

**Required Report:** Required - Public Distribution

**Date:** September 24, 2024

**Report Number:** TU2024-0040

## **Report Name:** Livestock and Products Annual

**Country:** Turkiye

**Post:** Ankara

**Report Category:** Livestock and Products

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### **Report Highlights:**

In 2025, Turkiye's cattle inventories are projected to fall by 4 percent, reaching 15 million head. The dairy cattle population is expected to continue its downward trend in 2025 due to increased cow slaughters driven by low farmgate prices for raw milk. In 2024, total cattle imports are estimated at 550,000 head, down 32 percent from 2023. The 2024 estimate assumes that imports will be mostly feeder cattle because of the government's support of the feeder cattle industry. Unfortunately, while U.S. live cattle exports to Turkiye were set to see a record year in 2024, following the discovery of HPAI in some lactating dairy cattle herds in the United States, Turkiye placed a ban on imports of live cattle from the US in April 2024. For 2024, beef imports are expected to reach a record 80,000 MT, 131 percent higher than the previous year, due to low domestic production and in an effort to regulate beef prices at slaughterhouses.

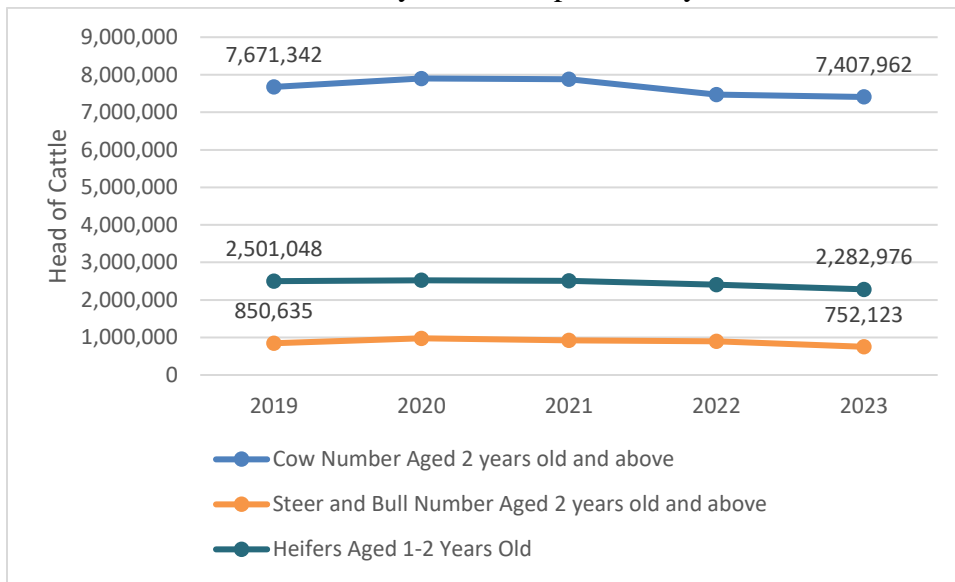
**Note:** This report is qualitative text only and does not include PSDs.

**Cattle Inventories:**

In 2025, Türkiye’s cattle inventories are projected to fall by 4 percent, reaching 15 million head. This decline is primarily attributed to high production costs, prompting farmers to liquidate their herds. Despite the Turkish government’s efforts to boost cattle numbers through improved artificial insemination and increased fertility rates, these measures have not effectively countered the decrease in the domestic cattle inventory, and the country has been focusing on importing feeder cattle for slaughter, which does not help increase herd numbers. The high cost of inputs, particularly feed, exacerbates the problem, as Türkiye imports 60 percent of its feed raw materials.

The dairy cattle population is expected to continue its downward trend in 2025 due to increased cow slaughters driven by low farmgate prices for raw milk. The dairy industry, grappling with high interest rates and a volatile economic environment, is forced to offer these low prices in response to decreased dairy consumption and high food inflation, which reached 60 percent in July 2024. With the industry’s stocks full and consumer demand waning, dairy cattle numbers are likely to diminish further.

**Chart 1. Türkiye Cattle Population by Year**



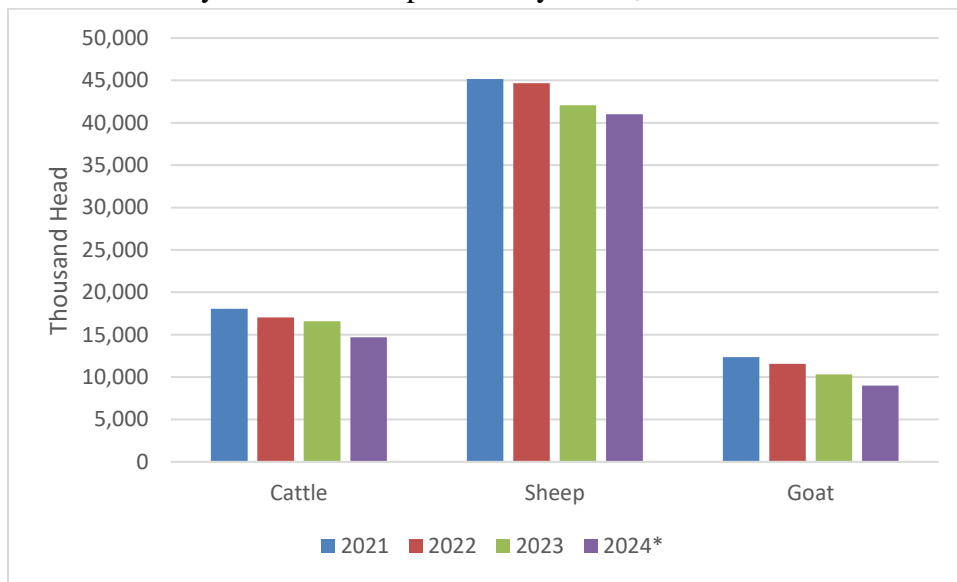
Source: TurkSTAT, 2024. *Cattle numbers include buffaloes and excluding cattle aged below 2 years old.*

In 2024, cattle numbers are predicted to fall by 4.8 percent to 15.7 million head due to decreasing birth rates, in correlation with decreasing cow numbers and insufficient artificial inseminations. The share of females slaughtered was between 50-55 percent prior to 2020, while it fell to 30-33 percent in the last 2 years. Farmers continue selling off their animals, most of which are dairy cows, to minimize financial losses resulting from higher on-farm input costs that exceed the farmgate price for milk. Even though the dairy cow population has been decreasing, imports of breeding cattle and bovine genetics are being limited by the government. According to industry, limiting imports will regulate the milk market against

surplus, however it has a simultaneous negative impact on cattle inventories. According to the Turkish Statistical Institute (TurkSTAT), raw cow milk production stagnated in 2023 at 19.9 MMT. Until 2022, Türkiye produced 23 MMT of raw milk each year. Meanwhile, the domestic price of breeding cattle has increased by 450 percent over the last 2 years.

