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Country: Turkiye

Post: Ankara

Report Category: Poultry and Products

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Report Highlights:

Chicken meat production for 2025 is forecast to hit a record after a below average performance the previous year. Most of the anticipated increase in production will go for domestic consumption, which continues to grow since chicken is expected to remain significantly cheaper than beef. With the Turkish government's export quota scheduled to end in December of 2024, exports in 2025 are projected to partially rebound. Iraq is expected to remain the country's largest export market.

Commodities:
Meat, Chicken

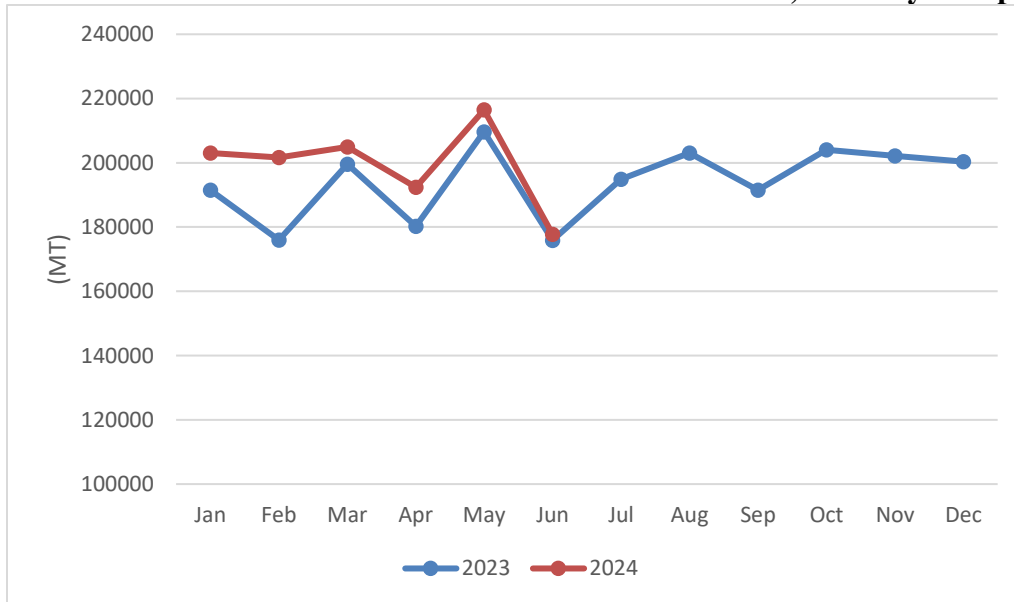
Production:

In calendar year (CY) 2025, chicken meat production is forecast to increase 200,000 MT or 8 percent year-over-year to a record of 2.6 MMT. This projected increase is in line with the historical growth rate of about 8-10 percent per year. This forecast also assumes stable domestic and export demand for Turkish chicken products with no government limits on chicken exports.

For CY 2024, the chicken meat production estimate is revised slightly higher from the USDA official figure to 2.4 MMT. Year-over-year production is only up by 3 percent, which is below the average growth rate in production. The reason for this slower growth is mostly attributed to the Turkish government’s decision to enact an export quota from June-December in order to stabilize the rising retail price of chicken meat. The slowdown in production is already evident in monthly production figures, as shown in Figure 1.

The broiler sector continues to struggle with higher input costs. The price of feed, which accounts for 70 percent of the total cost of production, has increased year-over-year by more than 30 percent. In addition, the sector is grappling with complicated labor issues. As one example, workers at one of the country’s biggest broiler companies went on strike for a couple months to protest being displaced by cheaper immigrant labor. The impact of the strike had a negligible impact on the country’s overall production of chicken.

