



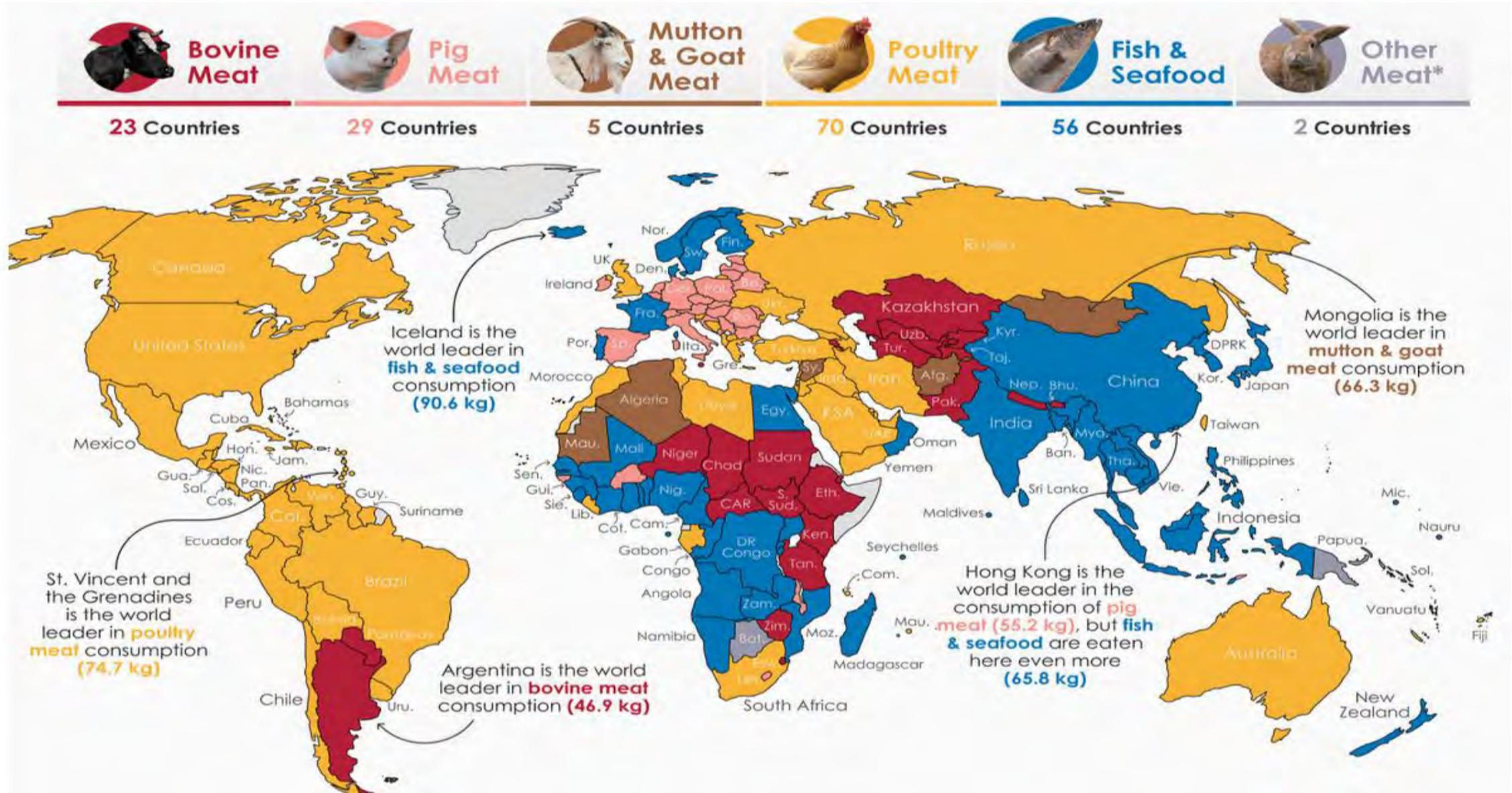
Marketing Opportunities for the Turkey Industry

AGRIF**OOD**
STRATEGIES
Looking Deeper, Seeing Further

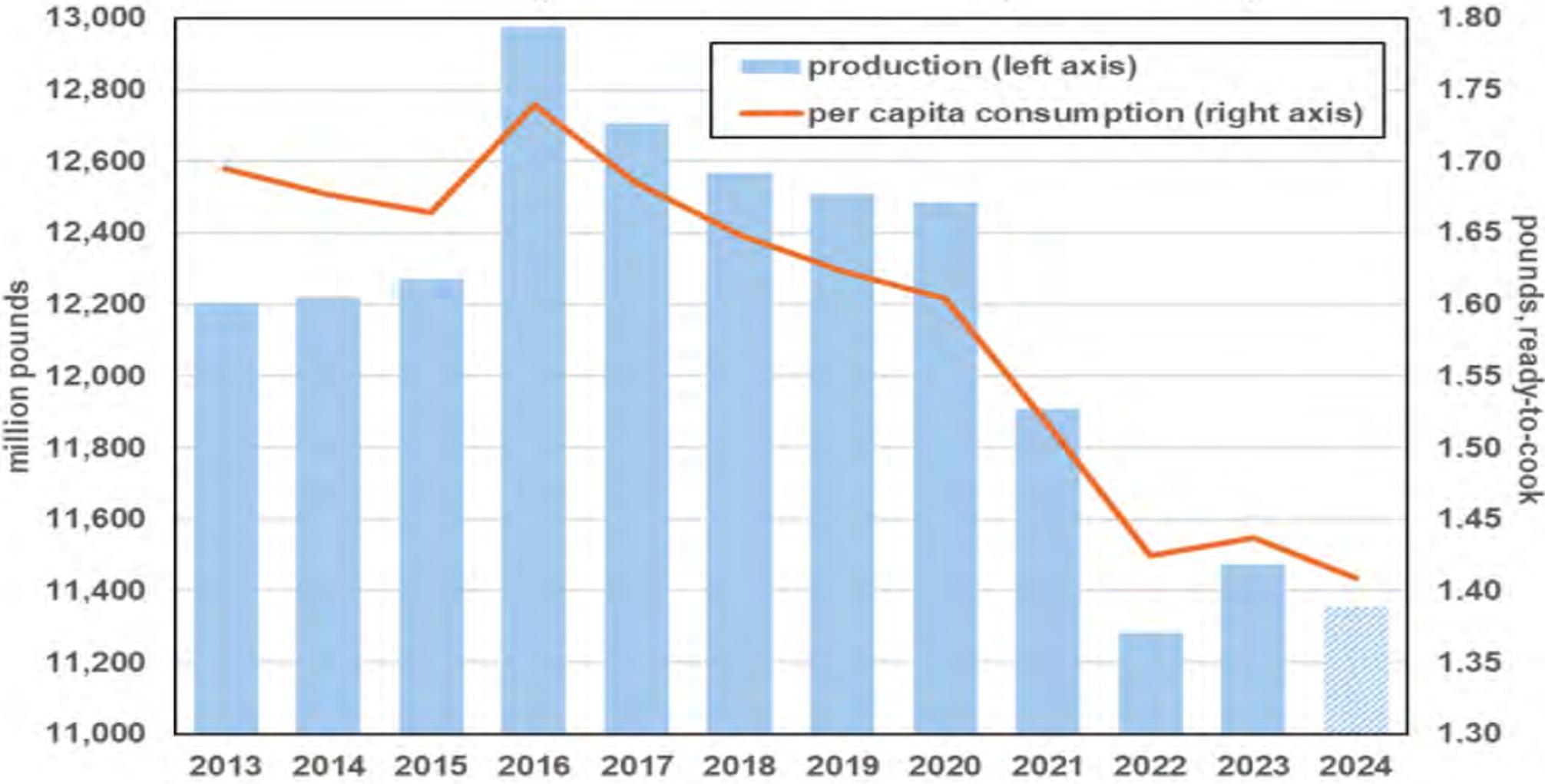
Albert Davleyev, President

18th Turkey Science and Production Conference -2026

WORLD MEAT CONSUMPTION: IS THERE A PLACE FOR TURKEY?



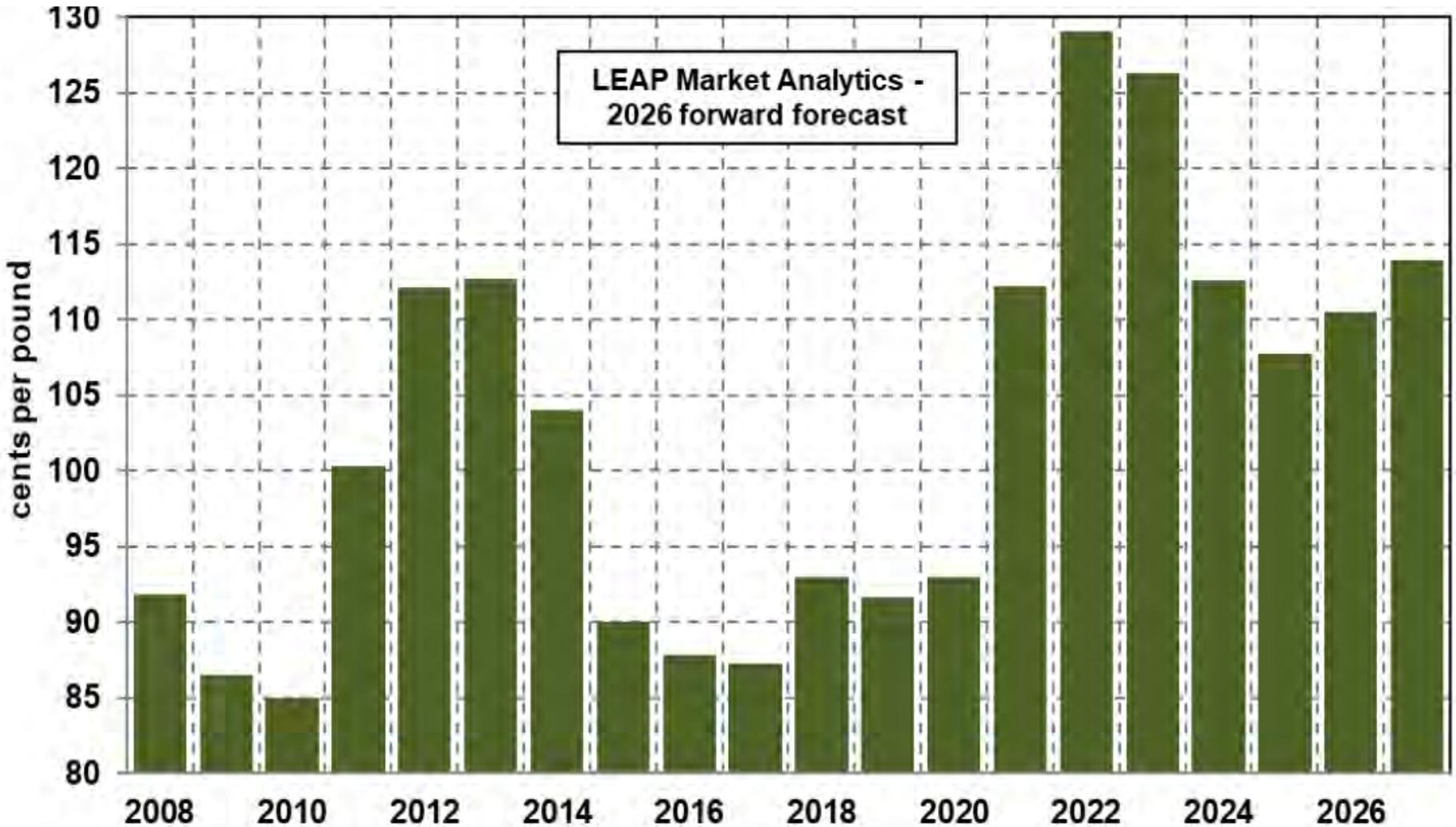
WORLD TURKEY PRODUCTION AND PER CAPITA CONSUMPTION