In 2023, the cattle population was 16.5 million head. For reference purposes, according to TurkSTAT, Türkiye’s sheep and goat population in 2023 was estimated at 52.6 million, which was 6.9 percent lower than the previous year.

**Chart 2.** Türkiye Ruminant Population by Years, 2021-2024



Source: TurkSTAT, 2024. *Cattle numbers include buffalos. \* Post estimation.*

In correlation with cattle numbers, the number of cattle operations have been shrinking for the past several years due to deteriorating market conditions. By 2023 the number of operations had fallen from 1.4 million to 1.1 million. The sector also continues to struggle with the appropriate management of animal diseases, which has resulted in significant economic losses and 400,000 dead calves each year.

***Rising Production Expense Impacts in 2024***

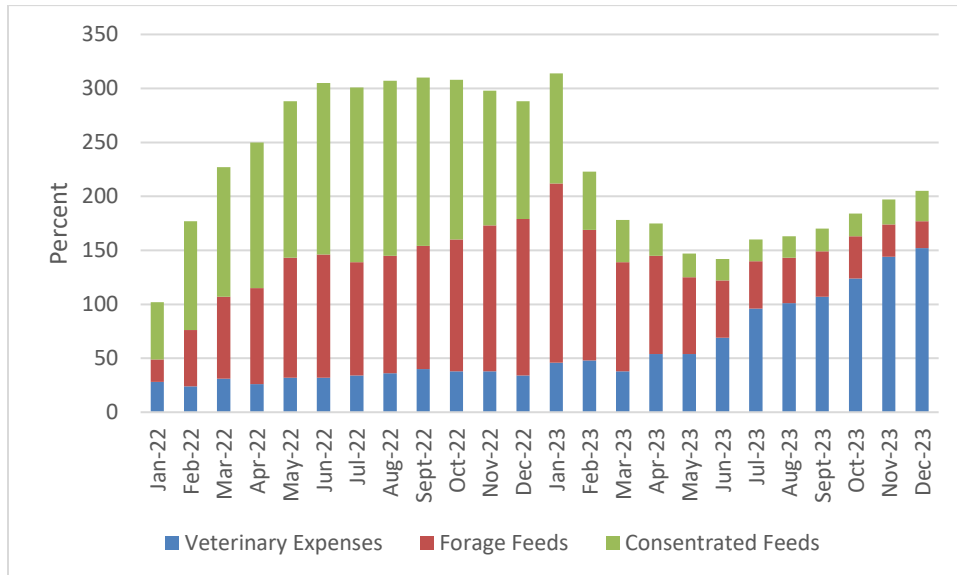
Livestock farmers continue to struggle with ballooning production costs due to rising input prices for feed and water, fertilizer, labor, electricity, and fuel.

Both dairy and beef cattle farmers, especially small-holder farmers, are particularly sensitive to the cost of feed since it accounts for 65-75 percent of total farm expenditures. However, veterinary expenses have significantly increased due to global drug price increases. According to TurkStat, veterinary expenses increased 134 percent in May 2024 compared to 2023. Animal feed prices increased 37 percent over the same period.

The high cost of live cattle is a major expense for producers and contributes to rising meat and milk prices. Conversely, domestic slaughter prices are falling due to large imports of feeder cattle, which is

squeezing feeder cattle operations out of the market due to their inability to cope with high production costs and low slaughter prices.

**Chart 3.** Annual increase rates of Feed and Veterinary Expenses, 2022-2023

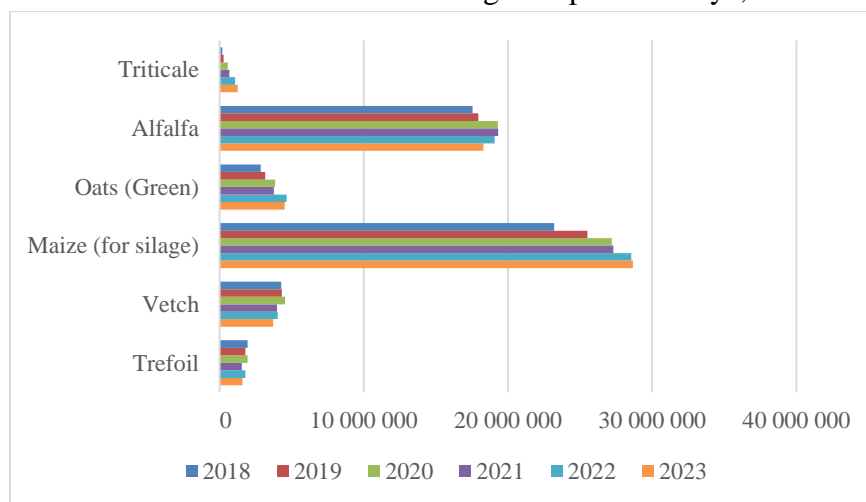


Source: TurkSTAT, 2024.

The price of compound feed is particularly vulnerable to outside economic pressures, since about half of the 25 MMT of compound feed made in Türkiye last year was made from imported ingredients.

There are several other factors contributing to rising feed costs, such as the shortage in local forage production. According to livestock producers, annual forage production has been decreasing in recent years and is estimated at 65 million metric tons (MT), while local experts peg demand at around 90 million metric tons.

