

4.3 South America

4.3.1 Regional Demographics and Poultry Stocks

Overall poultry stocks in South America have increased since 2010. Chicken stocks have increased 21.5%, duck stocks have increased 4.4%, and turkey stocks have increased 10.4% (Figure 82).

The South American broiler industry has 3.7 million farms with 171,927 (4.6%) of those being commercial farms and 3.5 million (95.4%) being household or micro-producer farms. South American broiler farms have stocks of 2.7 billion chickens with 93.5% being on commercial farms and 6.5% being on household or micro-producer farms. The average size of commercial broiler farms is 14,731 head.

The average size of the household or micro-producer farms is 50 head. There are 94,477 duck farms in South America with an inventory of 9.3 million head. The average size duck farm is 99 head. There are 57,798 turkey farms in South America with 66.9 million head of inventory. The average turkey farm has an inventory of 1,159 head (Figure 83).

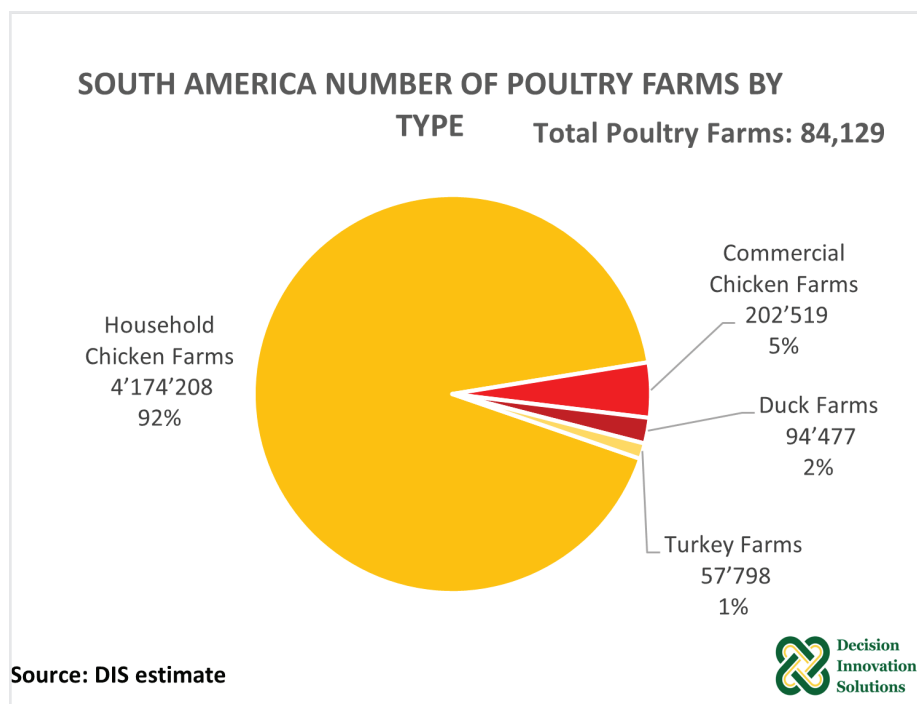


Figure 82. South America number of poultry farms by type

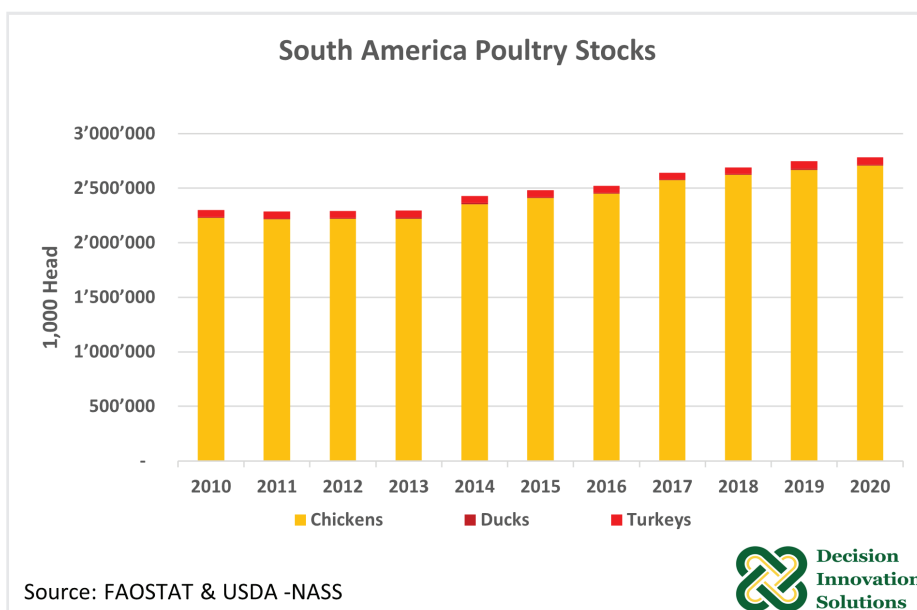


Figure 83. South America poultry stocks

4.3.2 Regional Economics

The total GDP for South America was an estimated \$3.72 trillion in 2020. Approximately, 6% of the total GDP was derived from Agricultural Production. Of that 6%, crop production was an estimated \$146.3 billion or 4% of the total GDP in South America. Red meat production was the second largest agricultural production sector, valued at \$78 billion (Figure 84)

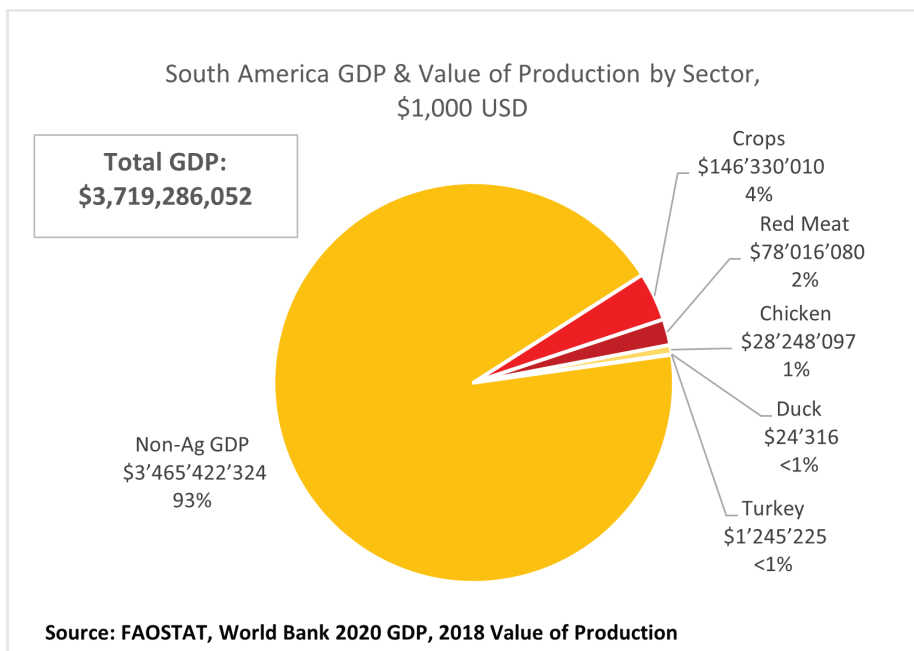


Figure 84. South America GDP & value of production by sector

4.3.3 Regional Poultry Production Volume and Value

South America produced 22.1 million metric tons of poultry meat in 2020 with 97% being chicken meat, less than 1% being duck meat and 3% being turkey meat (Figure 85).