Courtesy of  LEAP Market Analytics

Source: www.leapmarkets.com/turkey-reports

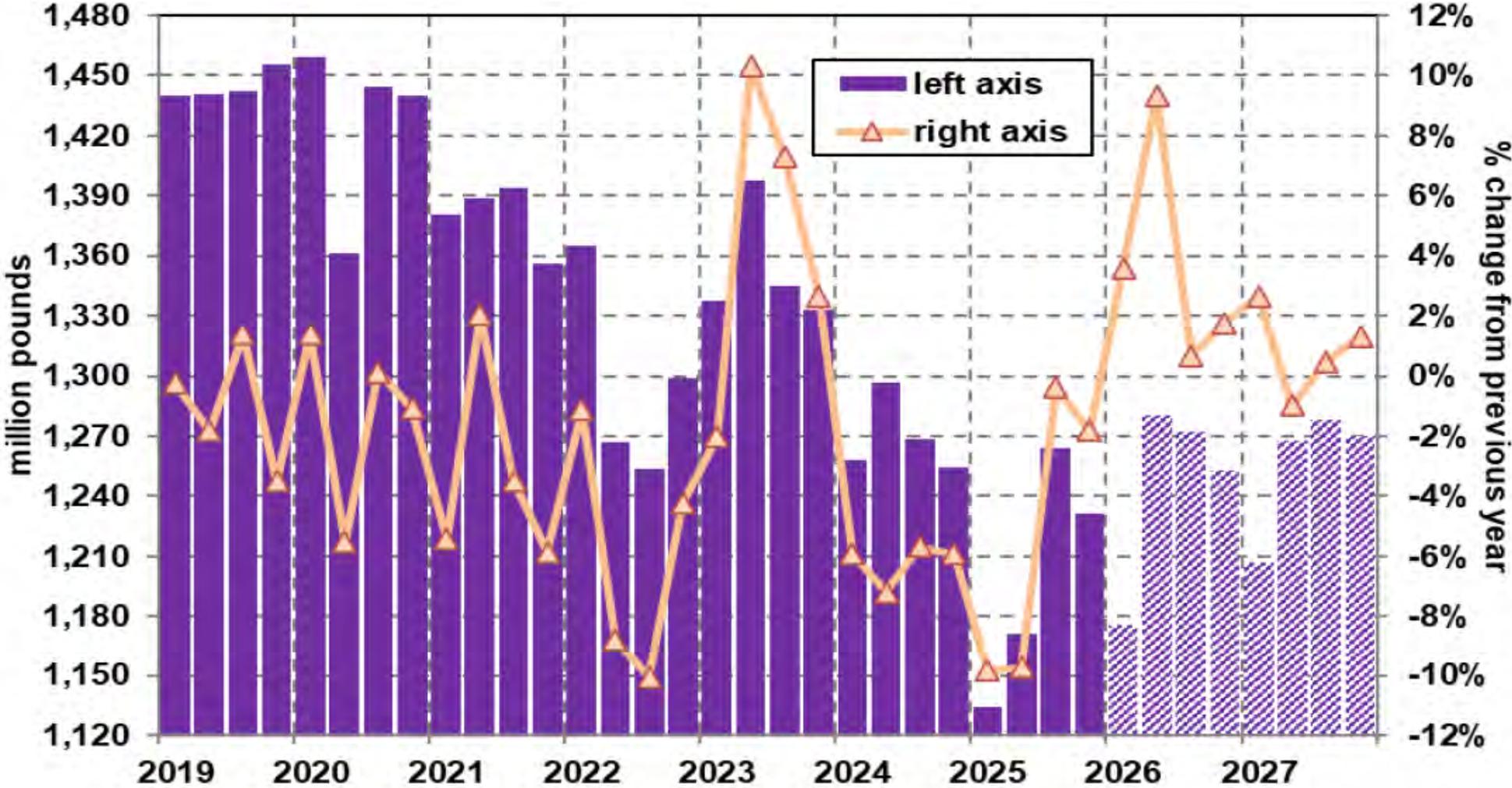
UNITED STATES: TOTAL WHOLE TURKEY COST OF PRODUCTION



Courtesy of  LEAP Market Analytics

Source: www.leapmarkets.com/turkey-reports

UNITED STATES: TOTAL READY-TO-COOK TURKEY PRODUCTION

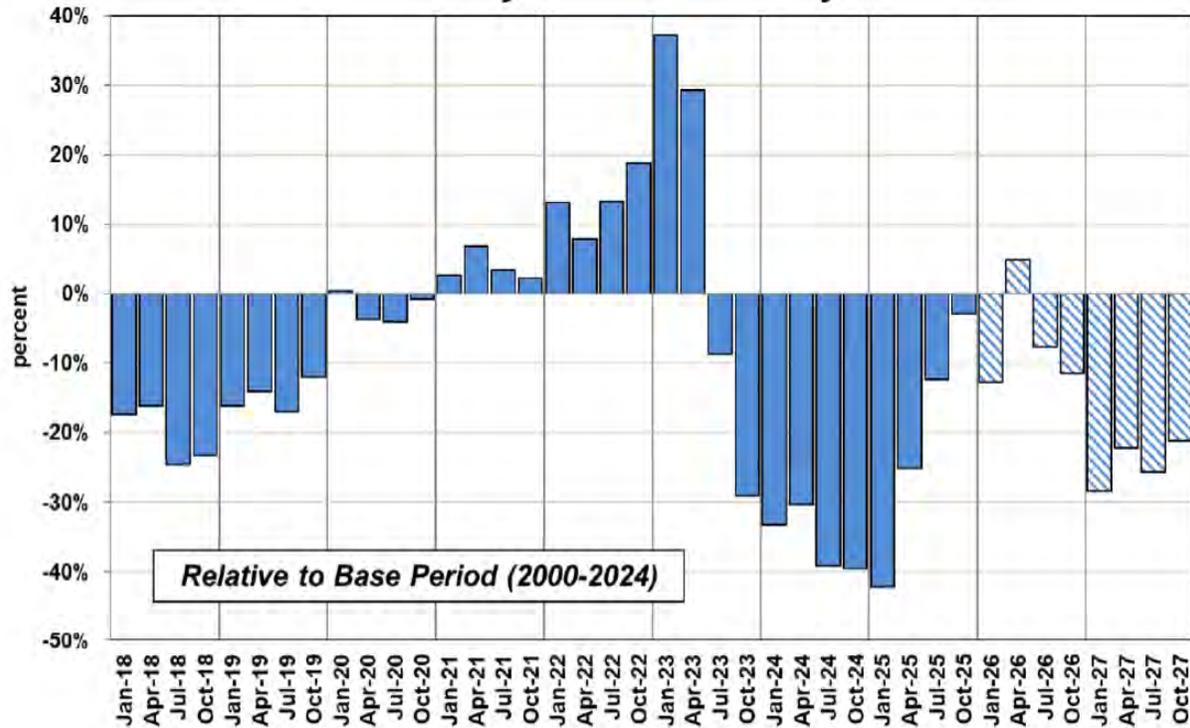


Courtesy of  LEAP Market Analytics

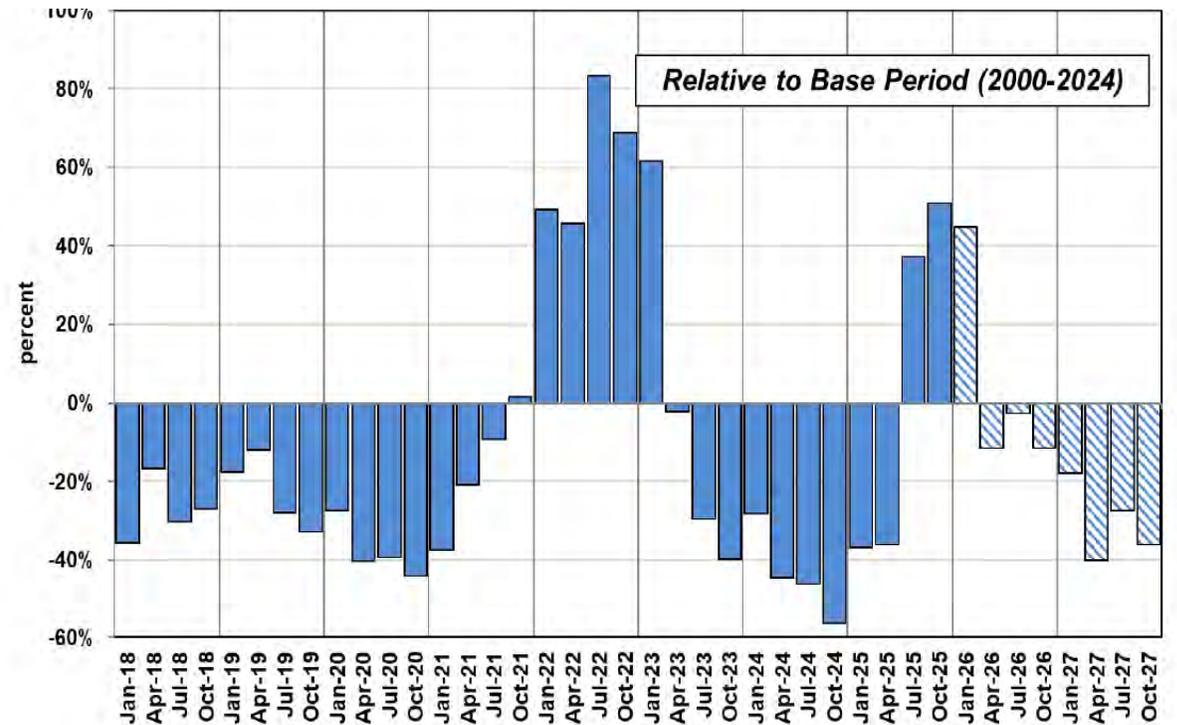
Source: www.leapmarkets.com/turkey-reports