**Chart 4.** Production of the Main Forage Crops in Türkiye, 2018-2023

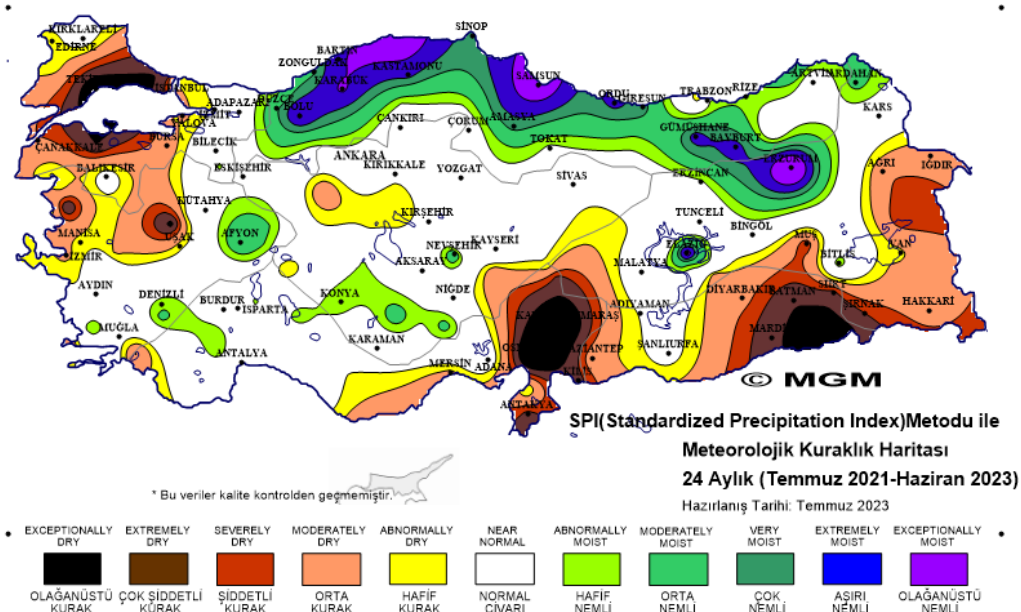


Source: TurkSTAT, 2024.

The expansion of forage production is one of the livestock sector's top priorities, but increasing production is difficult because food crops compete for the same acreage. The most important forage products are alfalfa, silage corn, common vetch, trefoil, and oats. According to livestock sector contacts, only 2.5 million hectares, or 7-8 percent of the total arable lands in Türkiye are cultivated for forage, whereas to be self-sufficient, cultivation would need to be increased to 6 million hectares.

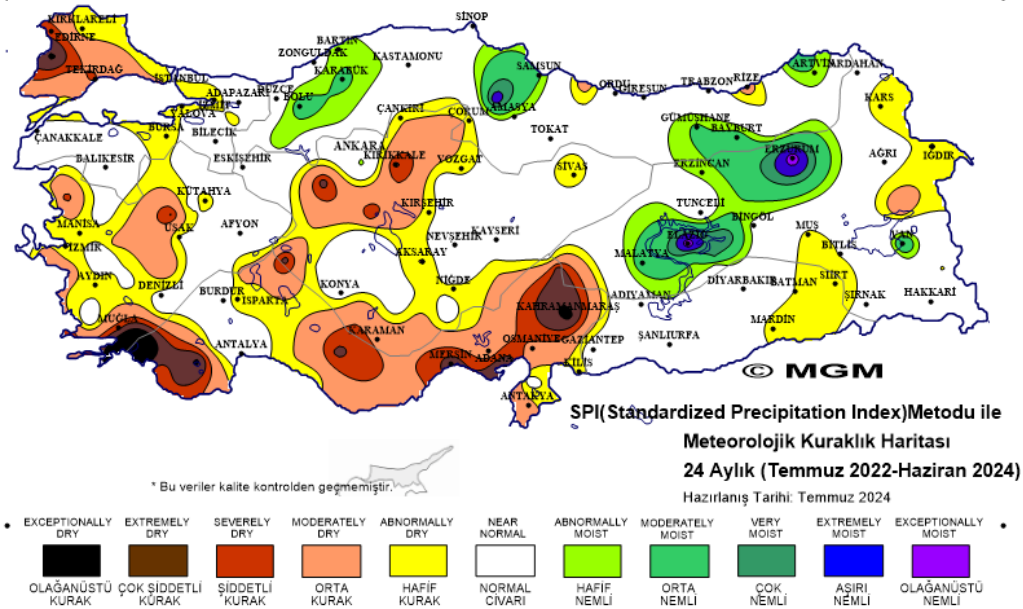
Forage production has improved slightly since late 2023, however the lack of improved forage seeds and poor management of existing pastureland remain problematic. The largest pasture areas are in east and central Anatolia, as well as the Black Sea region. The quality of the graze in these drought-prone regions is considered poor, which contributes to lower carcass yields. According to local experts, the development of high-yielding, drought-tolerant forage crops is crucial to sustain the country's livestock sector into the future.

**Chart 5. Drought Map for 2022-2023.**



Source: Turkish Meteorological Service, 2023

Chart 6. Drought Map for 2023-2024.

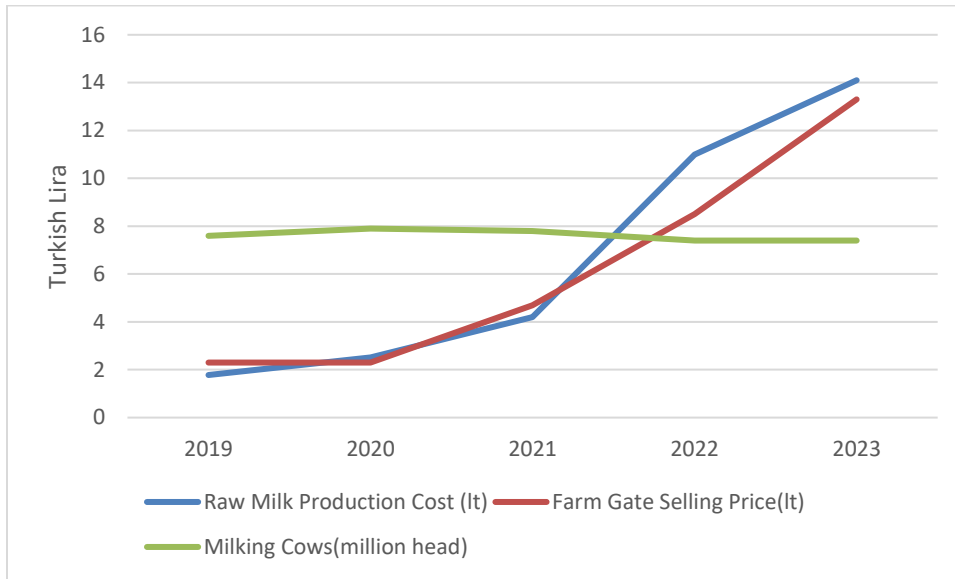


Source: Turkish Meteorological Service, 2024

### ***Farmers Complain Milk Reference Price Too Low***

Raw milk prices (farmgate price) are determined by the National Milk Council (NMC), which consists of representatives from the dairy industry, government officials, academicians, and NGOs. In May 2024, the NMC raised the reference price for raw milk by 8.5 percent, from 13.5 Turkish Lira (TL) per liter (\$0.41/liter) to 14.65 TL (\$0.44)/L. Despite this increase, farmers continue to complain that the reference price is too low, since it doesn't even cover the inputs needed to produce one liter of milk at 17 TL (\$0.51)/L. This continued disparity is the main reason why farmers continue to sell off their herds. Additionally, slaughter prices of reformed cows are too low. The average raw milk production cost has annually increased 59 percent while NMC's farmgate reference price has only increased 27 percent.

