

4.2 Central America

4.2.1 Regional Demographics and Poultry Stocks

The Central American broiler industry has 2.1 million farms with 21,792 (1.1%) of those being commercial farms and 1.97 million (98.9%) being household or micro-producer farms. Central American broiler farms have stocks of 769 million chickens with 85.7% being on commercial farms and 14.3% being on household or micro-producer farms (Figure 47). The average size of commercial broiler farms is 30,270 head. The average size of the household or micro-producer farms is 56 head. There are 98,607 duck farms in Central America with an inventory of 8.6 million head. The average size duck farm is 88 head. There are 10,411 turkey farms in Central America with 3.8 million head of inventory. The average turkey farm has an inventory of 368 head.

Overall poultry stocks in Central America have steadily increased since 2010. Chicken stocks are up 16.7%, duck stocks are up 2.6%, and turkey stocks are down 6.5% (Figure 48).

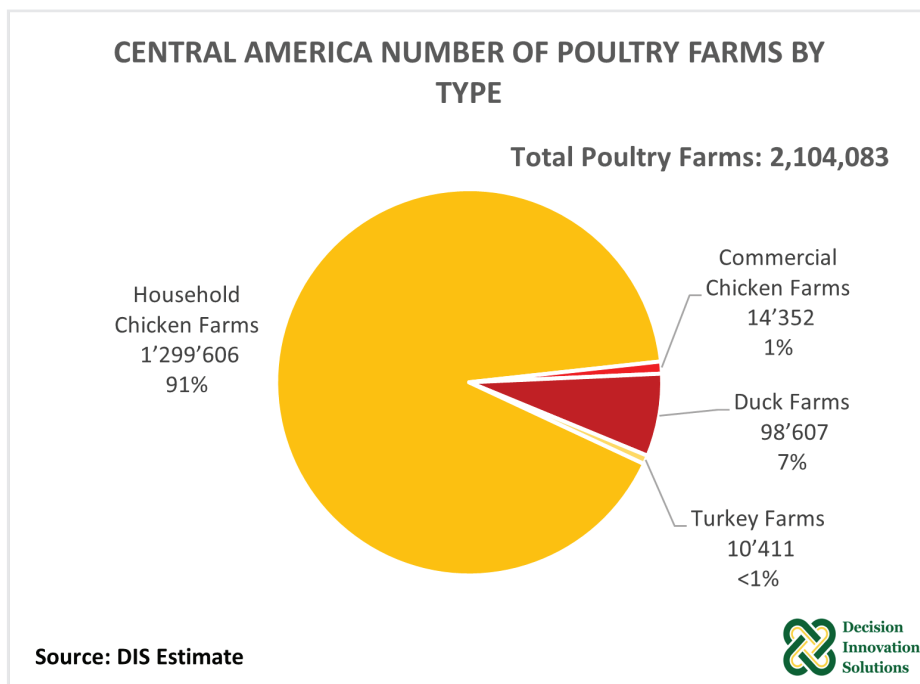


Figure 47. Central America number of poultry farms

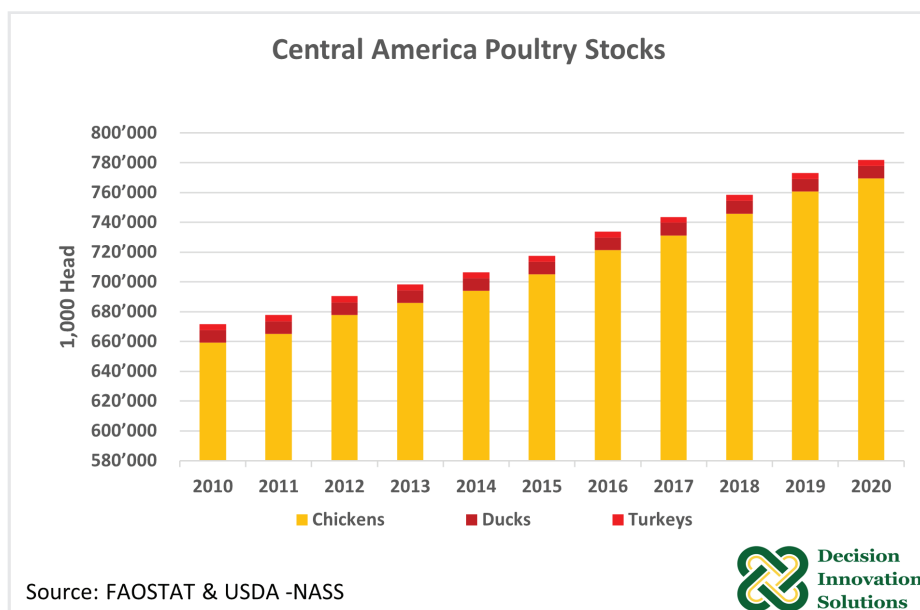


Figure 48. Central America poultry stocks

4.2.2 Regional Economics

The total GDP for Central America was valued at \$1.48 trillion in 2020. An estimated 4 percent of the total was derived from agricultural production sectors such as crops, red meat, and poultry production. Crop production was the largest of the agricultural production sectors and was valued at \$35.5 billion. Red meat production was the second largest agricultural production sector, contributing nearly \$20.5 billion (Figure 49).

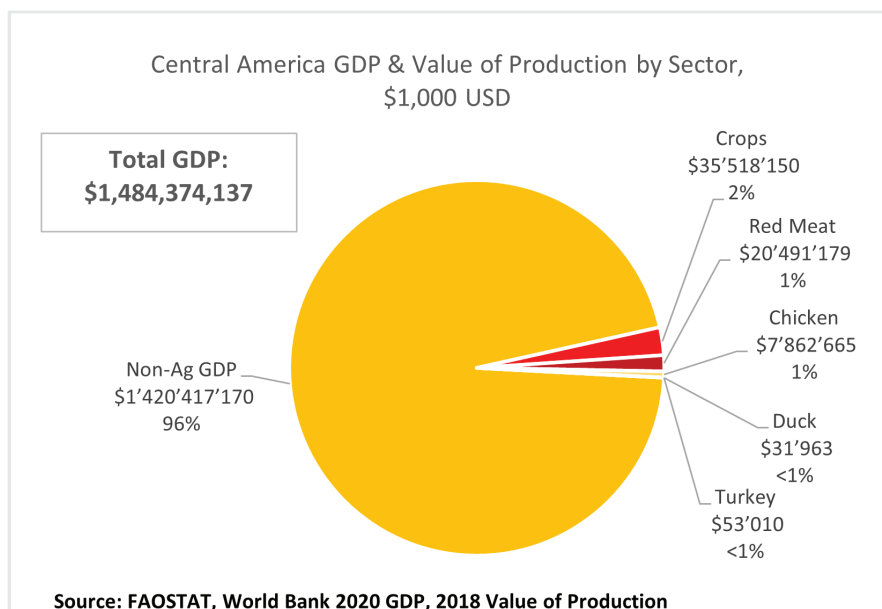


Figure 49. Central America GDP & value of production by sector

4.2.3 Regional Poultry Production Volume and Value

In 2020, Central American poultry production totaled 4.7 million metric tons (Figure 50). Chicken meat production represented 99% (4.7 million metric tons) of poultry production in Central America. Duck meat production represented 1% (21,141 metric tons) and turkey meat production accounted for less than 1% (17,305 metric tons) of poultry production (21,141 metric tons).

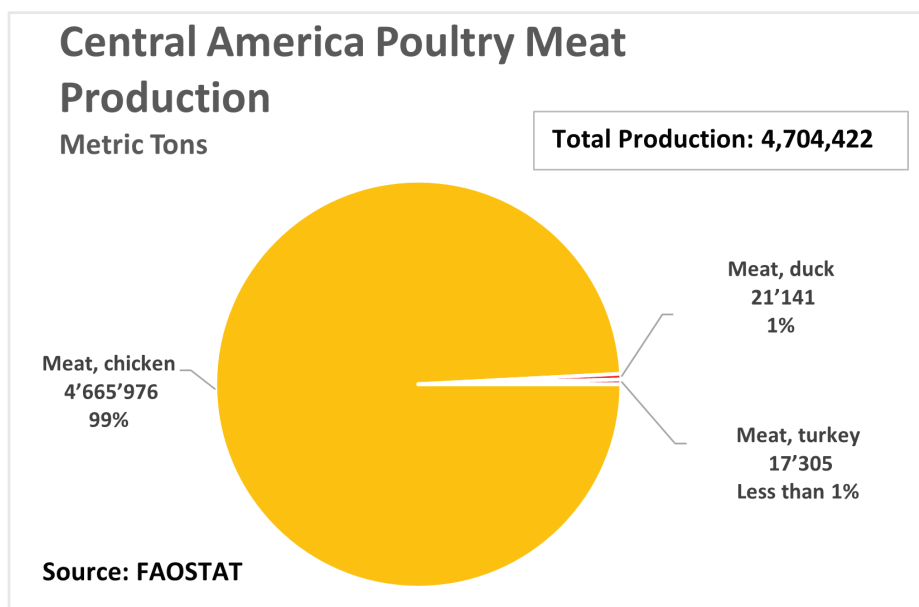


Figure 50. Central America poultry meat production

Central America poultry production has increased 16.4% since 2010. Central American poultry production in 2020 totaled \$7.9 billion with 99% due to chicken production, 1% due to turkey production and less than 0.5% due to duck production. Central America produced 4.7 million metric tons of poultry meat in 2020 with 99% being chicken meat, 1% being duck meat and less than 0.5% being turkey meat (Figure 51).

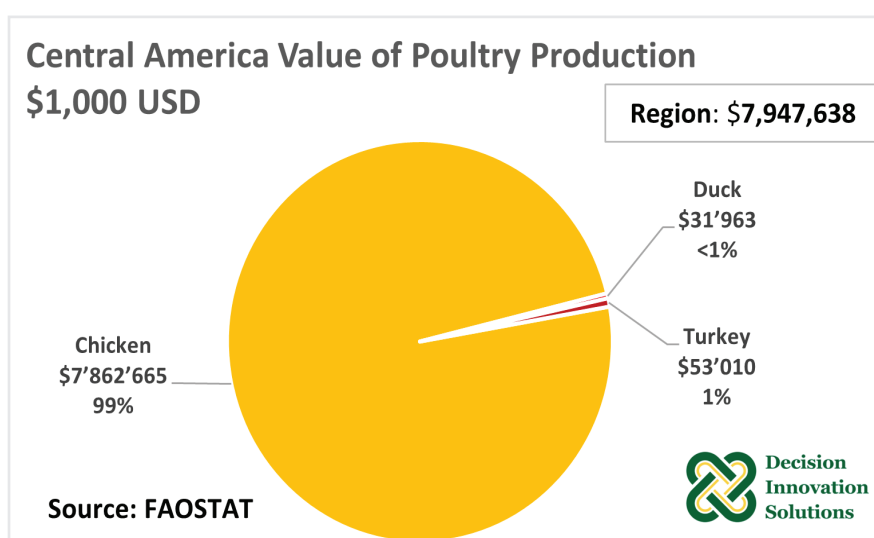


Figure 51. Central America value of poultry production

4.2.4 Regional Cost of Production

Within the Central American region (for the countries with available data), feed cost share of total production ranges from 66% in Mexico to 70% in Panama (see Figure 52).