UNITED STATES: WHOLE TURKEY AND BREAST MEAT DEMAND

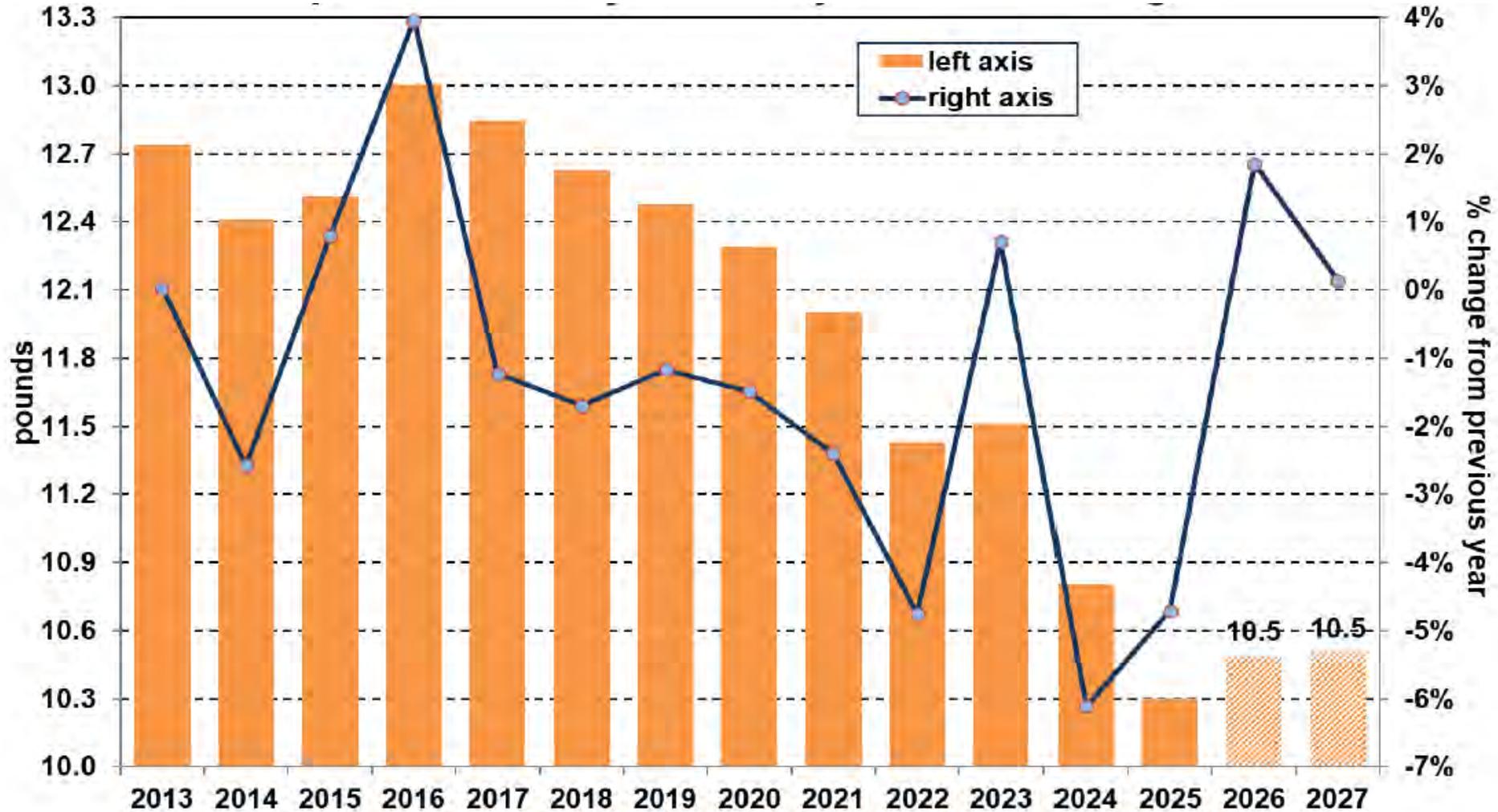
TURKEY WHOLE TURKEY DEMAND INDEX



TURKEY BREAST MEAT DEMAND INDEX



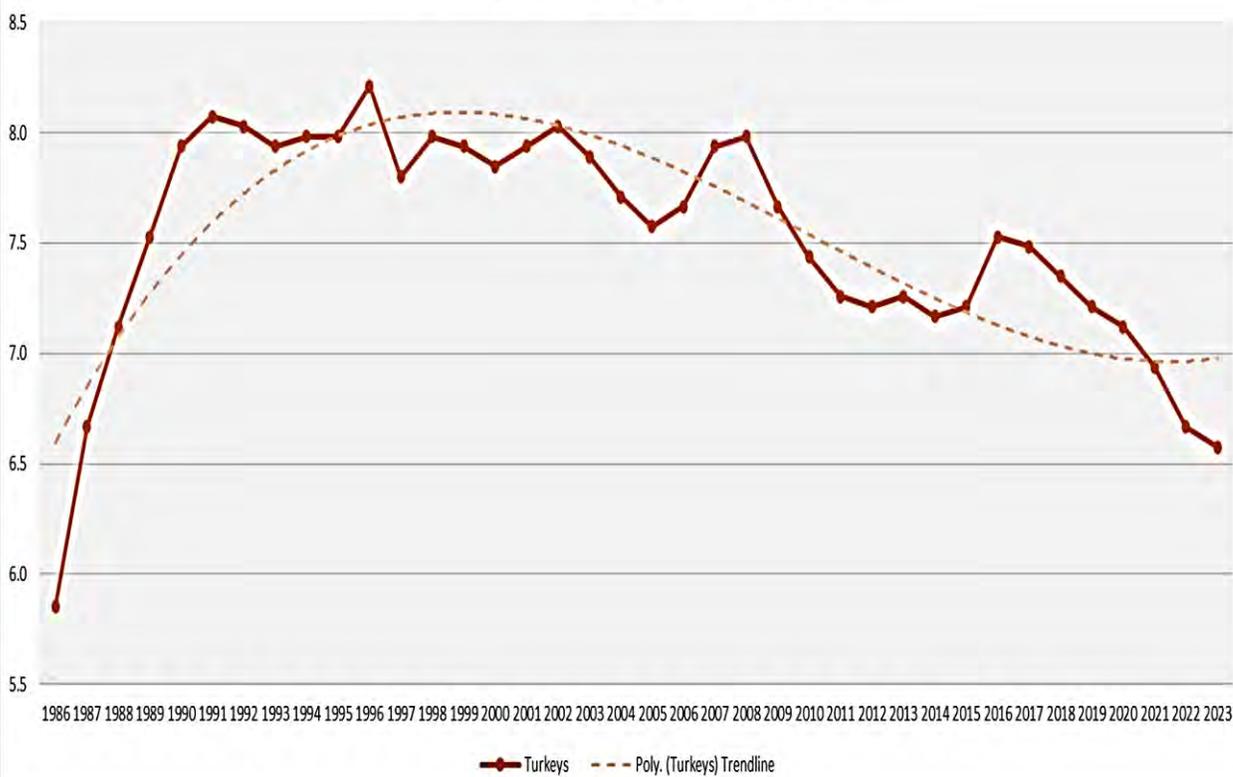
UNITED STATES: PER CAPITA CONSUMPTION, BNLS WEIGHT



UNITED STATES: THE WORLD'S LARGEST MARKET IS GOING DOWN



US Turkey Protein Per Capita Consumption, kgs

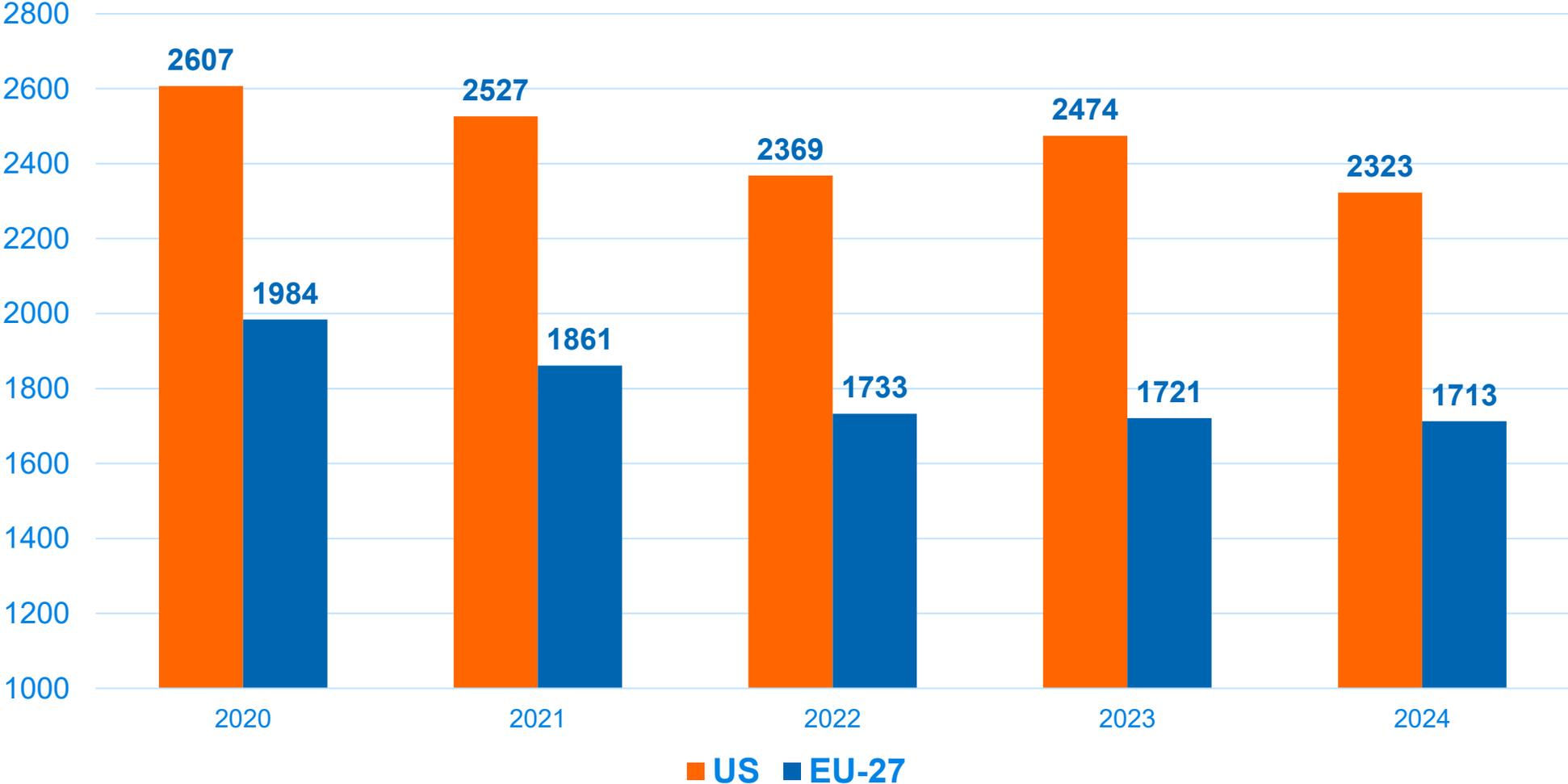


Occasions respondents usually consume turkey (n = 565)