**Chart 7. Raw Milk Production Cost and Farmgate Selling Prices vs. the Number of Milking Cows, 2019-2024**



Source: TurkSTAT, 2024.

According to raw milk producers, there is strong pressure from the dairy processing industry to reduce the farmgate selling price, as processors continue to deal with the unstable economic situation and high interest rates, decreasing dairy consumption due to high food inflation, and consequently high stocks. However, raw milk producers believe that the solution to high food inflation should not be sought through them, and they point out that should they fall further victim to the country's economic woes, it would lead to greater economic and social problems.

#### ***Low Dairy Consumption Led to Re-Open Milk Powder Exports***

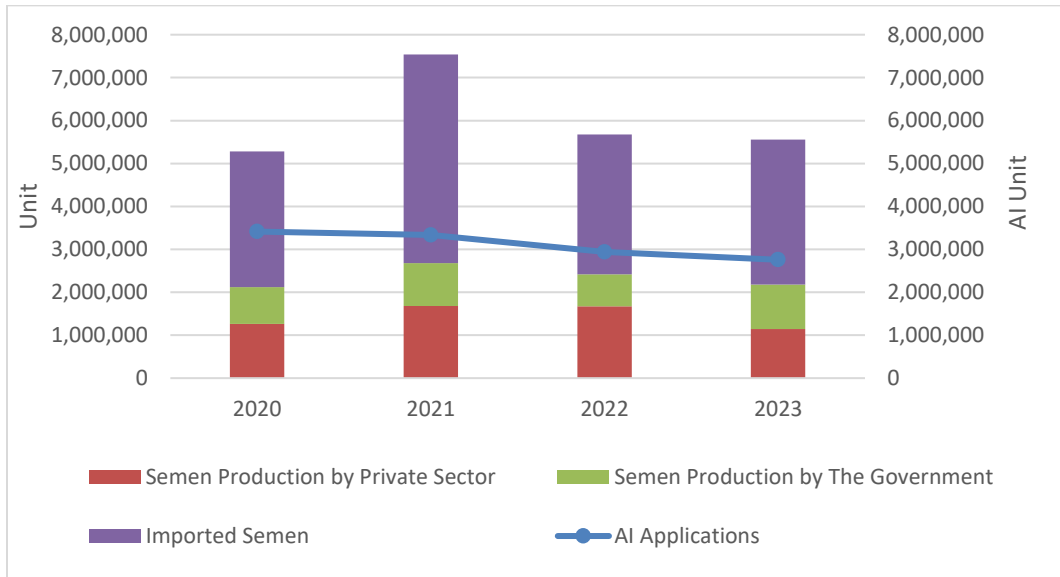
In recent years, the raw milk market has been fluctuating due to price instability and stagnated production. The Ministry of Agriculture and Forestry has decided to terminate the restrictions on the export of full fat and skimmed milk powder, claiming that it will create vitality in the sector where demand is currently low. Although milk production has not improved and retail prices remain high, MinAF announced that the government would purchase 1,000 MT of raw milk to help regulate prices.

#### ***Drop Off in Production and Imports of Livestock Genetics***

Insufficient domestic cattle production in Türkiye is partly due to limited use of artificial insemination, particularly in eastern and southeastern Anatolia, where there are shortages of qualified veterinarians. In 2023, the number of artificial inseminations declined by 6 percent to 2.7 million doses, and domestic bull semen production fell by 23 percent to 2.17 million doses. Although imports of bovine semen increased by 3.7 percent to 3.7 million doses in 2023, this is below the record 2021 level of 4.8 million doses. To address this shortfall and rebuild livestock inventories, Türkiye will need to enhance its use of both domestic and imported genetics.

The United States is a leading supplier of bovine genetics to Türkiye, though it ranks fourth in terms of units supplied. In 2023, U.S. livestock genetics imports were valued at \$4.1 million, a decrease from \$7.9 million in 2022 due to economic instability. However, the volume of U.S. bull semen imports surged by 117 percent in the first half of 2024 compared to the same period the previous year, indicating a growing reliance on U.S. genetics despite recent challenges.

**Chart 8. Semen Production, Imports, and Number of Artificial Insemination (AI) Applications, 2020-2023**



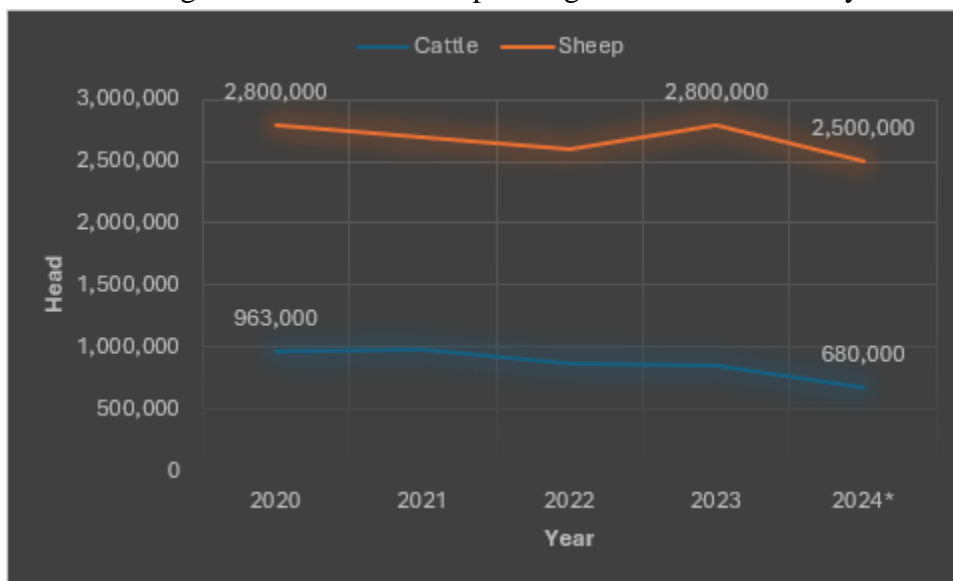
Source: The Ministry of Agriculture and Forestry and Trade Data Monitor, LLC.