Figure 1. Turkish Chicken Meat Production from 2023 to 2024, Monthly Comparison



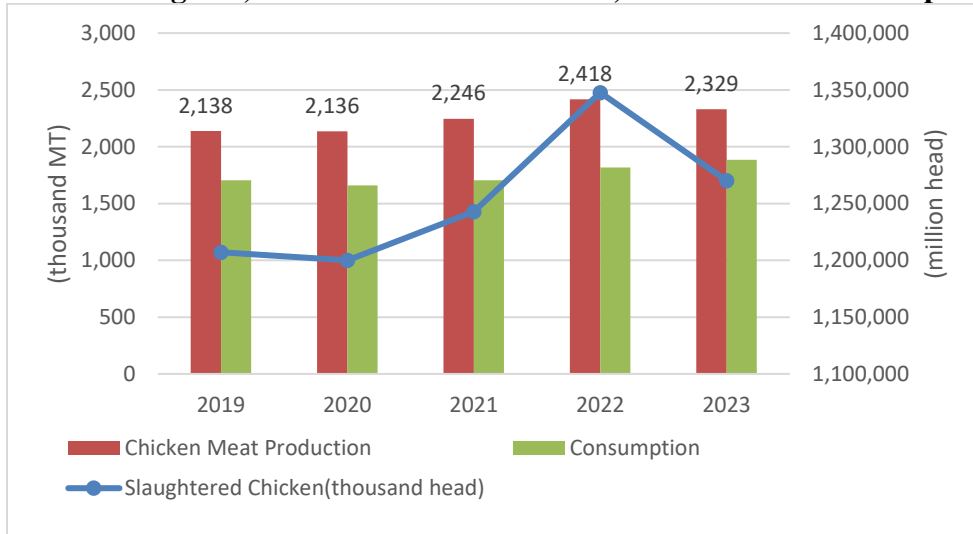
Source: Turkish Statistical Institute (TurkSTAT), 2024

Turkiye’s chicken industry is highly integrated, yet dependent on imported feed ingredients, like soymeal, corn, and fishmeal. The sector has sought to reduce this import dependency in order to improve its competitiveness. In response, the government in recent years has encouraged farmers to expand their production of soybeans and other feed ingredients. However, domestic soybean production

remains very limited and insufficient to meet the growing demands from both the poultry and aquaculture sectors.

At the same time, to support chicken meat exports, the government previously instituted the [Inward Processing Regime \(IPR\)](#) that allows poultry companies to import certain feed ingredients at a zero duty. These feed ingredients are only allowed to be used to produce chicken meat for export. From Post’s perspective, the existence of the IPR regime dilutes the incentive to reduce the country’s dependence on imported feed ingredients.

Figure 2. Chicken Slaughter, Chicken Meat Production, and Chicken Consumption (2019-23)

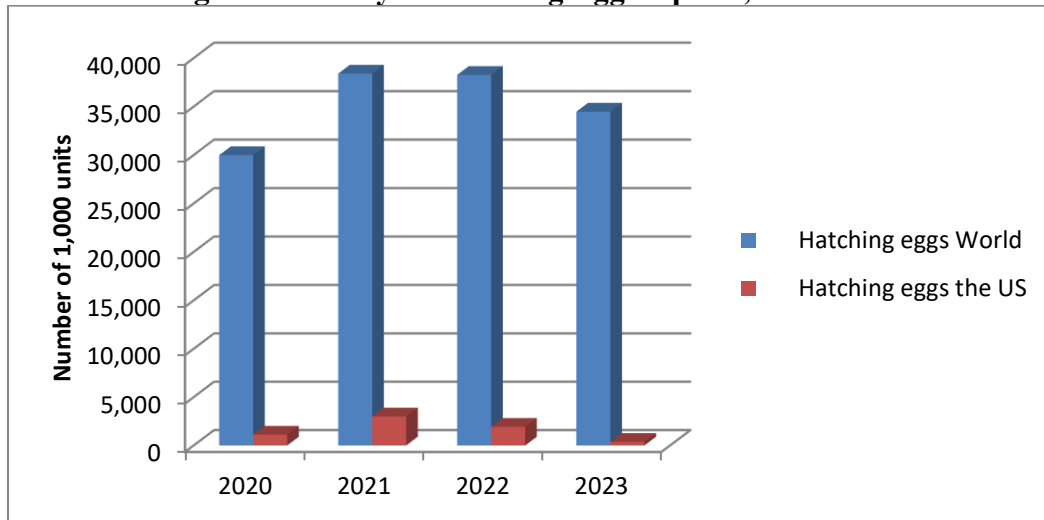


Source: Turkish Statistical Institute (TurkSTAT), 2024

One other longstanding constraint the poultry sector faces is a reliance on imported breeding materials, namely hatching eggs and day-old chicks. However, some of that dependence has been mitigated in the last couple of years after a European investor set up a facility to produce day-old chicks and hatching eggs. With this facility coming online, imports of breeding materials decreased by nine percent in 2023.

Türkiye primarily imports hatching eggs from the United Kingdom, Netherlands, and France. Imports of U.S. hatching eggs have declined 10 percent in the first of 2024 because of commercial cases of highly pathogenic avian influenza (HPAI) in the United States. In the case of day-old chicks, imports mainly come from Spain, United Kingdom, and France. Türkiye hasn’t imported any day-old chicks from the United States so far this year.