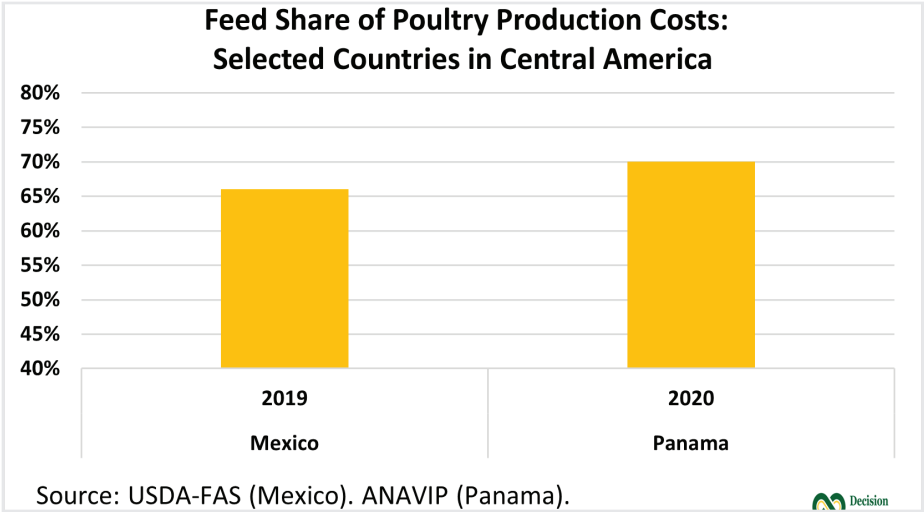


Figure 52. Feed share of poultry production costs: Central America

4.2.5 Honduras

4.2.5.1 Demographics

Household or micro-producer chicken farms are the most common poultry farm in Honduras with 99.95% or 594,282 of the total 594,551 poultry farms. The remaining 0.05% or 269 poultry farms were commercial chicken farms (see Figure 53). The average household chicken farm in Honduras had 52 chickens, while the average commercial chicken operation contained an average 61,969 chickens.

Poultry production and consumption in Honduras is increasing. Poultry production reached 212,596 metric tons in 2019 and has increased 58% since 2010. Poultry consumption reached 227,998 metric tons in 2019 and has increased 58% since 2010 (Figure 54).

In 2020, stocks of chicken in Honduras totaled 47.6 million head (see Table 10). Since 2010, chicken stocks in Honduras have increased 10%. Poultry slaughter totaled 99.4 million head and were comprised of chickens only. Chicken slaughter increased 34% compared to 2010. Total chicken production amounted to 194,000 metric tons. Since 2010, chicken production increased 44%.

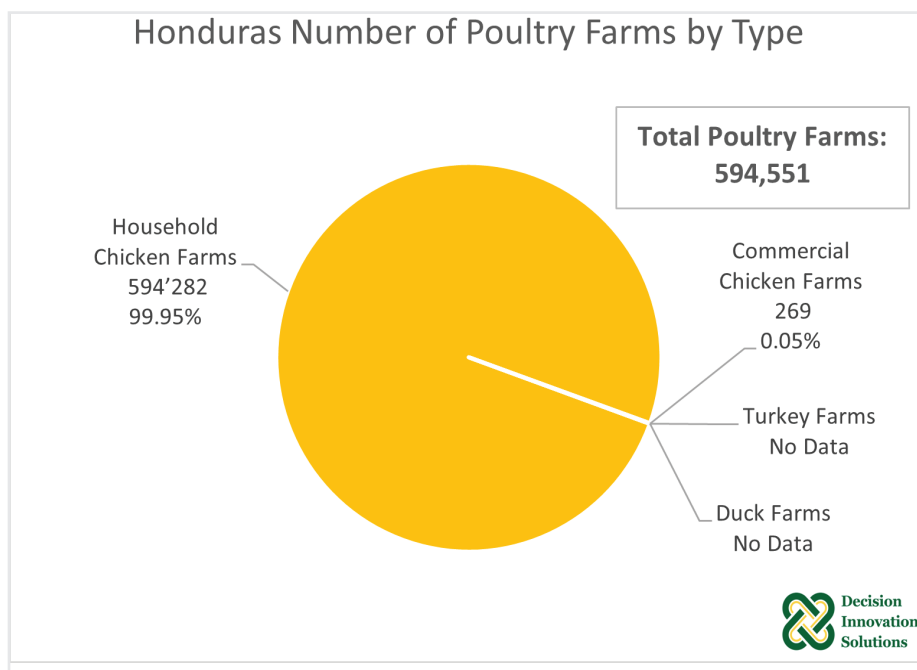


Figure 53. Honduras number of poultry farms

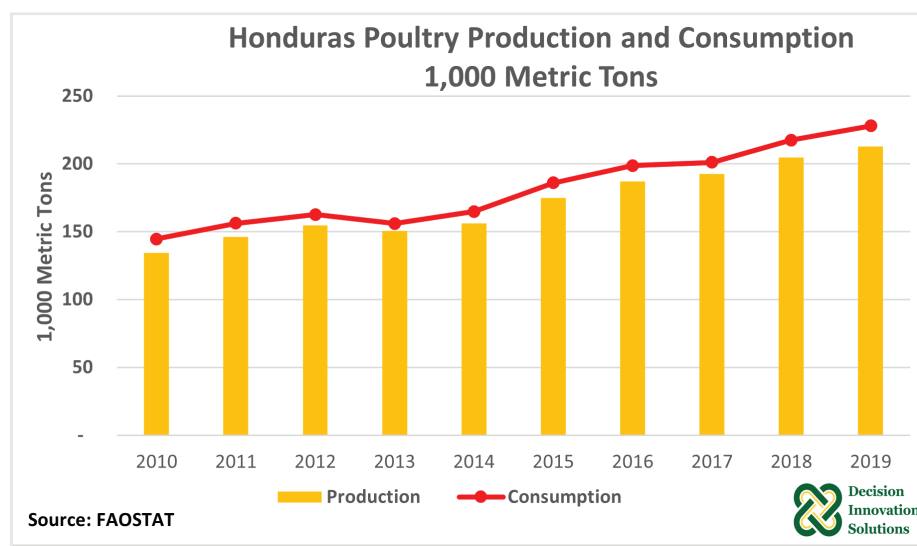


Figure 54. Honduras poultry production & consumption

| HONDURAS POULTRY STOCKS, SLAUGHTER, AND PRODUCTION | | | | |
|--|----------|-------|---------|--------|
| 1,000 head | Chickens | Ducks | Turkeys | Total |
| Stocks | 47'601 | - | - | 47'601 |
| Producing Animals/Slaughtered | 99'365 | - | - | 99'365 |
| Production (1,000 MT) | 194 | - | - | 194 |

Sources: FAO, 2020

Table 10. Honduras poultry stocks, slaughter & production

4.2.5.2 GDP and Value of Production

The GDP in Honduras was valued at \$23.8 billion in 2020. Approximately, 13% of GDP was derived from the agricultural production sector. Crop production was 9% or \$2.2 billion. Red meat production was the third largest in the sector with 1% or \$230.7 million of the total. Other livestock products account for about 2% of GDP being valued at \$336 million. About 1% of the total GDP was contributed by the production of chicken with a value of \$303.6 million. Data was not available for duck or turkey production in Honduras (Figure 55).

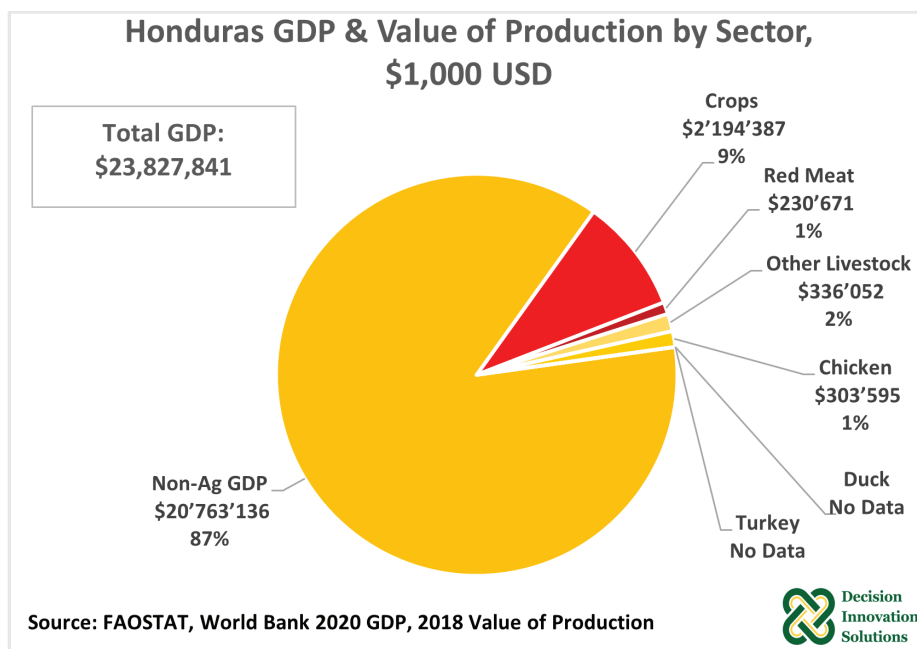


Figure 55. Honduras GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Honduras are estimated to be \$4.5 billion. Of this amount, \$657 million comes from chicken meat production. Agriculture pays a net value of \$24 million in taxes, \$2 million of which is estimated to be from chicken meat production. Data was not available for duck or turkey production in Honduras (Table 11).

| ECONOMIC EFFECTS - HONDURAS (\$1,000 USD) | | | | |
|---|-------------|-------------|-------------|-------------|
| | Direct | Indirect | Total | Taxes paid* |
| All agriculture | \$3'064'705 | \$1'462'439 | \$4'527'144 | \$23'678 |
| Livestock | \$870'318 | \$689'752 | \$1'560'070 | \$6'724 |
| Poultry | \$303'595 | \$353'408 | \$657'003 | \$2'346 |
| Chicken | \$303'595 | \$353'408 | \$657'003 | \$2'346 |
| Duck | - | - | - | - |
| Turkey | - | - | - | - |

Source: FAOSTAT, Central Bank of Honduras. *taxes is equal to taxes on production net of subsidies

Table 11. Economic effects - Honduras

4.2.5.3 Labor

The labor force total in Honduras was reported at 4.1 million in 2020, according to the World Bank.

Based on data from the International Labour Organization (ILO), an estimated 1.0 million people comprised the total agricultural labor sector. Of that total, 109,665 were employed in the poultry industry (see Table 12).

| AGRICULTURAL LABOR FORCE CHARACTERISTICS - HONDURAS | | | |
|---|-----------|-----------|-----------|
| | Total | Female | Male |
| Total Country Labor | 4'089'919 | 1'436'033 | 2'653'886 |
| Non-Agricultural Labor | 3'045'615 | 1'301'947 | 1'743'667 |
| Agricultural Labor | 1'044'304 | 134'086 | 910'219 |
| Total Non-Poultry Agricultural Labor | 934'639 | | |
| Total Poultry Labor | 109'665 | | |
| Chicken Labor | 109'665 | | |
| Turkey Labor | | | |
| Other Poultry Labor | | | |
| Wages (\$1,000 USD) | | | |
| Total Meat Processing Labor | - | - | - |
| Livestock Processing Labor | - | - | - |
| Poultry Processing Labor | - | - | - |

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 12. Agricultural labor force characteristics - Honduras

4.2.5.4 Trade

El Salvador was the largest market for Honduras' poultry exports in 2019. Honduras exported more than \$1.7 million in poultry products to El Salvador. The second largest market for Honduran poultry exports was Guatemala which imported \$69,000 in poultry exports. The USA also ranked in the top 3 destinations for poultry exports from Honduras in 2019 with \$60,000 of Honduran poultry exports. Neighboring country, Costa Rica was the fourth largest market for poultry exports from Honduras (see Figure 56 and Figure 57).