Occasion	Percentage of respondents
Thanksgiving	87%
Christmas	35%
Easter	10%
Other religious holiday	4%
Family meal aside from holidays	31%
None of the above	7%

► [Poult Sci. 2020 Mar 13;99\(5\):2798–2810. doi: 10.1016/j.psj.2019.12.047](https://doi.org/10.1016/j.psj.2019.12.047)

U.S. AND EU PRODUCTION HAVE THE SAME DYNAMICS



Sources: USDA. European Commission

EU ANIMAL WELFARE STANDARDS CHALLENGE THE FUTURE OF THE TURKEY INDUSTRY



MORE SPACE	A SAFE & ENRICHED ENVIRONMENT	ACCESS TO PASTURE OR OUTDOORS	A HEALTHY, VEGETARIAN DIET (NO ANIMAL BY-PRODUCTS)
		(STEPS 3 & ABOVE)	

Stufe 3
Pute

TIERWOHL VERBESSERT

PRO Tierwohl

Baue An Liebe

Nature & Respect

Bauern Gut Landleben

Wiesenhof Privathof Geflügel

Landbauern PUTE

BAUERNSCHÄTZE

Steer/Oxen, Heifers, Calves for fattening | Pigs | **Turkeys** | Chickens | Peking ducks | Rabbits | Dairy cows

Programme	Haltungsform 1	Haltungsform 2	Haltungsform 3	Haltungsform 4	Haltungsform 5
	Stall	Stall + Platz	Frischlufstall	Auslauf/Weide	Bio
	haltungsform.de	haltungsform.de	haltungsform.de	haltungsform.de	haltungsform.de

Beter Leven

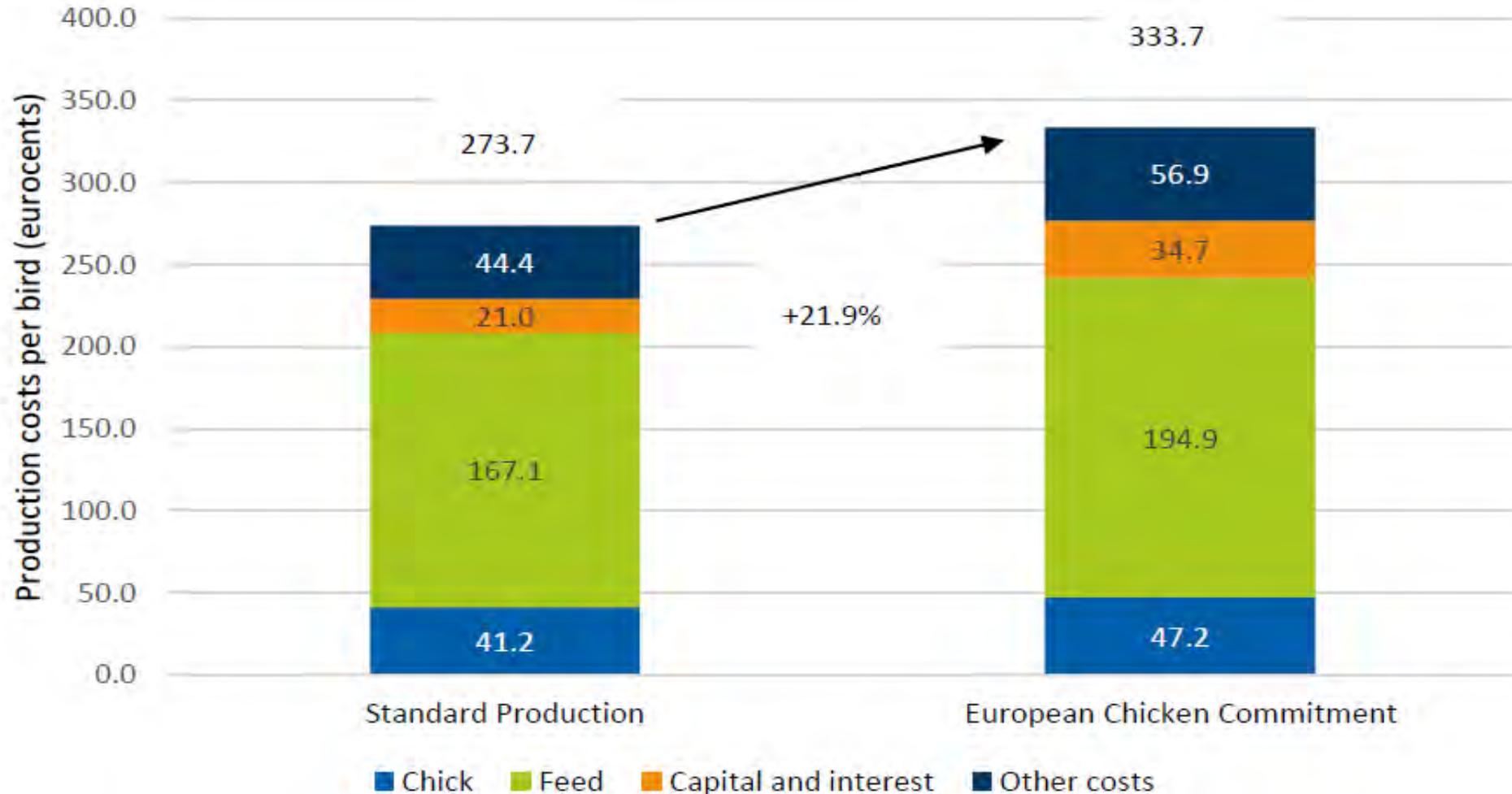
DIEREN BESCHERMING

EU ANIMAL WELFARE STANDARDS ALREADY HITTING THE BROILER INDUSTRY



AVEC

Cost of production (eurocents) for standard and ECC production per bird



KEY FACTORS AFFECTING TURKEY CONSUMPTION

United States

- Seasonal consumption
- Shrinking households
- Competition from pork
- Lack of innovation

European Union

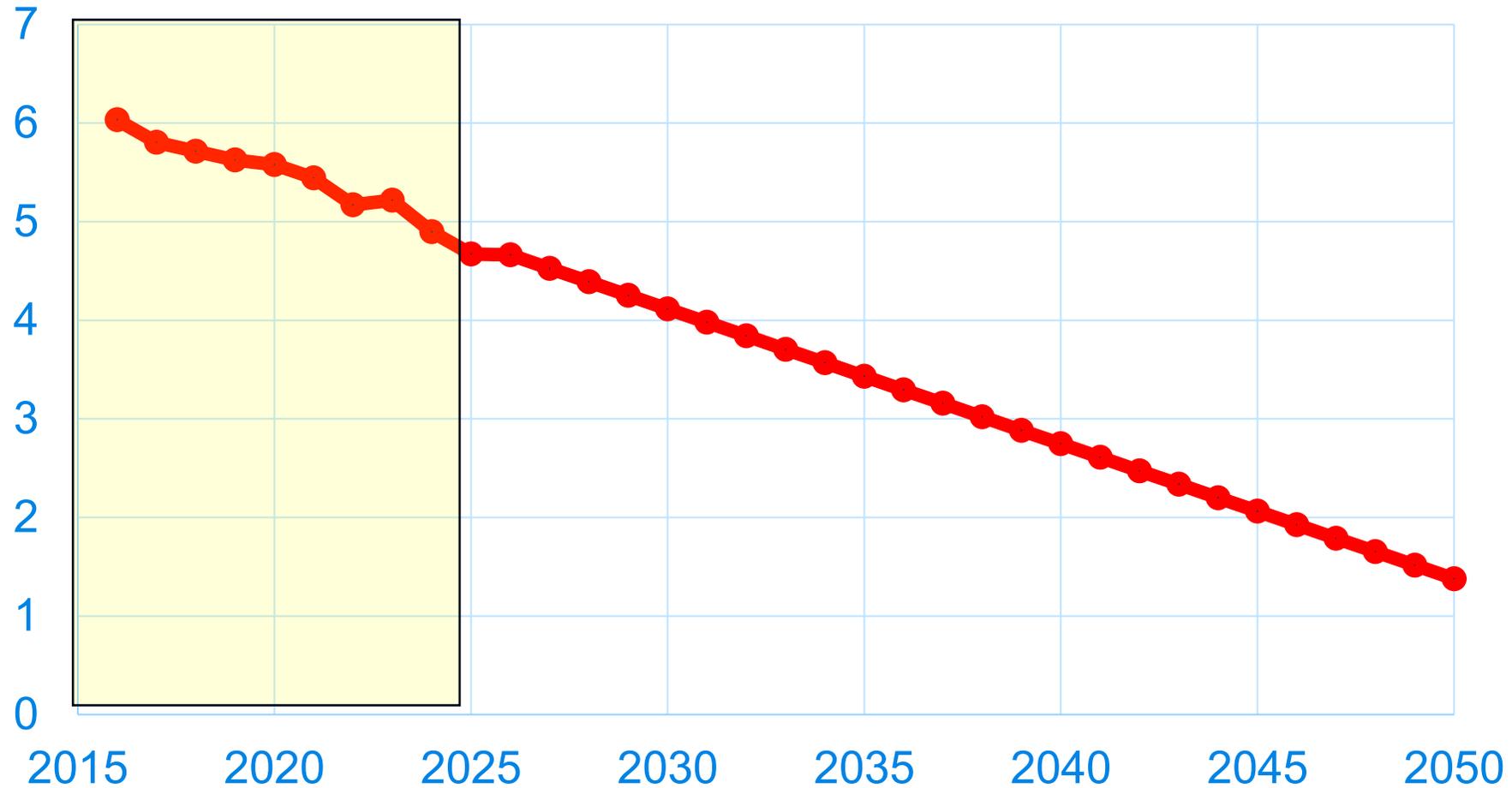
- Animal welfare regulations
- Meat consumption decline
- Shrinking households
- Positioning close to chicken

