

4.3.8 Colombia

4.3.8.1 Demographics

The number of poultry farms in Colombia was estimated at 469,140. Of the total number of poultry farms, household or micro-producer chicken farms accounted for the largest share with 99% or 463,113 farms. About 1% or 6,027 of the total poultry farms were commercial chicken farms (Figure 111).

Colombia's poultry production and consumption both increased from 2010 to 2021. Poultry production reached 1.6 million metric tons in 2021, up 54% compared with the volume in 2010. Note, that in 2020 poultry production declined almost 3% year-over-year. Production rebounded in 2021 but still was down from the 2018 level (see Figure 112).

Colombia's poultry consumption had an upward trend from 2010 to 2019. Consumption in 2020 and 2021 remained down 3.4% and 2.2% from the 2019 level (1.8 million metric tons), correspondingly. Overall, 2021 poultry consumption in Colombia rose 59% relative to 2010. From 2019 to 2021, about 7% of poultry consumption was imported. The USA has been the largest supplier of poultry meat to Colombia.

Colombia Number of Poultry Farms by Type

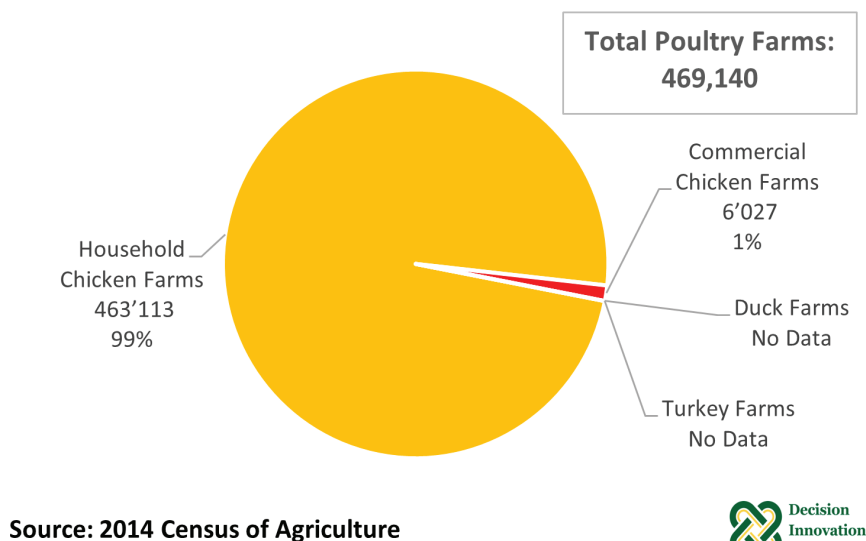


Figure 111. Colombia number of poultry farms by type

Colombia Poultry Production and Consumption
1,000 Metric Tons

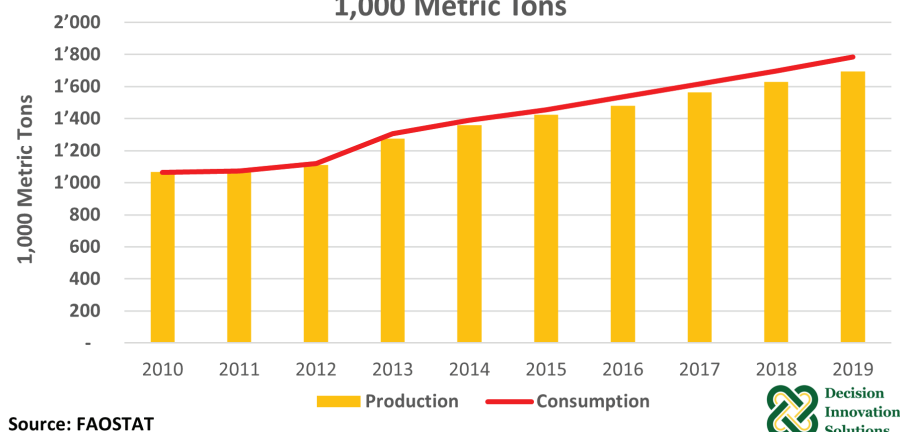


Figure 112. Colombia poultry production & consumption

In 2020, poultry stocks in Colombia totaled 201.6 million head with 100% of the inventory being chickens (see Table 31). Poultry slaughter totaled 1.0 billion head, with 100% of slaughter being chickens. Chicken production was estimated at 1.6 million metric tons. Since 2010, Colombia's chicken stocks increased 28% and chicken production increased 52%. However, slaughter of chicken declined 5% in the same time period.

