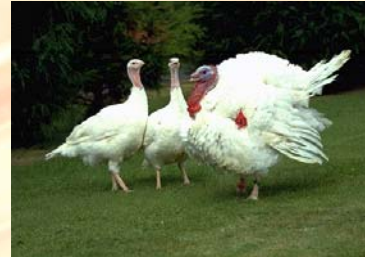




# World Turkey Market Review

Martin Shea  
President  
British United Turkeys of America



Who produces the world's turkey meat ?



## World Turkey meat Production 2003

000's Tonnes

Major Producers		% of total
N. America	2700	52.6
S. America	230	4.5
Asia	120	2.3
Europe	2000	39.0
Others	80	1.1
<b>Total</b>	<b>5130</b>	<b>100.00</b>

Source: USDA / FAS



Who is consuming turkey meat ?

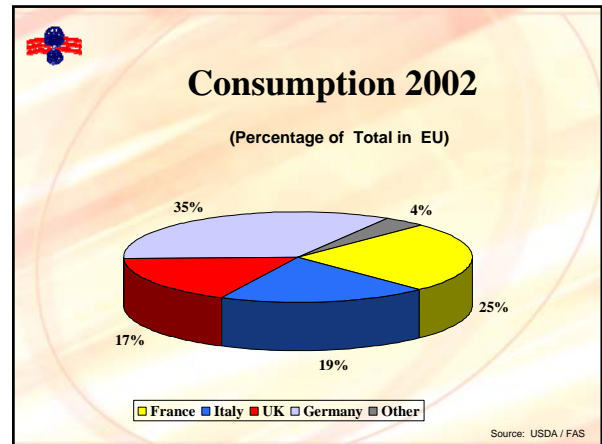
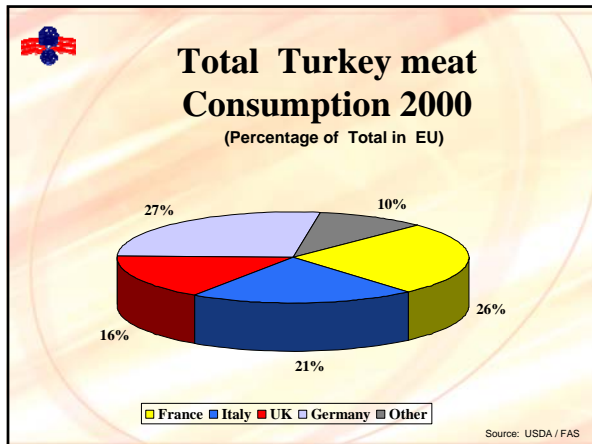


## Per Capita Consumption 2002

lbs per capita

U.S.A.	17.8
France	14.7
Germany	14.3
Italy	11.6
U.K.	9.9
Israel	33.0

Source: USDA / BUT

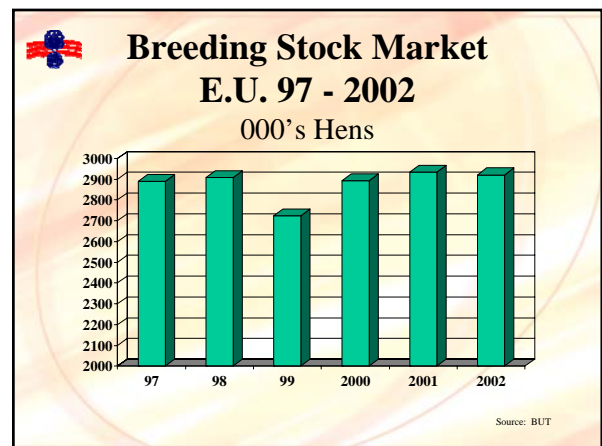


Who buys the breeding stock ?

### Breeding Stock Market 2002

	000's day old females	% of total
N. America	4160	49.56
S. America	450	5.4
Asia	2500	2.9
Europe	3430	40.8
Africa / Oceania	110	1.3
<b>Total</b>	<b>8400</b>	<b>100</b>

Source: BUT





## Breeding Stock Placements of Total EU 2000 and 2003

	<u>2000</u>	<u>2003</u>
France	55.4%	52.5%
Italy	16.2%	16.5%
Germany	10.0%	13.2%
UK	13.1%	13.2%
<b>Total</b>	<b><u>94.7%</u></b>	<b><u>94.2%</u></b>

Source: BUT



Who exports turkey meat ?



