

Turkey Industry

Mary Gray Davis & Emily
Kearney

Turkey Industry

101

- Broad - Breasted White
- Two Sectors of the industry
 - Breeder
 - Meat
- Vertically integrated industry
 - Contract Growers
- Raised in environmentally controlled barns
- Hens are used for Meat Production
 - Whole Bird
- Toms are used for further processing
 - Turkey Bacon
 - Turkey Burgers



Top US Turkey Production

Top 8 Turkey Producing States

Number of turkeys raised,
Based on 2018 USDA data.



Top NC Turkey Production

9 NC counties produced more than 1 million turkeys in 2018

Turkeys produced and share of NC production, by county, 2018

Name	Number of turkeys	Share of NC turkey production
Sampson County	7,700,000	24%
Wayne County	5,100,000	16%
Union County	4,200,000	13%
Duplin County	3,700,000	11%
Onslow County	1,900,000	6%
Bladen County	1,650,000	5%
Lenoir County	1,550,000	5%
Anson County	1,200,000	4%
Greene County	1,150,000	4%
All Other Counties	4,350,000	13%
NC Total	32,500,000	100%

Source: USDA NASS

Top Turkey Producing Companies



Tyson Foods, Inc.



1. Butterball
2. Cargill Turkey and Cooked Meats
3. Tyson Foods
4. Perdue
5. Cooper Farms



Markets

Meat

- For people that don't eat red meat, turkey is a great option
- Examples of the meat market for turkeys
 - Bacon
 - Lunch meat
 - Ground meat
 - Hot dogs.
- The most money brought in for the turkey meat market is around the holidays with whole birds.



By - Products

- Not mainly thought to be a high commodity because it is not explicitly stated
- Examples
 - Feathers for animal feed
 - Feather Meal
 - Quill fibers for nylon and yarn
 - waste can be used for fertilizer



Paths of Production

Breeding

- Sexually mature at 30 weeks old
- Capable of 25 week laying cycles (95-100 eggs)
- Turkey eggs are used only for breeding not human consumption (more expensive)
- Very controlled feedings



Market

- As of 2019 North Carolina was number 2 in producing market turkeys (40 million)
- Toms take 17-20 (26.4 - 32.3lbs) week
- Hens take 14-16 weeks(14.7-17.5lbs)
- Fed high protein feed for muscle development



Demand

- In the last 10 years, the percentage of poultry meat consumption has grown more rapidly than red meats.
- People are recognizing turkey's nutritional health value and is being consumed all year and not just holidays.
- The largest growth of turkey product sales has been ground turkey - why?
- Easy convenience marketing for the turkey products and whole turkeys

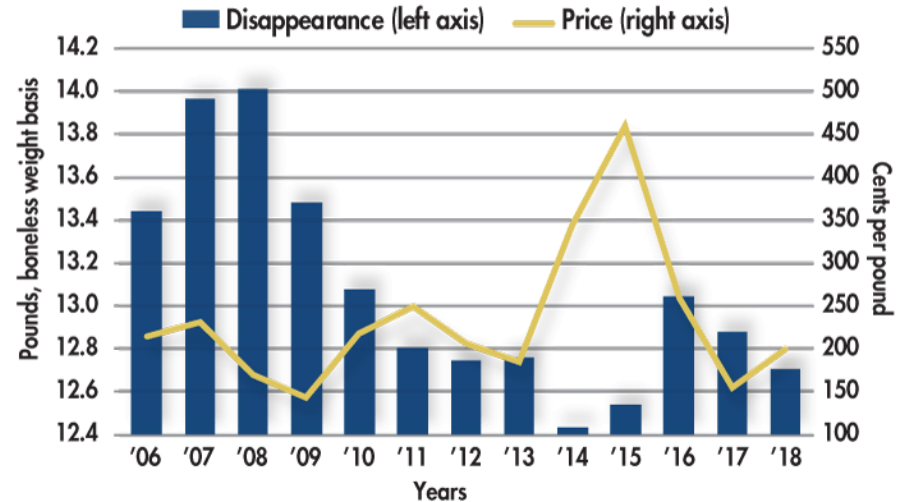


Prices

From 2012 to 2019 the price per pound of:

- Whole frozen turkeys has fluctuated between \$1.62 and \$1.50
- Whole turkey hens has fluctuated between \$1.06 to \$0.89

Per capita disappearance of turkey in the US vs. USDA fresh tom breast meat price



Note: United States Department of Agriculture, Economic Research Service & Agricultural Marketing Service; LEAP Market Analytics 2018 forecast

Exports

- In 2019: 637 million pounds of Turkey was exported
- US Exported a total of 87 Million pounds of Turkey from Jan 2020 - Feb 2020
- Top Exporting Countries;
 - Mexico
 - Hong Kong
 - Russia
 - China (Mainland)
 - Canada