COLOMBIA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	201'601			201'601
Producing Animals/Slaughtered	1'011'486			1'011'486
Production (1,000 MT)	1'620			1'620

Sources: FAO, 2020

Table 31. Colombia poultry stocks, slaughter & production

4.3.8.2 GDP and Value of Production

The GDP of Colombia was valued at \$271.4 billion in 2020. Non-agricultural GDP was estimated at \$245.7 billion. The agricultural production sector represented about 9% of the total GDP. An estimated \$11.5 billion was derived from crop production. Red meat production followed with \$11.1 billion in contributions. Chicken production contributed an estimated \$3.0 billion or 1% of the total GDP (Figure 113).

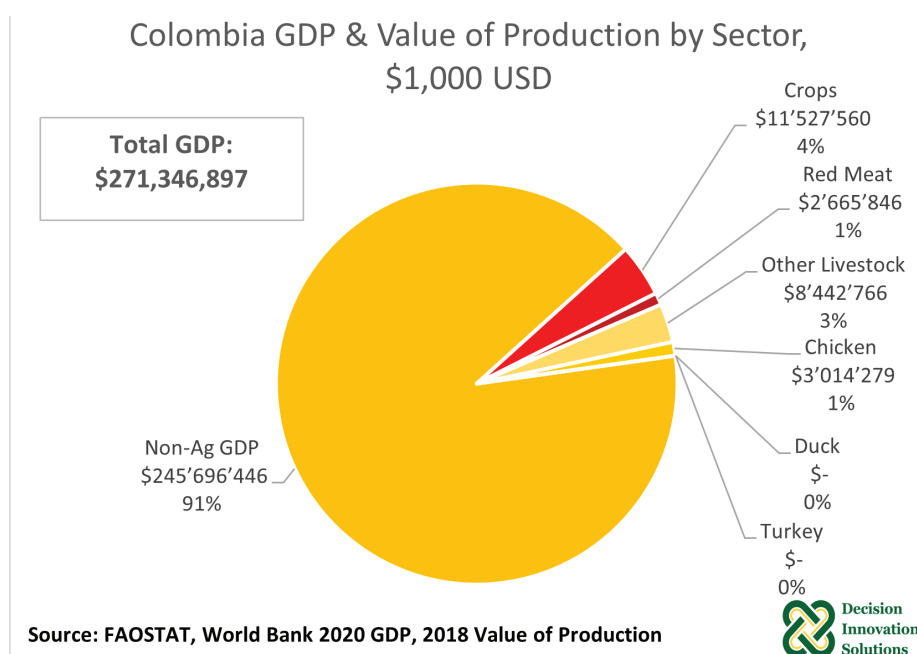


Figure 113. Colombia GDP & value of production by sector

ECONOMIC EFFECTS - COLOMBIA (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$25'650'451	\$23'855'466	\$49'505'917	\$578'551
Livestock	\$14'122'891	\$13'134'590	\$27'257'481	\$318'544
Poultry	\$3'014'279	\$4'021'048	\$7'035'327	\$83'443
Chicken	\$3'014'279	\$4'021'048	\$7'035'327	\$83'443
Duck	-	-	-	-
Turkey	-	-	-	-

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

Table 32. Economic effects - Colombia

The combined (direct and indirect) effects of agricultural production in Colombia are estimated to be \$49.5 billion. Of this amount, \$7 billion comes from chicken meat production. Agriculture pays a net value of \$578.5 billion in taxes, \$83.4 million of which is estimated to be from the poultry industry (Table 32).