***Slaughter Numbers Decreased from Last Year’s Sacrifice Holiday***

Türkiye celebrated the Sacrifice Holiday (Eid al-Adha) this year from June 16-20. The number of cattle slaughtered fell due to high prices, which were 560 percent higher than 3 years ago and 69 percent higher than the previous year. For this reason, more sheep were slaughtered, even though live sheep prices have increased 88.4 percent compared to 2023.



**Chart 9.** Slaughtered cattle and sheep during the Sacrifice Holiday in 2024.



Source: Turkish Agricultural Chambers. \*2024 number is the estimation of Turkish Agricultural Chambers.

The state-controlled Meat and Milk Board (ESK), which is responsible for regulating the meat market in Türkiye, purchased animals that farmers were unable to sell during the holiday. However, producers were reportedly reluctant to sell because ESK's offer price was considered too low to cover their production costs.

According to the Turkish National Meat Council, it is estimated that 20 percent of beef and meat by-products are wasted during the Sacrifice Holidays, valued at 2.4 billion TL (\$72 million). Since the country is suffering from a meat shortage, producers believe that slaughterhouses across the country should be efficiently used during the Sacrifice Holidays and reduce losses. Culturally, however, local butchers and regular citizens are primarily the ones who perform slaughters during religious holidays. According to local news, there were thousands of emergency room visits during the holiday period due to injured amateur slaughterers.

### ***The Minister Announced the Roadmap for Livestock***

The Minister of Agriculture and Forestry, Ibrahim Yumakli, announced the "2024-2028 Livestock Roadmap" in February 2024, following significant decreases in domestic livestock inventories. These shortages were the result of a sizable increase in the number of slaughtered female cattle after domestic raw milk prices fell sharply. At the same time, Türkiye imported 640 percent more live cattle in 2023 than the previous year, valued at \$1.2 billion. The roadmap, which the Ministry continues to promote, seeks to secure Türkiye's domestic livestock industry through support to women and family-farms, as well as to increase the viability of Türkiye's livestock genetics inventory. For more information, please see the relevant GAIN report [here](#).

### ***Livestock Subsidies***

According to Türkiye's [Agricultural Law](#), agricultural supports allocated from the national budget cannot be less than 1 percent of the gross national product. This year, \$603 million is allocated for livestock subsidies. In Türkiye, agricultural subsidies have always been criticized by the sector when compared to ever increasing input costs.

Minister Yumakli has unveiled a new support model for animal husbandry that will be in effect over the next three years. This model emphasizes production performance and strategic planning, offering support for livestock and product development. The primary focus areas include cattle, sheep, beekeeping, and silkworm industries, with additional assistance directed towards raw milk, male feeder cattle, and mohair production. Notably, the new program introduces support specifically for women and young farmers. Other key components of the support model are aimed at improving the country's animal population through funding for artificial insemination, pedigree registration, domestic semen production, and disease management, all geared towards enhancing overall efficiency.

Despite these advancements, the new support model has faced criticism from livestock producers, agricultural experts, and journalists. Concerns have been raised about the removal of crucial supports from previous years, such as those for feed plant production and new cattle purchases, which were essential for sustainable feed supply and supporting family-sized farms. The removal of support for purchasing new cattle has been particularly controversial, as it was seen as vital for encouraging family-sized farms, considered the backbone of the livestock sector. In response, the new model includes a lower limit for supported animal numbers, providing additional support to farms with a maximum of 20 head of cattle, thus offering support to smaller, family-run operations for the first time.

### **Cattle Trade:**

In 2025, Türkiye's cattle imports are forecast to decrease 30 percent to 420,000 head due to projected contractions in availability from the main cattle supplier countries and global demand. In line with historic trends, most of these imported animals will be feeder cattle for beef production.

In 2024, total cattle imports are estimated at 550,000 head, down 32 percent from 2023. The 2024 estimate assumes that imports will be mostly feeder cattle because of the government's support of the feeder cattle industry. This figure is slightly lower than the Ministry's target, which was to import 600,000 head of feeder cattle to regulate domestic beef prices. As of January 2024, the private sector is not allowed to import feeder cattle (for more information, please click [here](#)).

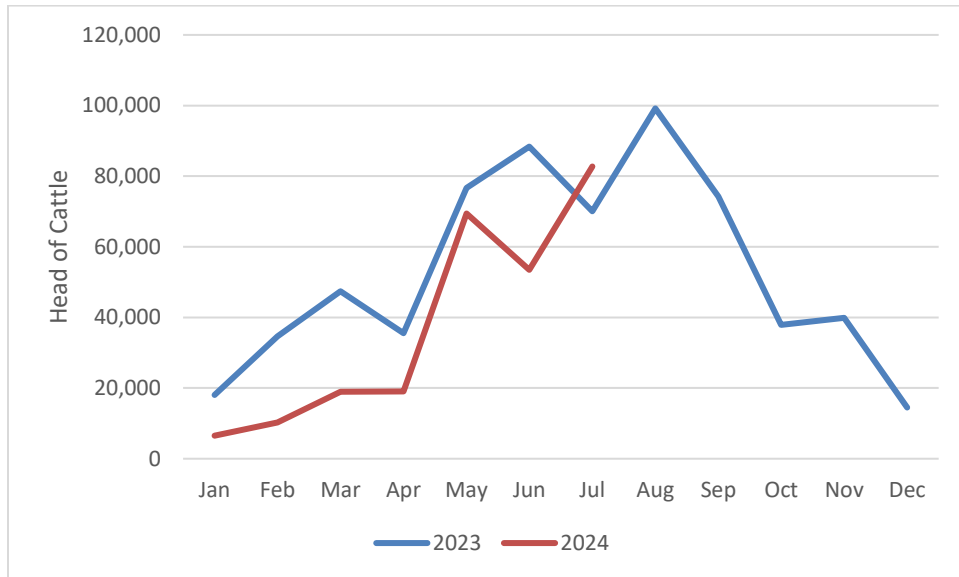
The number of imported feeder cattle has reached around 210,000 head as of June 2024. This number includes cattle for immediate slaughter which are purposed directly for the beef value chain to gain control over skyrocketing retail prices. ESK has also already selected the facilities that it will send these feeder cattle to for slaughter for the remainder of the year.