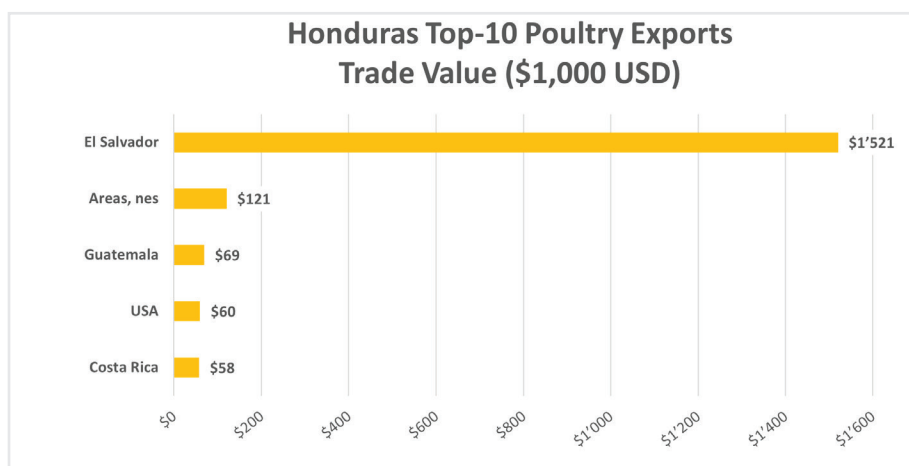


Figure 56. Honduras top 10 poultry exports, trade value

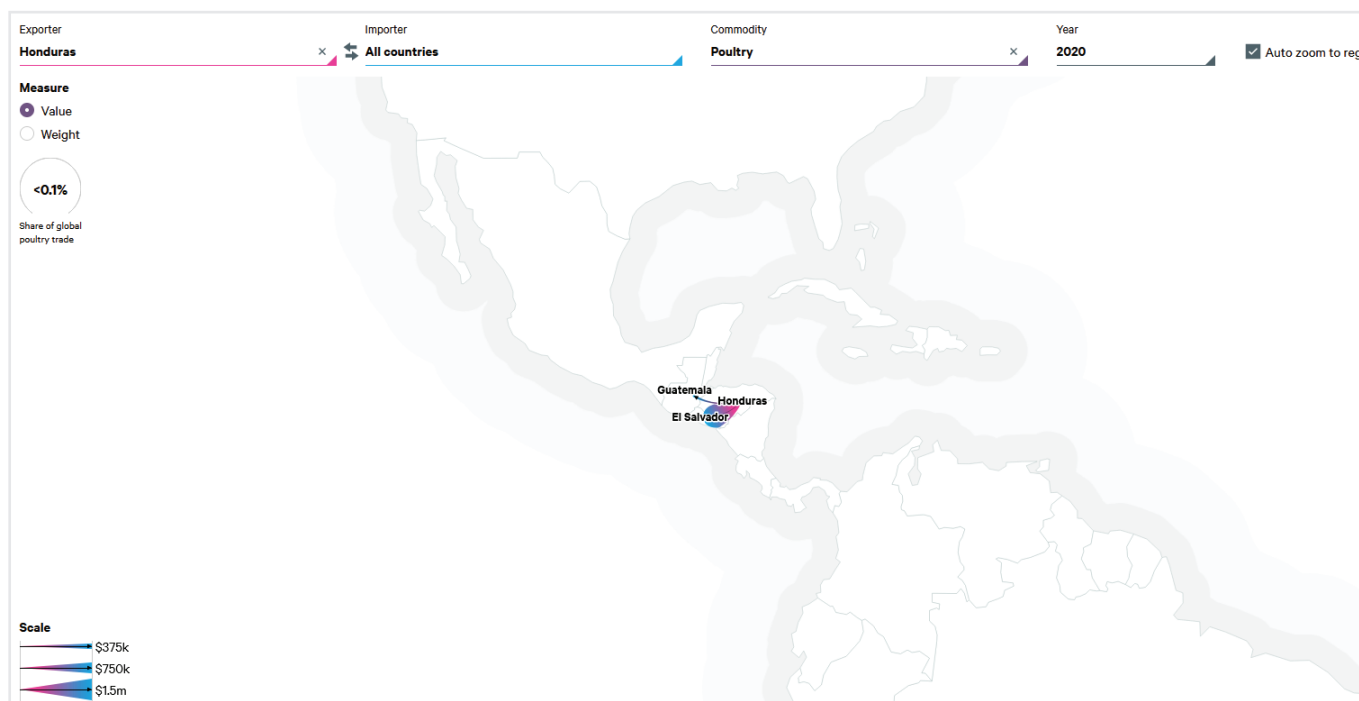


Figure 57. Honduras poultry export flows

The USA was the largest supplier of poultry products to Honduras with nearly \$29.5 million in 2019. Honduras' imports from Guatemala were the second largest in value (\$3.9 million). Poultry imports from Costa Rica totaled \$2.0 million (Figure 58 & Figure 59).

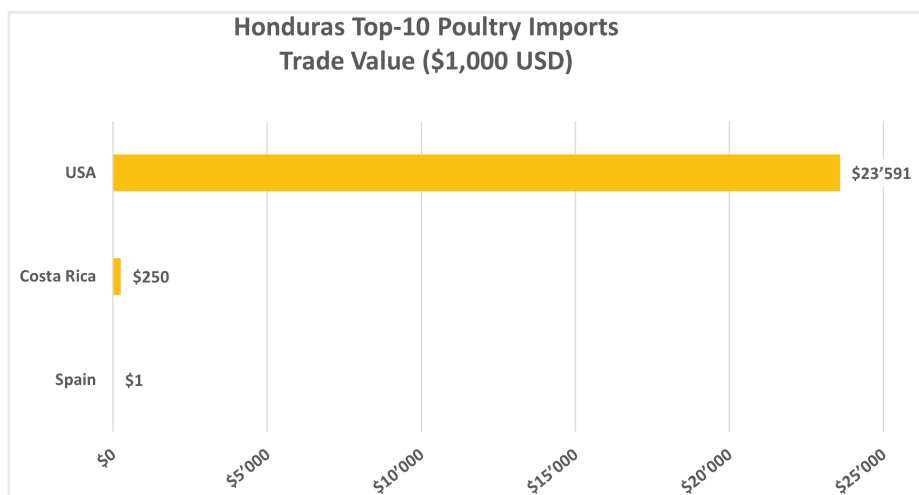


Figure 58. Honduras top 10 poultry imports, trade value

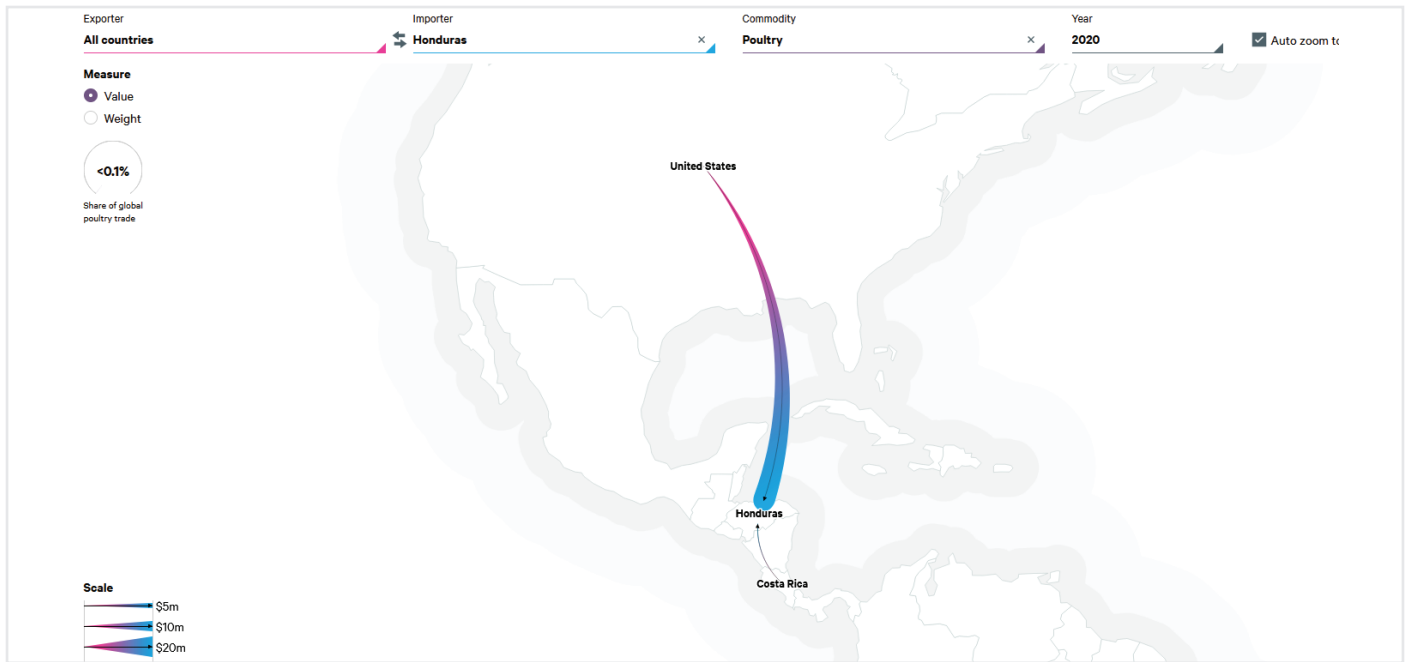


Figure 59. Honduras poultry import flows

4.2.6 Mexico

4.2.6.1 Demographics

Of the 370,730 poultry farms in Mexico, approximately 95% or 353,520 were household or micro-producer chicken farms. There were 11,082 commercial chicken farms which comprised 3% of the total poultry farms in Mexico. About 4,069 turkey farms made up 1% share of the total poultry farms. The remaining 1% or 2,059 poultry farms were duck farms (see Figure 60). The average farm sizes by number of animals were as follows: 100 chickens per household/micro-producer farm, 50,193 chickens per commercial chicken operation, 1,368 ducks per duck farm, and 923 turkeys per turkey farm.

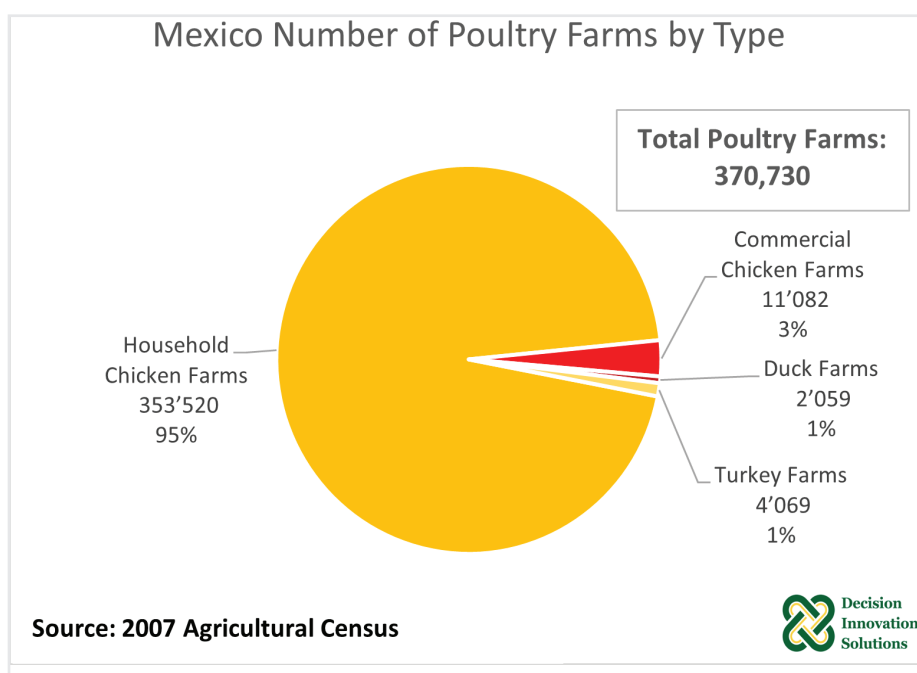


Figure 60. Mexico number of poultry farms

Mexican poultry production and consumption are increasing. In 2021, poultry production in Mexico exceeded 3.64 million metric tons and increased 34% since 2010. Poultry consumption in Mexico topped 4.66 million metric tons in 2021 and has increased 36% since 2010 (Figure 61).