4.3.8.3 Labor

The World Bank and ILO reported that nearly 20.5 million people worked in Colombia's labor force. About 10.2 million were male, and 10.2 million were female. An estimated 16.9 million people were employed in non-agricultural sectors, compared to nearly 3.6 million in agricultural sectors. Approximately 428,964 people were employed in the poultry labor sector (Table 33).

AGRICULTURAL LABOR FORCE CHARACTERISTICS - COLOMBIA			
	Total	Female	Male
Total Country Labor	20'490'914	10'245'457	10'245'457
Non-Agricultural Labor	16'933'917	9'610'870	7'323'047
Agricultural Labor	3'556'997	634'587	2'922'410
Total Non-Poultry Agricultural Labor	3'128'033		
Total Poultry Labor	428'964		
Chicken Labor	428'964		
Turkey Labor	-		
Other Poultry Labor	-		
Wages (\$1,000 USD)			
Total Meat Processing Labor	32'917	\$159'842	
Livestock Processing Labor	15'449	\$75'018	
Poultry Processing Labor	17'468	\$84'823	

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

Table 33. Agricultural labor force characteristics - Colombia

In 2020, labor from meat processing totaled 32,917 jobs. The total value of wages earned from meat processing was \$159.8 million. Poultry meat processing accounted for 53% or 17,468 meat processing jobs, and more than \$84.8 million in wages. The remaining 15,449 jobs in meat processing were from livestock meat processing and were valued at \$75.0 million in wages earned.

4.3.8.4 Cost of Production

Feed represented 63% of Colombia’s total cost of poultry production in 2017. In addition, 30% of poultry production cost was assigned among labor (12%), day-old chick (11%), and services, which includes electricity, gas, and water (7%). Water treatment and sanitation added each 3%, leaving 1% for transportation costs (Figure 114).

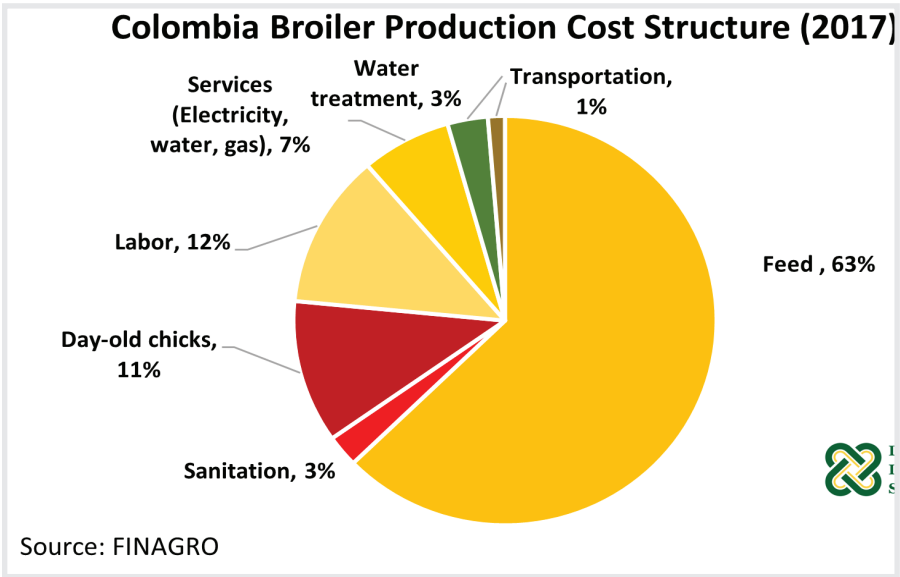


Figure 115. Colombia broiler production cost structure

4.3.8.5 Trade

The largest market for Colombia’s poultry meat was the United Arab Emirates in 2020, with a total value of exports estimated at \$21,108. Poultry meat exports to Vietnam totaled \$1,246 in 2020 (Figure 115 and Figure 116).