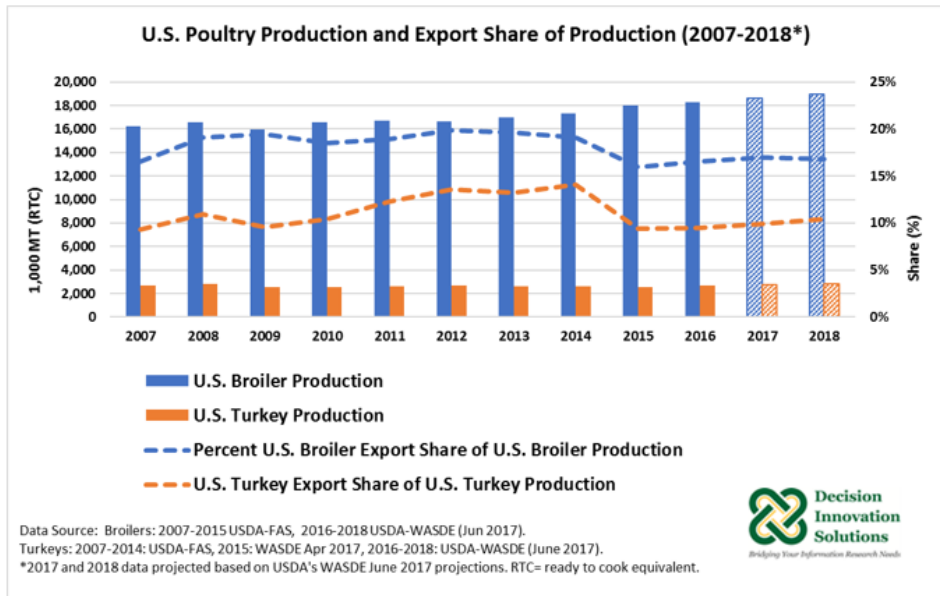
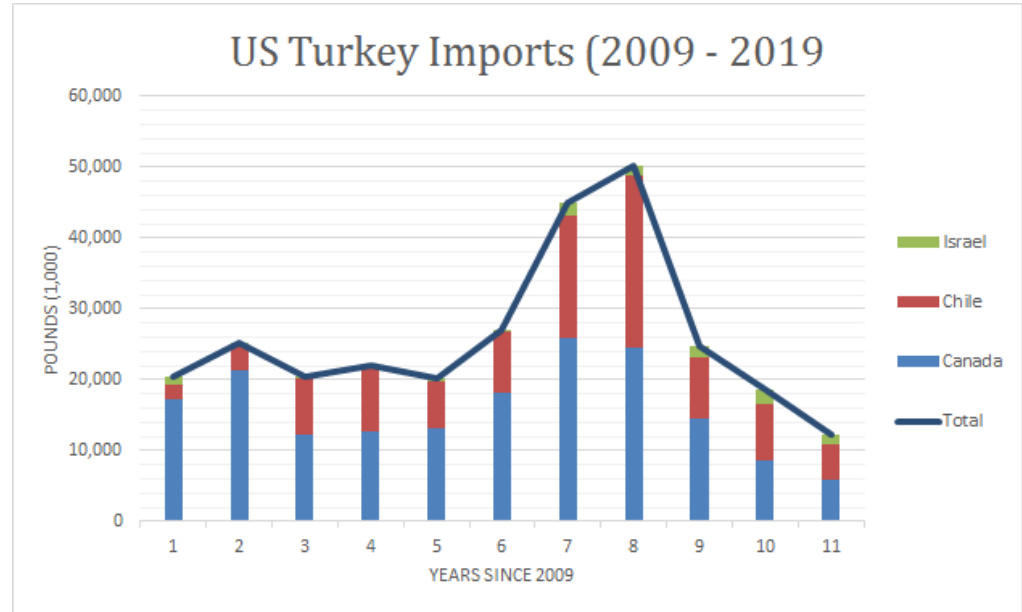


Figure 1. U.S. Poultry Production and Export Share of Production (2007-2017)

Imports

- In 2019: 12.3 Million pounds were imported
- US Imported a total of 2.20 Million pounds of Turkey from Jan 2020 - Feb 2020
- Top Importing Countries;
 - Canada
 - Chile
 - Israel



Biggest Issues

- Diseases
 - Blackhead
 - High Path Avian Influenza
 - New Castle
- Welfare
- Changing Market ‘
- Expectations of the Industry
- Biosecurity



Economic Value of the Turkey Industry



- In 2018 , the US Turkey Industry made \$3,875,131,000
- North Carolina brings in approximately \$933 Million in turkey sales annual
- Industry is appraised at \$5 Billion
- The total value of the turkeys produced during 2016 was more than \$6 billion, up nearly \$5 million since 2015