The total number of poultry stocks in Mexico was nearly 598.2 million head (see Table 13). About 98.9% or 591.6 of Mexico's poultry stocks were chickens. Turkeys (3.8 million) and ducks (2.8 million) each accounted for less than 1% of poultry stocks. Since 2010, Mexico's chicken stocks increased 17%, duck stocks increased 2%, and turkey stocks decreased 7% since 2010.

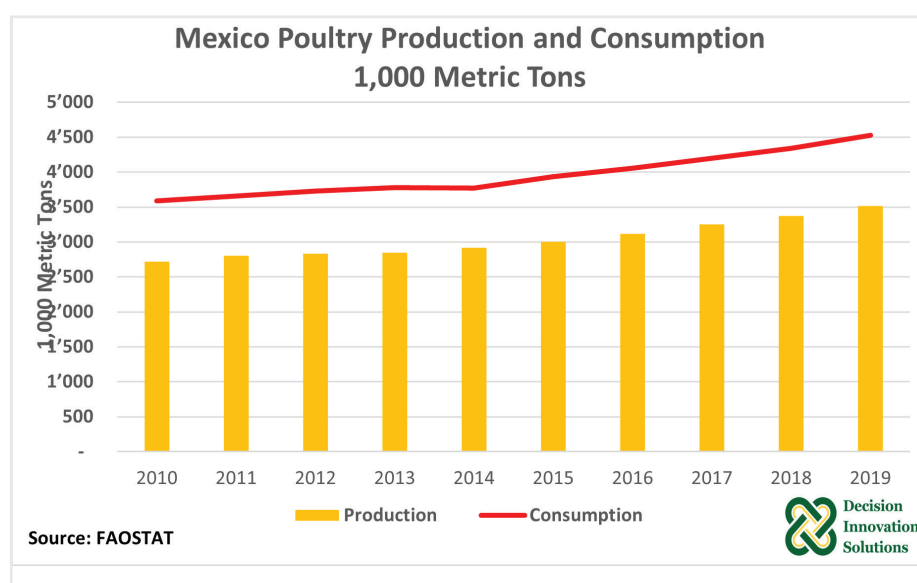


Figure 61. Mexico poultry production & consumption

| MEXICO POULTRY STOCKS, SLAUGHTER, AND PRODUCTION | | | | |
|--|-----------|-------|---------|-----------|
| 1,000 head | Chickens | Ducks | Turkeys | Total |
| Stocks | 591'596 | 2'817 | 3'757 | 598'170 |
| Producing Animals/Slaughtered | 1'961'066 | 8'451 | 2'910 | 1'972'427 |
| Production (1,000 MT) | 3'579 | 21 | 17 | 3'617 |

Sources: FAO, 2020

Table 13. Mexico poultry stocks, slaughter & production

Poultry slaughter in Mexico totaled 1.97 billion in 2020. An estimated 99% or 1.96 billion head of poultry slaughter was chickens. Duck slaughter outnumbered turkey slaughter and represented 8.5 million head of poultry slaughter. Approximately, 2.9 million turkeys were slaughtered in 2020. Chicken and duck slaughter also increased by 27% and 2%, respectively. Turkey slaughter declined 16% from 2010.

Poultry production included 3.6 million chickens, 21,000 ducks, and 17,000 turkeys. Since 2010, poultry production increased 33% and turkey production declined 18%.

4.2.6.2 GDP and Value of Production

The GDP of Mexico was valued at nearly \$1.1 trillion in 2020. The agricultural production sector supported 5% of the total GDP. Crop production was an estimated 3% or \$28.5 billion. Red meat production was nearly \$10.7 billion. Other livestock products were \$7.3 billion. Chicken production was less than 1% of the total and was estimated at \$5.6 billion. Duck production is valued at \$32 million and turkey production at \$51.9 million. (Figure 62).

The combined (direct and indirect) effects of agricultural production in Mexico are estimated to be \$94.9 billion. Of this amount, \$11.6 billion comes from the poultry industry, with \$11.4 billion from chicken meat production, \$65 million from duck production, and \$106 million from turkey production. Agriculture pays a net value of \$185 million in taxes, \$23 million of which is estimated to be from the poultry industry (Table 14).

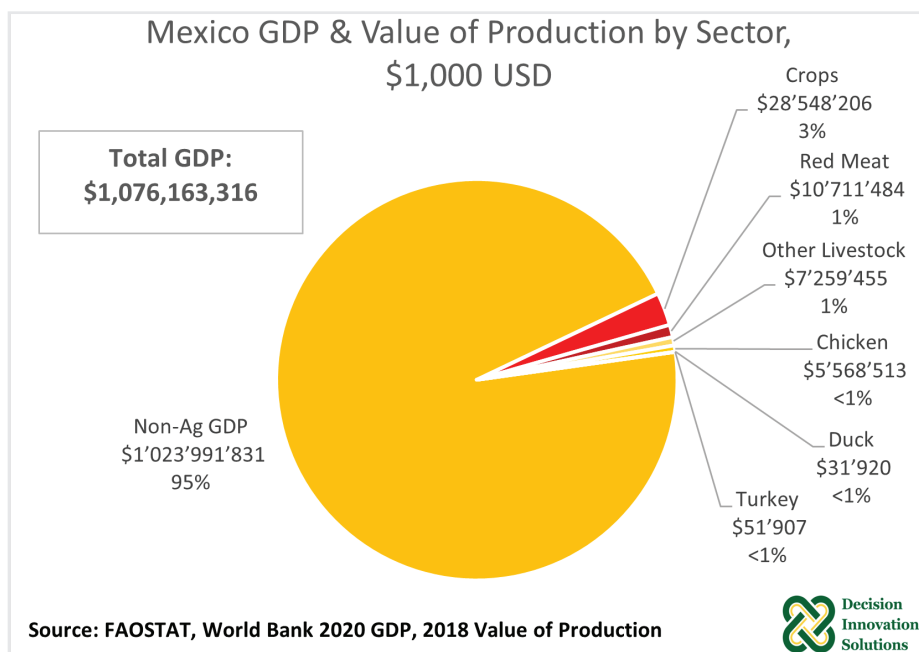


Figure 62. Mexico GDP & value of production by sector

| ECONOMIC EFFECTS - MEXICO (\$1,000 USD) | | | | |
|---|--------------|--------------|--------------|-------------|
| | Direct | Indirect | Total | Taxes paid* |
| All agriculture | \$52'171'485 | \$42'741'946 | \$94'913'431 | \$184'734 |
| Livestock | \$23'623'279 | \$19'353'578 | \$42'976'857 | \$83'648 |
| Poultry | \$5'652'340 | \$5'906'695 | \$11'559'035 | \$22'624 |
| Chicken | \$5'568'513 | \$5'819'096 | \$11'387'609 | \$22'289 |
| Duck | \$31'920 | \$33'356 | \$65'276 | \$128 |
| Turkey | \$51'907 | \$54'243 | \$106'150 | \$208 |

Source: FAOSTAT, OECD Input-Output Tables. *taxes is equal to taxes on production net of subsidies

Table 14. Economic effects -Mexico

4.2.6.3 Labor

2020 data from the World Bank and ILO reflects 53.1 million people in Mexico's labor force (see Table 15). Non-agricultural labor totaled 46.5 million. Among the agricultural sector, there were 5.9 million males, and 739,486 females, totaling 6.6 million workers in the agricultural sector. Poultry production labor totaled 729,352 people in 2020.

Meat processing labor accounted for 77,001 jobs in 2020. Wages earned from meat processing in Mexico totaled \$420.4 million. About 65% of the total meat processing labor was from livestock processing, and the remaining 35% was from poultry processing labor.

| AGRICULTURAL LABOR FORCE CHARACTERISTICS - MEXICO | | | |
|---|------------|------------|------------|
| | Total | Female | Male |
| Total Country Labor | 53'080'123 | 20'230'808 | 32'849'315 |
| Non-Agricultural Labor | 46'453'674 | 19'491'322 | 26'962'352 |
| Agricultural Labor | 6'626'449 | 739'486 | 5'886'963 |
| Total Non-Poultry Agricultural Labor | 5'897'097 | | |
| Total Poultry Labor | 729'352 | | |
| Chicken Labor | 718'535 | | |
| Turkey Labor | 6'698 | | |
| Other Poultry Labor | 4'119 | | |
| Wages (\$1,000 USD) | | | |
| Total Meat Processing Labor | 77'001 | \$420'391 | |
| Livestock Processing Labor | 50'404 | \$275'181 | |
| Poultry Processing Labor | 26'597 | \$145'210 | |

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 15. Agricultural labor force characteristic - Mexico

4.2.6.4 Cost of Production

After feed cost, which is the largest proportion of broiler production cost in Mexico (66%), chick cost (17%) is the second largest cost of production component in this industry, while labor and electricity represent each 6.5% of total costs. Medication and management have the lowest share of production costs at 2% each (see Figure 63).

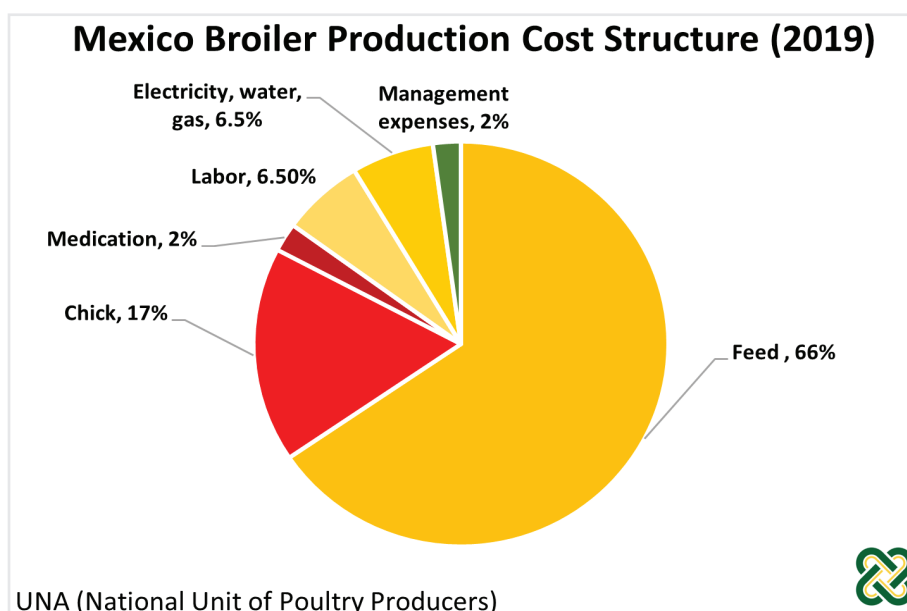


Figure 63. Mexico broiler production cost structure

4.2.6.5 Trade

Mexico has observed limited access to poultry export markets due to restrictions imposed by other countries. These restrictions are generally towards fresh poultry; however, efforts have been made to establish disease-free recognition in recent years. Mexico exported an estimated \$15.9 million and \$198,639 in poultry meat to the USA and Ghana, respectively in 2020 (see Figure 64). Poultry meat export partners in 2021 included Hong Kong, Namibia, and Georgia, among other countries (Figure 65).



