



EGGS AND POULTRY MEAT



CONTENTS

I. INTRODUCTION

II. CURRENT SITUATION

- LEGAL BASIS
- STAKEHOLDERS
- REGISTERS AND FARM STRUCTURE (DATABASE)
- TYPE of OWNERSHIP
- PRODUCTION AND MARKETING
- STRUCTURE of TRADE AND INDUSTRY
- PRICE FORMATION
- SUPPORT FOR FARMERS
- MARKETING STANDARDS
- IMPORTS AND EXPORTS
- AGREEMENTS WITH THIRD COUNTRIES
- EXPORT SUBSIDIES

III. EVALUATION



I. INTRODUCTION



- Approximately **2 million** people make a living from the poultry sector.
- The poultry sector constitutes one of the most dynamic and strong agricultural sectors with an approximate annual turnover of **2.5-3 billion USD**.
- According to data published by FAOSTAT in 2004, Turkey was in **14th position** in the world with a chicken meat production of **943,000 tons**.

Source: The Poultry Meat Producers and Breeders Association (BESD-BIR)



POULTRY POPULATION (x1000) *			
	2002	2003	2004**
Laying hens	57,139	60,400	58,774
Broilers	188,637	217,133	238,102
Turkeys	3,092	3,994	3,902
Geese	1,400	1,337	1,251
Ducks	832	811	770

Source The Turkish Statistics Institute (TURKSTAT)

***** Data for the poultry population is the numbers of live animals by the end of the year.

****** Figures for the year 2004 are provisional.



EGG and MEAT YIELDS

- Egg yield per hen during laying period of 1 month is **22 eggs**.
- Broilers are slaughtered at the age of **42 - 45 days**,
and at an average live weight of **2.2 - 2.5 kg**.

Source: MARA



PRODUCTION of EGGS and POULTRYMEAT

	2002	2003	2004*
Slaughtered chicken**	416,002,290	512,750,071	512,238,553
Slaughtered turkeys**	2,412,401	3,636,838	4,181,881
Slaughtered ducks**	2,900	5,210	5,040
Slaughtered geese**	3,550	5,345	12,955
Chicken meat production (tons)***	696,160	872,419	876,774
Turkey meat production (tons)***	30,372	32,801	37,623
Duck meat production (tons)***	4	10	10
Goose meat production (tons)***	11	21	51
Number of hen eggs (x1000)	11,554,910	12,666,782	11,055,557

Source

TURKSTAT

*

Figures for the year 2004 are provisional.

**

Numbers of animals slaughtered within the year.

Data collected from slaughterhouses.



II. CURRENT SITUATION



LEGAL FRAMEWORK

1 –THE LAW

- ❖ Law on Animal Health Control (1986)
- ❖ Law on Animal Protection (2004)
- ❖ Law on Food Production, Consumption and Inspection (2004)
- ❖ Law on Agricultural Producers Organisations (2004)
- ❖ Law on Agricultural Insurance (2005)
- ❖ Law on Tobacco (2002)



2 – By-law on

- **By-law on Animal Health Control (1989)**
- **By-law on the Turkish Food Codex (1997)**
- **By-law on the Operation and Health Control of Hatcheries and Breeder Holdings (2004)**
- **By-law on the Operation and Inspection Procedures and Principles of Production Facilities of Poultrymeat and Poultrymeat Products (2005)**
- **By-law on the Operation Procedures and Principles of the Agricultural Insurance Pool (2005)**
- **By-law on the Establishment Procedures and Principles of Agricultural Producer Organisations (2005)**



3 – Communiqué;

- **Communiqué on Standardisation in Foreign Trade (2005)**
- **TS 1068 Hen Eggs In Shell**
- **Communiqué Laying Down Marks and Symbols Pertaining to Batch Numbers of Foodstuffs (2002)**
- **Communiqué of the Turkish Food Codex on Rules of General Labelling and Labelling with Regard to Nutrition for Foodstuffs (2002)**
- **Communiqué on Fresh Meat, Meat Preparations and Mixtures of Meat Preparations (2000)**
- **Communiqué on Requirements for the Issue of Control Documents for Imports of Live Chicken, Chicken Meat and Eggs (2000)**
- **Communiqué of the Turkish Food Codex on Egg and Egg Products (2000)**
- **Instructions on Legal Arrangements for Exports of Poultrymeat and Poultrymeat Products to the European Union (2003)**



STAKEHOLDERS

The Ministry of Agriculture and Rural Affairs (MARA)

The Turkish Statistics Institute (TURKSTAT)

The Undersecretariat for Foreign Trade (UFT)

The Turkish Standards Institute (TSI)

The Poultry Meat Producers and Breeders Association (BESD-BİR)

The Turkish Association of Egg Producers (TYUD)

Agricultural Chambers

The Meat and Fish Company



REGISTERS AND FARM STRUCTURE (DATABASE)

The total number of poultry holdings in Turkey is **10,067**.

