



INTERNATIONAL EGG AND POULTRY REVIEW



U.S. Department of Agriculture Agricultural Marketing Service Poultry Programs Market News and Analysis Branch

Poultry Industry in Turkey

Turkey has a modern chicken industry with about 80% of chicken production in fully integrated facilities where HACCP (Hazard Analysis and Critical Control Point) and GMP (Good Manufacturing Practices) are practiced. The Turkish poultry industry has grown enormously and in 2009 broiler meat production was estimated to reach 1.25 million metric tons (MMT), up almost 17% from a year earlier when production totaled 1.07 MMT. In 2010 broiler production is forecast to reach 1.3 MMT. Turkish poultry production capacity is 1.5 MMT/year. Commercial egg production was 10.5 billion eggs in 2007, 11.5 billion in 2008 and 12.0 billion in 2009. In 2007, egg production in Turkey ranked 10th in the world by value, 11th by volume.

Poultry feed costs represent 70% of total production costs. Most feed is imported, leading to higher production costs that make Turkey less competitive. In CY 2008 Turkey imported 4.96 MMT of feed ingredients, including 1.23 MMT of soybean; 530,971 MT of CGF (Corn Gluten Feed); 521,855 MT of DDGS (Dried Distillers Grains with Solubles); and 359,000 MT of soybean meal. On October 26, 2009, the Ministry of Agriculture and Rural Affairs published a regulation covering biotechnology in food and feed. The regulation prohibited the importation of all GMO products. This will lead to even higher feed costs.

Turkey: Poultry Meat Exports in metric tons and '000 USD

	2007		2008		2009	
	MT	USD	MT	USD	MT	USD
Total poultry meat exported	51,707	44,367	79,852	87,269	115,099	152,594
Chicken meat and offal	24,749	22,465	47,895	58,889	81,632	121,050
Chicken Paw	26,151	21,631	30,659	26,752	32,511	30,330
Turkey meat	807	539	1,296	1,630	953	1,193
Other fresh poultry meat	0.1	0.7	0	0	3	21

Source: BESD-BIR

In 2009 Turkey's poultry exports rose 44% over 2008, mostly due to increased exports to Iraq, which is now Turkey's largest export market for poultry. In 2009 Turkey also resumed exports of poultry to China, which had been banned in 2008 due to avian influenza worries. At the same time, exports of chicken meat to Azerbaijan fell almost 50%.

Turkey gained access to the EU market in March 2009 when SANCO (the EU's Directorate General for 'Health and Consumers') published a list of Turkish companies whose products could be imported into the EU and the relevant health certificate on its web page. The seven companies listed have a 70% market share in Turkey and they are approved to export poultry products processed at more than 70 degrees Celsius. Turkey started exporting in August 2009 but total exports to the EU only reached 60 MT.

The Russian Veterinary and Plant Quarantine Service (FVBKS) inspected Turkish poultry establishments in August and September 2009. Six plants were approved as eligible to export to Russia. Turkish Prime Minister Erdogan visited Russia on January 12-13, 2010 and during this visit Russian authorities declared 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.

Source: USDA FAS GAIN Report; EU Directorate-General for Health and Consumers; TURKSTAT; news wires

Turkish Poultry Meat Production and Egg production

	Broiler MT	Laying Hens MT	Turkeys MT	Hen Eggs in thousands
1996	406,698	13,910	1,027	9,787,220
1997	464,928	6,487	376	12,089,341
1998	476,719	9,990	702	13,887,864
1999	589,981	6,898	12,744	14,090,023
2000	639,342	4,114	19,274	13,508,586
2001	612,744	2,001	15,125	10,575,046
2002	694,060	2,127	30,401	11,555,910
2003	862,956	9,463	32,801	12,666,782
2004	866,862	9,912	37,623	11,055,557
2005	925,900	10,797	42,709	12,052,455
2006	910,226	7,432	17,062	11,733,572
2007	1,059,483	8,970	31,467	12,724,959
2008	1,069,696	17,985	35,451	13,190,696
2009*	1,250,000			14,500,000
2010**	1,300,000			

