 8.64  | 8.75  | 8.80  | 8.90  | 9.00  | 9.35  |
| <b>Turkeys</b>     | 27.44 | 26.22 | 27.23 | 27.38 | 27.44 | 28.03 | 28.25 | 28.09 | 28.01 | 29.52 | 31.31 | 32.87 |
| <b>Hen eggs</b>    | 0.22  | 0.21  | 0.21  | 0.21  | 0.21  | 0.21  | 0.20  | 0.21  | 0.21  | 0.21  | 0.21  | 0.22  |

Source: TUIK

The average 2009 producer price for broilers is 5.99, for laying hens is 8.76 and for turkey is 29.27 TL/head. Although the broiler producer price decreased from 6.7 to 5.99 TL in CY 2009 the consumer price of chicken meat increased. Producer price increases were reflected in the consumer prices in 2008 and 2009.

As shown in figure 1, the chicken meat consumer price was at a record level in CY 2009, due to increased domestic and export demand and high feed prices. The retail price of chicken meat rose 22% in 2008 compared to 2007 and 34% in 2009 compared to 2008. Due to implementation of biotechnology regulations and law, prices are expected to increase further in CY 2010.

**Figure 1: Chicken meat consumer price 2009**





## Feed Supplies

Poultry feed in Turkey is generally made up of 40% corn, 20% soybean, 5-10% soybean oil and 30% other ingredients. Feed costs in the poultry sector represent 70% of total production costs.

Turkey imported 4.96 MMT of feed ingredients in CY 2008. Soybeans represented 25% of total feed material imports in 2008, corn represented 23%, soybean meal represented 7%, and DDGS and CGF represented 11%.

Turkey imported 1.23 MMT of soybean, 530,971 MT of CGF, 521,855 MT of DDGS and 359,000 MT of soybean meal in 2008.

Turkey's total mixed feed production increased to 9.8 MMT in 2009 from 9.5 MMT in 2008. Turkey imported 3.17 MMT of feed ingredients in 2008 and 4.9 MMT in 2009. Soybean imports decreased from 1.23 MMT in 2008 to 855,000 MT in 2009.

The Regulation on the Importation, Processing, Exportation, Control and Inspection of Genetically Modified Organisms Intended for Food and Feed, published in the Official Gazette on October 26, 200, prohibited the importation of all GMO products. The regulation has been amended several times, and briefly was invalidated by a court decision that later was overturned. It is currently in force. In addition, the Turkish parliament is currently reviewing a draft National Biosafety law which also would affect trade in transgenic crops and their derivatives, including soy, soy meal, CGF and DDGS. As the situation is evolving rapidly, please contact [AgAnkara@fas.usda.gov](mailto:AgAnkara@fas.usda.gov) for up-to-date information.

**Table 10: Soybean Imports**

| Turkey: Monthly Soybean Imports (MT) |         |         |        |        |         |        |         |              |
|--------------------------------------|---------|---------|--------|--------|---------|--------|---------|--------------|
|                                      | June    | July    | Aug    | Sept   | Oct     | Nov    | Dec     | Annual Total |
| <b>2008</b>                          | 175,618 | 148,391 | 83,346 | 68,970 | 120,724 | 49,339 | 118,501 | 1,239,065    |
| <b>2009</b>                          | 183,911 | 152,267 | 72,114 | 79,015 | 41,084  | 17,171 | 72,844  | 973,574      |

**Table 11: Soy Meal Imports**

| Turkey: Monthly Soybean Meal Imports (MT) |     |     |     |     |     |     |     |              |
|---|-----|-----|-----|-----|-----|-----|-----|--------------|
|   | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Annual Total |

|             |        |        |        |        |        |        |        |         |
|-------------|--------|--------|--------|--------|--------|--------|--------|---------|
| <b>2008</b> | 9,757  | 22,183 | 397    | 29,043 | 45,011 | 25,083 | 28,987 | 359,556 |
| <b>2009</b> | 37,872 | 37,974 | 34,947 | 15,996 | 48,297 | 40     | 8,198  | 349,812 |

Turkey imported 3.17 MMT of feed ingredients in CY 2009. Of this, 27% was soybeans, 13% was corn, and 11% was soybean meal. Despite decreased DDGS and CGF imports in the last quarter of 2009 because of the biotechnology regulation, 11% of the year's total imported feed ingredients were DDGS and 10% was CGF.

In 2009 Turkey imported 855,942 MT of soybeans (1.23 MMT in 2008), 325,524 MT of CGF (530,971 MT in 2008), 354,090 MT of DDGS (521,855 MT in 2008) and 341,614 MT of soybean (359,000 MT in 2008).

