

4.3.5 Argentina

4.3.5.1 Demographics

Of the 66,428 poultry farms in Argentina, household chicken farms represented 85% of the total poultry operations. Approximately 7%, or 4,325 were duck farms. Commercial chicken farms accounted for 2% or 1,499 of the total poultry farms in Argentina (Figure 88). The average farms size by number of animals were as follows: 70 chickens per household/micro-producer farm, 76,978 chickens per commercial chicken operation, 607 ducks per duck farm, and 698 turkeys per turkey farm.

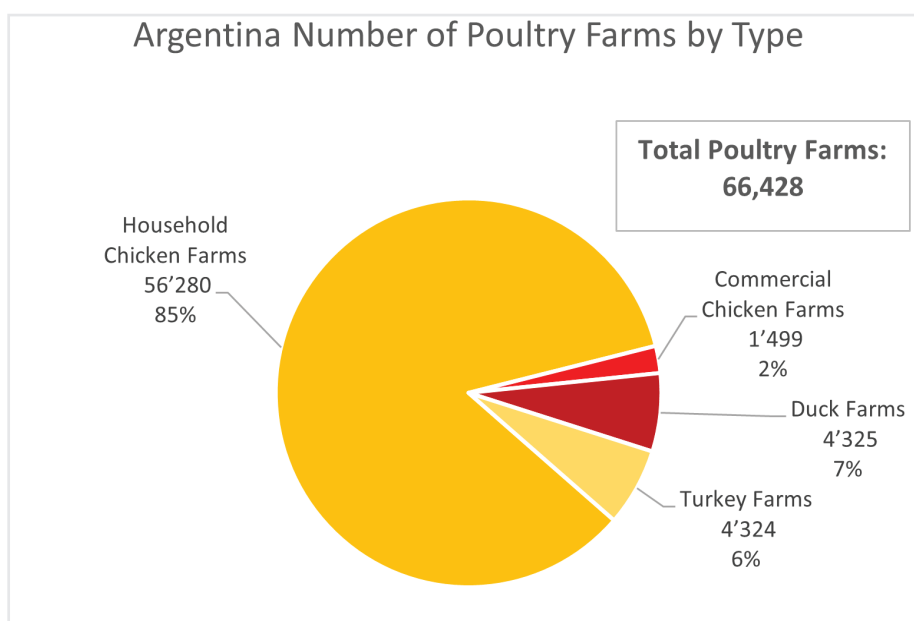


Figure 88. Argentina number of poultry farms by type

Poultry production and consumption are increasing in Argentina. Poultry production in 2021 was 2.25 million metric tons and represents an increase of 35% since 2010. Poultry consumption in Argentina in 2021 was 2.01 million metric tons and was 37% greater than in 2010 (Figure 89).

Total poultry stocks in Argentina were an estimated 124.1 million head. The largest share of poultry stocks were chickens, representing nearly 95.5% or 118.5 million head of poultry stocks (see Table 22). Turkey stocks were 2.4% or 3.1 million head of Argentina's total poultry. Duck stocks represented 2.1% or 2.6 million. Since 2010, chicken stocks increased 21%, duck stocks increased 5%, and turkey stocks increased 1%.

