

**Required Report:** Required - Public Distribution

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

**Country:** Turkiye

**Post:** Ankara

**Report Category:** Poultry and Products

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### **Report Highlights:**

In calendar year (CY) 2026, chicken meat production is forecast to increase 8 percent to 2.9 million metric tons (MMT). This projected increase is in line with historical trends of 8-10 percent per year. For CY 2025 the chicken meat production estimate is 2.7 MMT, 9 percent higher than in 2024, due to increasing export demand expectations. In 2026, chicken meat consumption is expected to increase 7 percent to 2.45 MMT. This projection assumes consumers will increase their chicken intake and chicken meat will remain the top protein source due to high beef prices. In CY 2026 chicken meat exports are forecast to increase 6 percent to 445,000 MT due to rising export demand and no government limits on chicken exports. This report was corrected to more accurately describe chicken meat consumption figures.

## Commodities:

Meat, Chicken

## Production:

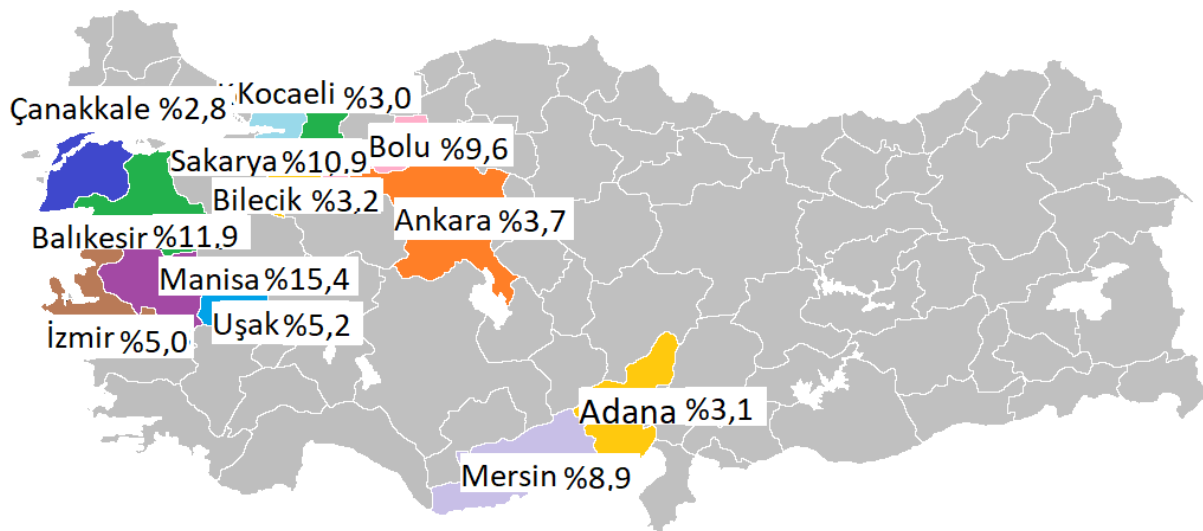
In calendar year (CY) 2026 chicken meat production is forecast to increase 8 percent to 2.9 million metric tons (MMT). This projected increase is in line with historical growth rates of about 8-10 percent per year. This forecast also assumes stable domestic and export demand for Turkish chicken products, with no government limits on chicken exports.

For CY 2025 the chicken meat production estimate is 2.7 MMT, 9 percent higher than 2024, due to high export demand expectations; domestic consumption is not meeting the sector's expectations to increase their production capacity. In 2024 Turkiye produced 2.5 MMT of chicken meat.

The year-on-year production increase in recent years is only 3 percent, which is below the average growth rate. The reason for this slower rate is mostly attributed to the Turkish government's decision to enact an export quota to stabilize rising domestic retail prices of chicken meat. Export quotas and export challenges are the main factors in the slowdown in production.