* Estimated, ** Forecast

Source: TURKSTAT 'The Results of Animal Production Statistics, 2008' and TUIK

Turkey: Poultry Exports to Top Three Countries

	2007		2008		2009	
	MT	USD (000)	MT	USD (000)	MT	USD (000)
Chicken meat and offal	24,749	22,465	47,895	58,889	81,632	121,050
Iraq	619	1,183	9,143	16,657	50,647	92,629
Tajikistan	5,470	2,999	8,328	5,432	10,082	6,175
Azerbaijan	7,629	10,022	8,338	15,114	4,805	8,271
Chicken feet	26,151	21,631	30,659	26,752	32,511	30,330
Vietnam	20,840	18,416	29,542	25,815	24,638	23,444
China	4,459	2,135	110	84	2,770	2,784
Hong Kong	696	645	880	722	2,572	2,166
Turkey meat	807	539	1,296	1,630	953	1,193
Tajikistan	562	301	579	400	517	269
Azerbaijan	46	79	292	798	206	588
Guinea	0	0	50	23	100	48

Source: BESD-BIR

Chicken Meat Production, Select Countries, in metric tons

	2005	2006	2007	2008
U.S.	15,869,000	15,930,000	16,211,000	16,677,000
China	9,964,490 *	10,163,929 *	10,615,020 *	11,054,320 *
Brazil	7,865,780	8,164,003	8,988,035	10,215,500
Mexico	2,436,534	2,463,797	2,542,493	2,580,779
India	1,900,000 *	2,000,000 *	2,240,000 *	2,490,000 *
Russia	1,345,725	1,580,160	1,868,889	2,000,675
Iran	1,237,000	1,360,000	1,400,000F	1,400,000F
Japan	1,273,141	1,366,667	1,366,102	1,366,102F
Indonesia	1,125,710	1,260,148	1,295,840	1,358,390
UK	1,333,789	1,288,832	1,270,170	1,259,060
Argentina	1,010,000	1,159,000	1,160,000 F	1,160,000F
Spain	1,083,968	1,064,944	1,131,031	1,155,000 *
Turkey	936,697	917,658	1,068,453	1,087,680
Canada	1,000,077	997,482	1,028,230	1,040,580
Thailand	950,000 *	961,930	985,997	1,018,844

* = Unofficial figure; F= FAO estimate

Source: FAOSTAT © FAO Statistics Division 2010; 05 February 2010

**INSPECTED EGG PRODUCTS-
U.S. & CANADA IMPORT/EXPORT TRADE**

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

Type	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Liquid	193	143	724	335
Frozen	0	0	0	0
Dried	0	40	40	81
Total	193	183	764	416

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

Type	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Liquid	520	360	1,972	1,717
Frozen	6	0	33	67
Dried	0	0	0	0
Total	526	360	2,005	1,784

Inspected Shell Eggs

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

	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Jumbo	0	0	0	0
Extra Large	0	390	1,500	1,033
Large	0	0	800	5,360
Medium	750	1,110	750	1,110
Ungraded	2,472	4,878	19,716	6,942
Misc	0	0	0	136
Total	3,222	6,378	22,766	14,581

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

/2 Includes revisions to previous week(s)

Note: Year to-date totals reflect comparable time periods.