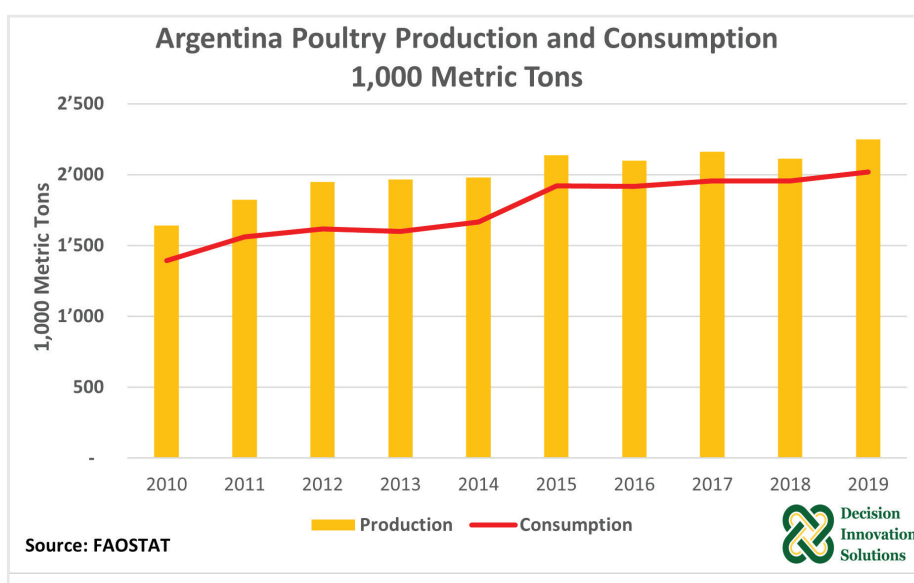


Figure 89. Argentina poultry production & consumption

ARGENTINA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	118'463	2'625	3'017	124'105
Producing Animals/Slaughtered	757'488	3'774	6'980	768'242
Production (1,000 MT)	2'219	10	36	2'265

Sources: FAO, 2020

Table 22. Argentina poultry stocks, slaughter & production

Poultry slaughter totaled 768.2 million head in 2020. An estimated 98% or 757.5 million head of poultry slaughter were chicken. Approximately, 7.0 million head were turkeys and 3.8 million were ducks. Since 2010, chicken slaughter 23%, duck slaughter increased 6%, and turkey slaughter remained about the same.

Argentina’s poultry production in 2020 included 2.2 million metric tons of chicken, 36,000 metric tons of turkey, and 10,000 metric tons of ducks. Compared to 2010, poultry production in Argentina increased 39%, duck production increased 6%, and turkey production remained about the same.

4.3.5.2 GDP and Value of Production

The total value of Argentina’s GDP was \$383 billion in 2020. Approximately, 6% of the total was derived from agricultural production. Red meat production was 3% or \$11.2 billion of the total GDP. Argentina’s crop production sector was valued at \$9.8 billion. The poultry production sector was about 1% of the total GDP for Argentina. Chicken production was valued at \$2.5 billion, while duck and turkey production contributed less than 1% to the total GDP (see Figure 90).

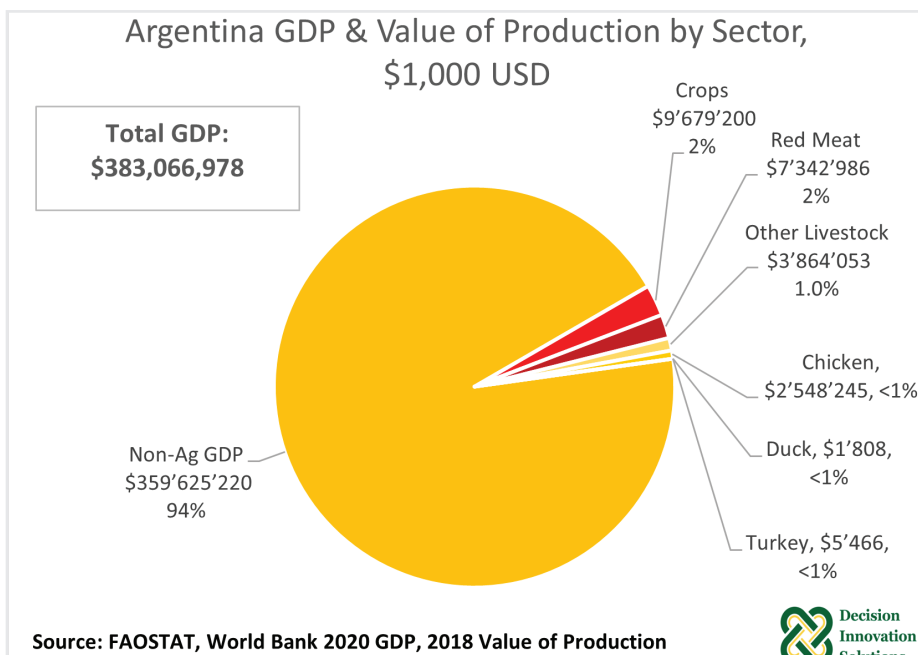


Figure 90. Argentina GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in the Argentina are estimated to be \$44.6 billion. Of this amount, \$5.7 billion comes from the poultry industry, with \$5.7 billion from chicken meat production, \$4 million from duck production, and \$12.2 million from turkey production. Agriculture pays a net value of \$1.2 billion in taxes, \$155.9 million of which is estimated to be from the poultry industry (Table 23).