Amongst these holdings;

- **9,758** are for both egg and poultry meat production;
- **233** are for breeding stocks;
- **76** are hatcheries.

The total number of pens pertaining to these holdings is **16,581**.

Amongst these pens;

- **12,652** are for broiler chickens;
- **2,805** are for laying hens;
- **1,124** are for breeder flocks.



REGISTERS AND FARM STRUCTURE (DATABASE)

- Information pertaining to poultry holdings is registered in the **Veterinary Information System (VIS)** in association with the geographical coordinates of the holdings.
- Registration is carried out by Provincial Directorates of MARA. Currently **8,235** pens (50%) are registered, and the total capacity of these pens has been determined as **696,702,197**.



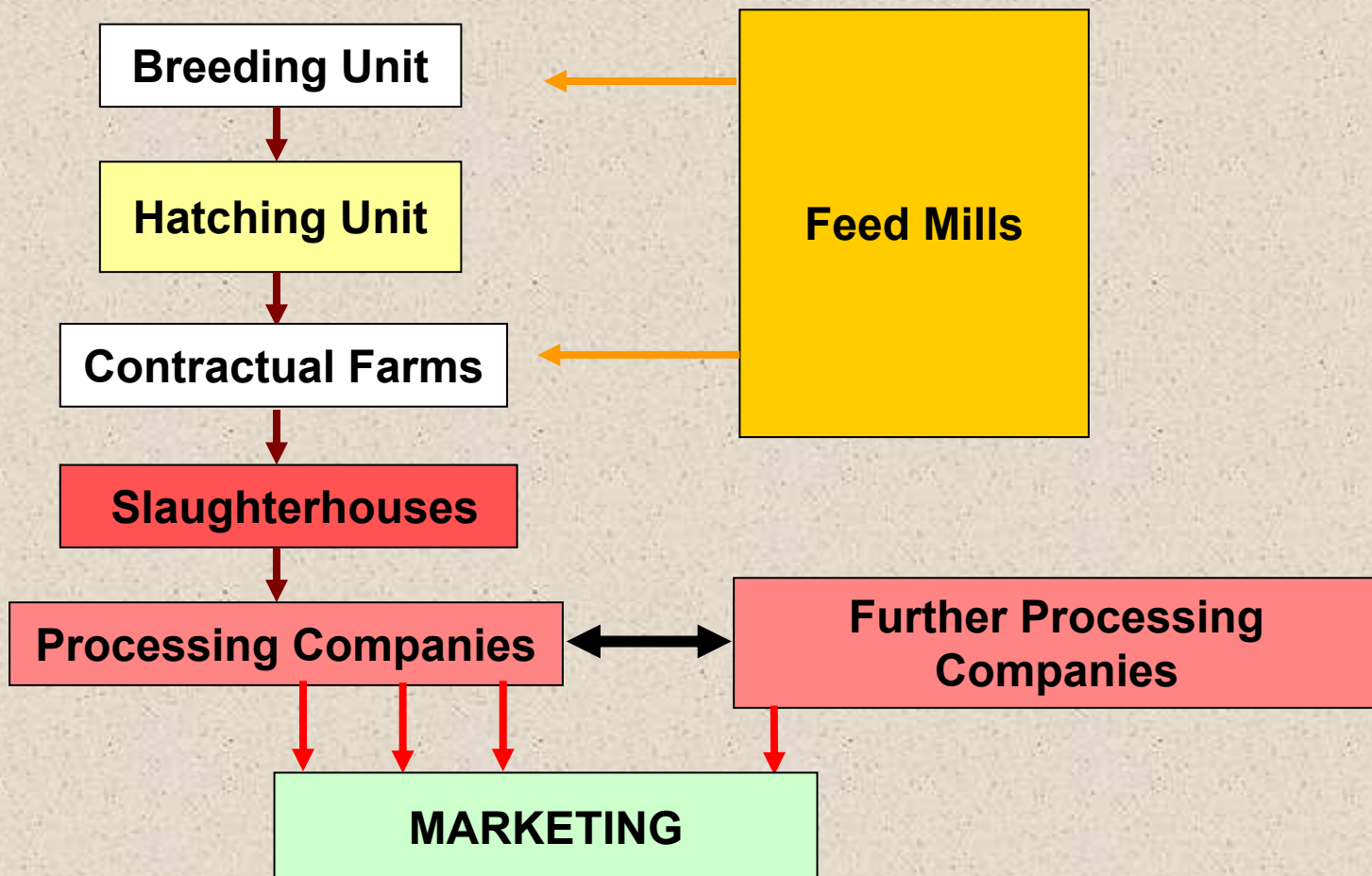
TYPE of OWNERSHIP

- **Holdings of laying hens**
 - 90 % private**
 - 10 % cooperatives**
- **Holdings of broiler chickens**
 - 100 % private**

Integrated farms implement contractual production.



PRODUCTION AND MARKETING





STRUCTURE of TRADE AND INDUSTRY

TYPE of PLANT	NUMBER of PLANT
Poultry Slaughterhouses	83
Cutting Plants	61
Processing Plants	21
Cold Storages	85

Source: MARA

- **62 slaughterhouses have cutting facilities.**
- **6 slaughterhouses have both cutting and processing facilities.**
- **Only 1 slaughterhouse belongs to the State.**
- **The remaining holdings are private enterprises.**



PRICE FORMATION

For the eggs and poultry meat sectors:

- **Public intervention does not exist.**
- **State trading/price control/State monopoly does not exist.**

SUPPORT FOR FARMERS

No structural or income support is paid to farmers.



MARKETING STANDARDS

Standards that apply to eggs, egg products and poultry meat are established by

- **Turkish Standards Institute (TSI)**
- **Ministry of Agriculture and Rural Affairs (MARA).**
- **Technical specifications of MARA in the context of Turkish Food Codex are mandatory in the internal market and import.**