Figure 3. Türkiye’s Hatching Egg Imports, 2020-2023



Source: Trade Data Monitor, LLC.

Consumption:

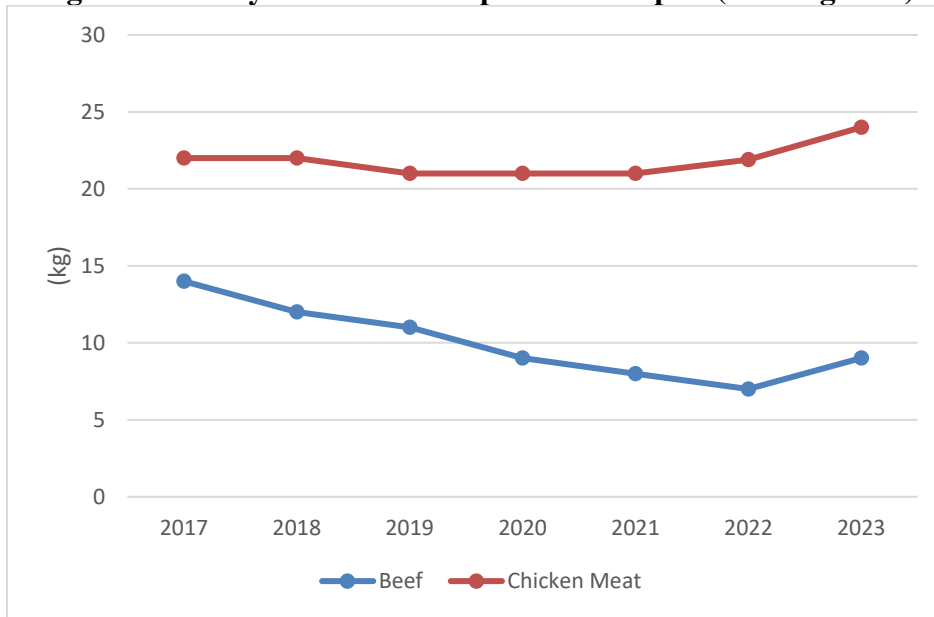
With production expected to have a record-breaking year, chicken meat consumption is likewise set to hit a record of nearly 2.2 MMT in 2025. This projection assumes consumers will increase their intake of chicken as domestic economic conditions improve. An expected increase in the millions of tourists coming to Türkiye every year will also contribute to increased consumption.

For 2024, the chicken meat consumption estimate is revised higher to 2.0 MMT as demand continues to remain strong even though retail prices have doubled over the past year. Part of the reason for strong demand is because chicken is at least four times cheaper than ground beef. One other factor contributing to higher consumption was the timing of the Sacrifice holiday, a weeklong religious celebration marking the end of Ramadan when people tend to eat more meat. This year, chicken consumption was more pronounced because the holiday fell in June which is the start of the outdoor barbeque season.

In May of this year, in hopes of stabilizing skyrocketing retail prices for chicken, the Ministry of Trade imposed a quota on chicken meat exports. Since the quota went into effect, the retail price of chicken has stabilized at 100 TL/kg (\$2.94/kg) as shown in Figure 5. Despite the quota, this price is not expected to soften given ongoing inflationary pressures in the country.

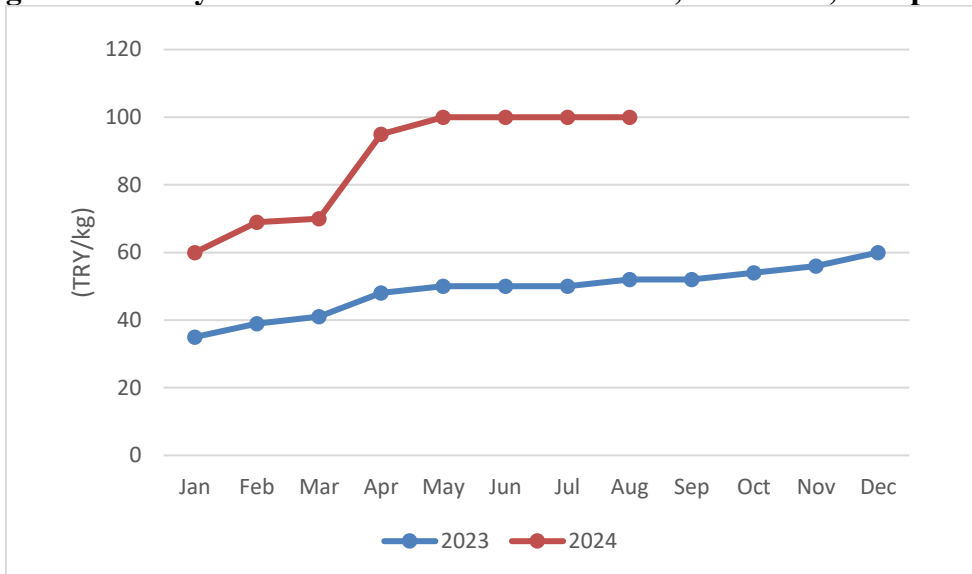
About 60 percent of the chicken produced in Turkey is consumed as a whole bird, and the remaining 40 percent is consumed as cuts, such as thighs, breasts and wings.