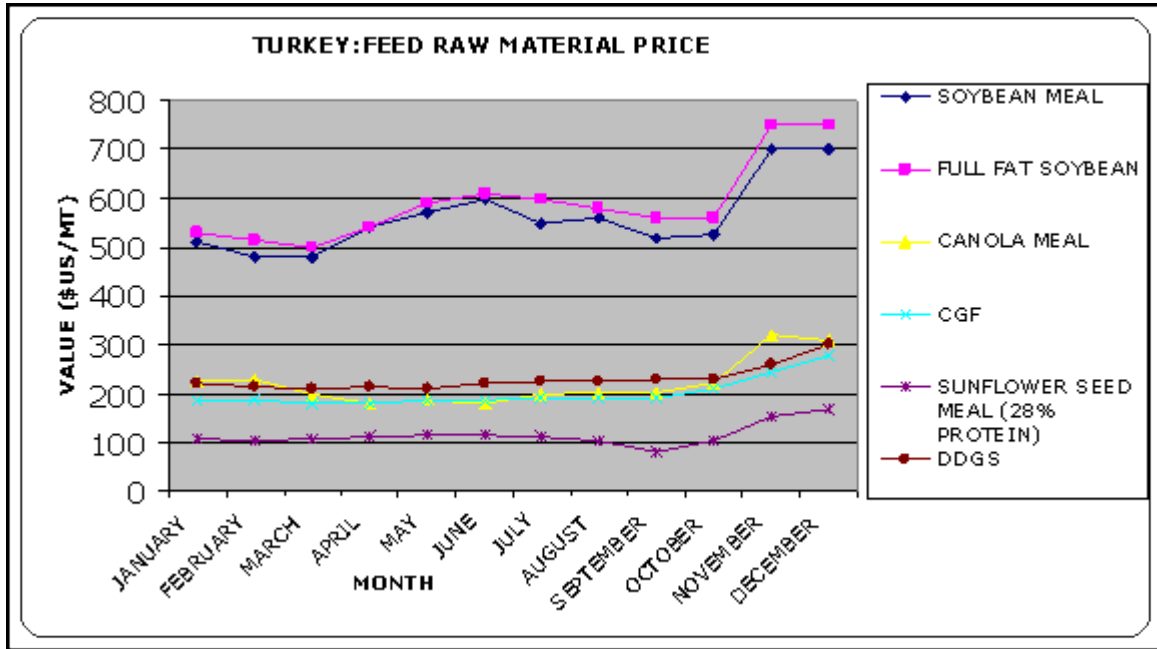
Feed material prices increased dramatically after the October 26, 2009, biosafety regulation blocked imports of soybean and soybean meal; soybean prices jumped 40% in November to \$700/MT. DDGS and CGF prices also increased dramatically.

**Table 12: U.S. Exports Of Feed Ingredients To Turkey**

| <b>U.S. Exports Of Feed Ingredients To Turkey</b> |              |            |                       |            |
|---|--------------|------------|-----------------------|------------|
| <b>Product</b>                                    | <b>2008</b>  |            | <b>Jan - Nov 2009</b> |            |
|   | <b>Value</b> | <b>Qty</b> | <b>Value</b>          | <b>Qty</b> |
| <b>Soybeans</b>                                   | 213,738      | 497,202    | 234,793               | 550,951    |
| <b>Soybean Meal</b>                               | 51,887       | 141,905    | 69,684                | 158,767    |
| <b>Corn Gluten Feed</b>                           | 119,356      | 543,348    | 33,338                | 285,631    |
| <b>Corn Gluten Meal</b>                           | 5,411        | 29,649     | 1,179                 | 10,075     |
| <b>DDGS</b>                                       | 111,334      | 465,212    | 52,185                | 377,707    |