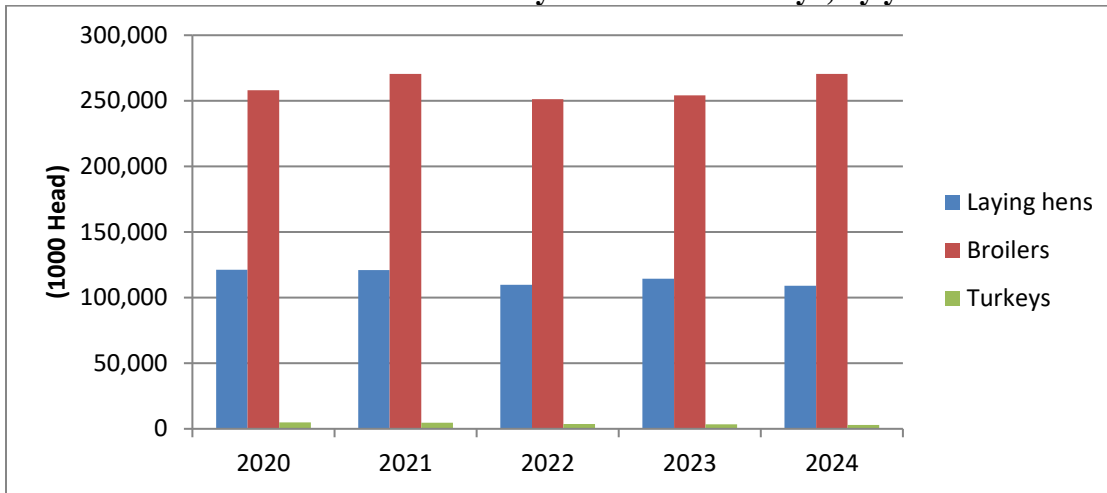
The broiler sector continues to struggle with higher input costs, especially feed, and low profitability. However, corn and soy prices have been on a downward trend since last year, which is helpful in increasing production without feedcost pressure. Post contacts report that they are avoiding reflecting inflation costs on poultry meat prices, and the sector is still grappling with complicated labor issues.

**Chart 1. The leader provinces in Turkiye on Chicken Meat Production**



Source, The Ministry of Agriculture and Forestry, 2025

**Chart 2. Number of Poultry Animals in Turkiye, by years**

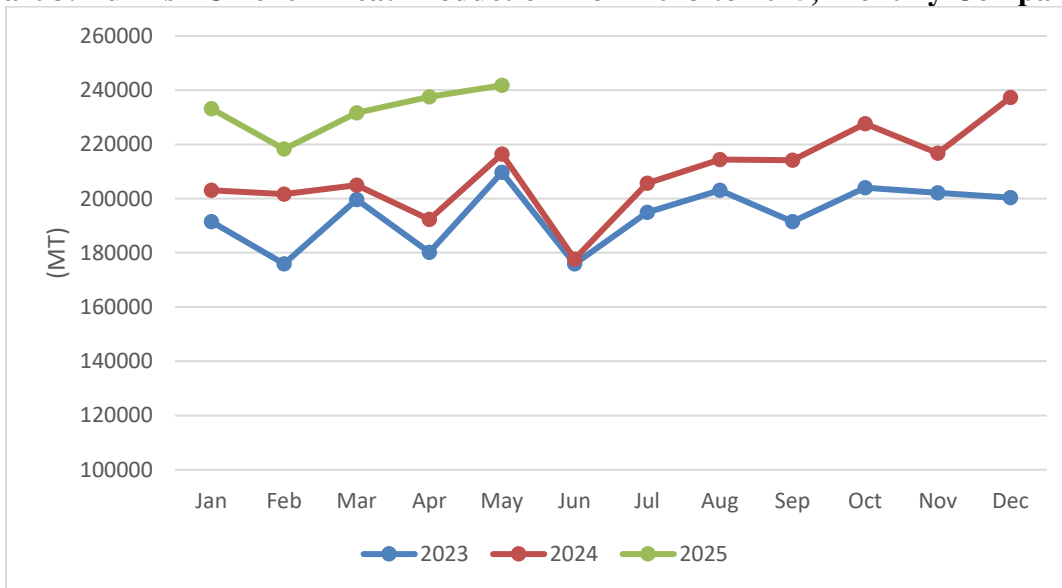


Source: Turkish Statistical Institute (TurkSTAT), 2025

Highly Pathogenic Avian Influenza (HPAI) disease is of significant concern for the Turkish poultry sector, since Turkiye is located on three major migration routes. Serious precautions and response strategies are needed.