- **At export and import, meeting the minimum criteria laid down by Turkish Food Codex, eggs are also subject to complying with quality standards laid down by the TSI and are checked by the **Group of Inspectors for Foreign Trade** under the Undersecretariat for Foreign Trade**



Technical Specifications of Poultrymeat

Compliance with the Turkish Food Codex Communiqué

(23960/2000) is compulsory.



PREFERENTIAL TRADE

EU COUNTRIES

- Turkey has no preferential import arrangement.
- Turkey has preferential export possibility for turkey meat within a tariff quota (1.000 tonnes, reduced duty).



CANDIDATE COUNTRIES

- Under Turkey-Bulgaria FTA Turkey has preferential export possibility for turkey meat within a tariff quota (100 tonnes reduced duty)
- Under Turkey- Bulgaria FTA, some poultry products are subject to import concession (10 t/ reduced duty).
- Under Turkey- Macedonia FTA, Turkey has preferential export possibility for poultry meat within a tariff quota (3.000 tonnes, 0 % duty).



THIRD COUNTRIES

- Under Turkey- Bosnia and Herzegovina all eggs are reciprocally subject to a concession of 0% duty on unlimited basis.
- Under Turkey- EFTA FTA (Switzerland), Turkey has preferential export possibility for poultry liver with 0% or reduced duty).



EXPORT SUBSIDIES

Export refunds applied to the exportation of eggs, poultrymeat and further processed products include:

6\$/1000 pcs export refund

for eggs with a quantitative limitation of 78%,
indicating the share of exported quantity eligible to receive the refund.

186\$/tons export refund

for poultrymeat with a quantitative limitation of 14%,
indicating the share of exported quantity eligible to receive the refund.

250\$/tons export refund

for further processed products with a quantitative limitation of 22%,
indicating the share of exported quantity eligible to receive the refund.



III. EVALUATION



REQUIREMENTS FOR ALIGNMENT WITH THE EU ACQUIS

- **Establishment of Administrative structure to implement relevant acquis**
- **Establishment of a price reporting system for eggs and poultrymeat**
- **Organisation of the egg sector**



THANK YOU FOR YOUR ATTENTION