PLUS

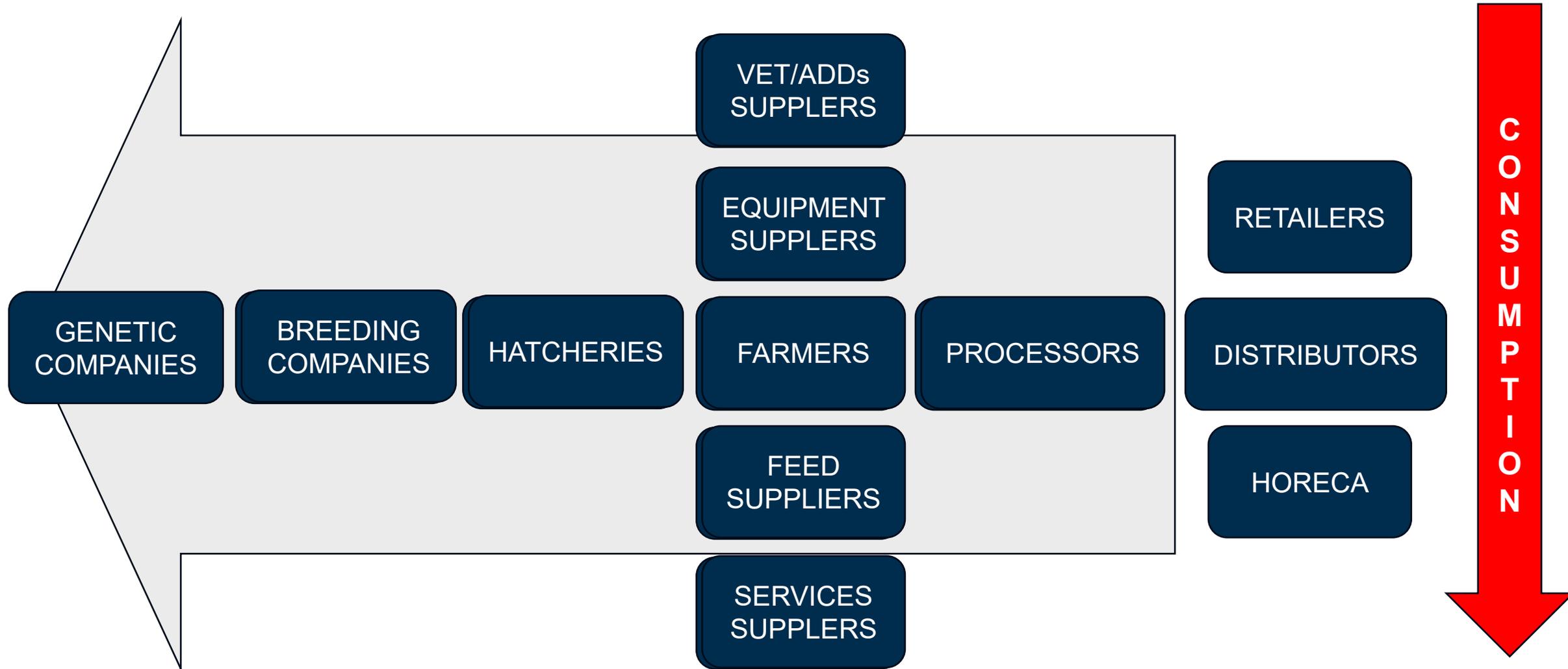
- Reducing physical availability due to decreasing production

WHAT'S NEXT FOR THE U.S. TURKEY CONSUMPTION?

Projection of Per Capita Turkey Meat Availability (kg/year)
Base period: 2015-2025

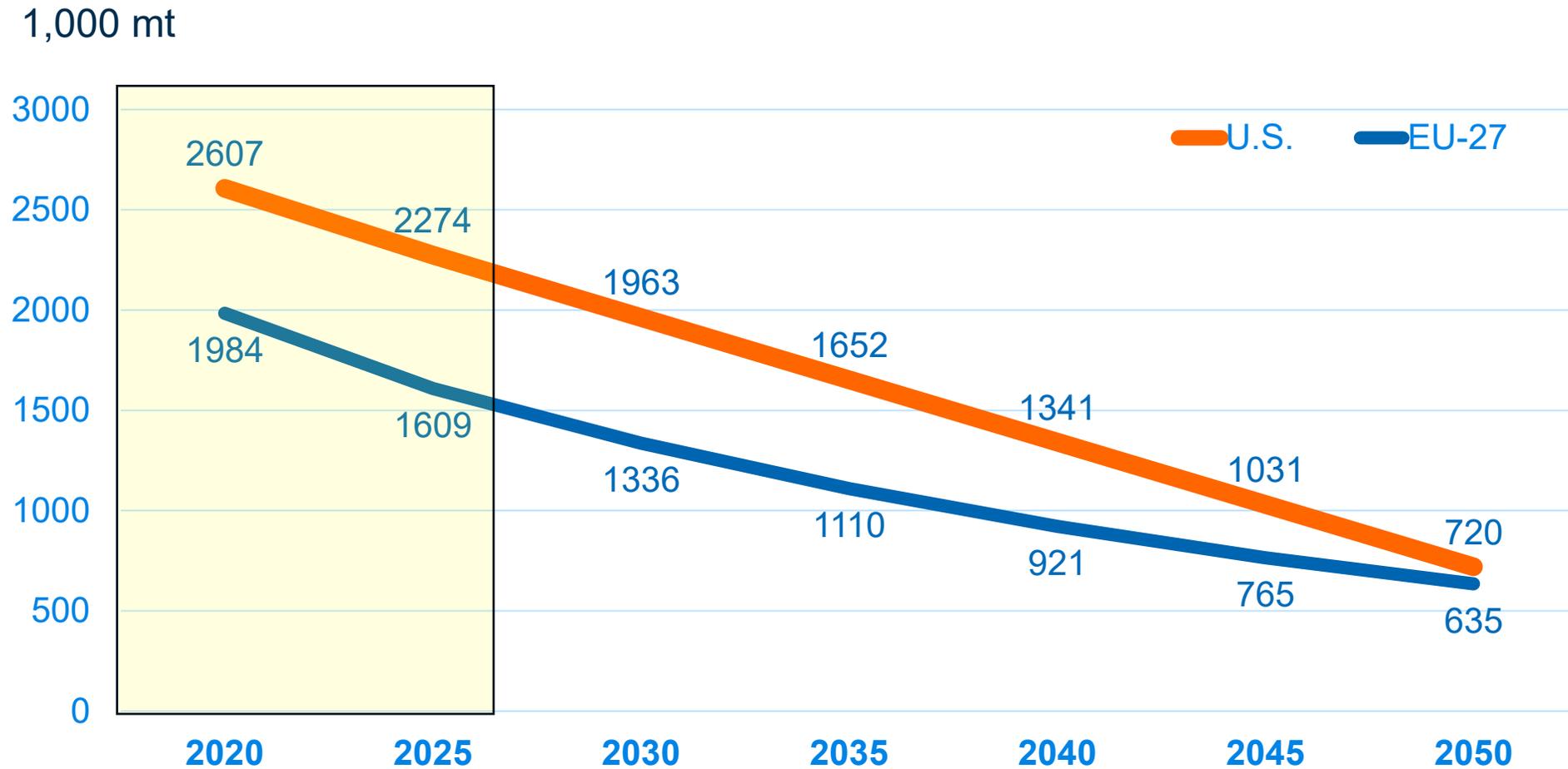


HOW WILL THIS AFFECT THE TURKEY INDUSTRY PRODUCTION, SUPPLY AND VALUE CHAINS?



WHAT'S NEXT FOR THE U.S. AND EU TURKEY PRODUCTION?

Projection of Per Capita Turkey Meat Production
(thousand tons, dressed weight)
Base period: 2015-2025





ACTION

CREATIVE

IDEAS

MARKETING PLAN

STRATEGY

TEAMWORK

Solution

to

etc

JUST MAKE THE BEST THINGS!

PROCESS

Time

* Focus on Quality.

To do list:

- bookmark website
- plan for location
- Focus on Quality



PRODUCT INNOVATION FOR CONSUMER MARKET IS A MUST



Why has demand for US turkey meat continued to decline?

BY TERRENCE O'KEEFE

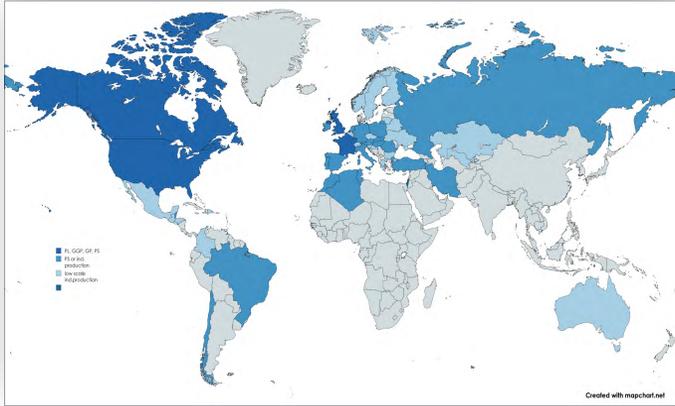
“U.S. turkey marketers have been losing the battle for market share this century”!

Where are the new products? Where is the innovation?

The U.S. turkey industry was rapidly growing and dynamic in the 1980s and into the 1990s. Innovative new products and marketing that focus on the unique flavor, texture and nutrition of turkey are needed to get the turkey industry growing again.

Turkeys are native to the Americas and the U.S. turkey market is the world's largest. The innovation needs to start here and it needs to start now.

EXPORTS: AN OPPORTUNITY FOR GROWTH



	CHICKEN	PORK	TURKEY
TOTAL PRODUCTION	103 000 000	120 000 000	5 500 000
EXPORTS	14 180 000	11 500 000	195 000
SHARE OF EXPORTS	13.76%	9.58%	3.54%

- TURKEY MEAT PRODUCTION IS TOO CONCENTRATED IN EUROPE AND NORTH AMERICA
- EXPORTS ARE VERY LIMITED IN VOLUME; THEY ARE HIGHLY INTRA-REGIONAL AND SEASONAL
- NEW INVESTMENTS ARE SCARCE, MOST OF THEM GO FOR RENOVATION
- LACK OF SUCH A KEY DRIVER AS COMPETITION DUE TO HIGH INDUSTRY CONCENTRATION

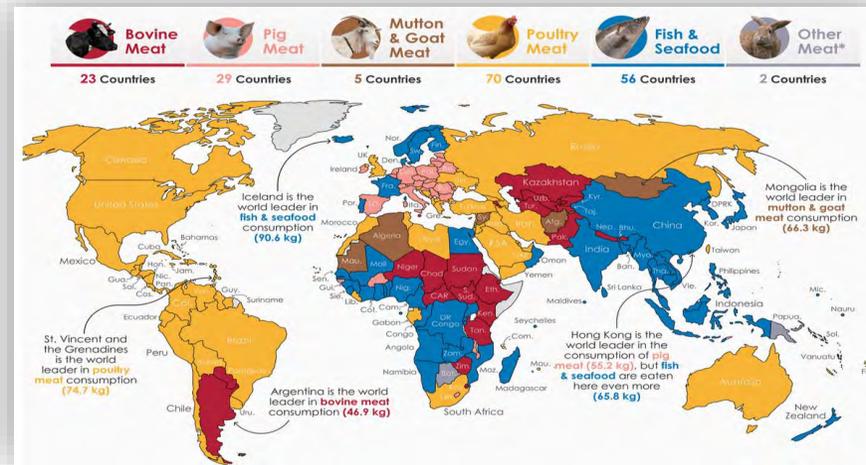
NEW REGIONS: THREE SCENARIOS FOR GROWTH

DECLINE

STAGNATION

CHALLENGES

- Decreasing consumption
- Animal welfare regulations
- Meat-free trends
- Poultry diseases