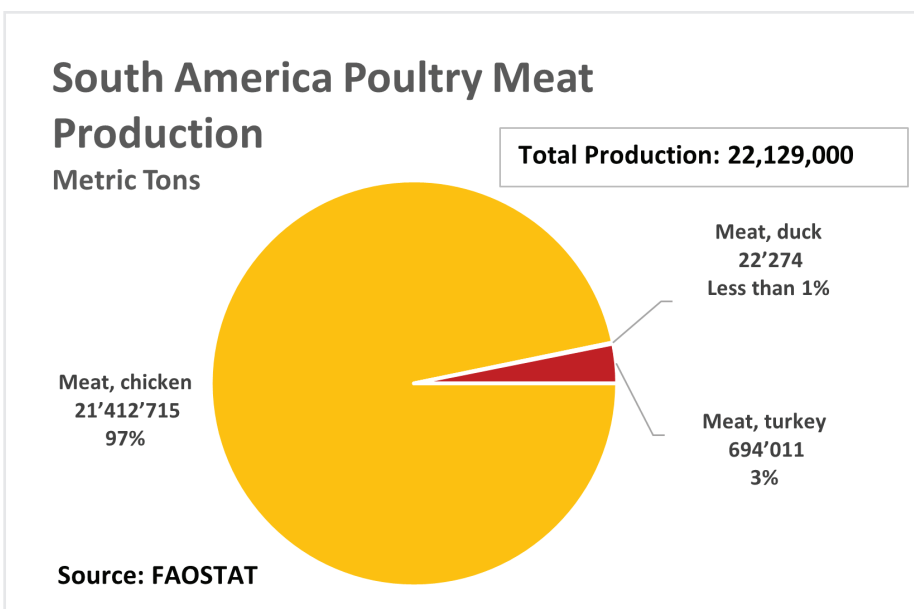


Figure 85. South America poultry meat production

South American poultry production has increased 21.2% since 2010. South American poultry production in 2020 totaled \$29.5 billion with 96% due to chicken production, 4% due to turkey production, and less than 0.5% due to duck production (Figure 86).

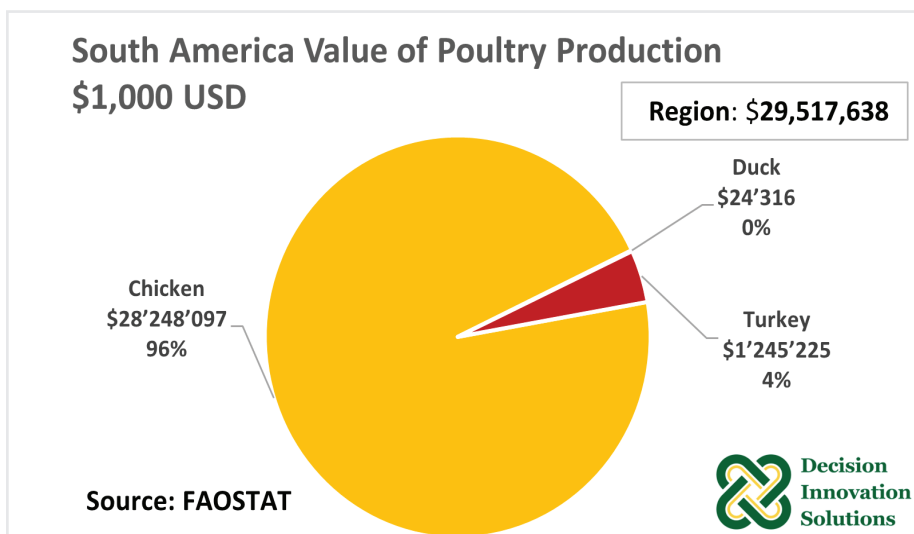


Figure 86. South America value of poultry production

4.3.4 Regional Cost of Production

In the region of South America, as it is the case in other regions, feed cost accounts for the largest cost in broilers total production cost. In the countries included in this region, the share of feed cost averaged 66% of total costs in 2017. This share ranged from 69% in Brazil to 63% in Colombia (see Figure 87).