ECONOMIC EFFECTS - ARGENTINA (\$1,000 USD)				Taxes paid*
	Direct	Indirect	Total	
All agriculture	\$ 23'441'758	\$ 21'122'489	\$ 44'564'247	\$ 1'247'370
Livestock	\$ 13'762'558	\$ 12'400'925	\$ 26'163'483	\$ 732'326
Poultry	\$ 2'555'519	\$ 3'156'066	\$ 5'711'585	\$ 155'933
Chicken	\$ 2'548'245	\$ 3'147'083	\$ 5'695'328	\$ 155'489
Duck	\$ 1'808	\$ 2'233	\$ 4'041	\$ 110
Turkey	\$ 5'466	\$ 6'751	\$ 12'217'	\$ 334

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

Table 23. Economic effects - Argentina

4.3.5.3 Labor

Over 19.2 million people comprised the total labor force in Argentina in 2020 (Table 24). Of that total, about 10.9 million were male, 8.3 million were female. Approximately 18.0 million people worked in non-agricultural sectors. Within the agricultural sector, 1.2 million people were employed. Poultry production employed an estimated 136,161 people. In 2020, Argentina’s labor from meat processing totaled 42,253 people and \$176.0 million in wages earned. Livestock processing accounted for nearly 74% of the labor from meat processing and \$130.6 million in total wages.

An estimated 10,909 people worked in poultry processing. Wages earned from poultry processing totaled \$45.4 million.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - ARGENTINA			
	Total	Female	Male
Total Country Labor	19'208'592	8'301'186	10'907'406
Non-Agricultural Labor	17'959'592	8'089'213	9'870'379
Agricultural Labor	1'249'000	211'973	1'037'027
Total Non-Poultry Agricultural Labor	1'112'839		
Total Poultry Labor	136'161		
Chicken Labor	135'773		
Turkey Labor	291		
Other Poultry Labor	96		
		Wages (\$1,000 USD)	
Total Meat Processing Labor	42'253	\$176'018	
Livestock Processing Labor	31'345	\$130'575	
Poultry Processing Labor	10'909	\$45'443	

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

Table 24. Agricultural labor force characteristics - Argentina

4.3.5.4 Cost of Production

Argentina's feed cost accounted for 67% of broiler production cost in 2017. Twenty nine percent (29%) of total broiler production costs was distributed among day-old chicks (14%), housing (9%), and other variable costs (heating, electricity, litter, and animal health, 6%). Labor costs represented less than 5% of costs (Figure 91).