In late 2024 more than 3.5 million laying hens were culled due to HPAI, and the sector is trying to repopulate their herds.

**Chart 3. Turkish Chicken Meat Production from 2023 to 2025, Monthly Comparison**



Source: Turkish Statistical Institute (TurkSTAT), 2025

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 to improve its competitiveness.

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.

### **Government Supports Contracted Production**

Contracts between chicken producers and processing companies are under government-issued agreement. With contracts, chicken producers purchase chicks and feed from the processing companies and then return the chickens ready to slaughter. According to the contract, the chick and feed quality must meet certain standards. However, under the current economic environment, chicken producers and industry often disagree on pricing, leading to the ministry's intervention.

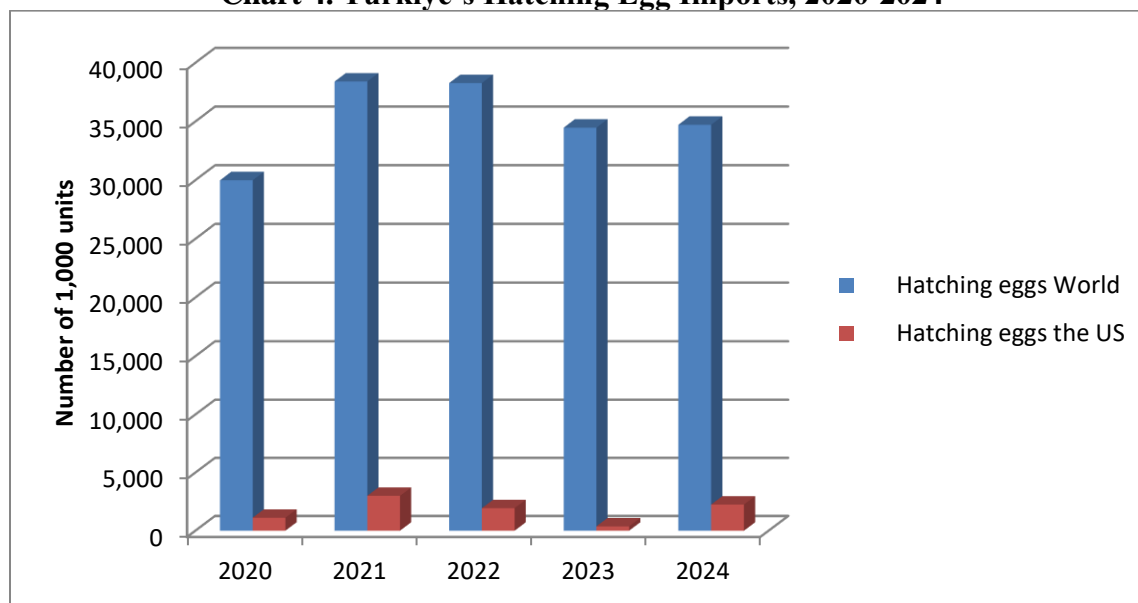
### **Addressing Animal Welfare Concerns**

By 2024 many domestic and international companies operating in Türkiye have committed to abandon cage-raised eggs, responding to increasing consumer demand for transparency and more animal welfare-friendly production. According to the [2024 Cage-Free Brands report](#), which includes 187 brands operating in hotels, retail, cafe/restaurant, prepared food, and the catering sector in Türkiye, 94 of these brands have issued commitments to eliminate cage-raised eggs, while 93 have not yet made any commitments. The Ministry of Agriculture and Forestry has enacted animal welfare regulations in support of cageless systems, but they have extended the transition period for enforcement.