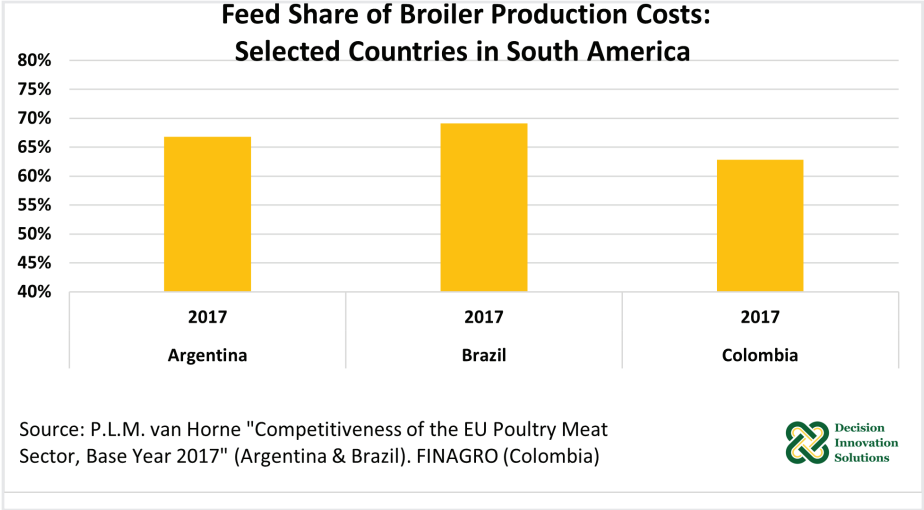


Figure 87. Feed share of broiler production costs: South America

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.

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%.