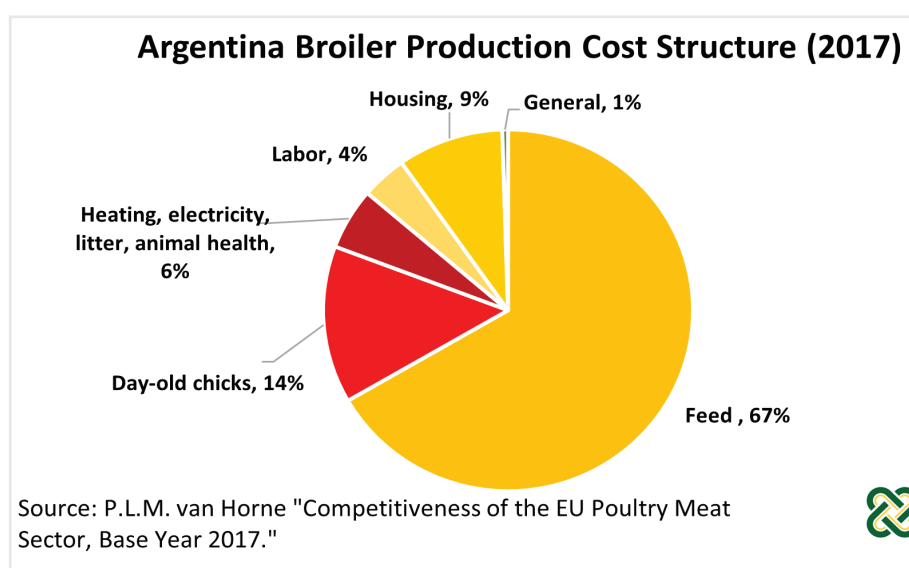


Figure 91. Argentina broiler production cost structure

4.3.5.5 Trade

In 2020 the top market for Argentina poultry was China (\$148.9 million). At a distance second and third place were Chile (\$27.5 million) and South Africa (\$13.872) (see Figure 92 and Figure 93). Few companies, including large scale operations, export poultry meat as the poultry industry tends to focus more on the domestic market rather than export markets¹¹.



Figure 92. Argentina top 10 poultry exports, trade value

11 USDA Poultry and Products Annual Report- Argentina, October 29, 2019, https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Poultry%20and%20Products%20Annual_Buenos%20Aires_Argentina_09-01-2021