Figure 64. Mexico top 10 poultry exports, trade value

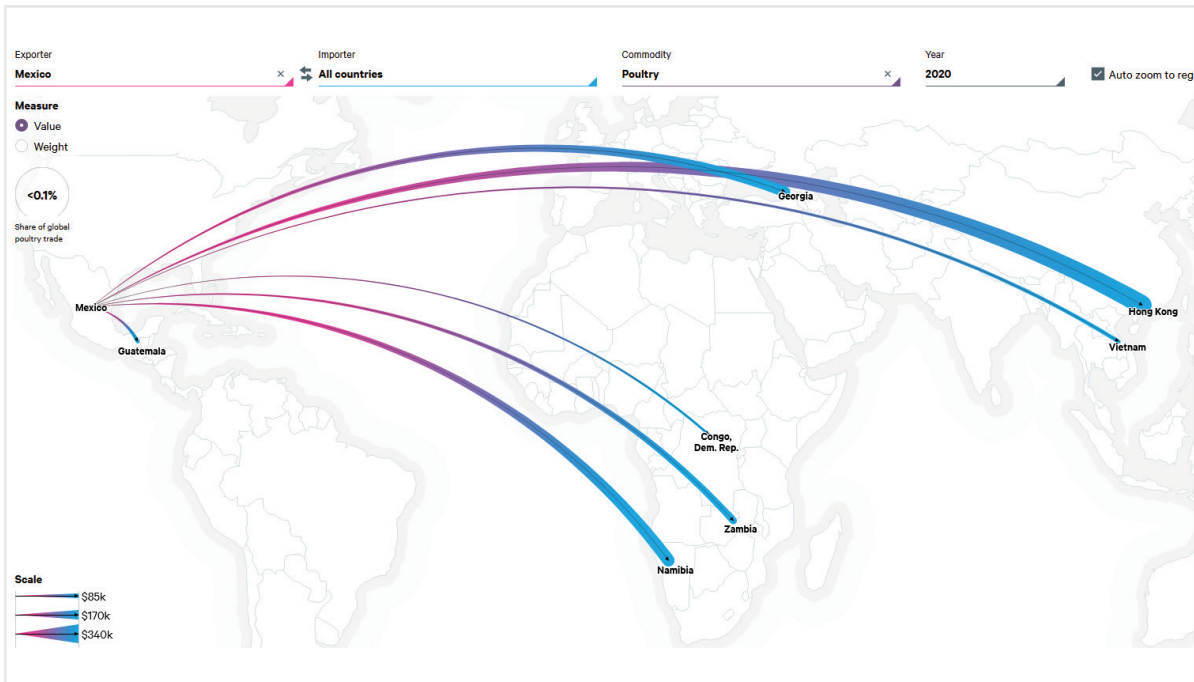


Figure 65. Mexico poultry export flows



Figure 66. Mexico top 10 poultry imports, trade value

At \$1.1 billion in poultry exports to Mexico, the USA was Mexico's top supplier of poultry in 2020 (\$986.5 million). Chile ranked number two, supplying \$57.5 million worth of poultry to Mexico in 2020. Mexico imported \$10.5 million in poultry products from Brazil. The fourth largest import value of poultry was shipped from Canada with \$2.8 million (see Figure 66 and Figure 67).

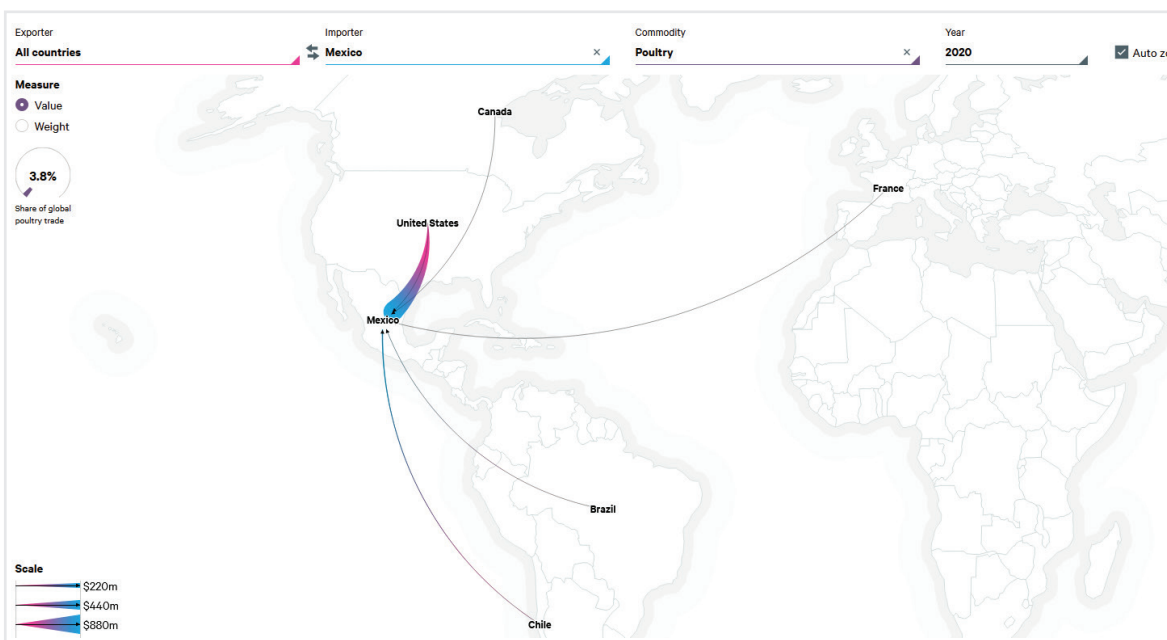


Figure 67. Mexico poultry import flows

4.2.7 Nicaragua

4.2.7.1 Demographics

Nearly all the 217,136 poultry farms in Nicaragua are household, micro-producer chicken farms. Commercial chicken farms accounted for 381 or less than 1% of the total poultry farms (see Figure 68). On average, household chicken farms had an estimated 59 chickens, while commercial farms had 31,895 chickens.

Poultry production in Nicaragua has increased 36% since 2010 but has seen little growth in the past 3 years. Poultry production in Nicaragua reached 142,712 metric tons in 2017 and was at 139,508 metric tons in 2019. Poultry consumption in Nicaragua is up 31% since 2010 at 129,628 metric tons but was at 136,793 metric tons in 2017 (Figure 69).

In 2020, poultry inventory/stocks in Nicaragua were comprised of chicken and totaled 25.0 million head (see Table 16). Since 2010, chicken stocks increased 32%. Chicken slaughter totaled 63.1 million head, and production totaled 140,000 metric tons. Since 2010, chicken slaughter increased 18%. Chicken production increased 37% compared to 2010.

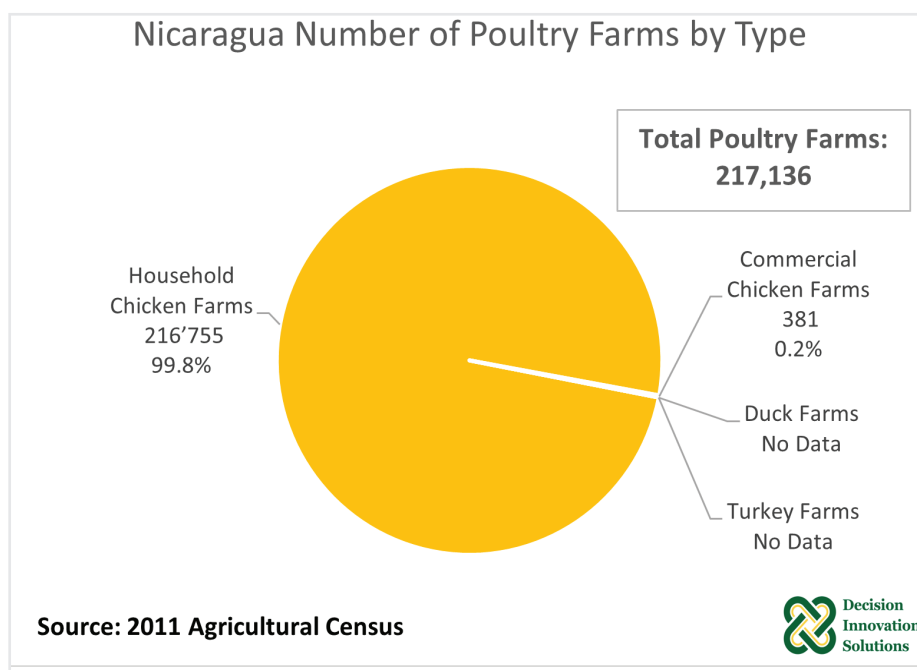


Figure 68. Nicaragua number of poultry farms

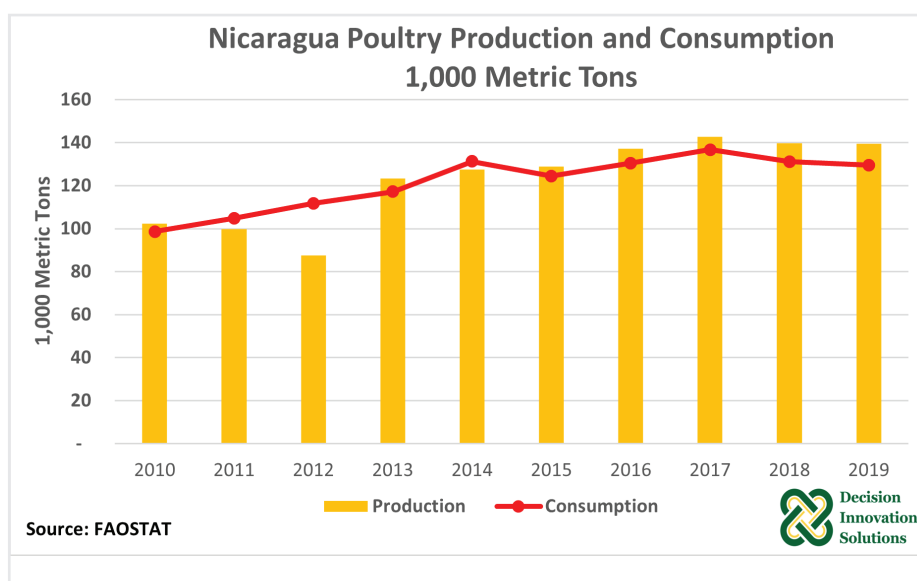


Figure 69. Nicaragua poultry production & consumption

| NICARAGUA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION | | | | |
|---|----------|-------|---------|--------|
| 1,000 head | Chickens | Ducks | Turkeys | Total |
| Stocks | 25'015 | | | 25'015 |
| Producing Animals/Slaughtered | 63'062 | | | 63'062 |
| Production (1,000 MT) | 140 | | | 140 |

Sources: FAO, 2020

Table 16. Nicaragua poultry stocks, slaughter & production

4.2.7.2 GDP and Value of Production

The GDP of Nicaragua was valued at \$12.6 billion in 2020. The agricultural production sector was 15% of the total GDP. Within the agricultural production sector, crop production ranked highest with an estimated \$1.1 billion contribution to the total GDP. Red meat production was the second highest with \$285.9 million in contribution. Chicken production followed with \$256.2 million or 2% of the total GDP. Other livestock products were valued at \$203 million. (Figure 70).