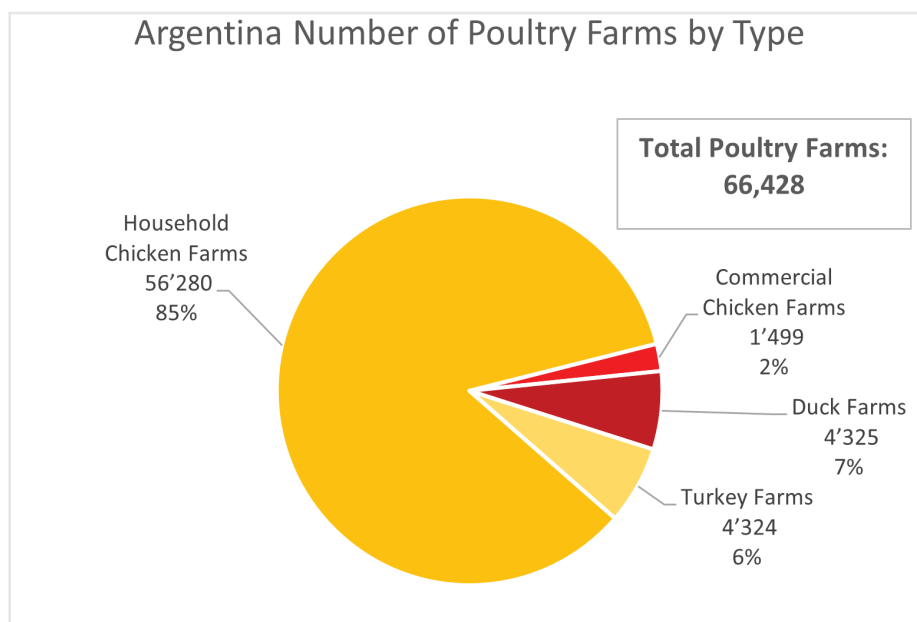


Figure 88. Argentina number of poultry farms by type

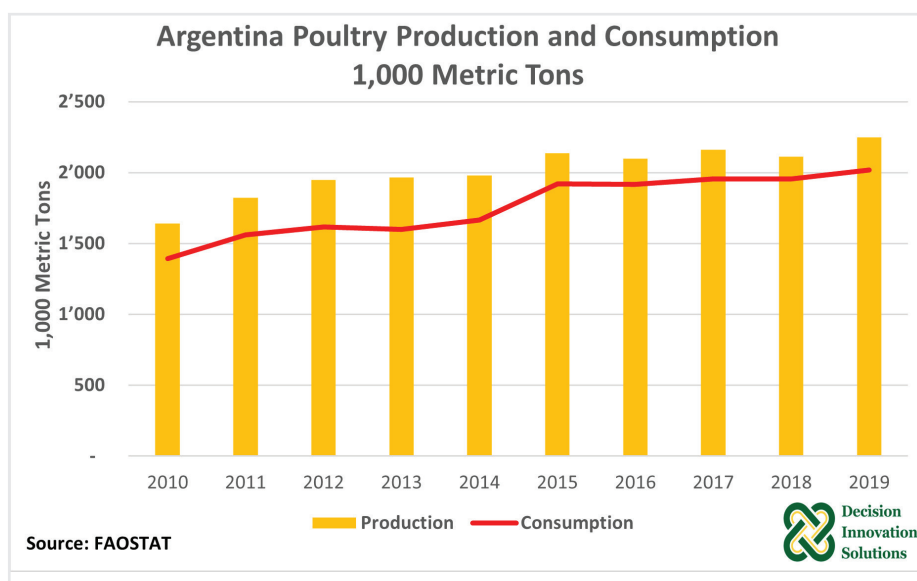


Figure 89. Argentina poultry production & consumption

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).

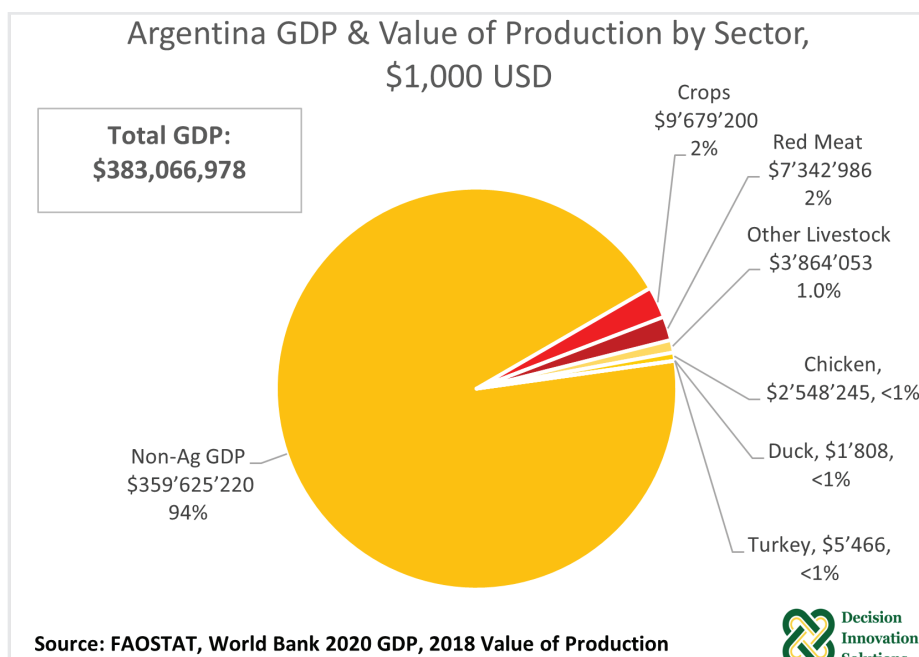


Figure 90. Argentina GDP & value of production by sector

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)				
	Direct	Indirect	Total	Taxes paid*
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).