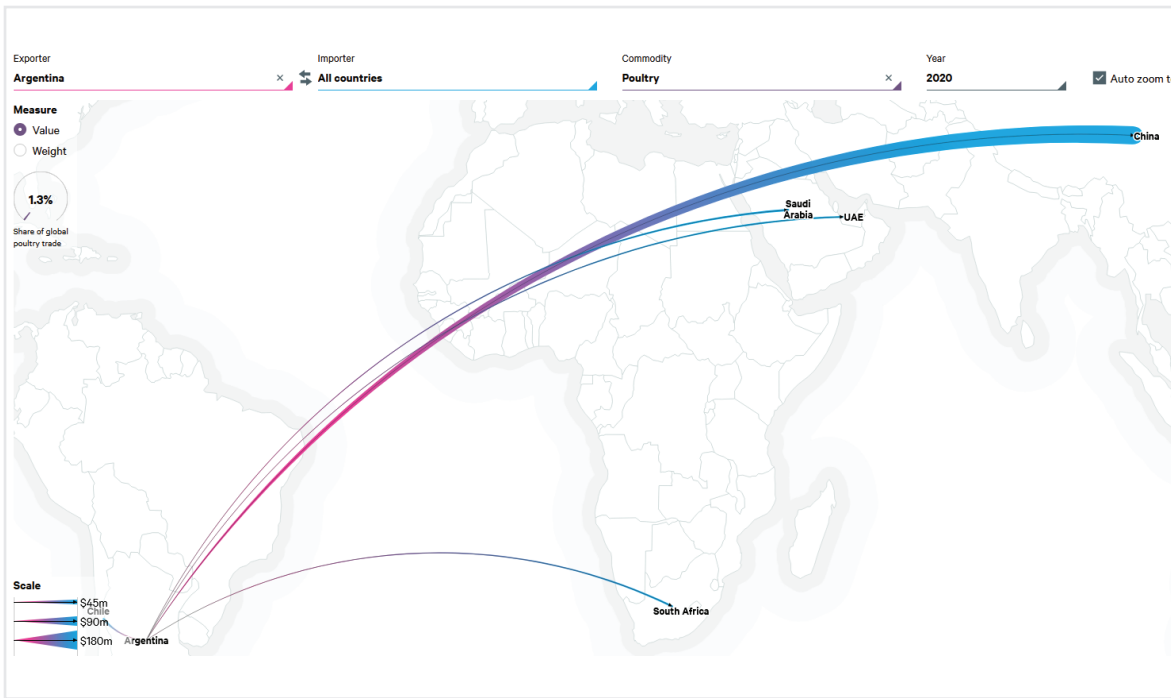


Figure 93. Argentina poultry export flows

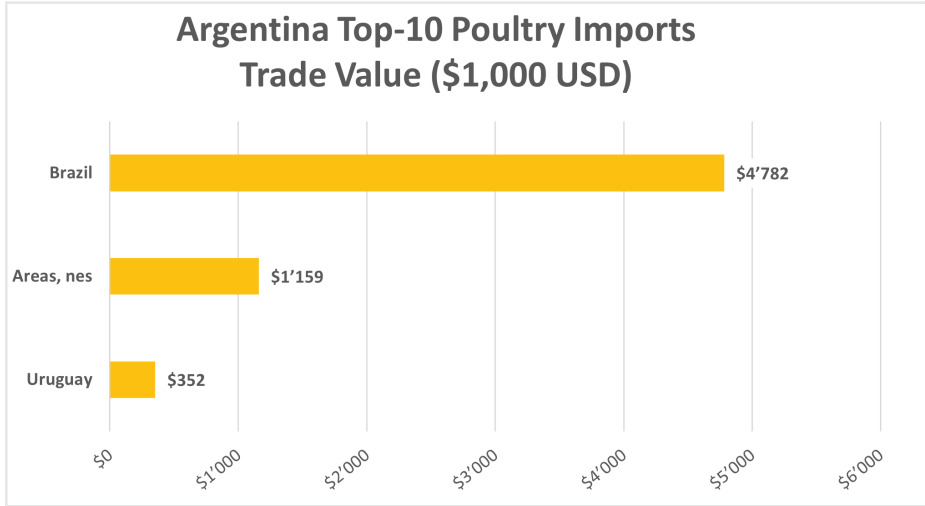


Figure 94. Argentina top 10 poultry imports, trade value

As a result of the Mercosur agreement, chicken meat and prepared poultry products imported from Brazil and Uruguay to Argentina enter tariff-free. The top supplier of poultry meat to Argentina was Brazil at \$6.277 million in 2020. Argentina also imported about 337 MT of poultry meat from Uruguay valued at \$351,619. Argentina's remaining import partners' volumes reflect \$1.3 million in poultry meat exported to Argentina during 2020 (Figure 94 & Figure 95).

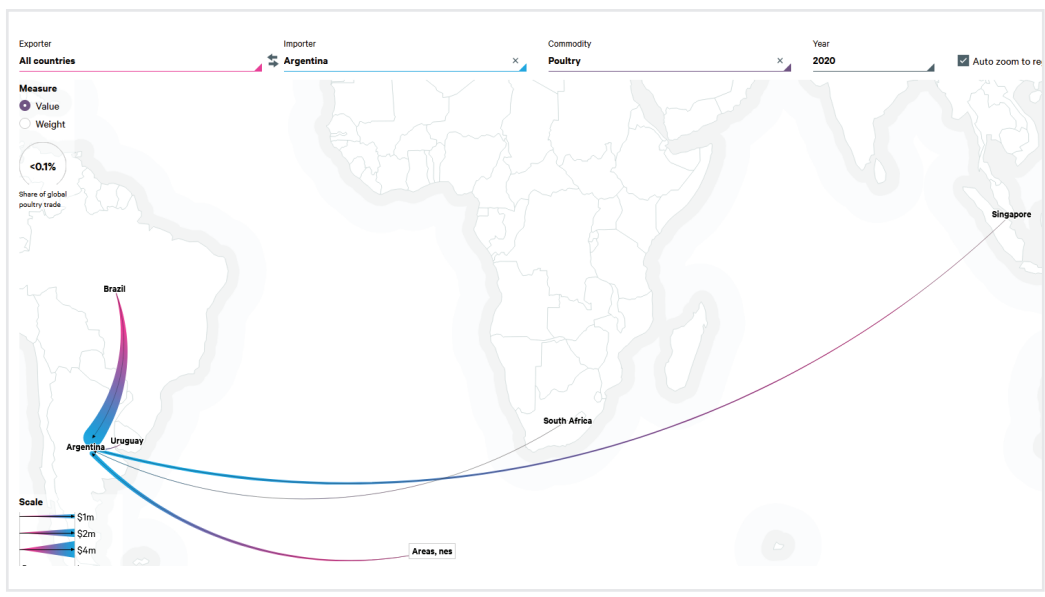


Figure 95. Argentina top 10 poultry exports, trade value