## Turkey meat Exports 2003 in 000's Tonnes

	Exports	% of total
N. America	228	38.1
S. America	85	14.1
Europe	280	46.8
Asia	5	1.0
<b>Total</b>	<b><u>598</u></b>	<b><u>100</u></b>

Based on USDA / FAS data

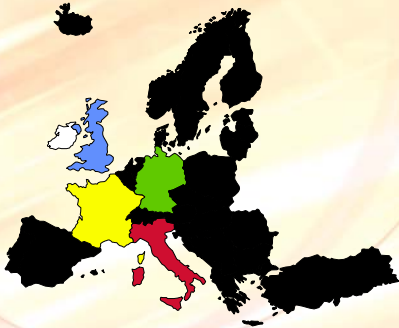


## Major Exporters

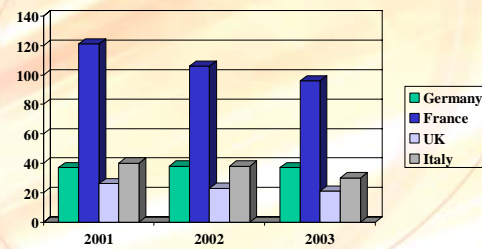
U.S.A.  
Brazil / Chile  
France  
Hong Kong



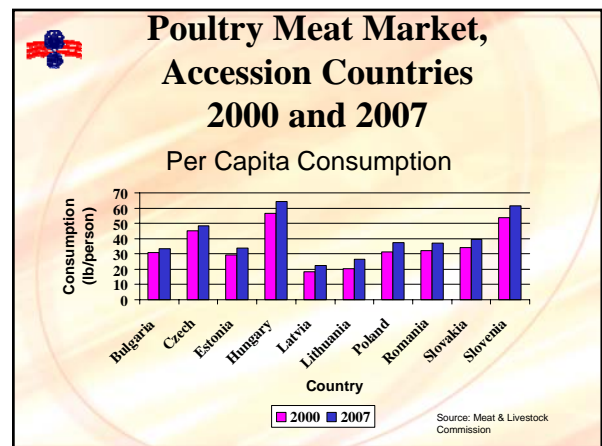
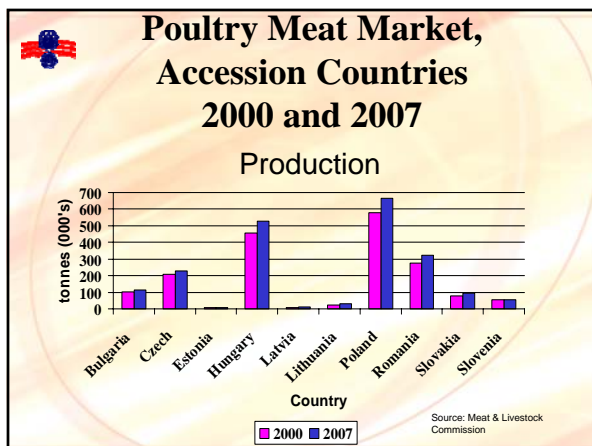
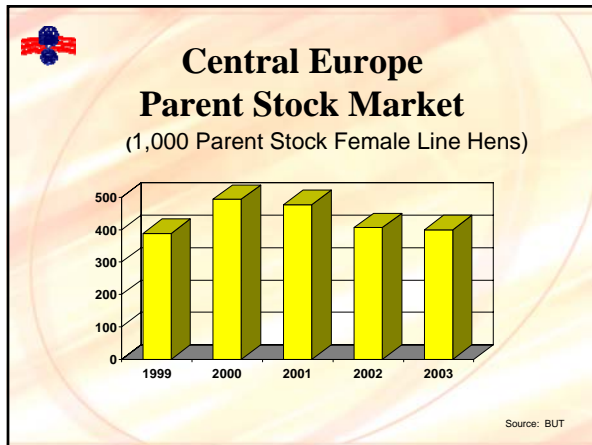
## E.U. Major Markets



## Major E.U. Markets Commercial Poultry Placings (in millions) 2001 - 2003



Source: European Commission





## Central Europe

### Commercial Poultry Placement Estimate 2003

	Millions Poults
Poland	25
Hungary	14
Czech Republic	2.5
Croatia	1.0
Slovakia	0.8
Romania	0.5
Bulgaria	0.3
Serbia	0.5



## Future Prospects

- Russia
- China
- S.E. Asia
- Central Asia



## Summary

- Worldwide agriculture in a state of change
- Poultry consumption continues to increase
- More convenience products required
- Retailer power
- Consumer more demanding
- Focus on efficiency