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

**U.S./CANADIAN LIVE POULTRY-
SLAUGHTERED UNDER INSPECTION**

Week Ending 06-Feb-10 (Preliminary)

U.S. fowl slaughtered domestically

	Thousands		
	Light Hens	Heavy Hens	Total Hens
Head	1,490	1,390	2,880
Last Week	1,541	1,385	2,926
Same week yr ago	1,246	1,545	2,791
To-date/2010*	7,755	6,808	14,563
To-date/2009*	6,686	7,854	14,540

U.S. fowl slaughtered in Canada

	Thousands		
	Light Hens	Heavy Hens	Total Hens
Head	490	0	490
Last Week	262	0	262
Same week yr ago	280	0	280
To-date/2010*	1,963	0	1,963
To-date/2009*	1,259	11	1,270

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

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

	Thousands		
	Light Hens	Heavy Hens	Total Hens
Head	1,980	1,390	3,370
Last Week	1,803	1,385	3,188
Same week yr ago	1,526	1,545	3,071
To-date/2010*	9,718	6,808	16,526
To-date/2009*	7,945	7,865	15,810

*Note: Year to-date totals reflect comparable time periods.

NATIONAL MECHANICALLY SEPARATED CHICKEN

(FOB Shipper Dock or equiv., negotiated prices in trucklot and less-than-trucklot volumes reported in thousand lb. quantities, cents/lb.; delivery within 2 weeks.)

The market tone on frozen 15-20% was fully steady to firm with the balance of fat contents mostly steady. Supplies of frozen 15-20% were balanced to close, fresh 15-20% generally adequate, and about adequate on the remainder. Supplies of raw materials were about adequate to close. Export and domestic demand was fair on fresh 15-20% and moderate to fairly good on frozen 15-20%. Trade interest and movement into the Caribbean and Central American countries continues to be good with some interest into Eastern Europe; Mexico was quiet. Schedules were irregular due to winter storm activity in parts of the country throughout the week causing plant disruptions and trucking delays. Some make the necessary preparations for more inclement weather as another storm front moves through this weekend.

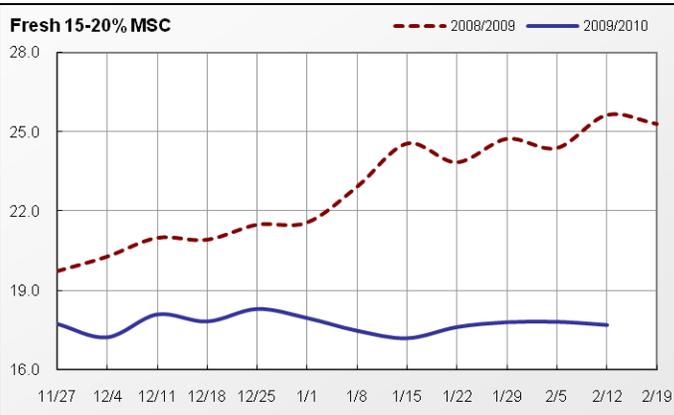
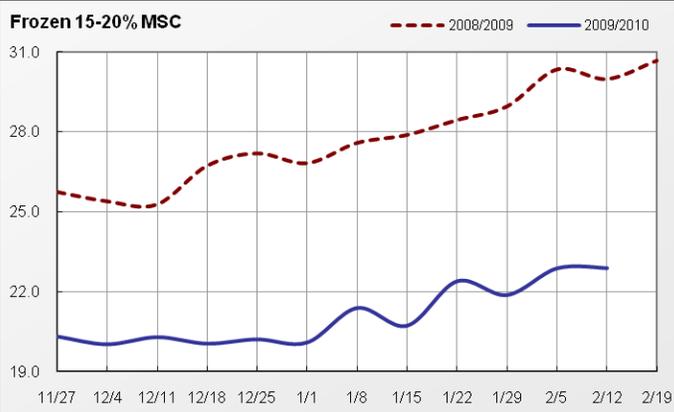
Weekly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)

