

4.6.9 Turkey

4.6.10 Demographics

The total number of poultry farms in Turkey was 13,931. Commercial chicken farms represent 100% of poultry farms in Turkey (Figure 246). The average size of a commercial chicken farm was 27,233 head.

Poultry production and consumption both increased in Turkey from 2010 to 2021. Poultry production in 2021 reached 2.4 million metric tons (Figure 247). Poultry consumption in 2021 was estimated at 1.8 million metric tons. Poultry production increased 63% from 2010 to 2021. Turkey's poultry consumption expanded 31%.

The total number of poultry stocks was 384.7 million head. An estimated 379.3 million head were chickens, which accounted for 98% of poultry stocks in 2020. The total number of turkeys was 4.8 million and represented 1% of the total poultry stocks in 2020. Ducks accounted for 560,000 head (less than 1%) of poultry stocks (Table 75).

In Turkey, poultry slaughter included 916.1 million chickens, 6.1 million turkeys, and 508,000 ducks. compared to 2010, chicken slaughter increased 9%, duck slaughter increased 54%, and turkey slaughter increased 66%.

In Turkey, poultry production included 2.1 million metric tons of chicken, 58,000 metric tons of turkey, and 1,000 metric tons of duck. Compared to 2010, chicken production increased 48%, duck production increased 54%, and turkey production increased 82%.