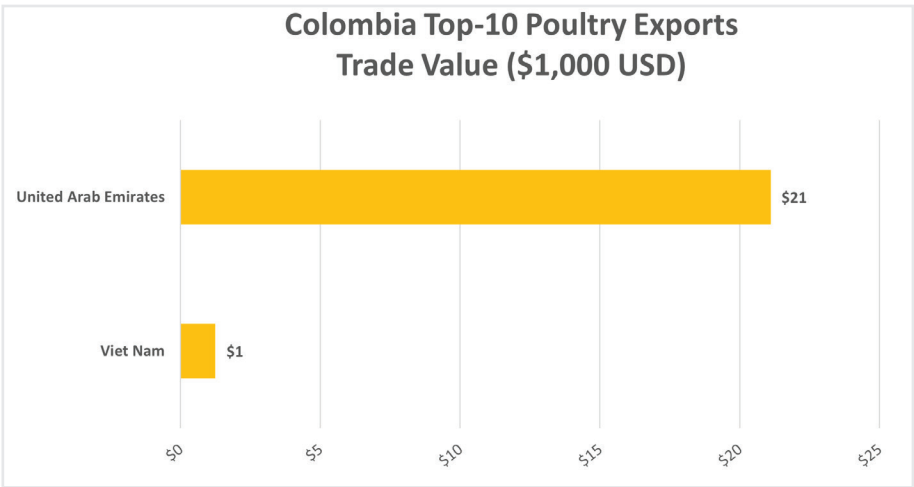


Figure 114. Colombia top 10 poultry exports, trade value

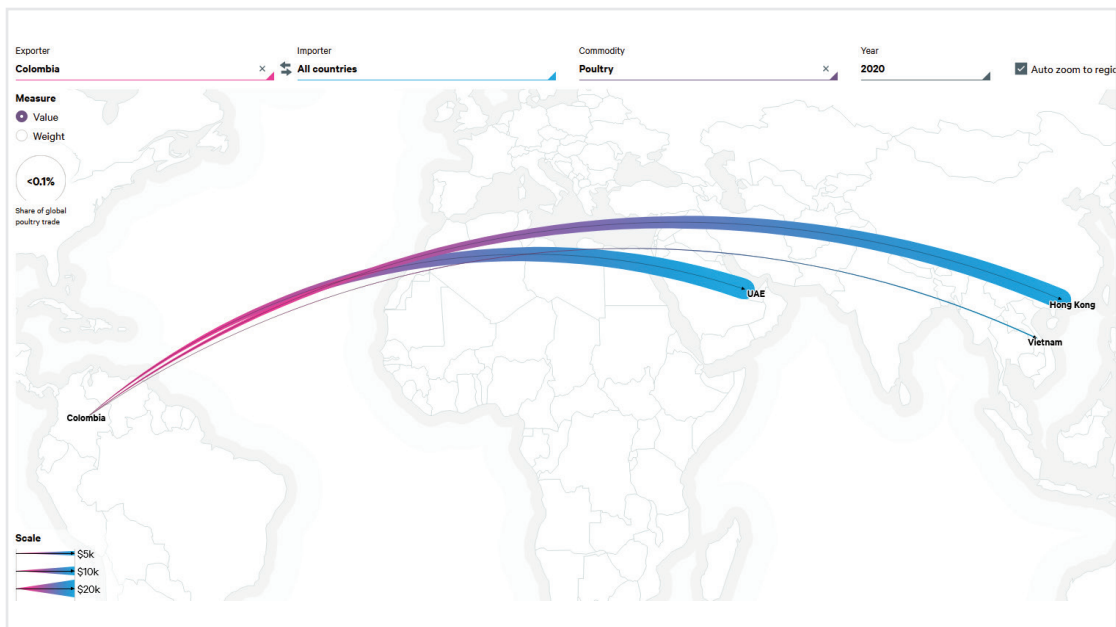


Figure 116. Colombia poultry export flows

Colombia's main supplier of poultry meat was the USA in 2020. Colombia imported 77,539 MT of poultry meat from the USA valued at \$84.9 million. In 2020, Colombia imported \$12.6 million in poultry meat from Chile. Approximately \$278,316 of poultry meat was imported from Peru (see Figure 117 and Figure 118).