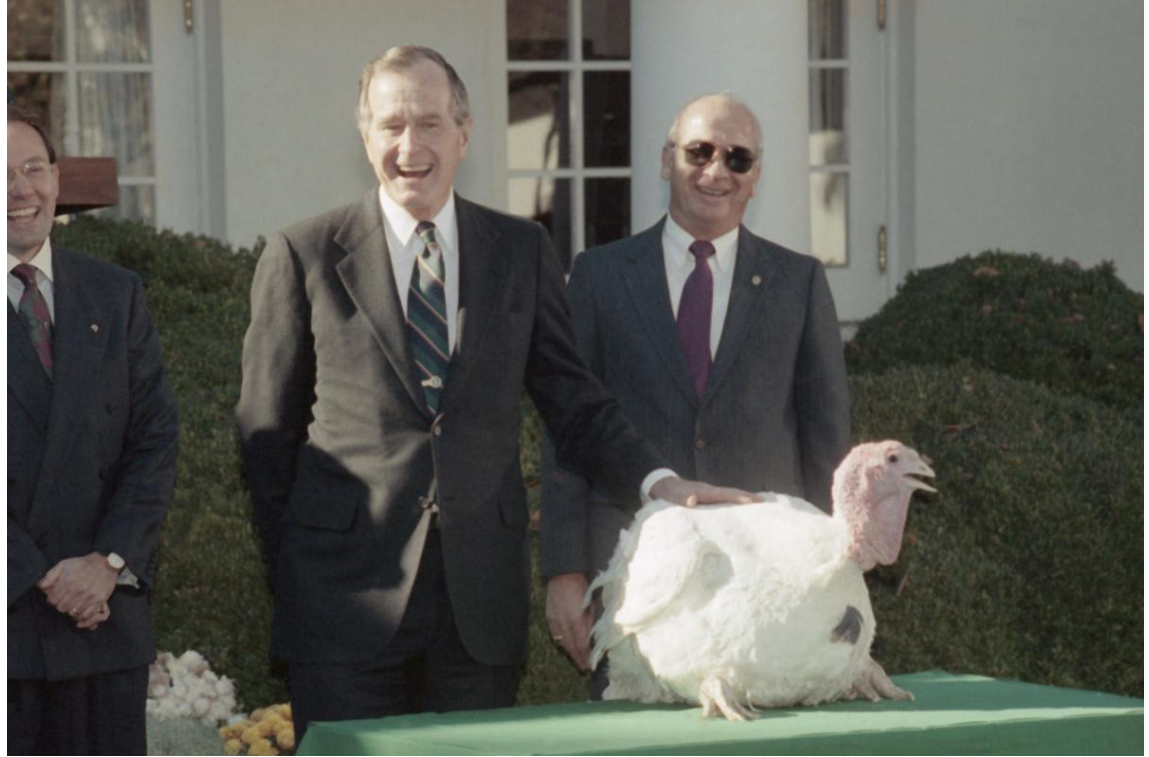
Current Events

High Path Avian Influenza is back

<https://www.poultryworld.net/Health/Articles/2020/4/US-battles-high-pathogenic-bird-flu-in-South-Carolina-turkey-farm-570015E/>

Turkeys are Pardoned by the President

<https://www.cbsnews.com/news/president-donald-trump-pardon-turkeys-bread-butter-thanksgiving-white-house-tradition-watch-live-stream-2019-11-26/>



Fun Facts

- Hoke County is home to the NC Turkey Festival
 - Raeford, NC
- Turkey's commonly imprint on others
- Pardoning of the Turkey Started in 1947
 - President Harry Truman
- Presidential Turkey has been from NC 2 times in past 13 years



Paving the Way for Animal Welfare

Dr. Temple Grandin
Colorado State University



Sources

<https://www.agmrc.org/commodities-products/livestock/poultry/turkey-profile>

<https://www.eatturkey.org/raisingturkeys/>

<https://www.ers.usda.gov/newsroom/trending-topics/turkey-sector-background-statistics/>

https://www.uspoultry.org/educationprograms/PandEP_Curriculum/Documents/PDFs/Lesson7/TurkeyProductionPres.pdf

https://www.nass.usda.gov/Statistics_by_Subject/result.php?88F8D165-807C-3C39-BD17-3DFF6B81A985§or=ANIMALS%20%26%20PRODUCTS&group=POULTRY&comm=TURKEYS

<https://www.ncdemography.org/2017/11/21/nc-in-focus-turkeys-in-north-carolina-2017/>

<https://downloads.usda.library.cornell.edu/usda-esmis/files/00000002j/h989r601h/70795b51m/usturk-04-30-2014.pdf>

<https://www.ers.usda.gov/data-products/livestock-and-meat-international-trade-data/>

https://www.uspoultry.org/economic_data/