GROWTH

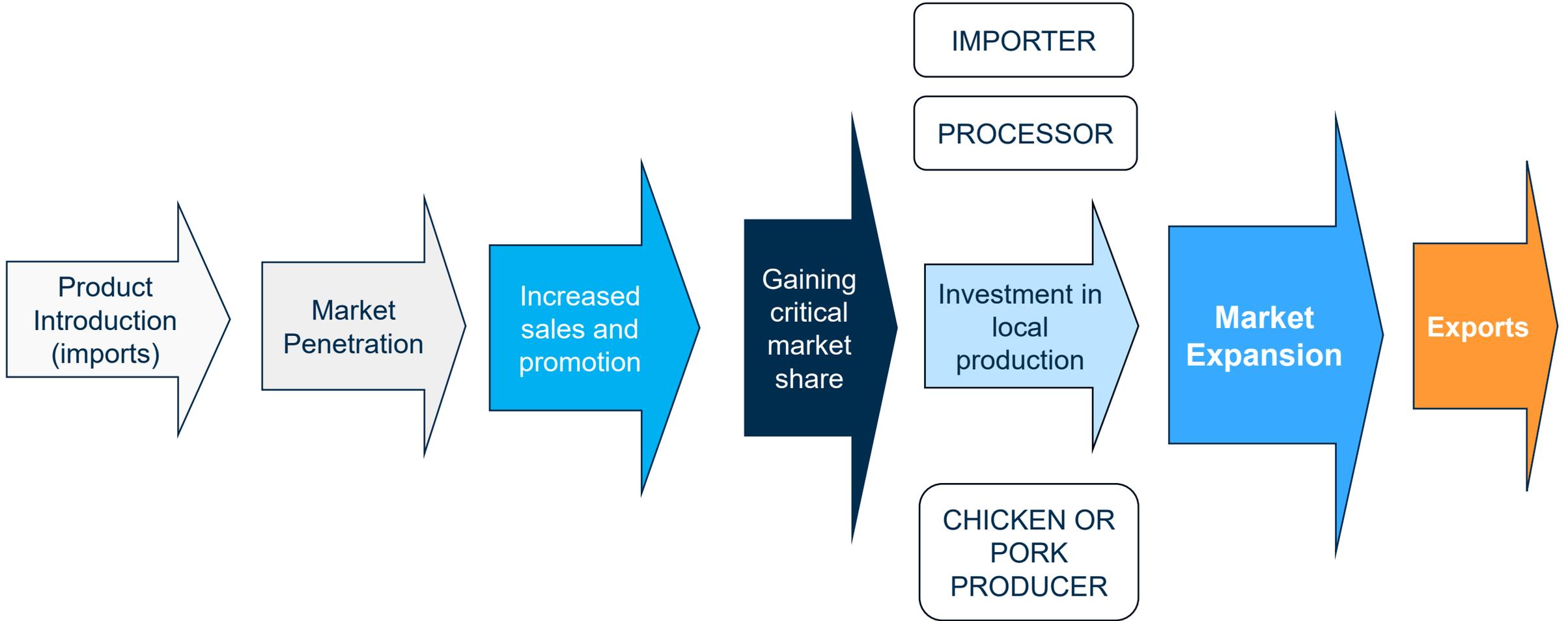
OPPORTUNITIES

- New markets development
- Growing halal food sector
- Healthy life/wellness trends
- Increasing consumer incomes
- Further processing for convenience

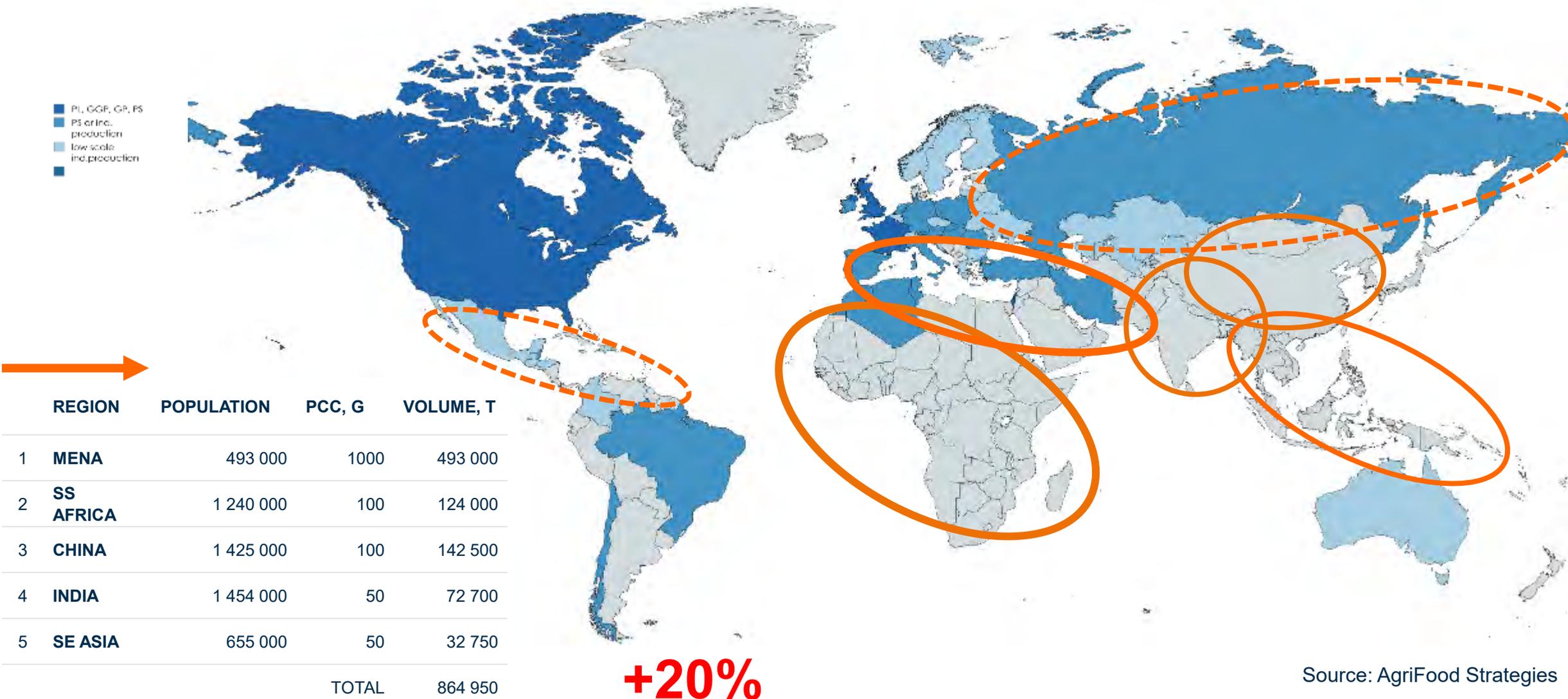
CONSTRAINTS

- Product unawareness
- Physical unavailability
- Competition with other types of meat

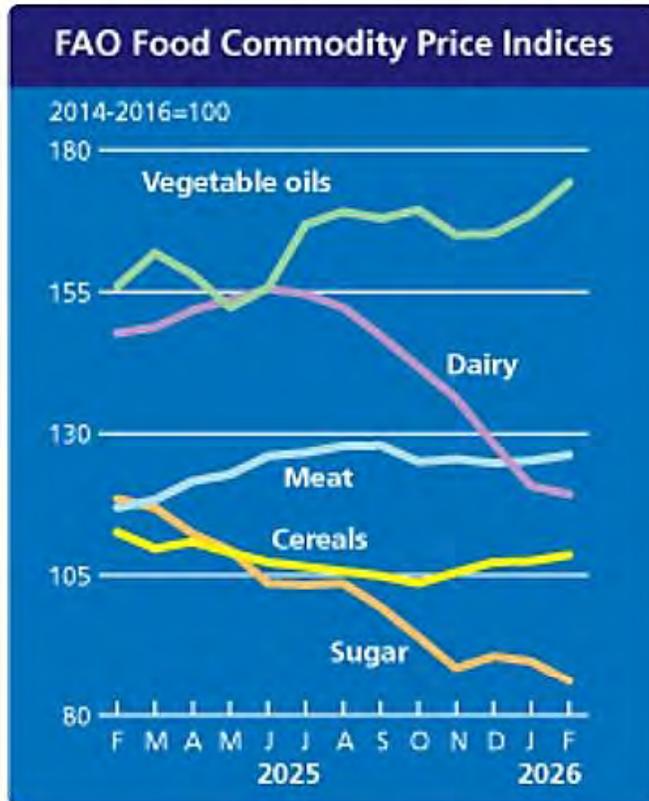
PATTERN: EVOLUTION OF EMERGING TURKEY MARKETS



PERSPECTIVE MARKETS FOR TURKEY MEAT TRADE AND INVESTMENT

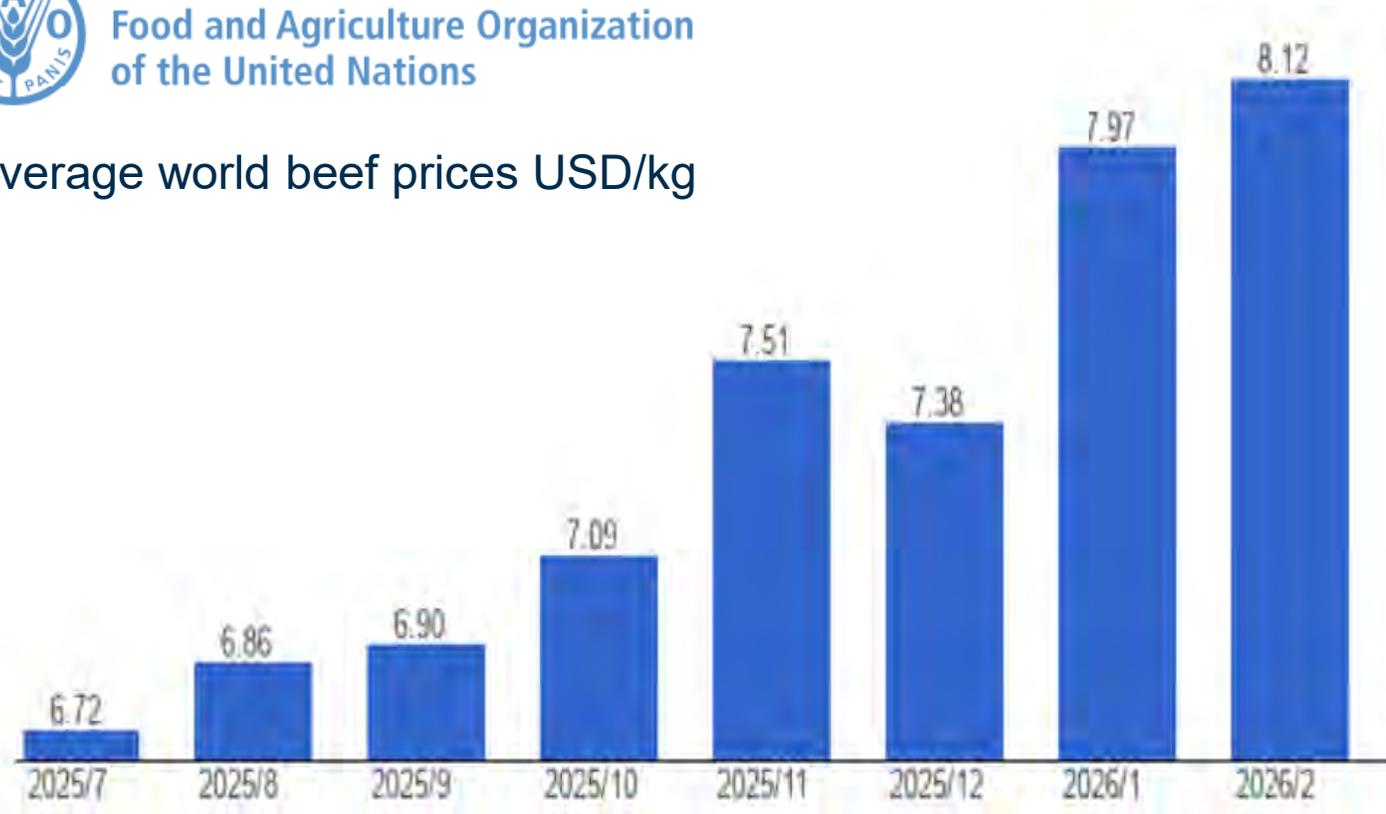


OPPORTUNITY: BEEF PRODUCTION FACING HARD TIMES



Food and Agriculture Organization of the United Nations

Average world beef prices USD/kg



The FAO Meat Price Index increased by 0.8 percent from January, as **ovine meat prices reached an all-time high and bovine meat prices rose on the back of strong import demand** from China and the U.S.