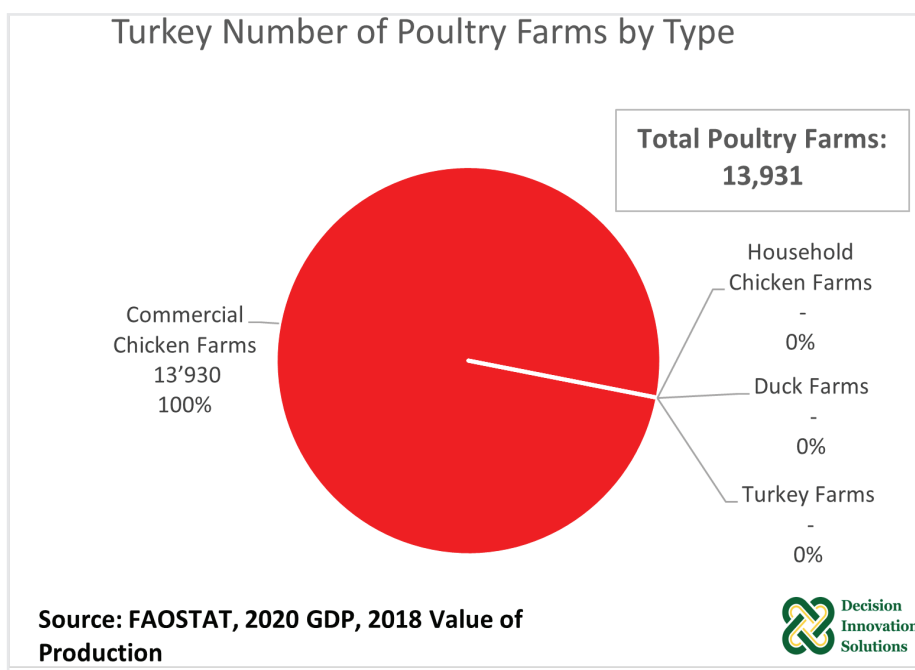


Figure 246. Turkey number of poultry farms by type

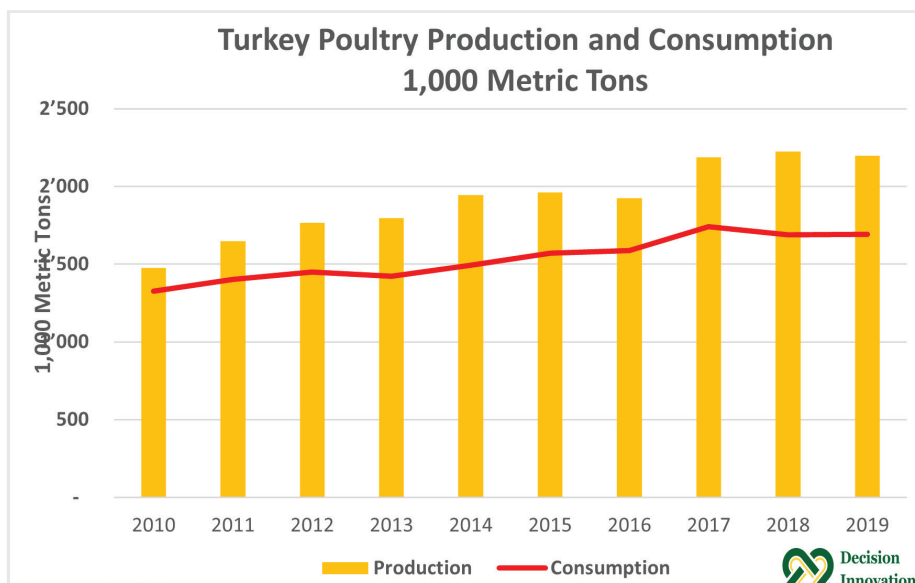


Figure 247. Turkey poultry production & consumption

TURKEY POULTRY STOCKS, SLAUGHTER, AND PRODUCTION					
1,000 head	Chickens	Ducks	Turkeys	Total	
Stocks	379'349	560	4'798	384'707	
Producing Animals/Slaughtered	916'126	508	6'064	922'698	
Production (1,000 MT)	2'138	1	58	2'197	

Sources: FAO, 2020

Table 75. Turkey poultry stocks, slaughter & production

4.6.10.1 GDP and Value of Production

The total GDP in Turkey was valued at \$720.1 billion in 2020. Non-agricultural production sectors accounted for an estimated \$666.1 billion, or 92% of the total GDP. Crop production was the largest agricultural production sector, representing about \$34.2 billion, or 5% of the total GDP. Red meat production was valued at \$15.9 billion or 2% of the total GDP. Chicken production was estimated to contribute 1% or \$3.8 million towards the total GDP. Although less than 1% of the total GDP, turkey production was estimated to represent \$207.7 million (Figure 248).

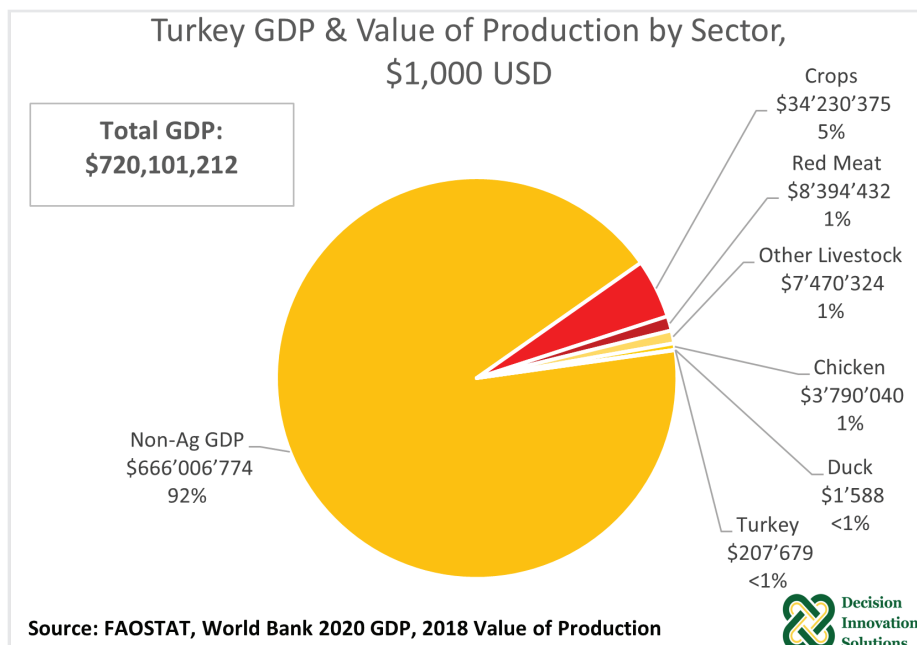


Figure 248. Turkey GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Turkey are estimated to be \$107.5 billion. Of this amount, \$10.0 comes from the poultry industry, with \$9.5 billion from chicken meat production, \$4 million from duck production, and \$500 million from turkey production. Agriculture pays a net value of \$1.5 billion in taxes, \$129 million of which is estimated to be from the poultry industry (Table 76).