In 2023, Türkiye imported 818,017 head of cattle consisting of 725,254 head of fattening and 92,763 head of breeding cattle, an increase of 600 percent compared to 2022. Türkiye is the second largest live animal importer in the world, with trade valued at \$1.63 billion in 2023.

To help offset the projected contraction in inventories, the government is expected to continue authorizing breeding cattle imports in 2025 for both private and government farms. According to livestock importers, Türkiye’s breeding cattle imports from Germany and Denmark will be reduced in 2024 due to restrictions imposed by MinAF following the recent Bluetongue disease outbreak seen in those countries. This follows Türkiye’s April 2024 decision to halt imports of US breeding cattle following the discovery of HPAI in some lactating dairy cow herds there.

Following the temporary closure of these sources, the Ministry is planning to import Charolais-Limousine and Angus heifers from producer associations and cooperatives in the European Union. MinAF hopes that this shift will meet the feeder cattle shortage in the country in the short term. Once beef cattle are imported, producers keep the animals at their farms for approximately 6 months before they send them to slaughter.

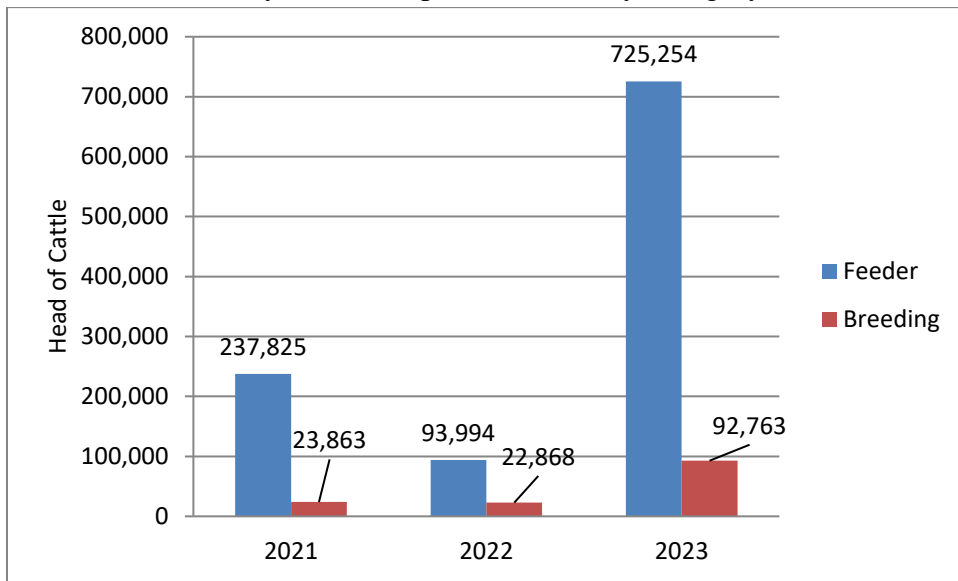
**Chart 10.** Türkiye Cattle Imports, Comparison for the six months, 2023-2024



Source: Trade Data Monitor, LLC

MinAF uses outdated EU health certificates for live cattle imports but does not allow imports from all EU-approved countries. Instead, the ministry authorizes imports from [countries](#) based on its own evaluation of their livestock health system and their interpretation of World Organization of Animal Health (WOAH) standards, which is sometimes at odds with the rest of the member states’ interpretation.

**Chart 11.** Türkiye Cattle Import Numbers by Category, 2021-2023



Source: Trade Data Monitor, LLC

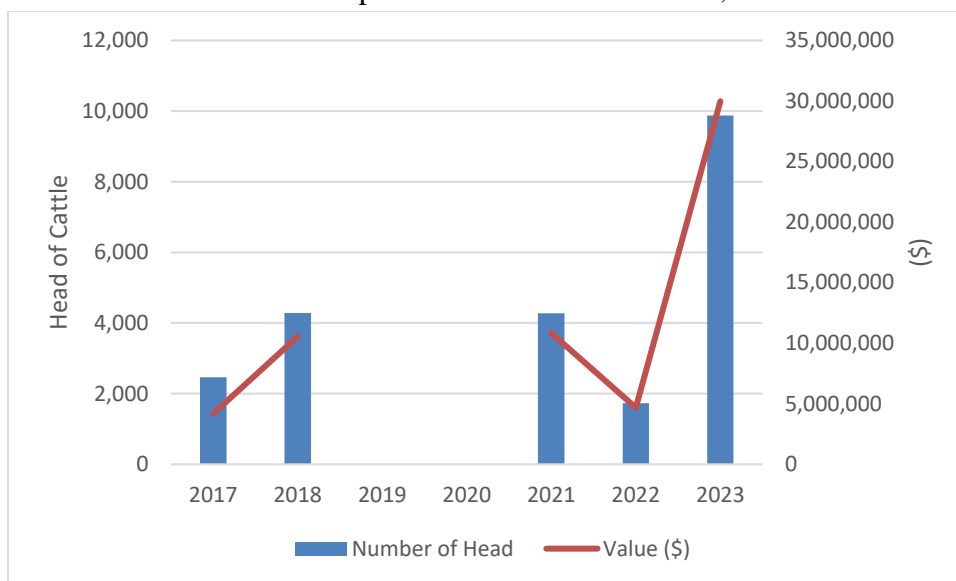
***Increasing Demand on Cattle Imports from the US Despite MinAF’s Import Restriction***

Unfortunately, while U.S. live cattle exports to Türkiye were set to see a record year in 2024, following the discovery of HPAI in some lactating dairy cattle herds in the United States, Türkiye placed a [ban on imports](#) of live cattle from the US in April 2024. Although USDA’s Animal and Plant Health Inspection Service (APHIS) provided regular updates on the situation in the US and offered concessions including certification that exported animals would not be from HPAI-affected premises and only tested, negative animals would be exported, MinAF continues to apply the ban, in contradiction to WOA’s recommendation.

For 2025, cattle imports from the United States are expected to be constrained by Türkiye’s existing import requirements for U.S. cattle. However, should MinAF’s ban be lifted and MinAF’s strict import health requirements for U.S. cattle be revised, the U.S. could gain parity with competitors in the EU and imports could reach 10,000 head, all of which would likely be dairy breeding cattle.”

As only two shipments were allowed to enter Türkiye prior to the ban’s enactment, cattle imports from the United States in 2024 will remain at 2,687 head (valued at \$13 million) in 2024. In 2023, Türkiye imported 9,875 head of breeding cattle from the US, valued at \$30 million.