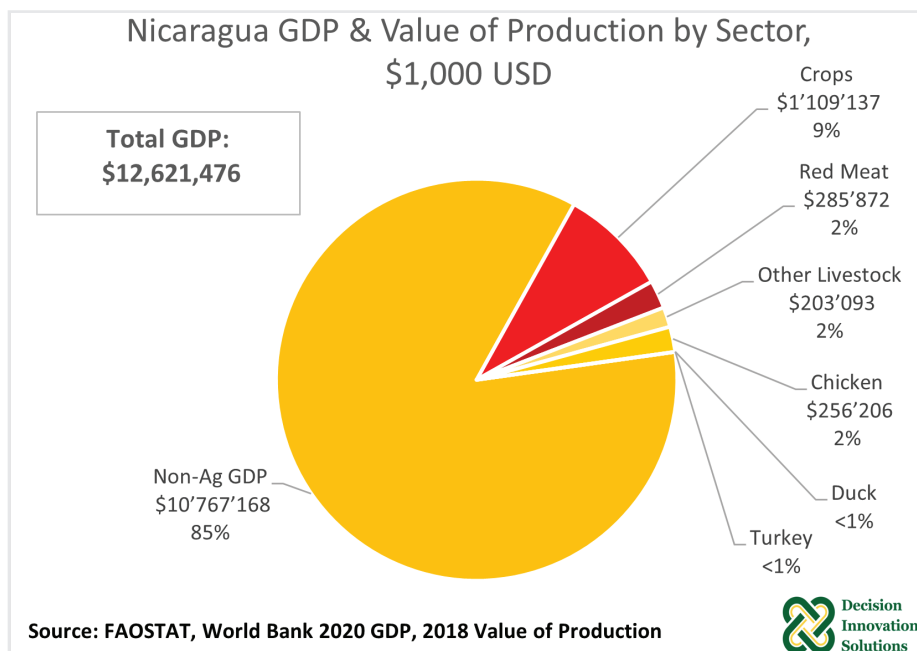


Figure 70. Nicaragua GDP & value of production by sector

| ECONOMIC EFFECTS - NICARAGUA (\$1,000 USD) | | | | |
|--|--------------|------------|--------------|-------------|
| | Direct | Indirect | Total | Taxes paid* |
| All agriculture | \$ 1'854'308 | \$ 963'862 | \$ 2'818'170 | \$ 12'780 |
| Livestock | \$ 745'171 | \$ 387'337 | \$ 1'132'508 | \$ 5'136 |
| Poultry | \$ 256'206 | \$ 281'089 | \$ 537'295 | \$ 1'220 |
| Chicken | \$ 256'206 | \$ 281'089 | \$ 537'295' | \$ 1'220 |
| Duck | - | - | - | - |
| Turkey | - | - | - | - |

Source: FAOSTAT, Central Bank of Nicaragua *Taxes is equal to total taxes net of subsidies

Table 17. Economic effects - Nicaragua

The combined (direct and indirect) effects of agricultural production in the Nicaragua are estimated to be \$2.8 billion. Of this amount, \$537 million comes from the poultry industry, all of which is from chicken meat production. Agriculture pays a net value of \$13 million in taxes, \$1 million of which is estimated to be from the poultry industry (Table 17).

4.2.7.3 Labor

In 2020, the total number of individuals in Nicaragua's labor force was 2.9 million. Of that total, an estimated 2.1 million worked in non-agricultural sectors. The remaining 846,086 individuals were employed in the agricultural sector. An estimated 752,706 labor force participants were men in the agricultural sector, compared to the 93,381 females. Poultry production employed 117,681 in 2020 (see Table 18).

| AGRICULTURAL LABOR FORCE CHARACTERISTICS - NICARAGUA | | | |
|--|-----------|-----------|-----------|
| | Total | Female | Male |
| Total Country Labor | 2'948'386 | 1'118'164 | 1'830'222 |
| Non-Agricultural Labor | 2'102'300 | 1'024'783 | 1'077'516 |
| Agricultural Labor | 846'086 | 93'381 | 752'706 |
| Total Non-Poultry Agricultural Labor | 728'405 | | |
| Total Poultry Labor | 117'681 | | |
| Chicken Labor | 117'681 | | |
| Turkey Labor | - | | |
| Other Poultry Labor | - | | |
| Wages (\$1,000 USD) | | | |
| Total Meat Processing Labor | - | | |
| Livestock Processing Labor | - | | |
| Poultry Processing Labor | - | | |

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 18. Agricultural labor force characteristics - Nicaragua

4.2.7.4 Trade

UN Comtrade and Resource Trade databases both suggest Nicaragua does not have a large poultry export market. In 2020, Nicaragua exported 98,543 MT of poultry meat to Guatemala, which was valued at \$79,017 (see Figure 71 and Figure 72). No other trading partners were reported.

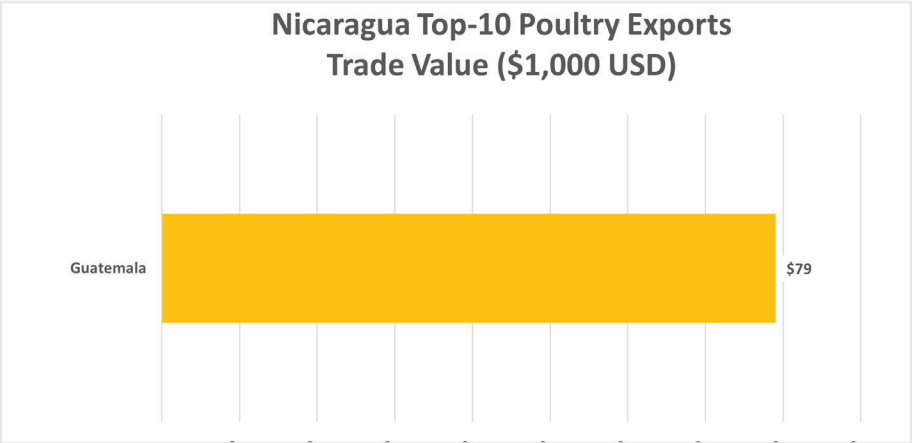


Figure 71. Nicaragua top 10 poultry exports, trade value

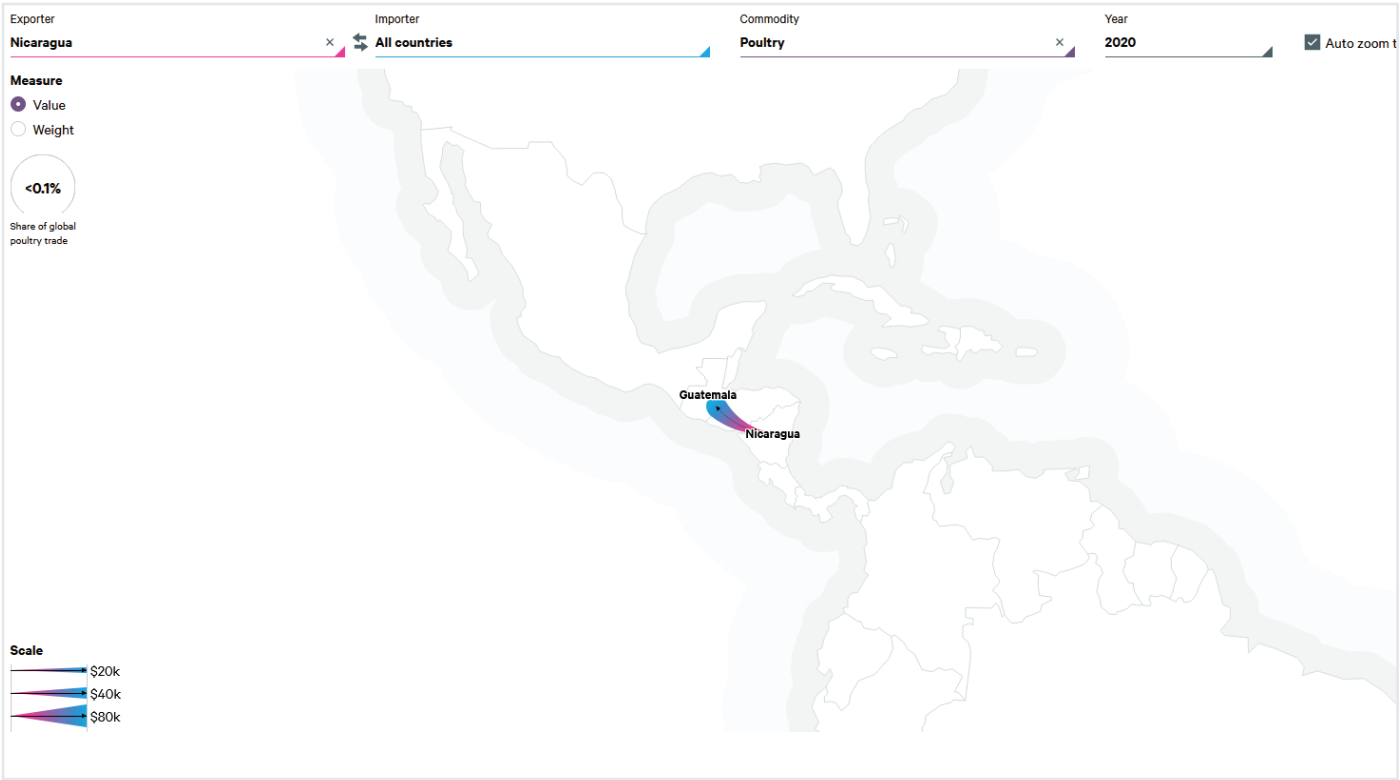


Figure 72. Nicaragua poultry export flows

In 2020 the main supplier of poultry meat to Nicaragua was the USA. About 8,319 MT of poultry meat were imported from the USA valued at \$9.9 million. Costa Rica supplied 1,163 MT of poultry meat valued at \$3.6 million. The third leading poultry exporter to Nicaragua was Guatemala which exported less than 28 metric ton of poultry meat (Figure 73 and Figure 74).

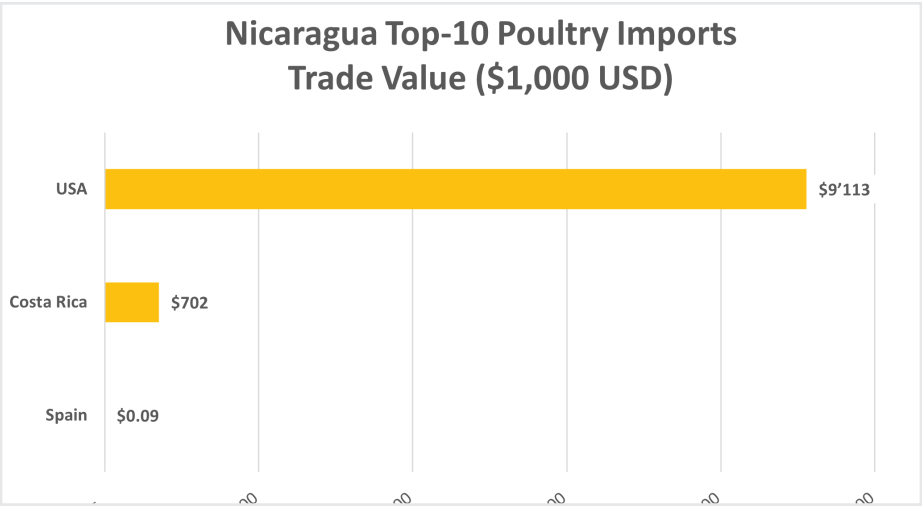


Figure 73. Nicaragua top 10 poultry imports, trade value

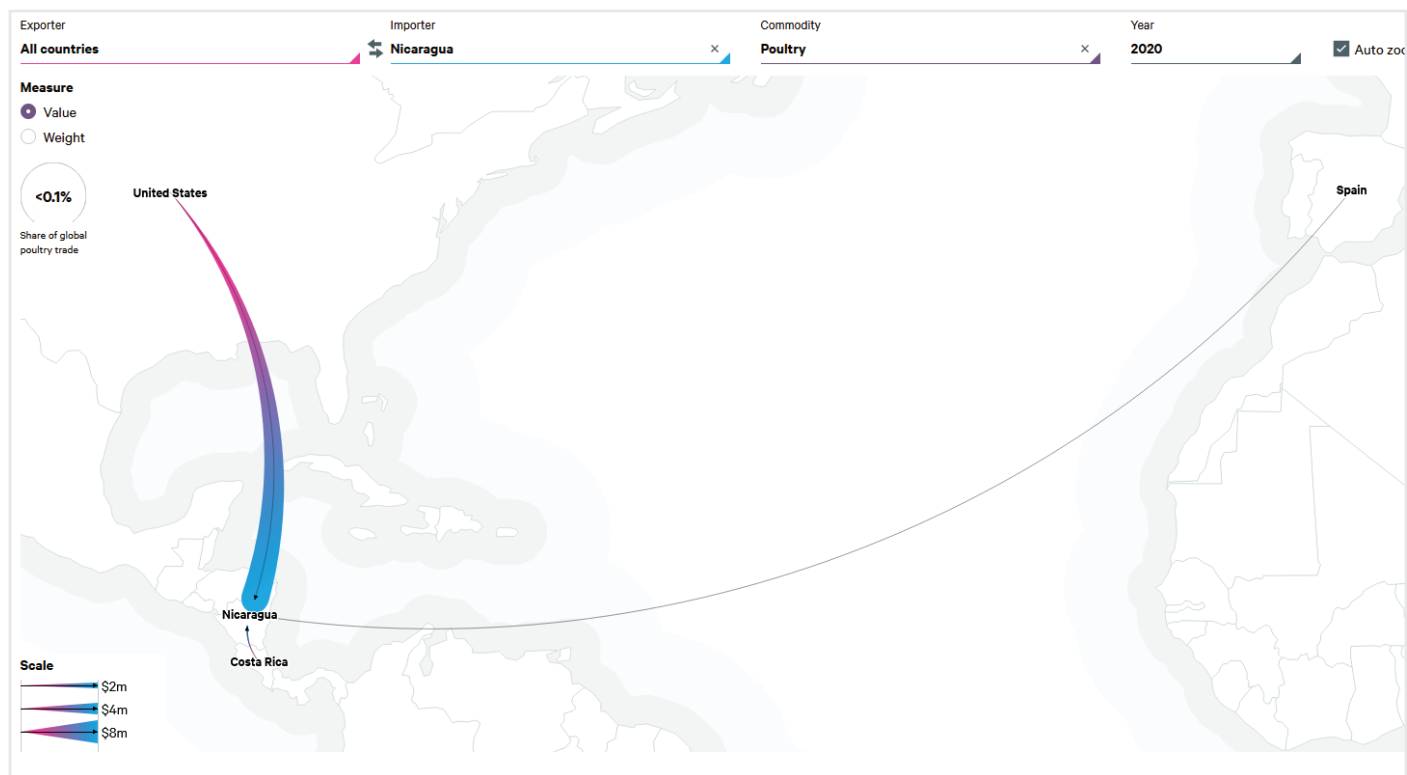


Figure 74. Nicaragua poultry import flows

4.2.8 Panama

4.2.8.1 Demographics

Panama has an estimated 21,796 poultry farms with duck¹⁰ and other poultry farms accounting for 73% or 15,830 poultry farms. The second largest share of poultry farms were turkey farms. Approximately 24%, or 5,207 farms were turkey farms. Household chicken farms or micro-producers account for 2% or 475 poultry farms. Commercial chicken farms were the smallest share of poultry farms with 1% or 284 farms (Figure 75).

The average farm sizes by number of animals were as follows: 9,969 chickens per household/micro-producer farm, 73,417 chickens per commercial chicken operation, 7 ducks per duck farm, and 19 turkeys per turkey farm.

Poultry production and consumption are both increasing in Panama. Poultry production reached 229,622 metric tons in 2019, an increase of 82% since 2010. Poultry consumption reached 234,900 tons in 2019, an increase of 127% since 2010 (Figure 76).

Panama's poultry inventory/stocks totaled 25.6 million in 2020 (Table 19). Approximately, 99% or 25.6 million head of poultry stocks were chicken. Less than 1% , or 114,000 head of Panama's poultry stocks

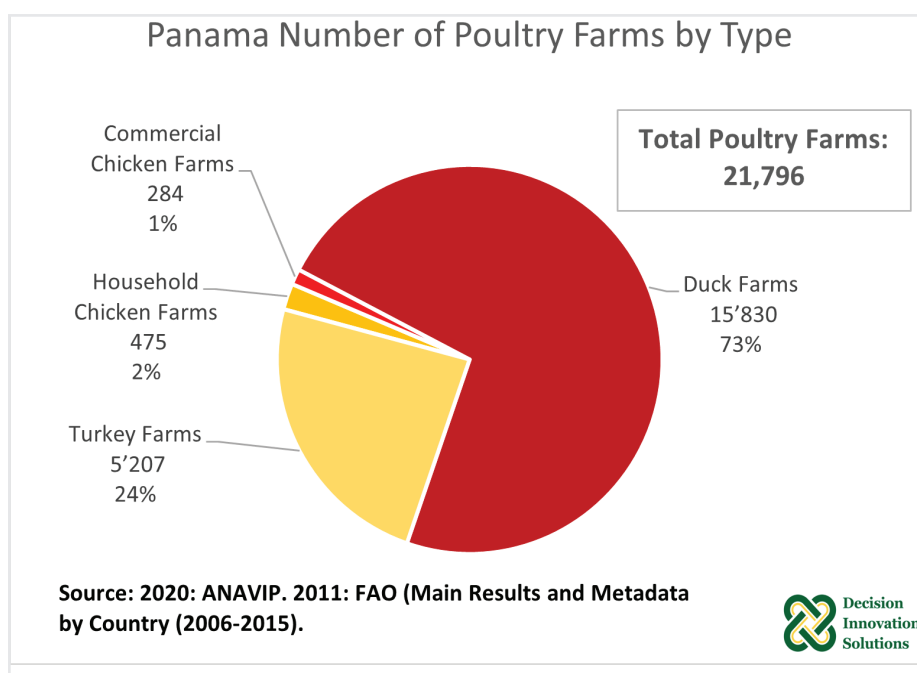


Figure 75. Panama number of poultry farms by type

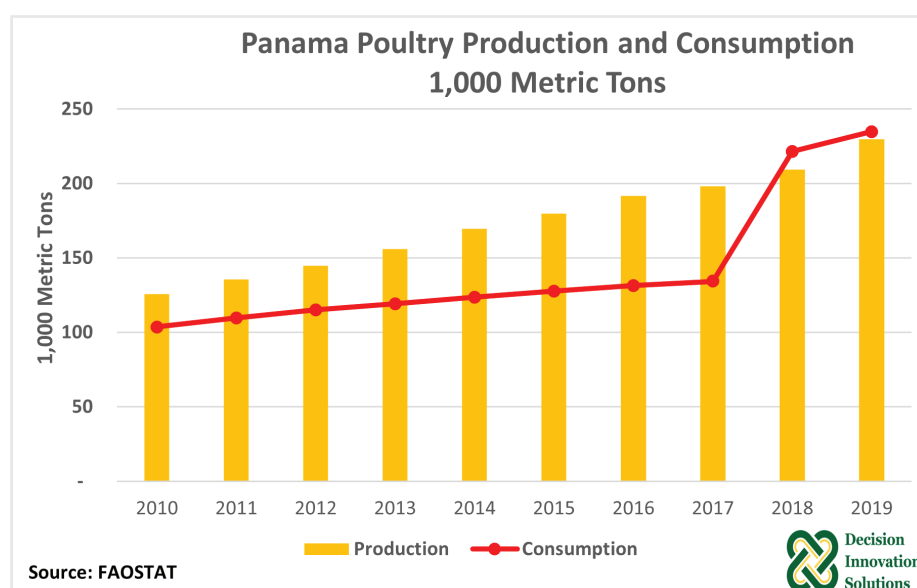


Figure 76. Panama poultry production & consumption

| PANAMA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION | | | | |
|--|----------|-------|---------|---------|
| 1,000 head | Chickens | Ducks | Turkeys | Total |
| Stocks | 25'586 | 114 | 19 | 25'719 |
| Producing Animals/Slaughtered | 121'221 | | | 121'221 |
| Production (1,000 MT) | 212 | | | 212 |

Sources: FAO, 2020

Table 19. Panama poultry stocks, slaughter & production

¹⁰ Duck and turkey farm numbers are from 2011.

were ducks. Turkeys also comprised Panama's poultry stocks, accounting for 19,000 head. Since 2010, chicken stocks in Panama increased 48% from 2010. Duck stocks increased 14%, and turkey stocks remained the same since 2010.

Poultry slaughter in Panama included 121.2 million chickens in 2020. Since 2010, poultry slaughter in Panama increased 62%. According to FAO, Panama's poultry production totaled 212,000 metric tons and was 100% chicken. Compared to 2010, chicken production increased 68%.

4.2.8.2 GDP and Value of Production

The GDP in Panama was worth \$52.9 billion in 2020. An estimated 2% or \$769.3 million was derived from the crop production sector. An estimated 2%, or 1.2 billion was derived from the chicken production sector. Approximately, 1% or \$251.7 million was derived from red meat production \$175.9 million from other livestock products. (Figure 77).

The combined (direct and indirect) effects of agricultural production in Panama are estimated to be \$3.8 billion. Of this amount, \$2.3 billion comes from the poultry industry, all of which is from chicken meat production. Agriculture pays a net value of \$15 million in taxes, \$8 million of which is estimated to be from the poultry industry (Table 20).

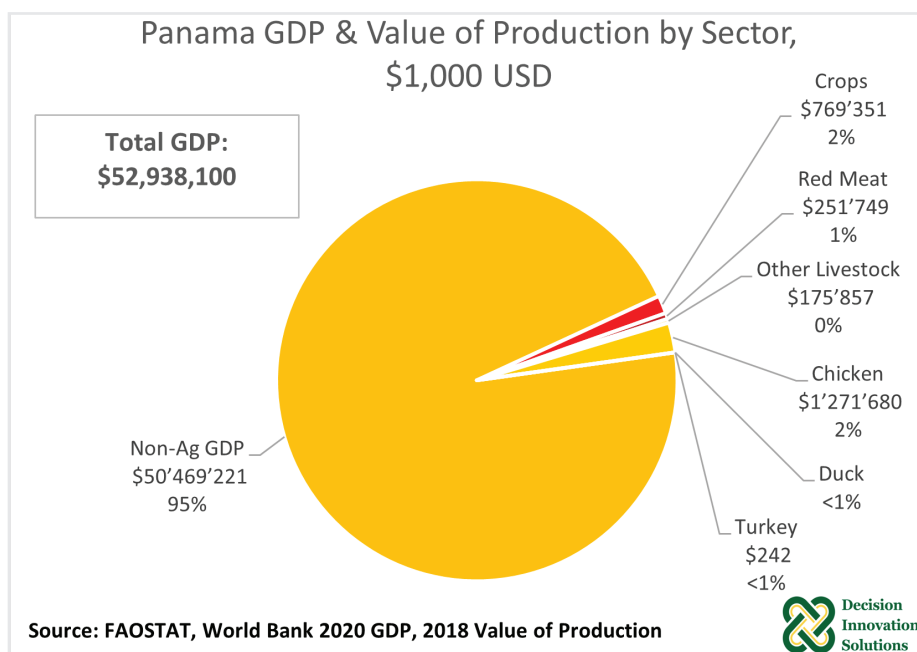


Figure 77. Panama GDP & value of production by sector

| ECONOMIC EFFECTS - PANAMA (\$1,000 USD) | | | | |
|---|-------------|-------------|-------------|-------------|
| | Direct | Indirect | Total | Taxes paid* |
| All agriculture | \$2'468'879 | \$1'426'688 | \$3'895'567 | \$15'041 |
| Livestock | \$1'699'528 | \$982'104 | \$2'681'632 | \$10'354 |
| Poultry | \$1'271'680 | \$981'737 | \$2'253'417 | \$7'748 |
| Chicken | \$1'271'680 | \$981'737 | \$2'253'417 | \$7'748 |
| Duck | - | - | - | - |
| Turkey | - | - | - | - |

Source: FAOSTAT, CFES Central America. *Taxes is equal to total taxes net of subsidies

Table 20. Economic effects - Panama

4.2.8.3 Labor

The total number of people in Panama's labor force totaled 1.8 million in 2020 (Table 21). Of that total, nearly 1.6 million people were employed in non-agricultural labor sectors, and 254,470 were employed in agricultural labor sectors. Men constitute most of the agricultural labor force with an estimated 195,215 males and 59,255 females. Among those employed in the agricultural sector, 135,371 worked in poultry production, specifically chicken production. Approximately 8,616 people worked in meat processing, collectively earning \$76.6 million in wages.

| AGRICULTURAL LABOR FORCE CHARACTERISTICS - PANAMA | | | |
|---|-----------|---------------------|-----------|
| | Total | Female | Male |
| Total Country Labor | 1'836'789 | 745'429 | 1'091'360 |
| Non-Agricultural Labor | 1'582'319 | 686'174 | 896'145 |
| Agricultural Labor | 254'470 | 59'255 | 195'215 |
| Total Non-Poultry Agricultural Labor | 119'099 | | |
| Total Poultry Labor | 135'371 | | |
| Chicken Labor | 135'371 | | |
| Turkey Labor | | | |
| Other Poultry Labor | | | |
| | | Wages (\$1,000 USD) | |
| Total Meat Processing Labor | 8'616 | | \$76'635 |
| Livestock Processing Labor | 1'424 | | \$12'662 |
| Poultry Processing Labor | 7'192 | | \$63'973 |

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 21. Agricultural labor force characteristics - Panama

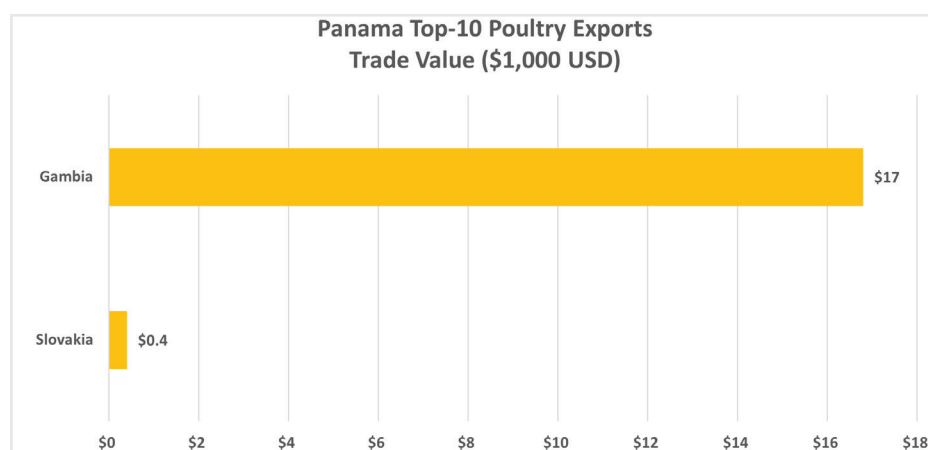


Figure 78. Panama top 10 poultry exports, trade value

4.2.8.4 Trade

In 2020, Panama's main destination for poultry meat was Gambia, which received \$16,800 in poultry meat from Panama. Slovakia reportedly received less than \$100 in poultry exports from Panama in 2020 (see Figure 78 and Figure 79).

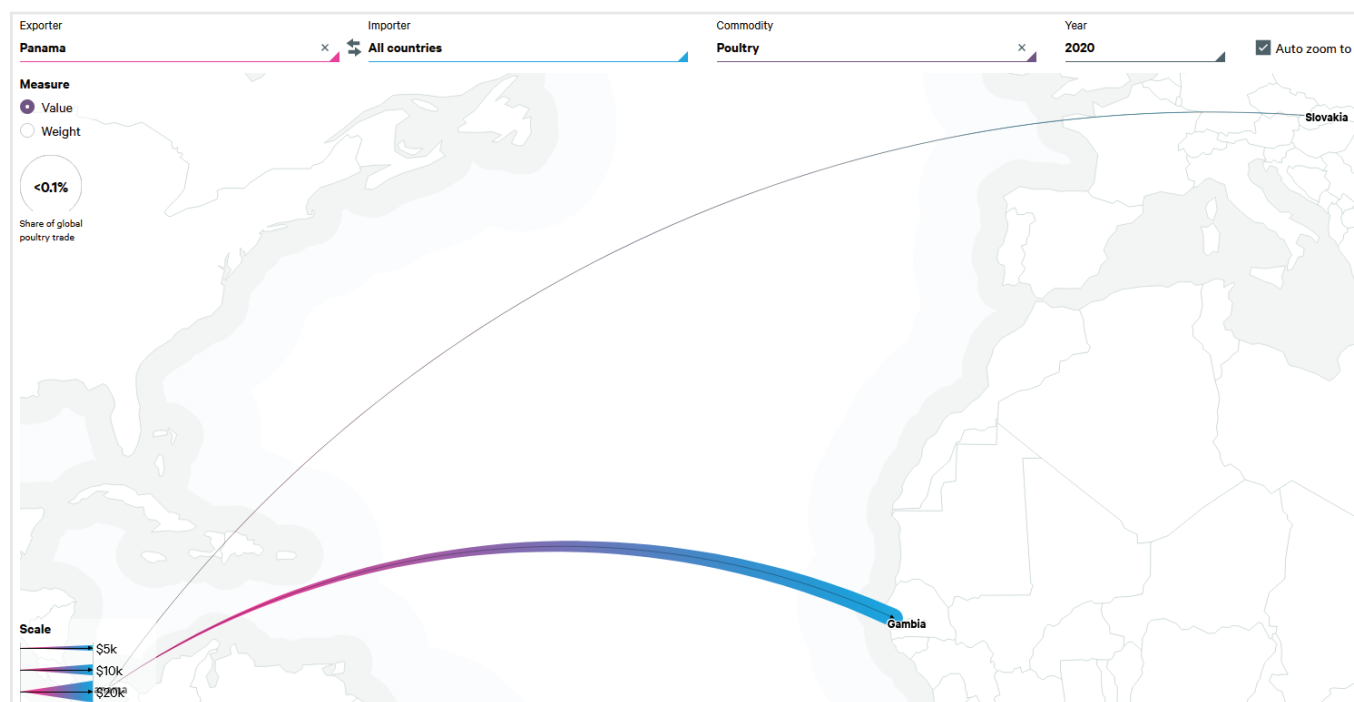


Figure 79. Panama top 10 poultry exports, trade value

The leading source for poultry meat imports to Panama was the USA which exported \$22.3 million worth of poultry meat to Panama in 2020. Turkey was the second leading source for poultry imports, shipping \$127,000 in poultry meat to Panama. Peru exported an estimated \$96,000 in poultry meat to Panama. Brazil and Germany ranked fourth and fifth, respectively, for supplying poultry meat to Panama. Approximately \$33,000 of poultry meat was imported from Brazil. An estimated \$31,000 of poultry meat was imported from Germany (see Figure 80 and Figure 81).

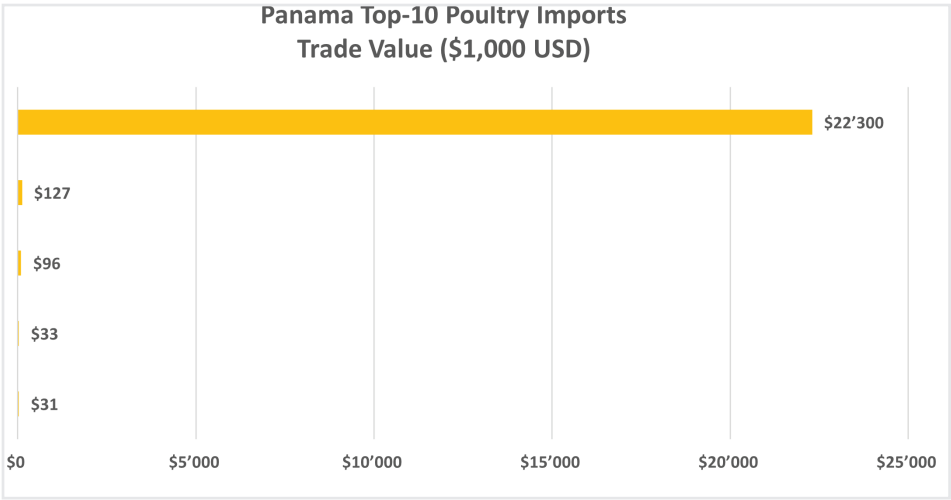


Figure 80. Panama top 10 poultry imports, trade value

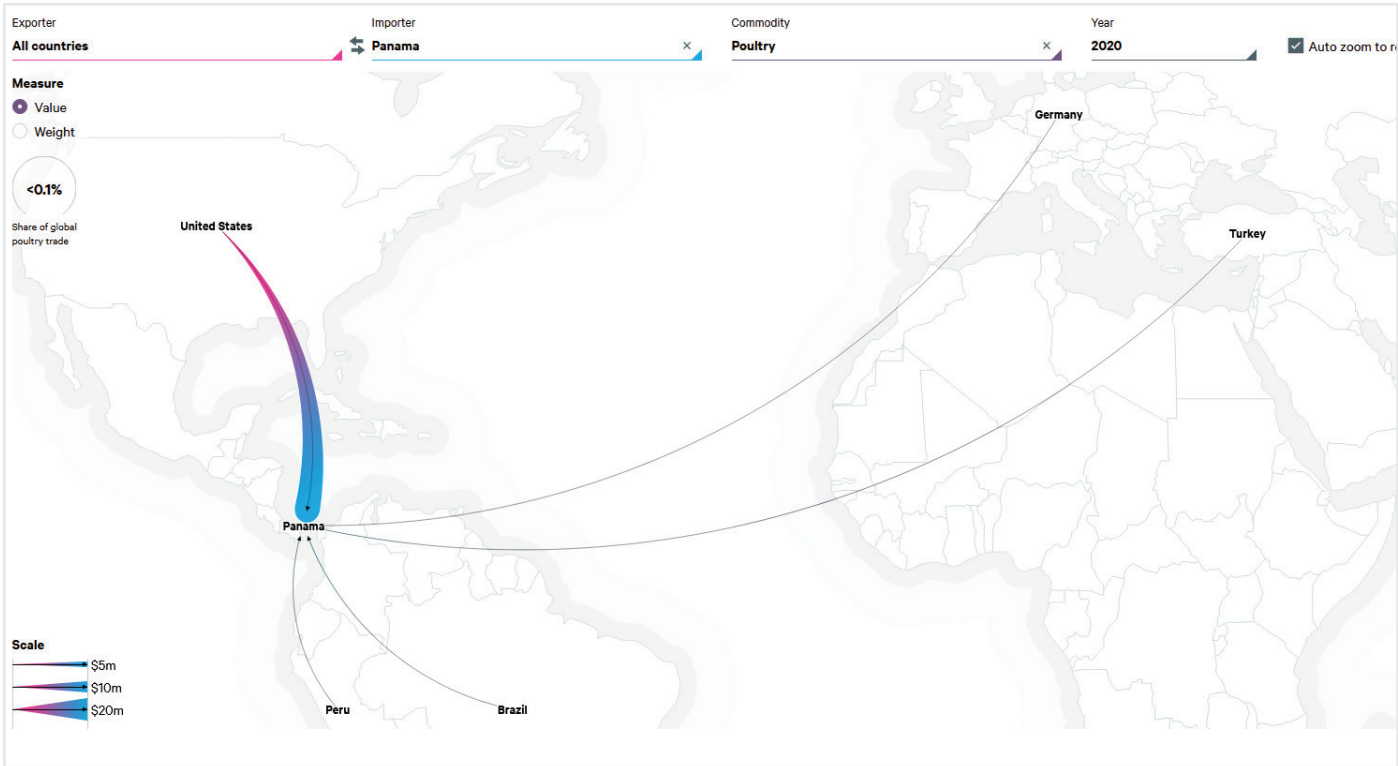


Figure 81. Panama poultry import flows