Figure 4. Türkiye Meat Consumption Per Capita (in Kilograms)



Source: Turkish Red Meat Producers Association and Turkish Poultry Industrialist Associations, 2024

Figure 5. Poultry Meat Prices at Domestic Markets, 2023-2024, Comparison



Source: Price data collected by Post from middle-income grocery stores. The Turkish Statistical Agency (TurkStat) has not published this price data since April 2022. As of August 29, 2024, the exchange rate was \$1 = 34 TL.

Trade:

Export figures have been updated from 2021 onward to reflect a new methodology.

Imports and Transshipments

Türkiye does not import chicken meat for domestic consumption but serves as a major transshipment hub for product going to countries in the Middle East because of Türkiye's central location. Transshipments are not included in the PSD balance sheet.

Most of the U.S. chicken that is transshipped through Türkiye goes to Iraq (80 percent) and Syria (20 percent). In 2023, a little more than 11,000 MT of U.S. chicken, valued at \$8.7 million, was transshipped via Türkiye.

Türkiye restricts transshipments of non-heat-treated poultry products from countries where commercial cases of highly pathogenic avian influenza (HPAI) have occurred. In the case of the United States, restrictions are limited to the HPAI-affected state. As these restrictions are constantly changing, please refer to the [FSIS Export Library](#) for the latest information on restricted states. Imports of non-heat-treated products from the United States that are destined to American military commissaries in Türkiye are restricted from entering Türkiye if the product has originated from a restricted U.S. state or transited through a third country/region where HPAI has been detected. Please click [here](#) for the list of HPAI-restricted countries and regions.

For protectionist reasons, Türkiye discourages chicken imports using high customs duties. The tariff on imported chicken meat is 65 percent and 121.5 percent for processed chicken products (HTS 160232). These higher duties end up protecting the domestic industry from outside competition.

Exports:

In 2025, chicken meat exports are forecast at 374,000 MT, up year-over-year by 8 percent and in line with the average growth rate in exports. This projection parallels an increase in chicken production and assumes steady export demand and no intervention by the Turkish government to limit exports. Iraq is expected to remain the top export destination for Turkish chicken. In recent years, chicken meat exports to Iraq have accounted for about half of total amount exported.

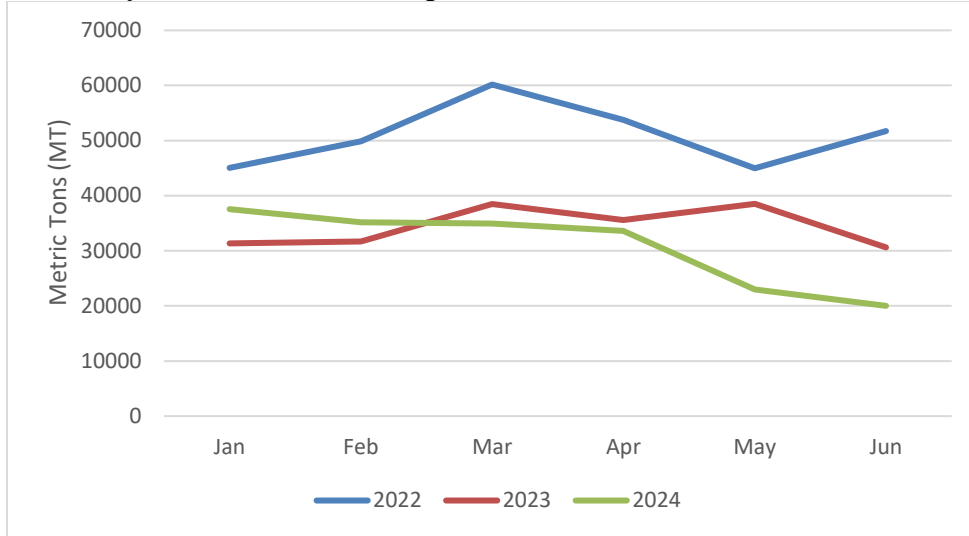
For 2024, the chicken meat export estimate is cut by 22 percent to 347,000 MT due to the government's decision to enact an export quota from May-December of this year to stabilize skyrocketing retail prices for chicken meat, excluding paws and mechanically deboned meat (MDM). The monthly quota was initially fixed at 10,000 MT from May-July.¹ However, according to sector contacts, after industry-government negotiations, the government reportedly agreed to increase the monthly quota to 22,500 MT starting in August, as long as the poultry industry kept retail prices stable.