### **Breeding Material Struggles**

Another 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 in Ankara. Türkiye has sought to increase its parent stocks, but there is still a 15 percent gap in production compensated by imports. Türkiye primarily imports hatching eggs from the United Kingdom, France and Netherlands. Imports of U.S. hatching eggs declined 60 percent in the first half of 2025 because of commercial cases of HPAI in the United States. In the case of day-old chicks, imports mainly come from Spain, the United Kingdom, and France. Türkiye hasn't imported any day-old chicks from the United States so far this year.

**Chart 4. Türkiye's Hatching Egg Imports, 2020-2024**



Source: Trade Data Monitor, LLC.

### **Consumption:**

In 2026, chicken meat consumption is estimated to increase 7 percent to 2.45 MMT. This projection assumes consumers will increase their chicken intake and chicken meat will remain the top protein source due to high beef prices. Sector representatives believe that poultry meat prices will increase 5-10 percent in 2025, but they believe that the price increase will remain below inflation levels.

In 2025 consumption is expected to increase 9 percent to 2.30 MMT due to the affordability of chicken meat. It is expected that chicken meat consumption per capita will exceed 25 kg in 2025. In 2024, chicken meat consumption was 2.10 MMT.

According to Turkish government data (TurkSTAT), the lamb price index increased by 660.6 percent, the beef price index by 616.7 percent, and the overall meat price index increased by 487.9 percent in 2025 when compared with the year 2021.

Low-income groups are the most affected by Türkiye's high inflation, and meat consumption has significantly decreased. Per capita beef consumption was 22.89 kg in 2021, but this decreased to 16.6 kg in 2024. Chicken and fish consumption, however, increased. In 2024, chicken meat consumption per capita was 24.1 kg.

In May of 2024, in an effort to stabilize 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 stabilized at 100 TL/kg (\$2 /kg). Despite the quota, this price is not expected to soften given ongoing inflationary pressures in the country. As of June 2025, chicken meat rose to 120 TL/kg (\$3).

Fast-food restaurants and mass-catering companies prefer chicken due to its cost-effectiveness. Products like chicken döner kebab, chicken burgers, and chicken nuggets are widely consumed, especially among young people.

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.

### **Trade:**

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

### **Imports and Transshipments**

Turkiye 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 Turkiye's central location.

Transshipments are not included in the PSD balance sheet.

Most of the U.S. chicken that is transshipped through Turkiye goes to Iraq (80 percent) and Syria (20 percent). According to Turkish statistics, 9,079 MT of U.S. chicken, valued at \$10.4 million, was transshipped via Turkiye in 2024. However as of July 2025 U.S. transshipments have all but halted due to previously unannounced Turkish regulations on transits which impose an undue burden on exporters. On July 17, 2025, FAS Ankara was informed by local industry that MinAF would not accept U.S. poultry transshipping through its territory, unless a new transit certificate that aligns its requirements with EU import protocols is provided. This measure has not been notified to the World Trade Organization (WTO). Moreover, MinAF refuses a transition period for exporter countries to be prepared, and they have provided no formal notification to Post on these new rules. Post will provide a separate report on this development when the regulation and its implementation plan are shared publicly.

Turkiye 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 Turkiye are restricted from entering Turkiye 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 more information about transshipment of frozen poultry meat and processed poultry meat products through Turkiye, please [click here](#).

For protectionist reasons, Turkiye uses high customs duties to discourage chicken imports. 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.

