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Turkey's Poultry Situation

The Turkish poultry industry has aspirations of exporting poultry meat to the European Union (EU.) Back in September of 2004 a delegation of inspectors with the EU's Food and Veterinary Office (FVO) was sent by the EU Commission to inspect Turkey's poultry industry and assess its governmental controls. Six processing facilities were inspected and a report was submitted to the EU's Public Health and Consumer Protection General Directorate (SANKO) and the Turkish Ministry of Agriculture. SANKO will be deciding whether poultry meat imports will be permitted from Turkey, as well as which facilities will be eligible.

Turkish authorities and industry representatives are optimistic of the outcome of the inspections even though the decision will be political and there are two areas in much need of improvement: analytical record keeping and residual controls. The report should provide a list of suggestions to eliminate these problems. According to Turkey's Customs Union agreement, it is supposed to be importing 19,000 metric tons (MT) of red meat from EU countries, however it has been banning imports of both red meat and poultry from all sources since 1996.

Demand and prices are beginning to rebound as market conditions have improved bringing prices back up to the cost of production (YTL 2.20 or USD 1.60 per kilogram.) Poultry meat production in 2004 totaled nearly 1 million metric tons (MMT) with approximately 50,000 MT being turkey meat and the remainder chicken meat. In 2005, exports of poultry slightly increased reaching 17,000 MT in the first four months with 11,000 MT of this total being meat (both turkey and chicken) and 6,000 MT chicken leg quarters. There has been an increase in exports of chicken legs to China and Hong Kong, and poultry meat to Azerbaijan, Iraq, Ukraine, Macedonia, and Uzbekistan.

Egg production is estimated at about 153 million a week, which is mostly unchanged from the start of 2005; however demand and prices have sharply declined recently from TL 120,000 per piece to TL 70,000 per piece. The estimated cost of production is at TL 90,000 per piece. In the first four months of 2005, Turkey exported 3,184 MT (about 50 million) hatching eggs and 7,573 MT (about 125 million) table eggs. In response, industry officials are asking for an export subsidy of USD 10 per 1,000 pieces, which is up 4 USD from its current level. Despite the fact there is no limit on total egg exports, exporters can only receive USD 4.68 per 1,000 pieces because the subsidy covers 78 percent of the total quantity.

Note: TL = Old Turkish Lira; YTL= New Turkish Lira

Turkey's Production and Exports of Poultry Meat and Eggs (MT)

	1999	2000	2001	2002	2003
Production					
Hen Eggs	840,000	810,000	660,940	722,182	791,674
Chicken	596,854	643,436	614,726	696,160	872,392
Turkey	12,000	11,800	11,600	10,200	10,200
Total Poultry Meat	614,784	660,916	631,376	710,900	887,041
Exports					
Hen Eggs	22,577	3,556	18,522	1,594	7,561
Chicken	9,886	3,659	21,076	19,260	24,193
Turkey	0	33	333	634	797
Total Poultry Meat	9,932	3,767	21,670	20,085	25,068

Source: FAO

Leading Countries of US Egg Exports

Table Eggs (1,000 doz)	January-December			January-April	
	2002	2003	2004	2004	2005
Canada	17,487.8	14,772.2	37,951.7	4,494.1	9,526.7
Hong Kong	22,653.2	14,750.3	12,389.5	1,886.1	7,050.3
Cuba	1,527.7	1,511.5	2,151.0	0.0	891.0
China, Peoples Rep.	498.8	1,055.9	1,052.6	161.2	430.5
Western Samoa	222.2	509.3	704.6	136.0	272.0
Others	5,698.4	8,243.5	2,165.7	566.7	3,166.8

Dried Yolks (MT) *	January-December			January-April	
	2002	2003	2004	2004	2005
Japan	439.0	728.6	457.1	166.3	271.9
Korea, Rep. of	35.0	77.0	166.9	51.0	51.6
Mexico	33.5	77.2	70.2	1.9	18.1
Canada	404.2	67.6	49.9	6.3	1.8
Colombia	55.4	33.3	32.3	0.0	33.6
Others	172.2	96.3	288.3	25.1	166.0

Yolks (MT) **	January-December			January-April	
	2002	2003	2004	2004	2005
Japan	5,859.6	4,792.1	6,664.7	1,272.6	2,405.6
Canada	916.6	1,765.6	2,433.0	946.8	392.1
Korea, Rep. of	944.2	749.4	986.2	171.4	461.3
Singapore	465.8	469.0	607.4	128.1	144.8
Mexico	503.1	315.9	471.9	125.1	286.7
Others	1,138.2	1,284.5	1,045.0	276.1	508.4

Dried Whole Egg (MT) ***	January-December			January-April	
	2002	2003	2004	2004	2005
Canada	750.9	920.4	1,166.2	366.0	89.0
Japan	1,070.4	503.5	569.7	39.3	1,349.9
Spain	221.0	312.7	445.3	171.7	138.0
Costa Rica	83.8	119.0	239.8	51.0	34.9
Mexico	538.8	246.6	239.5	83.3	137.8
Others	2,643.0	1,596.3	414.3	224.4	216.2

Whole Egg (MT) ****	January-December			January-April	
	2002	2003	2004	2004	2005
Canada	3,428.3	677.0	2,285.7	385.2	80.8
Hong Kong	14.6	66.0	565.3	142.7	218.6
Bahamas	152.8	187.5	165.4	62.8	55.1
Japan	595.2	944.0	59.1	25.1	141.6
Korea, Rep. of	50.7	125.9	32.9	18.2	0.0
Others	194.3	331.2	130.1	27.2	104.5