Since the initial quota came into effect, monthly export volumes have contracted significantly. The export volumes exceeded the quota because of shipments that were in the pipeline when the quota was announced. See Figure 7. With the expanded quota starting in August, sector contacts expect exports to immediately increase. The local poultry sector was initially concerned that this limit on exports was going to result in them losing market share in Iraq, their biggest export market. However, according to industry contacts, the threat has dissipated somewhat since Iraq reportedly has large stocks of Turkish poultry in frozen storage.

¹ For more information, please refer to our earlier [GAIN Report \(TU2024-0022\)](#)

In addition to the quota, past cases of HPAI as well as political and economic turmoil in the region have to a lesser extent also contributed to reduced export volumes in 2024.

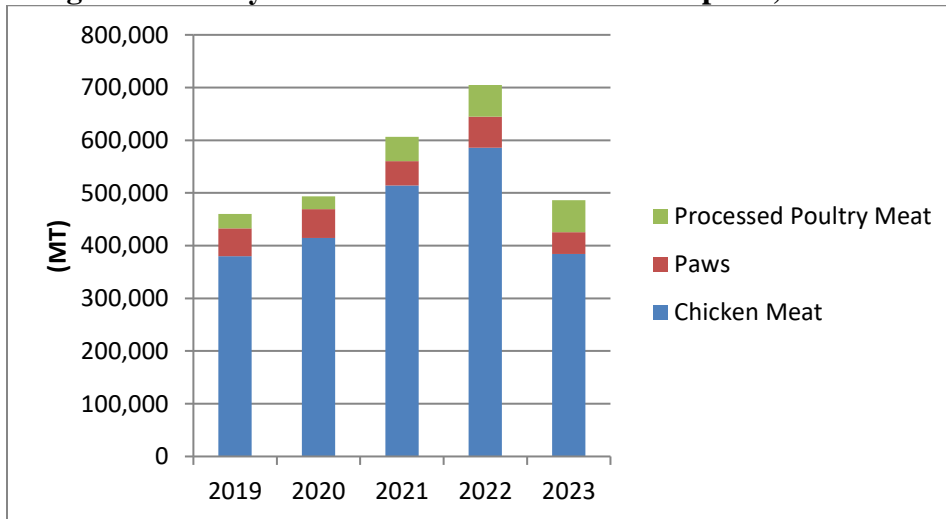
Figure 6. Türkiye’s Chicken Meat Exports, 2022-2024, First Six Months Comparison



Source: Trade Data Monitor, LLC.

In 2023, Turkish chicken meat exports totaled 445,047 MT and were valued at \$33 million. Exports were down year-over-year because top trading partners like Iraq, Iran, and Japan restricted trade after several HPAI cases occurred in Türkiye. Another cause of reduced export demand was the economic uncertainty leading up to the general election in May 2023.