» NEXT ON THE PLATE

Food Safety & Processing Perspective BY TERRENCE O'KEEFE



Fewer turkeys raised and fewer processing plants in the US

Two turkey slaughter plants have closed in 2025 and another recently ceased processing on second shift.

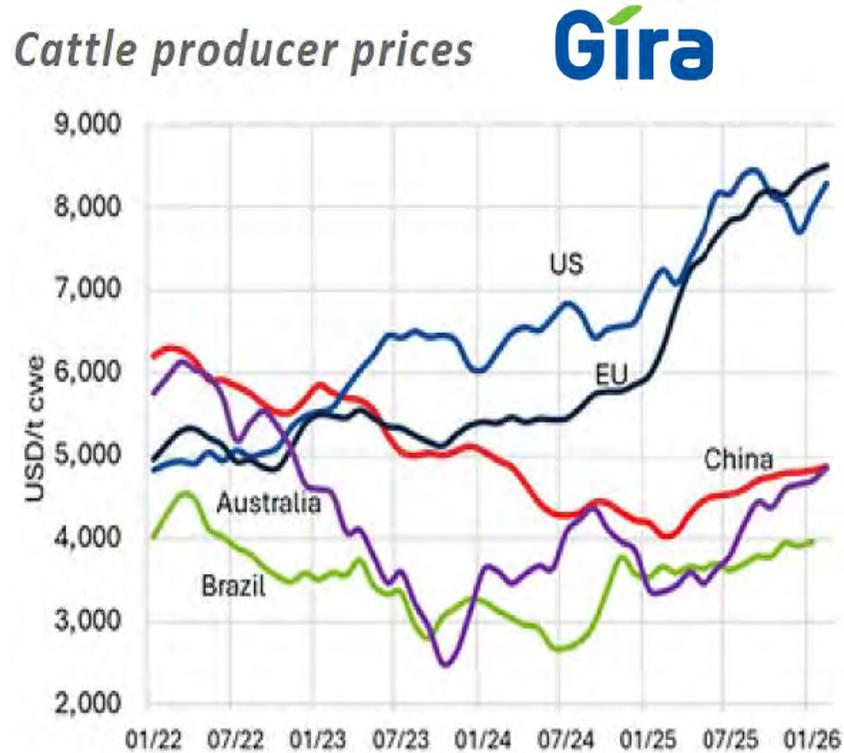
Terrence O'Keefe

Losing housing square footage may have as much or more effect on the number of turkeys raised in the future as lost shackle space. But ultimately, more birds won't be needed unless consumer demand for turkey rebounds from its multiyear decline.

I keep thinking that the incredibly high retail prices for beef will create more demand for turkey, but the chicken industry is the one gaining market share. ■



BEEF PRICES GROWTH KEEP EXCEEDING PROJECTIONS



World Bank Commodities Price Data (The Pink Sheet)

THE WORLD BANK

	Unit	Annual Averages			
		Jan-Dec	Jan-Dec	Jan-Dec	
		2023	2024	2025	
Other Food					
Bananas, EU	\$/kg	1.09	1.07	1.11	
Bananas, U.S.	\$/kg	b/	1.60	1.23	1.10
Beef **	\$/kg	b/	4.90	5.93	6.86
Chicken **	\$/kg	b/	1.53	1.46	1.71

+40%

PASTURE BASE FOR CATTLE BREEDING IS SHRINKING

☰ **CNN World** Africa Americas Asia Australia China Europe India Middle East United Kingdom

Barcelona, Spain
8:49 AM



GLOBAL FOOD THREAT
AFRICAN CLIMATE CONDITIONS ARE ALREADY EXTREME
Chaohui Li | Potsdam Institute for Climate Impact Research

Study: Grasslands could shrink by half due to climate change



POTSDAM INSTITUTE FOR
CLIMATE IMPACT RESEARCH

Iron Rich Foods



Poultry



Beans



Dark leafy greens



Turkey

@Nutrition_with_Wendi



Pumpkin seeds



Beef and pork



Fortified oatmeal



Seafood

NEW COMMUNICATION PARADYGM





TIRED OF CHICKEN?

CANNOT EAT PORK?





BEEF AND LAMB TOO EXPENSIVE?

**EAT MORE
TURKEY!**



... or

TRY

TURKEY



TURKEY:
THE REAL
TASTE
OF HEALTHY
MEAT



VEGAN-VEGETARIAN-FLEXITARIAN-REDUCTARIAN....

FoodNavigator
EUROPE

News Sectors Trends Resources Events

Consumers still cutting meat intake: What is a reductarian?



By Augustus Bambridge-Sutton
23-Jan-2026 Last updated on 23-Jan-2026 at 12:55 GMT



A 'reductarian' is not a vegan, vegetarian or flexitarian, but something else (Image: Getty Images/Riz Visual)

Lowering meat consumption remains a key part of European diets



WHERE IS A MEATATARIAN?



MEATATARIAN

beef | lamb | pork | chicken

WHERE IS TURKEY???

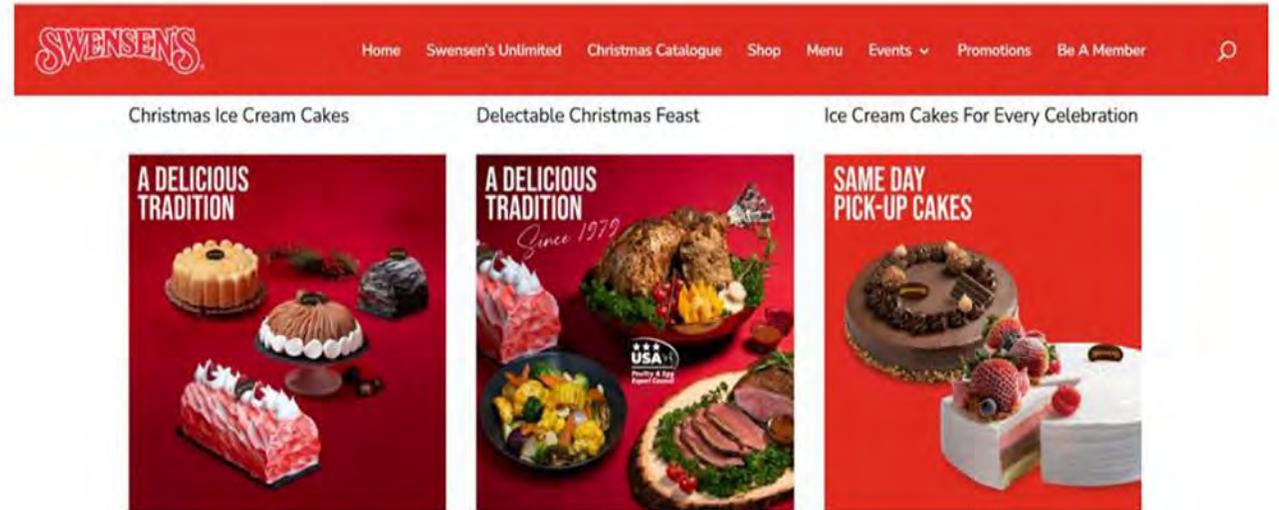
Butterball Turkey

The Choice of Turketarians.

Meet Wendy & Bruce



TURKEY MEAT PROMOTIONS IN SINGAPORE



TURKEY MEAT PROMOTIONS IN INDIA



Faster, Better, Easier! The Meatigo App V2.0 is here: [TRY APP](#)

MEATIGO
by PRASUMA

Jal Vihar
New Delhi

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CLASSIC AMERICAN POULTRY

Shop For America's Finest Turkey & Duck Range.



Whole Turkey (USA)



Raw Duck Breast (USA)



Duck Pastrami (USA)



Turkey Bacon (USA)



Smoked Turkey Breast Slices (USA)