Source: U.S. Census

**Figure 2: Feed raw material prices in CY 2009**



Source: YEMBIR

**Table 13: Feed raw material price before and after the October 26 biotech regulation**

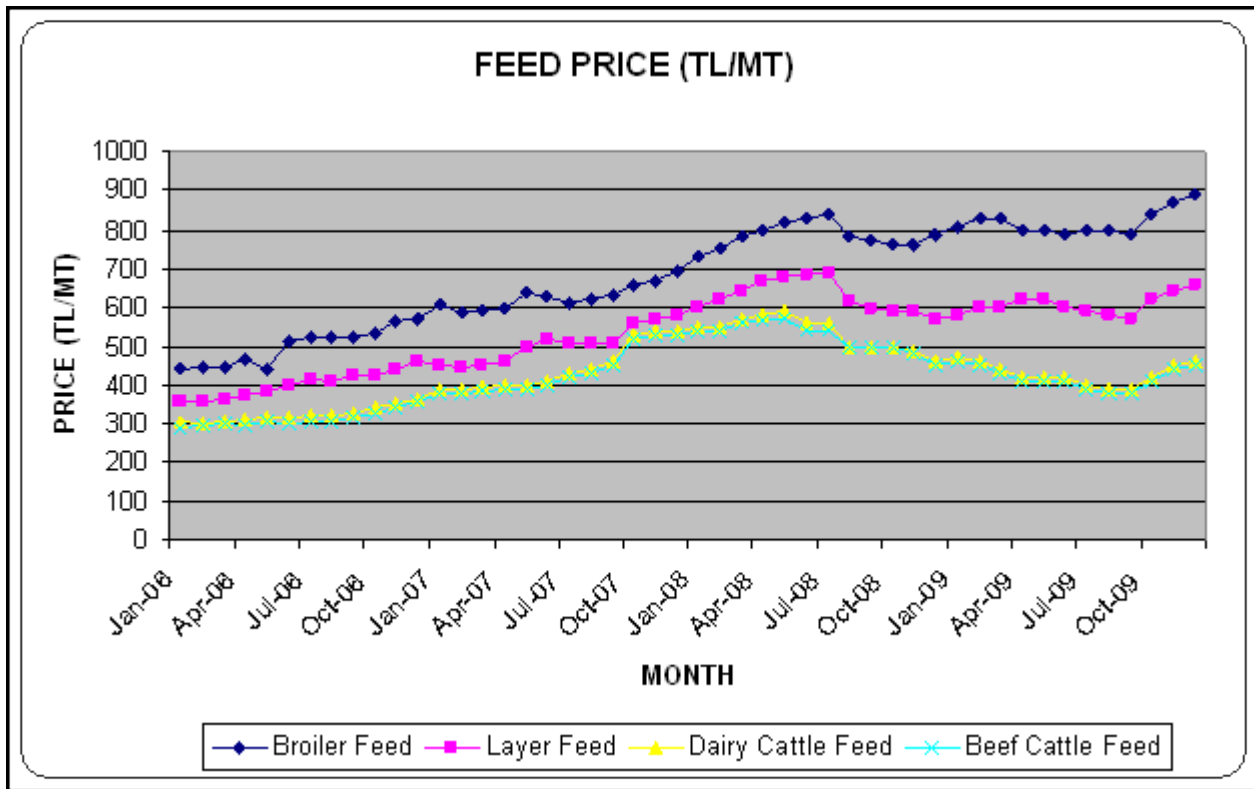
| Turkey: Feed raw material prices before and after biotech regulation (TL/MT) |                         |                                   |                         |        |
|--|-------------------------|-----------------------------------|-------------------------|--------|
| PRODUCT  | PRICE BEFORE REGULATION | PRICE AFTER REGULATION (NOVEMBER) | LATEST PRICE (DECEMBER) | CHANGE |
| Full fat Soybean   | 560                     | 750                               | 750                     |        |
| Soybean Meal   | 520                     | 750                               | 700                     | 35%    |
| DDGS   | 180                     | 250                               | 280                     | 56%    |
| CGF  | 150                     | 220                               | 250                     | 67%    |
| Canola Meal  | 220                     | 220                               | 230                     | 5%     |
| Sunflower Meal   | 150                     | 350                               | 360                     | 140%   |

**Table 14: Feed prices in CY 2009**

| Turkey: feed price (TL/MT) |        |        |        |        |        |        |        |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|
| TYPE OF FEED               | Jun-09 | Jul-09 | Aug-09 | Sep-09 | Oct-09 | Nov-09 | Dec-09 |
| Broiler Feed               | 790    | 800    | 800    | 790    | 840    | 870    | 890    |
| Layer Feed                 | 600    | 590    | 580    | 570    | 620    | 640    | 660    |
| Dairy Cattle Feed          | 420    | 400    | 390    | 390    | 420    | 450    | 460    |
| Beef Cattle Feed           | 410    | 390    | 380    | 380    | 410    | 440    | 450    |

Source: YEMBIR

**Figure 3: Feed prices in 2006-2009**



### Sanitary Issues

Chlorine usage in poultry factories is controlled in Turkey, so that only 0.5 ppm of chlorine can be used in poultry slaughterhouses. All slaughterhouse operations, including chlorine standards, are inspected by official veterinarians. For EU approved facilities, they are required to have four official veterinarians on the premises, permanently monitoring operations.

On February 2, 2010, Russian and Turkish authorities concluded negotiations for a veterinary certificate.