ECONOMIC EFFECTS - TURKEY (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$54'094'438	\$53'358'035	\$107'452'473	\$1'481'674
Livestock	\$19'864'063	\$19'593'648	\$39'457'711	\$544'087
Poultry	\$3'999'307	\$5'990'962	\$9'990'269	\$128'564
Chicken	\$3'790'040	\$5'677'480	\$9'467'520	\$121'837
Duck	\$1'588	\$2'379	\$3'967	\$51
Turkey	\$207'679	\$311'103	\$517'782	\$6'676

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 76. Economic effects - Turkey

4.6.10.2 Labor

An estimated 31.6 million people worked in Turkey's labor force in 2020 (see Table 77). Approximately, 68% or 21.4 million were males, and 32% or 10.2 million were female. The non-agricultural sector employed 26.6 million people. The remaining 5.0 million worked in the agricultural labor sector. Of that total, approximately, 362,242 people were employed in poultry production.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - TURKEY			
	Total	Female	Male
Total Country Labor	31'624'253	10'175'295	21'448'958
Non-Agricultural Labor	26'585'749	8'012'228	18'573'521
Agricultural Labor	5'038'504	2'163'067	2'875'437
Total Non-Poultry Agricultural Labor	4'676'262		
Total Poultry Labor	362'242		
Chicken Labor	343'287		
Turkey Labor	18'811		
Other Poultry Labor	144		
Wages (\$1,000 USD)			
Total Meat Processing Labor	47'818		\$428'591
Livestock Processing Labor	32'388		\$290'290
Poultry Processing Labor	15'430		\$138'301

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 77. Agricultural labor force characteristics - Turkey

The total number of meat processing jobs in Turkey was 47,818 during 2020. Wages earned in meat processing totaled \$428.6 million. Livestock meat processing accounted for 32,388 jobs and \$290.3 million in wages earned. Poultry meat processing accounted for 15,430 jobs and \$138.3 million in wages earned.

4.6.10.3 Trade

The value of Turkey’s poultry exports was estimated at \$545.80 million with exports to Iraq representing 56% of total value in 2020. The second and third largest market for Turkey’s poultry exports were China, Hong Kong (\$42.5 million), and Libya (\$32.3 million) (see Figure 249 and Figure 250).