Notes:

* Dried Egg Yolks whether or not (w/n) sweetened

** Egg Yolks, Fresh, Cooked, Molded, Frozen, or Preserved except dried w/n sweetened

*** Eggs not in shell, dried w/n sweetened

**** Eggs not in shell, Fresh, Frozen, Cooked, or Preserved except dried w/n sweetened

Source: USDA FAS

Inspected Egg Products-U.S. & Canada Export/Import Trade

U.S. Exports to Canada, in Pounds (000) (Preliminary)

Week Ending July 02, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	0	557	6,495	6,330
Frozen	0	0	21	11
Dried	0	1	207	387
Total	0	558	6,723	6,728

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending July 02, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	48	262	2,649	3,444
Frozen	5	46	418	999
Dried	0	80	345	1,567
Total	53	388	3,412	6,010

Inspected Shell Eggs

U.S Exports To Canada, In 30-Dozen Cases (Preliminary)

Week Ending July 02, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	0	67	207
Extra Large	2,160	5,580	45,620	62,216
Large	750	18,412	80,194	146,541
Medium	0	8,814	40,710	52,668
Ungraded	0	3,720	59,654	165,714
Misc	0	0	5,053	13,670
Total	2,910	36,526	231,298	441,016

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section
Source: USDA/AMS Poultry Programs, Market News Branch.

U.S./Canadian Live Poultry Slaughtered Under Inspection

W/E 2-Jul-05 (PRELIMINARY)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,574	1,452	3,026
Last Week	1,658	1,572	3,230
Same week yr ago	1,452	1,354	2,806
To-date/2005	40,438	35,973	76,411
To-date/2004	34,697	33,766	68,463

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	240	0	240
Last Week	148	0*	148
Same week yr ago	65	0	65
To-date/2005	7,169	33	7,202
To-date/2004	6,295	71	6,366

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

*Correction on last week heavy hens.

Total U.S. Fowl slaughtered in the U.S. and Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,814	1,452	3,266
Last Week	1,806	1,572	3,378
Same week yr ago	1,517	1,354	2,871
To-date/2005	47,607	36,006	83,613
To-date/2004	40,992	33,837	74,829

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jul 8, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	---- PRICES ----		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	26.00	61,200	-
WTD AVERAGE		26.00		
15-20%				
RANGE	-	15.00-24.00	703,800	81,600
WTD AVERAGE		19.51		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jul 8, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	---- PRICES ----		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	20.50	21.50-22.50	608,000	208,000
WTD AVERAGE	20.50	22.00		
15-20%				
RANGE	16.00-27.00	17.00-24.00	2,228,000	1,508,000
WTD AVERAGE	18.50	20.33		
20% OR MORE				
RANGE	-	14.00-19.00	160,000	-
WTD AVERAGE		15.25		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 8 JULY 2005.

The market tone on tom drums and tom full-cut wings was steady to fully steady, tom necks cautiously steady to steady and tom 2-joint wings steady to barely steady. Demand good on tom drums for domestic and export shipments, moderate to good on tom full-cut wings, light to moderate on tom necks and light at best on tom 2-joint wings. Offerings of tom drums and tom full-cut wings light at best, tom necks adequate to fully adequate and tom 2-joint wings adequate to instances ample. The market tone on thigh meat was steady to fully steady. Demand moderate for the light offerings. The market tone on mechanically separated turkey was steady to barely steady. Demand light for the mixed availability. Trading was heavy on open priced fresh tom drums for July-August export shipments, moderate on fresh tom breast meat for current shipments, balance slow to moderate. For domestic: fresh scapula 105, Grade A basted 8-10 lb. breasts 115, Grade A basted 12-14 lb. breasts 145 cents delivered. For export: tom drumettes 29, tom necks 38, hen drums 42.50, fresh tom drums 48 cents delivered.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, JULY 08, 2005	RANGE	CODE 1/	PRICE	(000)	PRICE	VOLUME
DRUMSTICKS, TOMS	49.00-51.00		50.11	392	50.04	1,228
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	30.33	312	30.33	312
TAILS	25.25		25.25	40	25.25	40
MECHANICALLY SEPARATED 2/	29.00		29.00	40	29.63	320
THIGH MEAT - FROZEN	82.00-83.00		82.28	288	82.43	368

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
THURSDAY, JULY 07, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	49.00-52.00		50.00	680
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	29.00-31.00		30.33	312
TAILS				
MECHANICALLY SEPARATED 2/	28.00-30.00		29.71	280
THIGH MEAT - FROZEN	82.00-84.00		83.00	80

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
WEDNESDAY, JULY 06, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	50.00		50.00	156
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		R	31.00	208
TAILS		W	23.00	40
MECHANICALLY SEPARATED 2/		F	31.00	40
THIGH MEAT - FROZEN		F	83.00	40

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
TUESDAY, JULY 05, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	50.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		R	31.00	208
TAILS		W	23.00	40
MECHANICALLY SEPARATED 2/		F	31.00	40
THIGH MEAT - FROZEN		F	83.00	40

NO EXPORT TRADING REPORTED DUE TO INDEPENDENCE DAY HOLIDAY
MONDAY, JULY 04, 2005

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY
2/ Product contains 15-20% fat with skin added.

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