**Chart 12. Cattle Imports from the United States, 2017-2023**



Source: Trade Data Monitor, LLC

### ***Cattle Exports***

Cattle export predictions for 2025 are unchanged from the previous year at 2,000 head. Major export markets are likely to remain neighboring countries, such as Azerbaijan and Iraq.

### **Commodities:**

Meat, Beef and Veal

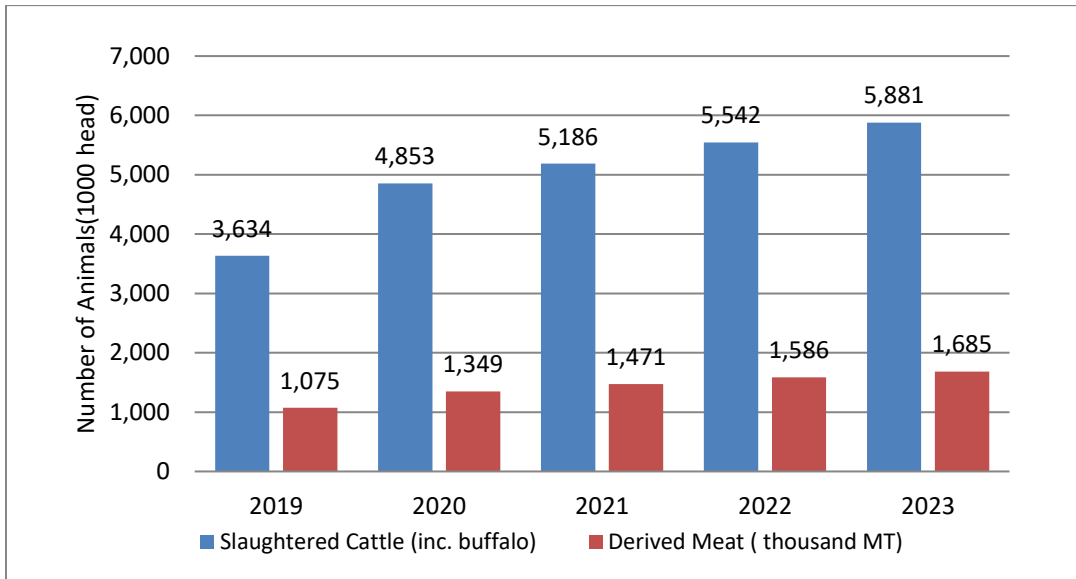
### **Beef Production:**

In 2025, beef production is forecast to increase slightly to 1.7 million metric tons (MMT) as farmers continue to reduce cattle inventories.

With decreasing cow slaughter and lower feeder imports in 2024, beef production is expected to stagnate at around 1.6 MMT. Production has been limited because farmers are slaughtering underweight animals to minimize losses and because of low carcass yields. Slaughter weights are currently between 270-300 kg, compared to more than 400 kg in the past.

TurkSTAT announced 2023 beef production at 1.68 MMT, including buffalo.

**Chart 13.** Slaughtered Cattle (Including Buffalo) and Beef Production, 2019-2023



Source: TurkSTAT, 2024

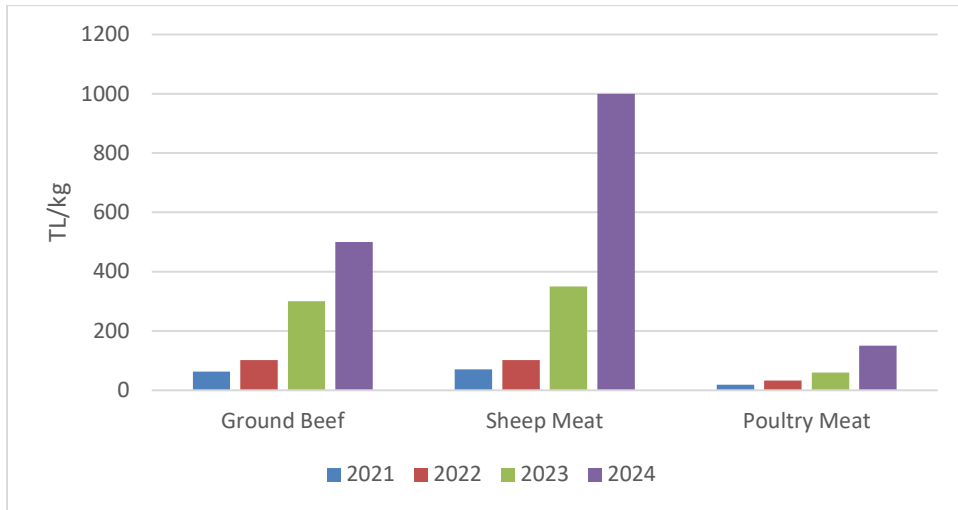
In Türkiye, beef accounted for 70.1 percent of total red meat production in 2023, with sheep, goat, and buffalo meat accounting for 23.9 percent, 5.4 percent, and 0.6 percent, respectively.

#### **Beef Consumption:**

Beef consumption in 2025 is forecast to increase year-on-year by 3 percent to 1.7 MMT. The projected increase in consumption volumes is mostly based on the slight increase in slaughter numbers. For 2024, beef consumption is forecast to decrease to 1.6 MMT due to high market prices and low beef production, despite increasing feeder cattle imports.

Beef, sheep, lamb, goat, and chicken meat are the most consumed meat since pork is not generally consumed in Türkiye. However, sheep and goat meat are less popular due to the perception of their smell. For this reason, of total meat consumed, around 80 percent is beef and around 20 percent is chicken. Due to high meat prices and record inflation, in correlation with decreasing purchasing power, demand for beef has fallen over the past year, as consumer preferences shift to cheaper sources of protein. According to TurkSTAT, beef meat prices increased by 63 percent, lamb meat by 114 percent, and poultry meat by 273 percent. Dairy milk prices increased 50-60 percent in the last year.