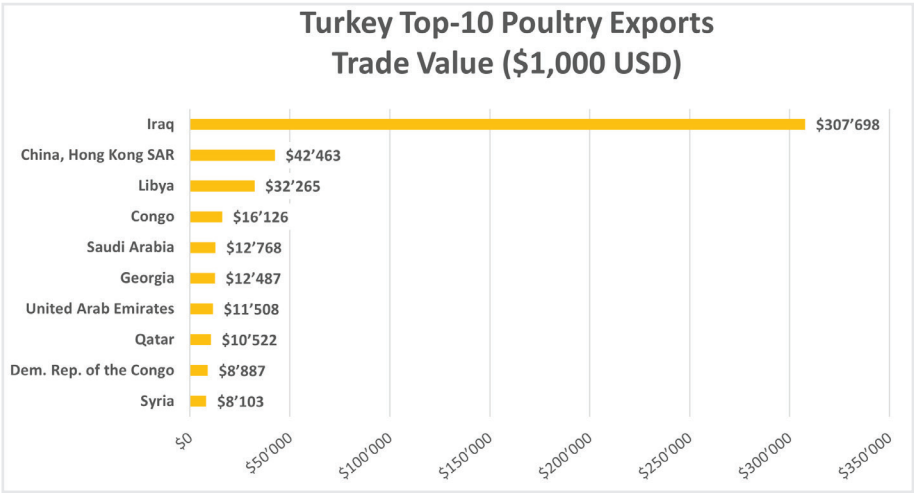


Figure 249. Turkey top 10 poultry exports, trade value

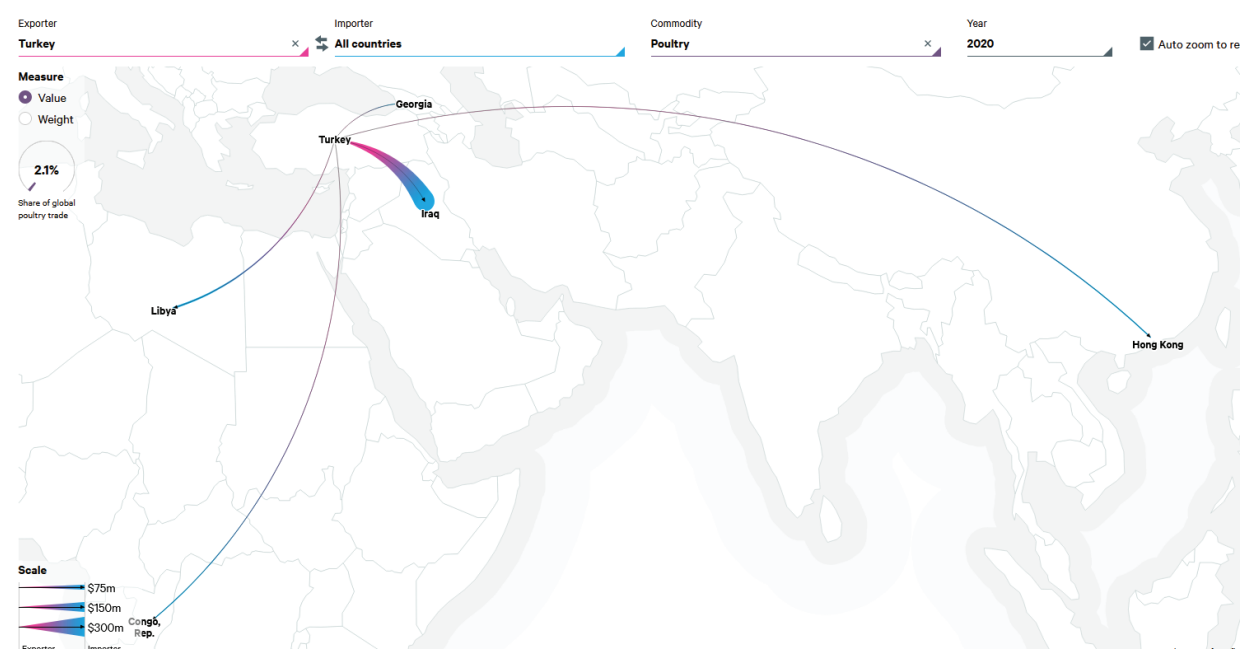


Figure 250. Turkey poultry export flows

In 2020, Turkey imported \$17.8 million in poultry meat from the USA, which was the main supplier of poultry meat to Turkey that year. Brazil was the second largest source of poultry meat imports for Turkey at \$12.4 million (see Figure 251 and Figure 252). According to the USDA FAS, Turkey produces enough poultry to meet domestic demand for poultry. Additionally, high custom tariff rates of 100% on poultry meat deters exports to Turkey. Transshipment of poultry meat through Turkey is allowed. Thus, Turkey serves as a hub to ship poultry meat to countries in the Middle East²¹.