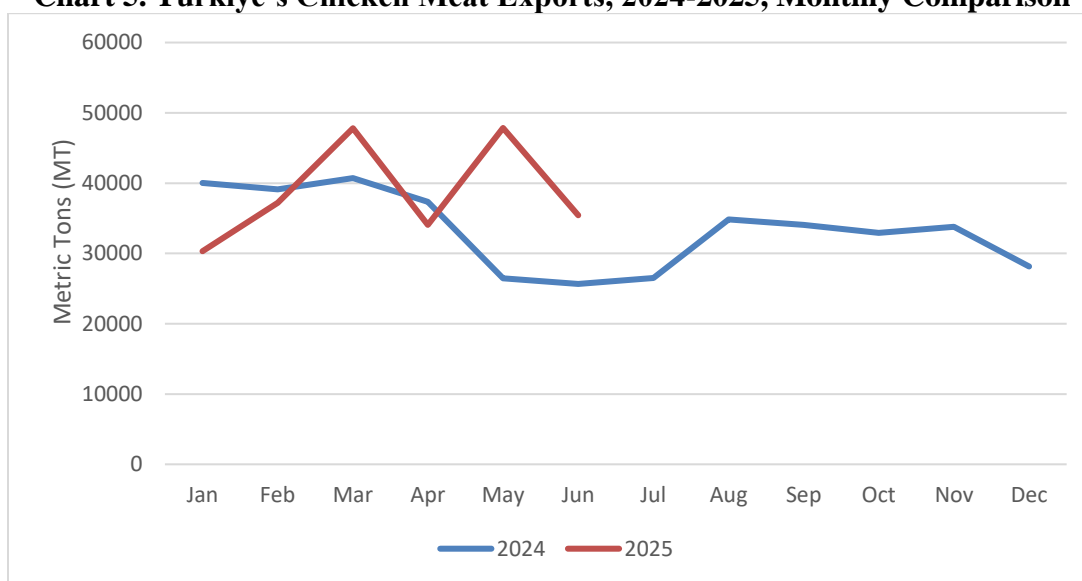
### **Exports:**

In CY 2026 chicken meat exports are forecast to increase 6 percent to 445,000 MT due to stable domestic and export demand for Turkish chicken products, with no government limits on chicken exports.

For CY 2025 the chicken meat export estimate is 420,000 MT, 5 percent higher than 2024, in line with the normal export growth rate, with no export limitation by the government. Turkish chicken meat exporters are expecting to reach \$1.5 billion export value in 2025.

In CY 2024 chicken meat exports decreased to 399,581 MT (\$649 million), which is 17 percent lower than 2023 due to the government's export restrictions in May 2024 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,<sup>1</sup> however, after industry-government negotiations, the government agreed to increase the monthly quota to 22,500 MT starting in August if the poultry industry kept retail prices stable. 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.

**Chart 5. Turkiye's Chicken Meat Exports, 2024-2025, Monthly Comparison**



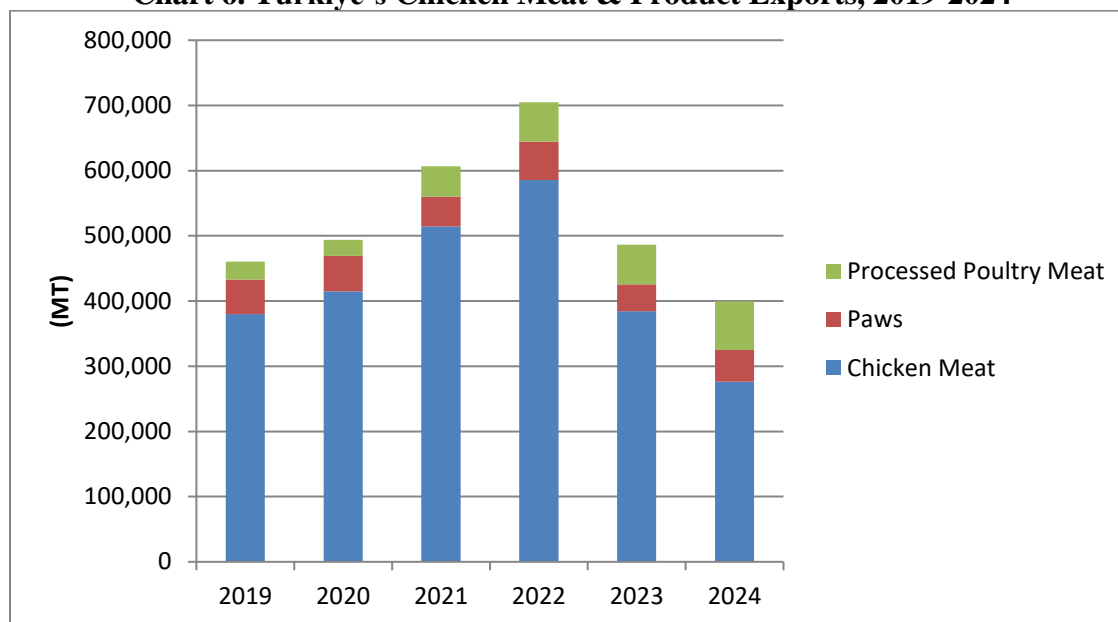
Source: Trade Data Monitor, LLC.