Fat Content	Frozen			Fresh		
	12-Feb-10	Last Week	Last Year	12-Feb-10	Last Week	Last Year
15% or Less						
Price Range		24.50	-	19.00 - 21.00	18.00 - 20.00	28.00-29.00
Wtd Avg Price		24.50	-	19.90	19.00	28.37
Volume Traded	-	40	-	406	245	216
Volume Exported	-	-	-	-	-	55
15-20%						
Price Range	20.00 - 28.00	20.00 - 28.00	24.00-36.00	16.00 - 21.00	15.75 - 21.00	22.00-29.00
Wtd Avg Price	22.88	22.87	29.99	17.70	17.82	25.64
Volume Traded	1,893	2,045	1,365	5,720	4,743	4,190
Volume Exported	1,245	1,645	805	1,244	755	1,183
20% or More						
Price Range	-	-	-	16.00 - 17.00	16.00 - 17.00	24.00
Wtd Avg Price	-	-	-	16.50	16.50	24.00
Volume Traded	-	-	-	82	82	82
Volume Exported	-	-	-	-	-	-

Monthly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)

Fat Content	Frozen			Fresh		
	Jan 2010	Dec 2009	Jan 2009	Jan 2010	Dec 2009	Jan 2009
15% or Less						
Wtd Avg Price	24.00	-	-	18.78	18.55	27.67
Volume Traded	80	-	-	1,689	894	1,524
Volume Exported	-	-	-	-	-	274
15-20%						
Wtd Avg Price	21.31	20.14	27.92	17.57	17.84	23.48
Volume Traded	6,700	6,781	5,100	15,974	12,366	12,494
Volume Exported	5,940	5,659	4,268	2,162	3,060	2,613
20% or More						
Wtd Avg Price	-	-	-	16.08	16.18	22.99
Volume Traded	-	-	-	530	449	284
Volume Exported	-	-	-	-	-	-

Note: Volume exported refers to that portion of the total volume that is destined for export markets.



Source: USDA AMS Poultry Market News & Analysis

NATIONAL YOUNG TURKEY PARTS, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 12 FEBRUARY, 2010.

The market tone on tom bulk parts and mechanically separated turkey was steady to fully steady. Demand was light to moderate with best inquiry on tom drums, tom necks, tails and fresh MST. Offerings were tight to barely adequate. The trade sentiment on fresh tom breast meat steady to barely steady, with the balance of white meat items mostly steady. Demand was limited while offerings were adequate. The market tone on thigh meat was steady. Demand was moderate for the light offerings. For domestic: frozen heavy hen thigh meat 117, fresh scapula meat 109-110, fresh tom full-cut wings 72, fresh tom necks 47-49, fresh tails 32, fresh mechanically separated turkey (pet food) 18 cents delivered. Export: frozen**tom**gizzards(hand cut, hand defatted) 104, frozen tom necks 59, fresh tom drums 61, fresh thigh meat 115, fresh mechanically separated turkey 22 cents delivered port or border.

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
FRIDAY, FEBRUARY 12, 2010						
DRUMSTICKS, TOMS	63.00		63.00	40	61.50	160
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	75.00-76.00		75.41	588	75.34	708
TAILS	36.00		36.00	162	36.00	162
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	117.00		117.00	40	115.70	200
EXPORT TRADING						
THURSDAY, FEBRUARY 11, 2010						
DRUMSTICKS, TOMS		M	61.00	120		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		M	75.00	120		
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	116.50		116.50	40		
EXPORT TRADING						
WEDNESDAY, FEBRUARY 10, 2010						
DRUMSTICKS, TOMS		M	61.00	120		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		M	75.00	120		
TAILS		W	35.00	54		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		W	26.50	40		
		M	115.00	120		
EXPORT TRADING						
TUESDAY, FEBRUARY 09, 2010						
DRUMSTICKS, TOMS		M	61.00	120		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		M	75.00	120		
TAILS		W	35.00	54		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		W	26.50	40		
		M	115.00	120		
EXPORT TRADING						
MONDAY, FEBRUARY 08, 2010						
DRUMSTICKS, TOMS	61.00		61.00	120		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	75.00		75.00	120		
TAILS		W	35.00	54		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	115.00	W	26.50	40		
			115.00	120		

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.