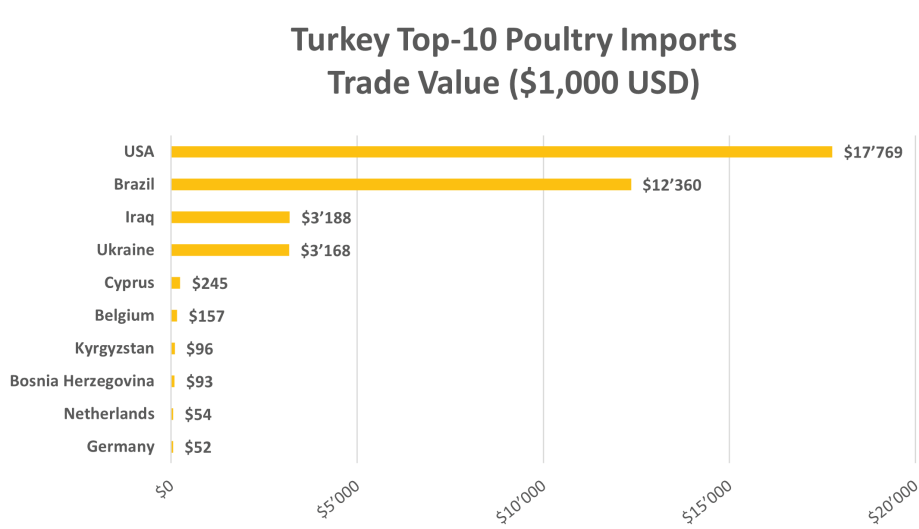


Figure 251. Turkey top 10 poultry imports, trade value

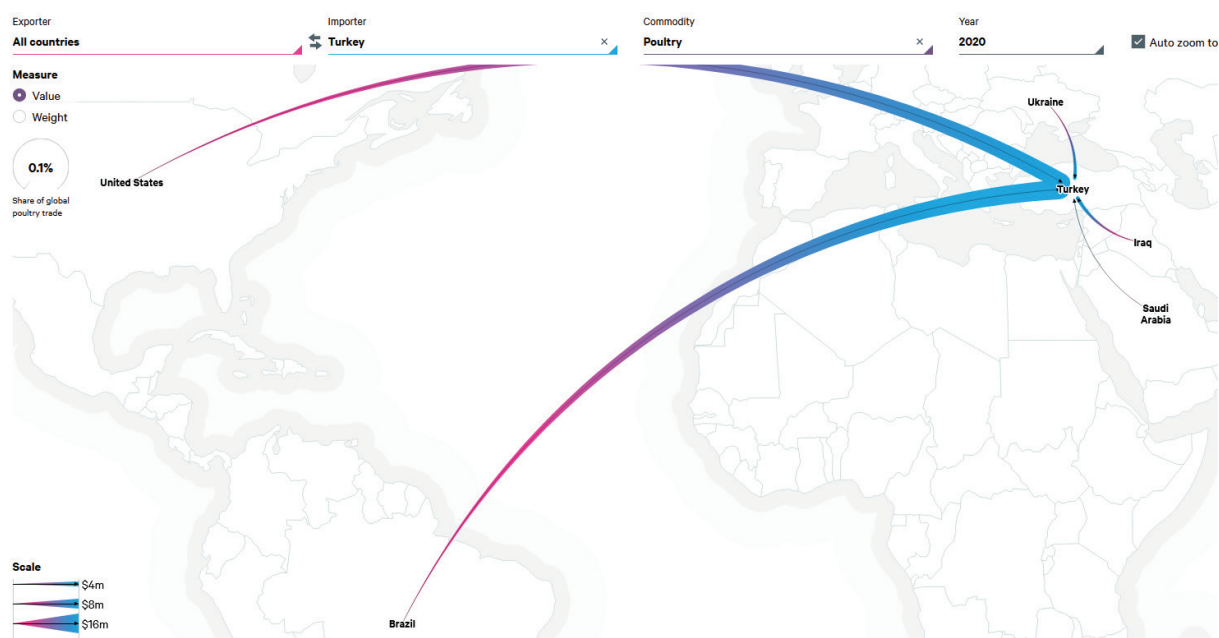


Figure 252. Turkey poultry import flows

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