HPAI outbreaks and economic crises disrupted the balance of poultry meat exports, which had been otherwise stable. Furthermore, the stress created by the Ministry of Trade's "Chicken Meat Export Limitation" decision, implemented between May 1 and December 31, 2024, caused an additional, unexpected crisis in the sector. Despite the decrease in chicken and turkey meat exports (-29 percent) in 2024 due to the restriction, exports of chicken paws increased 39 percent, and further processed products increased 23 percent, which were not subject to export restrictions.

While Turkiye was exporting to over 90 countries each year prior to 2024, that number dropped to around 75 following the export restriction. Last year, 70 percent of total exports (excluding chicken feet) in quantity and 58 percent in value were sent to Iraq. After Iraq, Turkiye sent chicken meat to Venezuela, Uzbekistan, Syria, Mauritania, U.A.E., Belarus, Qatar, Georgia, and Kuwait.

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

**Chart 6. Turkiye's Chicken Meat & Product Exports, 2019-2024**

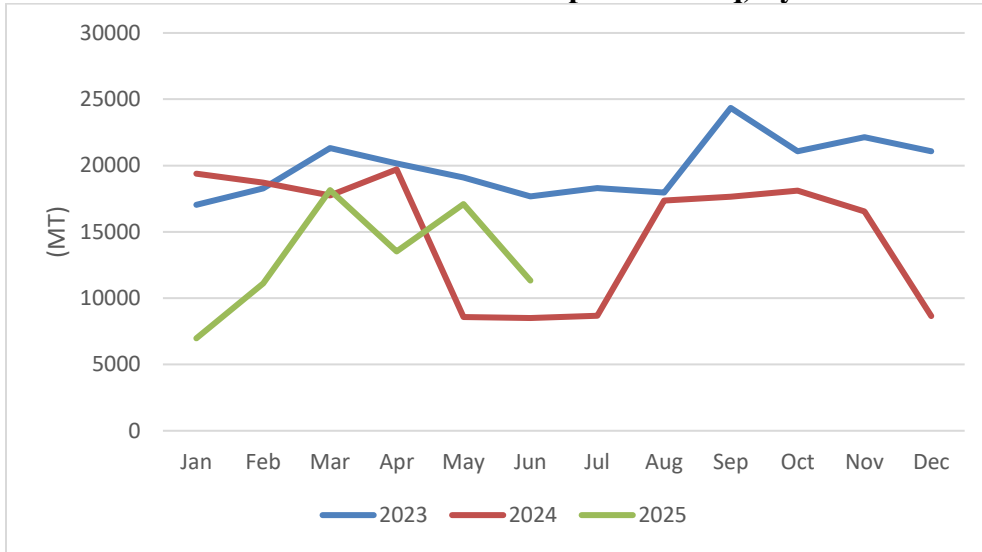


Source: Trade Data Monitor, LLC. Note: Chicken paw export numbers were taken from Turkish Association of Poultry Meat Producers and Breeders.

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 the total amount exported, but they decreased 24 percent (to 180,000 MT) in 2024. From January to June 2025, Turkish chicken meat exports to Iraq decreased 57 percent when compared with the same period in 2024. The reasons behind this decrease are the HPAI outbreaks in Turkiye and a protectionist [decision by the Iraqi government](#) regarding their domestic producers. It is expected that this downward trend will continue in 2025, although Turkish exporters believe that Iraq's domestic supply will not meet domestic demands, leading to further opportunity for Turkish exporters. Turkish chicken meat, hatching eggs, and table egg exports to Syria are trending upward in 2025.

