

PolicyPennings by Daryll E. Ray & Harwood D. Schaffer

# Anytime is turkey time

Fall is upon us, harvest is coming to a close, and Thanksgiving and the Holiday Season are approaching. Several food items are associated with Thanksgiving, but none more than turkey. When we were growing up, we only had turkey on Thanksgiving and maybe a Christmas get-together or two. While Thanksgiving, Christmas and Easter still account for a major portion of turkey consumption—one-fifth on Thanksgiving alone—turkey is consumed year-around in the form of everything from pre-prepared dinners to submarine sandwiches to hotdogs. And during the last couple decades a significant share of nation's turkey production has found its way into the export market.

US production of turkey meat has increased 143 percent over the last 32 years growing from 1.1 million metric tons (MMT) in 1980 to 2.7 MMT in 2012. Meanwhile, US per capita consumption of turkey has increased from 10.3 pounds in 1980 to 16.0 pounds in 2012 as US domestic consumption grew from 1.1 MMT to 2.3 MMT.

Internationally, turkey production is not nearly as widespread as the production of cattle, hogs and chickens. Three countries—the US, the European Union (EU), and Brazil—accounted for 95 percent of world turkey production in 2012 (US and EU accounted for 85 percent). Compared to the US's 2.7 MMT of production, the EU came in at 2.0 MMT, and Brazil produced 510 TMT of turkeys.

The US saw a 4.4 percent increase in production

over the last decade while the EU saw a 4.2 percent decline. Meanwhile, Brazilian turkey production increased by 56.9 percent.

Exports were an afterthought for turkey producers in 1980 accounting for 3.4 percent of production (34 thousand metric tons - TMT). By 2012, exports accounted for 12.6 percent of US turkey production (336 TMT) or a little more than 1 in 8 turkeys. US turkey imports have remained small throughout the period, failing to exceed 0.5 TMT until 2002.

The three countries that are largest producers of turkey are also the world's largest exporters of turkey. A decade ago (2002), the EU was the world's largest exporter of turkey at 236 TMT, followed by the US (199 TMT) and Brazil (90 TMT). In 2012, the US exported 336 TMT of turkey followed by Brazil (155 TMT) and the EU (150 TMT).

In 2012, Mexico was the largest importer of turkey at 170 TMT followed by the EU (81 TMT), China (41 TMT), and South Africa (32 TMT).

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