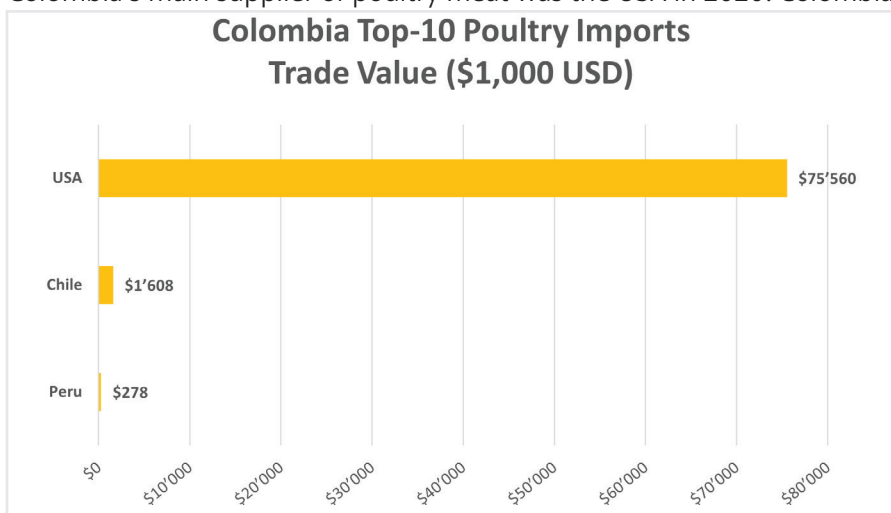


Figure 117. Colombia top 10 poultry imports, trade value

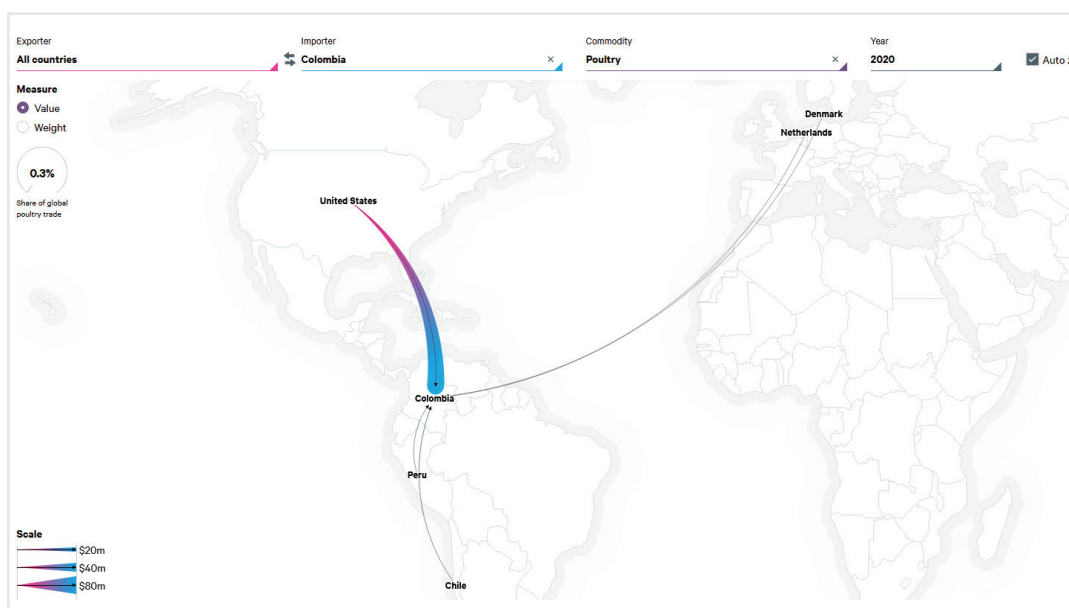


Figure 118. Colombia poultry import flows