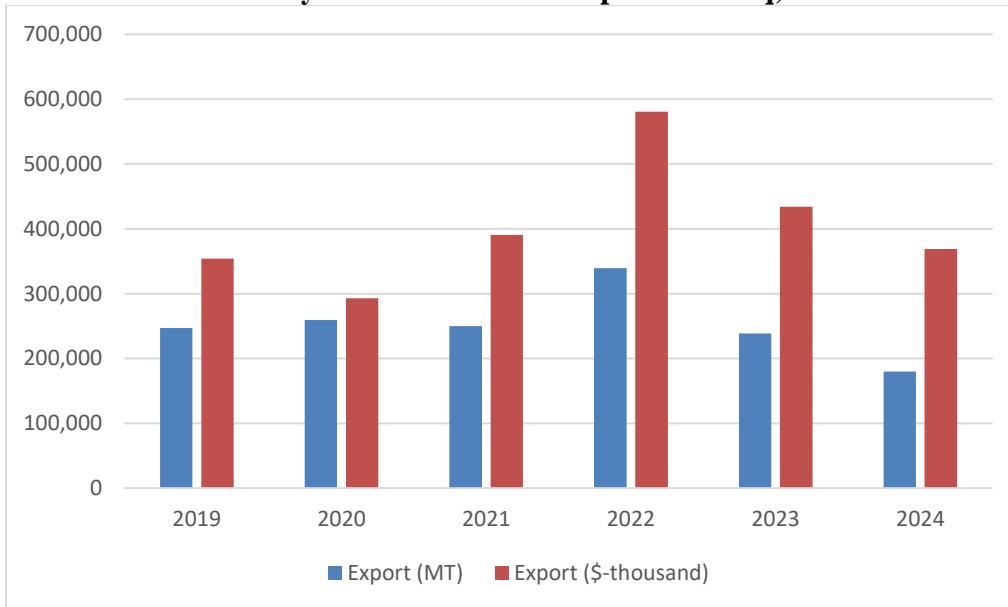
Turkiye usually exports 20 percent of its total chicken meat production.

**Chart 7. Turkish Chicken Meat Exports to Iraq, By Months**



Source: Trade Data Monitor, LLC.

**Chart 8. Türkiye’s Chicken Meat Exports to Iraq, 2019-2024**



Source: Trade Data Monitor, LLC.

**Turkish Government’s Interventions Strike Again:**

In response to elevated egg prices in the United States, Türkiye ramped up its breaking egg shipments to the United States. Imports of Turkish table/breaking chicken eggs (HS 040721) into the United States more than doubled in 2024 to 6.2 million dozen eggs, and Turkish industry reports that it has already contracted to ship about 460 million (38.3 million dozen) eggs to the United States during the first half of this year. For more information please [click here](#).

However, to prevent egg supply shortages and maintain the balance between domestic production and consumption, the Ministry of Trade decided to implement a deduction of 50 cents per kilogram for table egg exports under the Support and Price Stabilization Fund (DFIF). Following this decision, which was made to prevent domestic price increases, the deduction was increased. The deduction for table egg exports was raised from \$0.5 to \$1.5 per kilogram. Following these decisions, chicken egg exports were added to the list of goods subject to registration, further hampering Turkish exporters.

### Production, Supply and Distribution Data:

Note: PS&D numbers exclude chicken paws.

Meat, Chicken	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Turkey						
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	2512	2500	2665	2720	0	2900
Total Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2512	2500	2665	2720	0	2900
Total Exports (1000 MT)	355	400	390	420	0	445
Human Consumption (1000 MT)	2157	2100	2275	2300	0	2455
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	2157	2100	2275	2300	0	2455
Total Use (1000 MT)	2512	2500	2665	2720	0	2900
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	2512	2500	2665	2720	0	2900
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### Attachments:

No Attachments