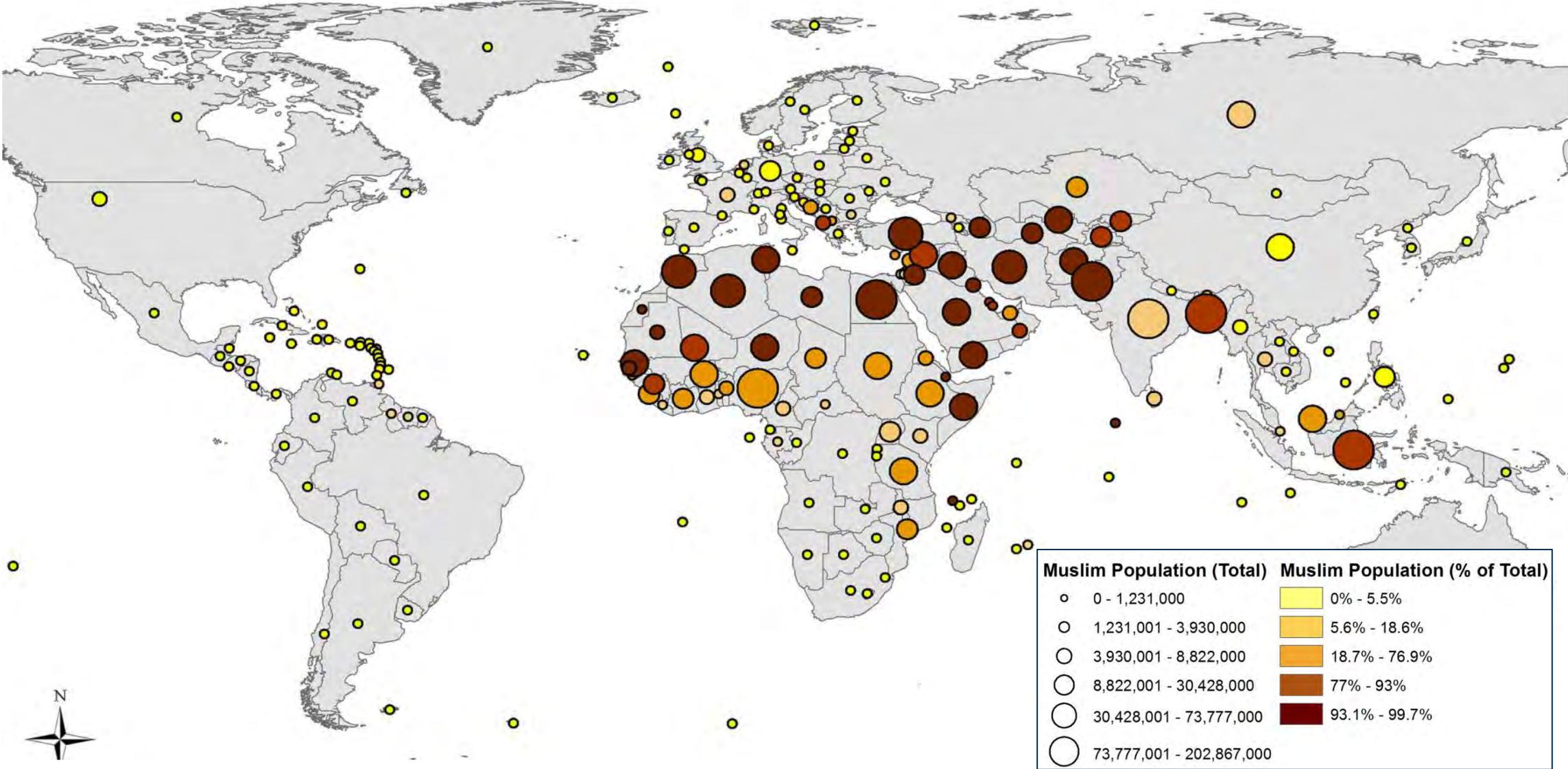
TURKEY MEAT PROMOTIONS IN INDIA



TURKEY MEAT PROMOTIONS IN DUBAI



GROWING MUSLIM POPULATION – ANOTHER DRIVER FOR GROWTH



THE MENA REGION: WORLD'S LARGEST HALAL MARKET

MENA FOOD MARKET VOLUME

>440
BILLION USD



>460
MILLION PEOPLE

95%
OF THEM - MUSLIMS

400,000 mt
POTENTIAL TURKEY MEAT
CONSUMPTION

COUNTRY	POPULATION (млн чел.)	GDP PER CAPITA (\$1,000 / YEAR)
QATAR	2,9	61,3
UAE	10,0	36,3
KUWAIT	4,3	24,8
SAUDI ARABIA	35,3	23,6
BAHREIN	1,7	22,2
OMAN	5,2	16,4
LYBIA	7,0	6,0
IRAQ	41,2	5,0
JORDAN	10,3	4,4
TUNISIA	11,9	3,9
EGYPT	104,3	3,9
ALGERIA	44,6	3,8
PALESTINE	4,9	3,7
MOROCCO	37,3	3,5
IRAN	85,0	2,8
LEBANON	6,8	2,7
SYRIA	18,3	1,2
YEMEN	30,5	0,7



Comprehensive consumer promotion campaign in UAE

Strategic Direction

ROLE OF THE BRAND

Make **turkey category** a mainstream, easy, modern protein for everyday meals in the UAE.

BUSINESS OBJECTIVE

Awareness & trial

MARKETING PLATFORM

Elevate your meal

FOCUS

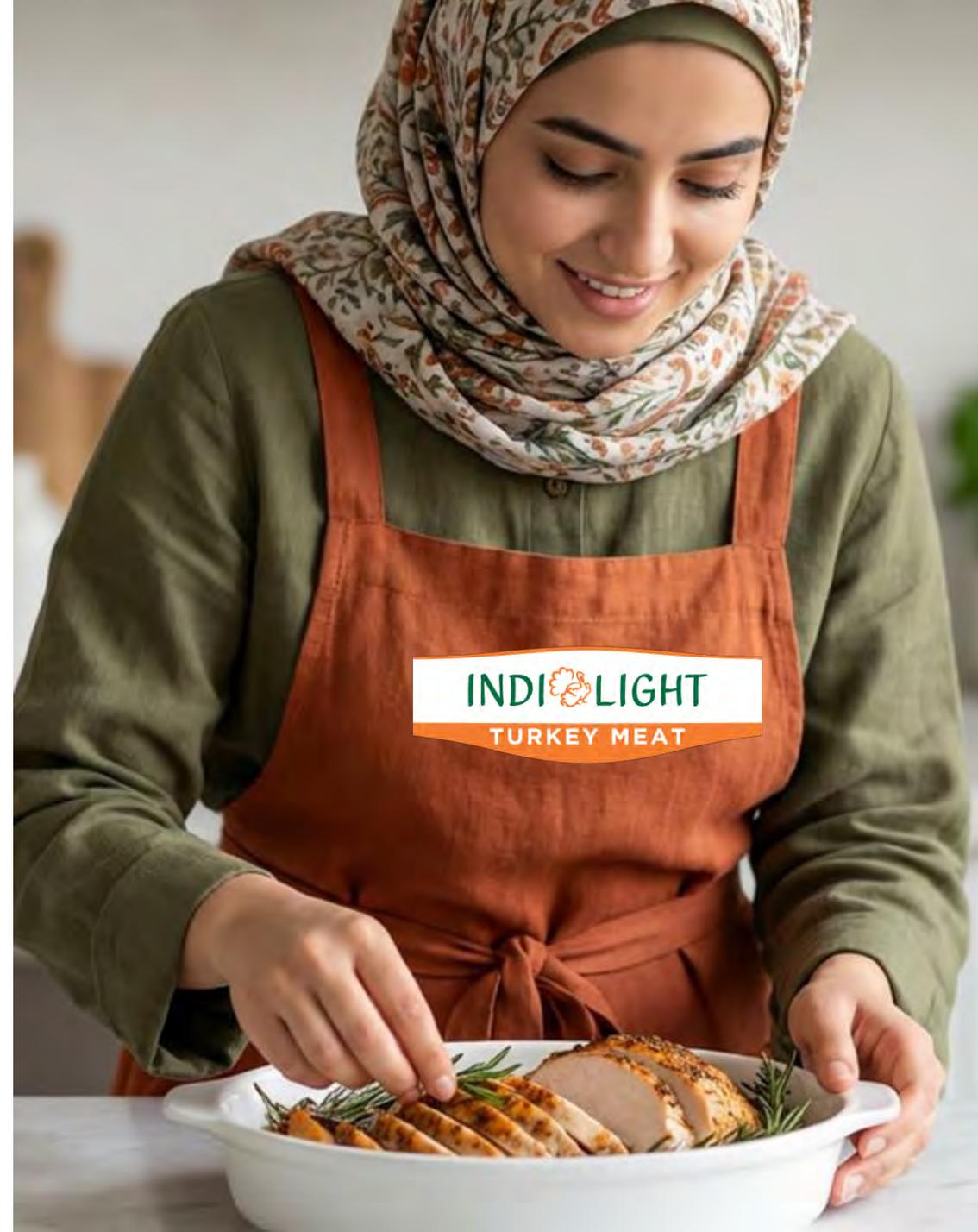
Education on category benefits & cooking

COMMUNICATION PILLARS

Wellness / Light, protein-forward

Gastronomy / Chef technique & Versatility

Convenience & Taste / Convenience & Culture — “Fits every table”



Indilight Market Presence

RETAIL & E-COMMERCE COVERAGE

RETAIL DISTRIBUTION

- Indilight is currently available across approximately **45 retail stores** in the UAE through key retail partners, such as *Union Coop, Grand Hyper, Ansar Gallery, F-Mart, Prostor, Park N Shop*
- Retail expansion is ongoing, with Carrefour listing expected by March 2026, further strengthening brand accessibility.

E-COMMERCE PRESENCE

Indilight products are available across major UAE online quick grocery platforms, providing convenient access to consumers through digital channels: *DXBBQ, Kibsons, Amazon, Careem, Prostor.ae*

UAE COVERAGE

Total Trade Chains - 15
Total Stores covered - 154
Distribution Coverage, % - 4.3%

OMAN COVERAGE

Total Trade Chains - 3
Total Stores covered - 11
Distribution Coverage % - 1.3%

KEY RESULTS

+14

New chains
added in 2025



+153

New stores
added in 2025



MAJOR CHAINS COVERED

UAE Retail



UAE E-com



OMAN Retail



Product Portfolio



**RAW
FROZEN ASSORTMENT**



**READY TO EAT
FROZEN ASSORTMENT**



**READY TO COOK
CHILLED RANGE**



**FESTIVE MARINATED
CHILLED
TURKEY STEAKS**

Digital Media Campaign

Duration:
15/10/2025 – 28/02/2026



OBJECTIVES

- Build category awareness for turkey across UAE markets
- Expand reach to new consumer audiences
- Scale demand through product introduction via the trail
- Increase website traffic and Arabic audience growth

CHANNELS



AWARENESS RESULTS

16M

Impressions

7.2M

Unique Users

5.7M

Video Views

TRAIL RESULTS

79K Clicks

1,5K Conversions

WEBSITE AUDIENCE

96K

Total Website Users

86K

New Website Users

+23%

Arabic Audience Growth



PR

OBJECTIVES

- Drive sustained media visibility across media: culinary, lifestyle, and wellness titles
- Establish trust via consistent coverage in local and niche outlets, paired with key influencer collaborations
- Build a loyal base of journalists and ambassadors to fuel long-term audience growth and category promotion



KEY PR PILLARS

A. ACTIVATIONS AT SIGNATURE LOCAL AND OWNED EVENTS



TASTE OF DUBAI

- Brand zone with product tastings
- Chef-led masterclasses driving product trials

~1200 turkey

Dishes Served Over 3 Days

B. PARTNERSHIPS WITH CULINARY AND WELLNESS INSTITUTIONS



ICCA CULINARY EVENT

Indilight partnered with ICCA Culinary School to introduce the brand through chef-led culinary experiences

2.4M+

Total Audience Reach

5.7M+

Total Media Impressions

C. COLLABORATIONS WITH PREMIUM VENUES



FAIRMONT "ELEVATE YOUR IFTAR"

Media and influencer launch event at Fairmont The Palm, introducing a month-long Ramadan activation featuring a special Iftar menu with Indilight turkey dishes to encourage product trials.

22

Total Publications

BTL Activities



RETAIL SAMPLING



OBJECTIVES

- Drive product trials through in-store sampling activations
- Introduce shoppers to the Indilight turkey range and build product awareness

Union Coop Activations (Oct 2025 – Jan 2026):

5000 people tried the products

IN-STORE VISIBILITY



To support product visibility within retail stores, with point-of-sale materials were implemented including: Shelf strips highlighting the Indilight brand



We need to unite the efforts of all stakeholders to ensure stability and sustainable development of the turkey industry worldwide.

It's time to consider **joint regional promotional campaigns** and **establishing an international turkey industry association.**

AGRIF**OOD**
STRATEGIES
Looking Deeper, Seeing Further

Albert Davleyev, President

a.davleyev@agrifoodstrata.com