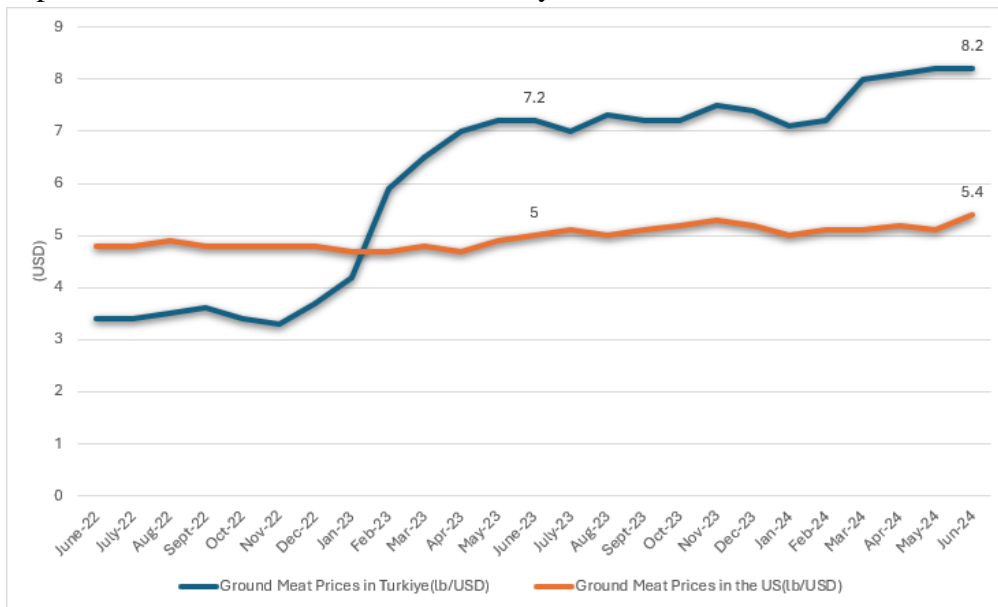
**Chart 14. Beef, Sheep Meat and Poultry Prices, 2020-2024**



Source: Price data from supermarkets (A101, Sok, Migros) for middle-income consumers. (Note: As of August 8, 2023, \$1 \$= 33.5 TL)

To reduce beef demand, ESK has allocated 193 million TL (\$5.8 million) to increasing the consumption of small ruminant meat and increasing product variety, with the aim of increasing sustainability of production and price stability in meat and dairy markets. However, the livestock sector remains concerned about low demand for small ruminant meat.

**Chart 15. Comparison of Ground Beef Prices in Türkiye and the US, June 2022-2024**



Source: Price data from supermarkets (A101, Sok, Migros) for middle-income consumers. (Note: As of August 8, 2023, \$1 \$= 33.5 TL) and the US Bureau of Labor Statistics.

## Trade:

### ***Beef Imports***

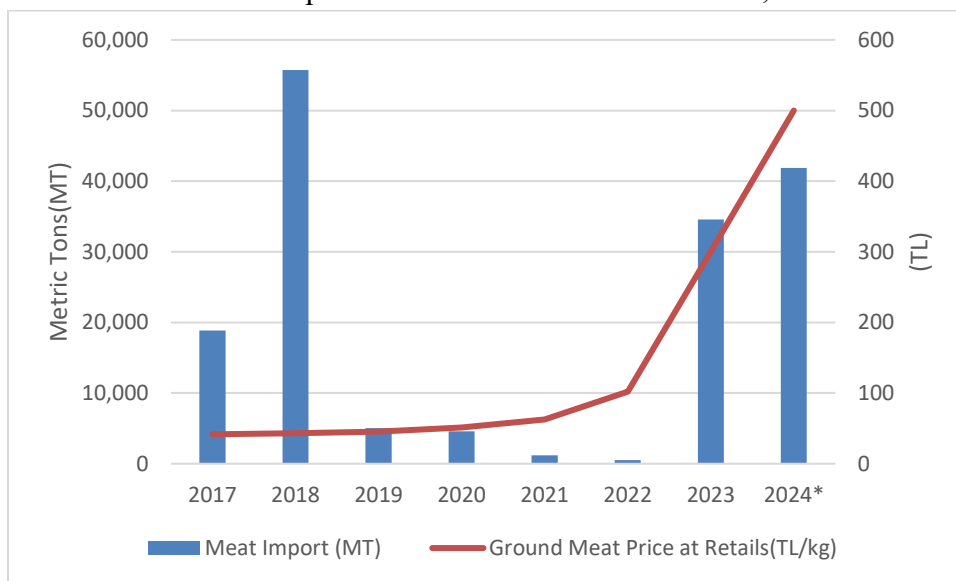
Beef imports in 2025 are forecast to stagnate at 80,000 MT, as the government is the only authority to import meat.

For 2024, beef imports are expected to reach a record 80,000 MT, 131 percent higher than the previous year, due to low domestic production and in an effort to regulate beef prices at slaughterhouses. The government accelerated meat imports in 2023, importing 34,593 MT or 6,600 percent more than 2022.

The state-controlled Meat and Milk Board (ESK) is the only entity authorized to import cattle and beef duty-free. ESK sources beef mostly from Europe, and in particular from Poland.

As MinAF seeks to get a handle on skyrocketing meat prices in Türkiye, as of 2024, the private sector is no longer able to import of feeder cattle; the government-influenced ESK is the only authorized purchaser currently. As of June 2024, ESK imported 41,892 MT meat from Poland and France, which is 1,779 percent more than the same period of the previous year.

**Chart 16. Meat Import and Retail Ground Meat Prices, 2017-2024**



Source: Trade Data Monitor, LLC. Price data from supermarkets (A101, Sok, Migros) for middle-income consumers. \*2024 import data includes January-June from TDM.

### ***Beef Exports***

Türkiye mostly exports very small volumes of prepared or preserved meat products (HS: 160250). In 2023, exports totaled about 1,640 MT, most of which went to Hong Kong, Vietnam, and Cyprus.



**Table 2.** Türkiye's Cattle and Beef Product Tariffs for All Countries, 2024

HS Code	Commodity	Tariff Rate (Percent)	
		Private Sector	ESK (Government-affiliated body)
<b>Live Cattle</b>			
010229	Cattle, live, other than purebred breeding	26 (Not currently allowed)	0
010221	Cattle, live, purebred breeding	0	0
010231	Buffalo, live, purebred breeding	0	0
<b>Beef</b>			
0201	Meat of bovine animals, fresh or chilled	40 (Not currently allowed)	0
0202	Meat of bovine animals, frozen	40 (Not currently allowed)	0
021020	Bovine meat salted, dried or smoked	114.5 (Not currently allowed)	0
160250	Meat Or Meat Offal Of Bovine Animals, Prepared Or Preserved, Nesoi	121.5	0

Source: Ministry of Trade, 2024

**Attachments:**

No Attachments