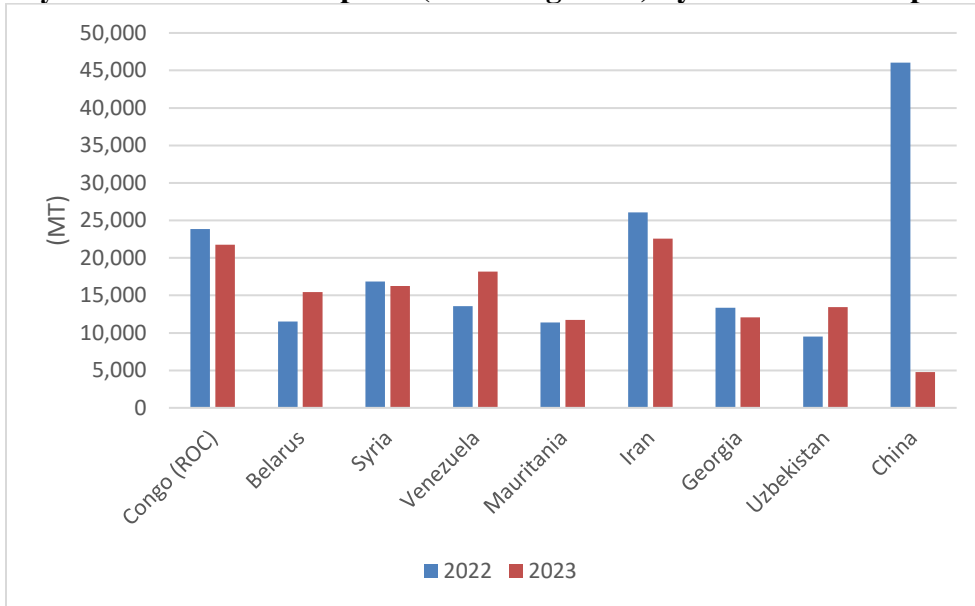
Figure 7. Türkiye’s Chicken Meat & Product Exports, 2019-2023



Source: Trade Data Monitor, LLC.

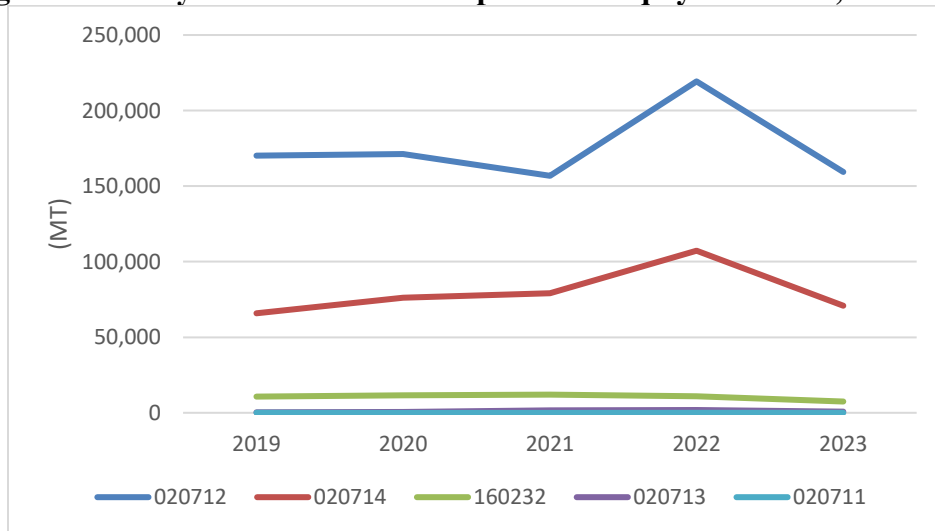
Note: Chicken paw export numbers were taken from Turkish Association of Poultry Meat Producers and Breeders.

Figure 8. Türkiye’s Chicken Meat Exports (Including Paws) by Countries Except Iraq, 2022-2023



Source: Trade Data Monitor, LLC.

Figure 9. Türkiye’s Chicken Meat Exports to Iraq by HS Codes, 2019-2023



Source: Trade Data Monitor, LLC.

020712: Meat And Edible Offal of Chickens, Not Cut in Pieces, Frozen

020714: Chicken Cuts and Edible Offal (Including Livers) Frozen

160232: Prepared Or Preserved Chicken Meat, Meat Offal or Blood, N.E.S.O.I.

020713: Chicken Cuts and Edible Offal (Including Livers) Fresh or Chilled

020711: Meat And Edible Offal of Chickens, Not Cut in Pieces, Fresh or Chilled

Production, Supply and Distribution Data:

Note: PS&D numbers exclude chicken paws.

Meat, Chicken	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	2330	2330	2380	2400	0	2600
Total Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2330	2330	2380	2400	0	2600
Total Exports (1000 MT)	459	445	480	347	0	374
Human Consumption (1000 MT)	1871	1885	1900	2053	0	2226
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	1871	1885	1900	2053	0	2226
Total Use (1000 MT)	2330	2330	2380	2400	0	2600
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	2330	2330	2380	2400	0	2600
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments