

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

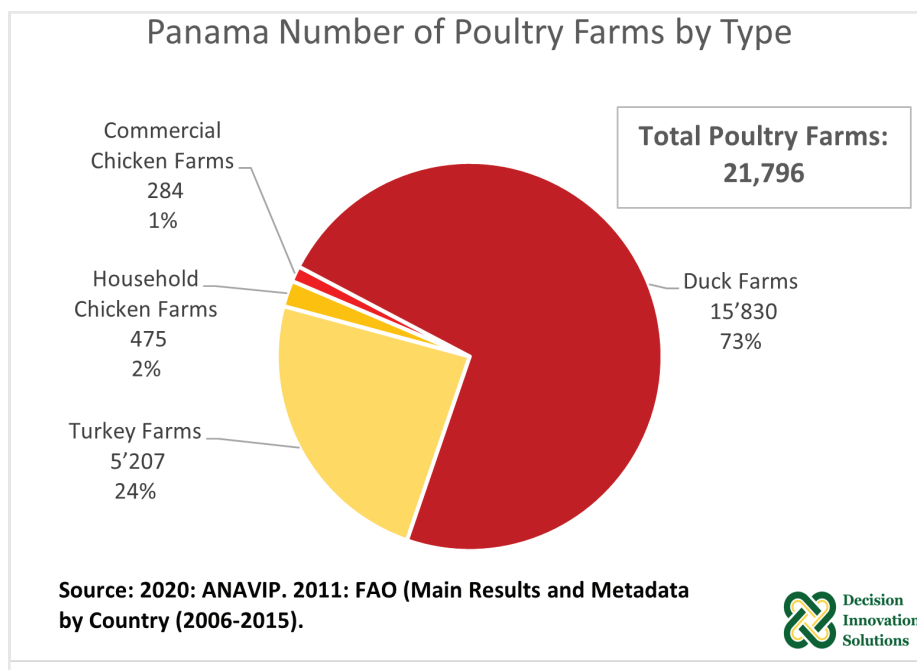


Figure 75. Panama number of poultry farms by type

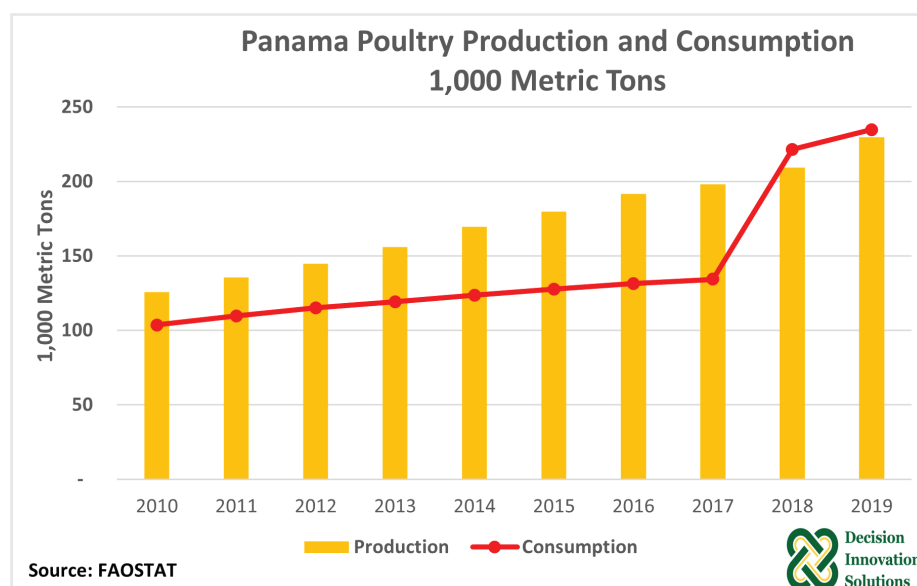


Figure 76. Panama poultry production & consumption

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).

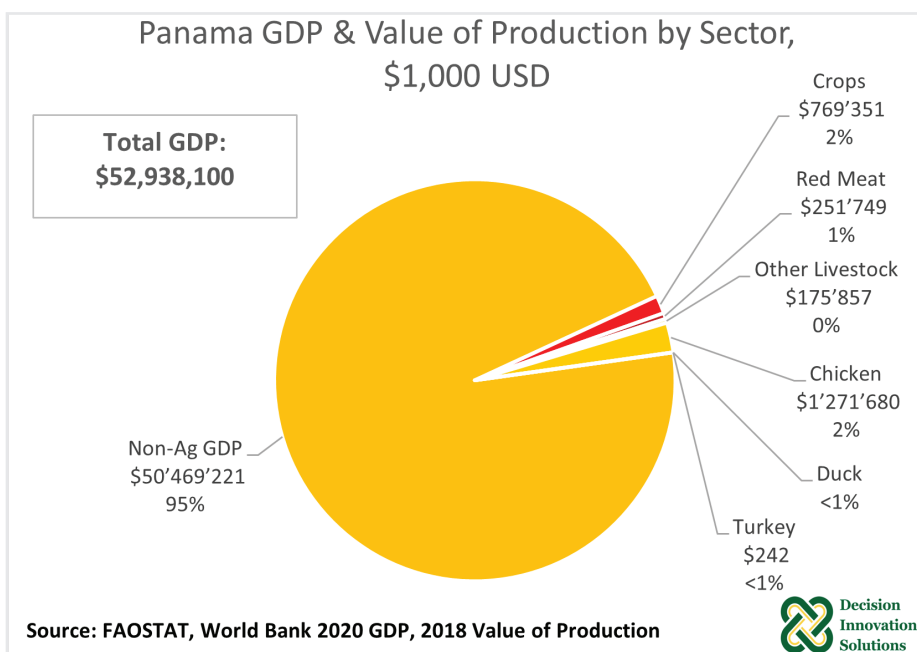


Figure 77. Panama GDP & value of production by sector

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

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).

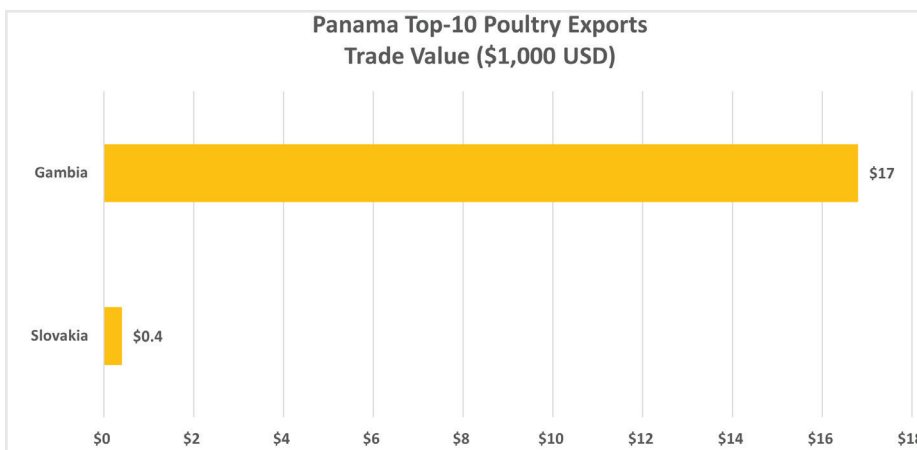


Figure 78. Panama top 10 poultry exports, trade value

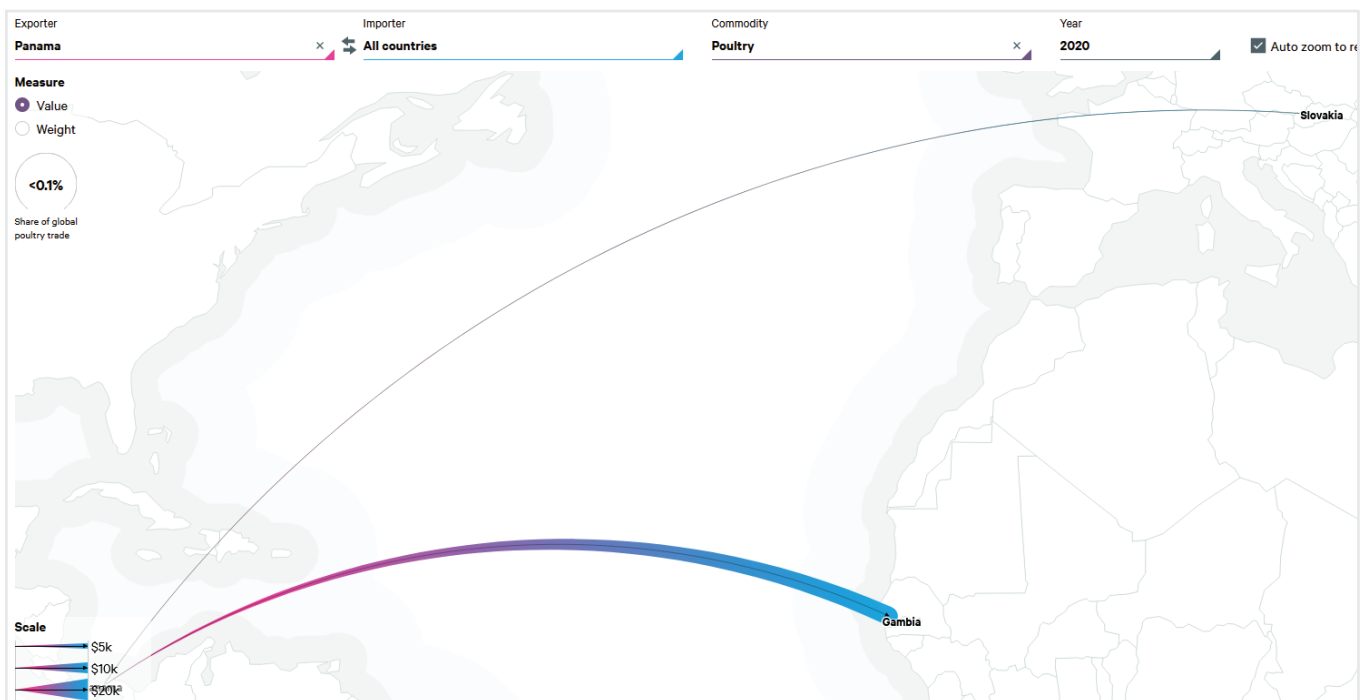


Figure 79. Panama top 10 poultry exports, trade value

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).

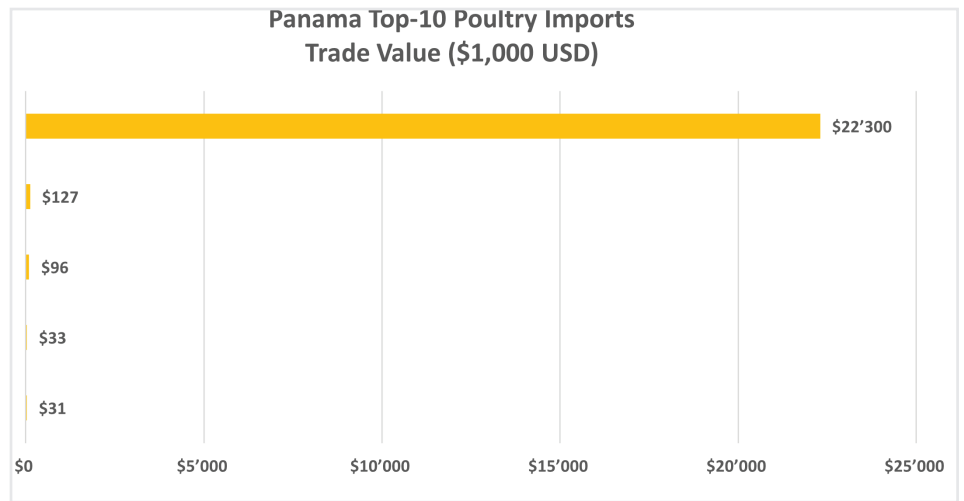


Figure 80. Panama top 10 poultry imports, trade value

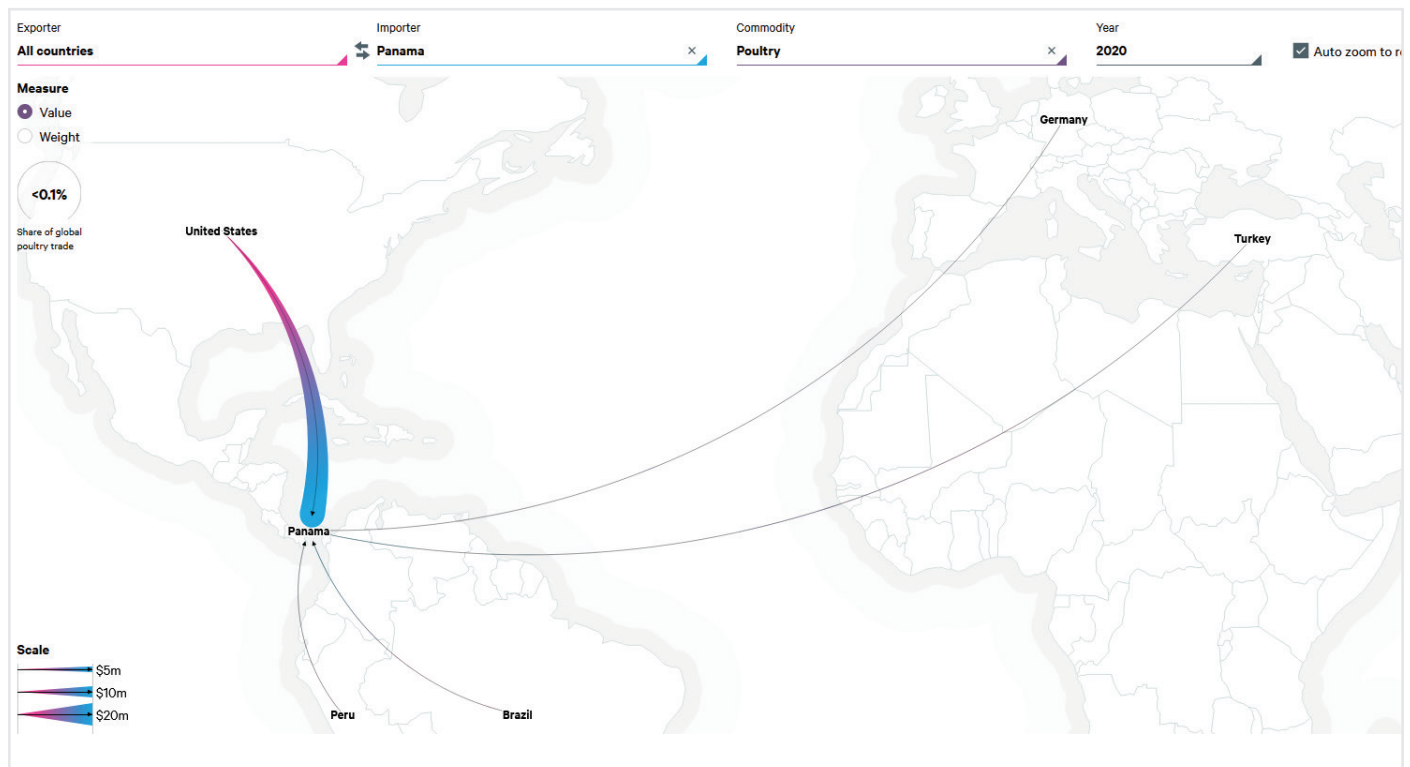


Figure 81. Panama poultry import flows