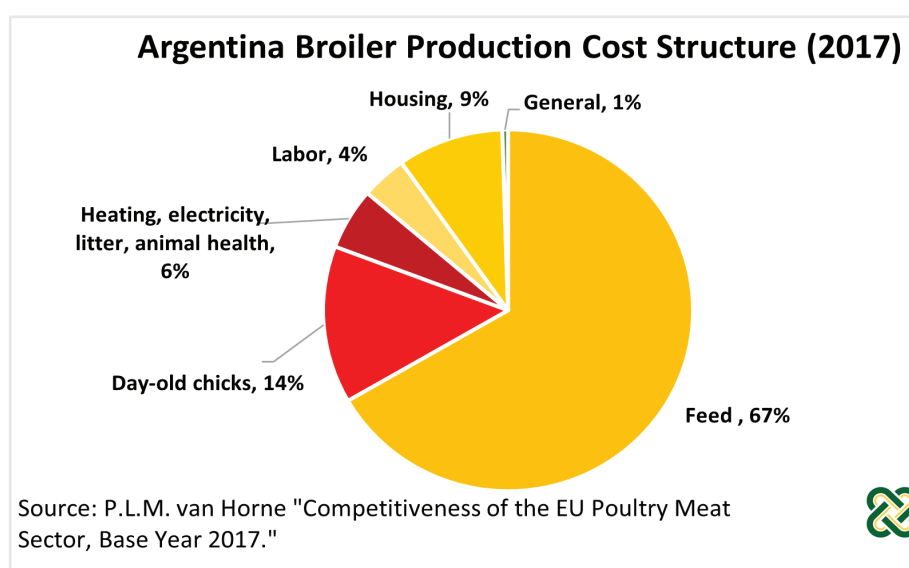


Figure 91. Argentina broiler production cost structure

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

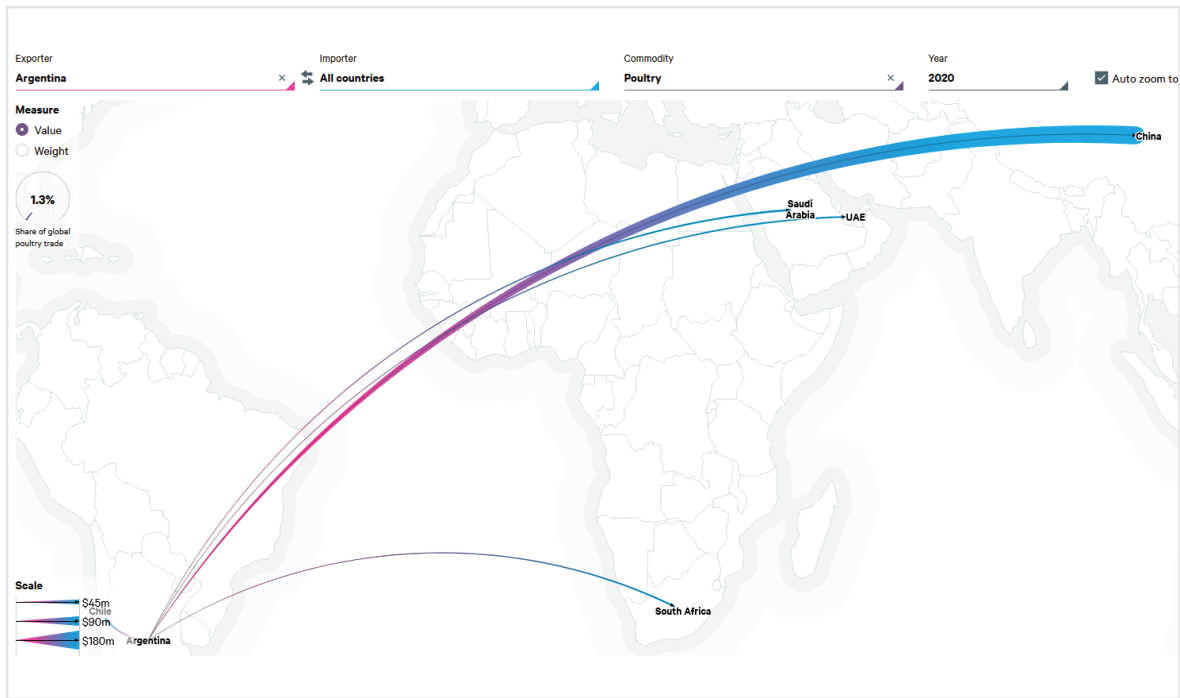


Figure 93. Argentina poultry export flows

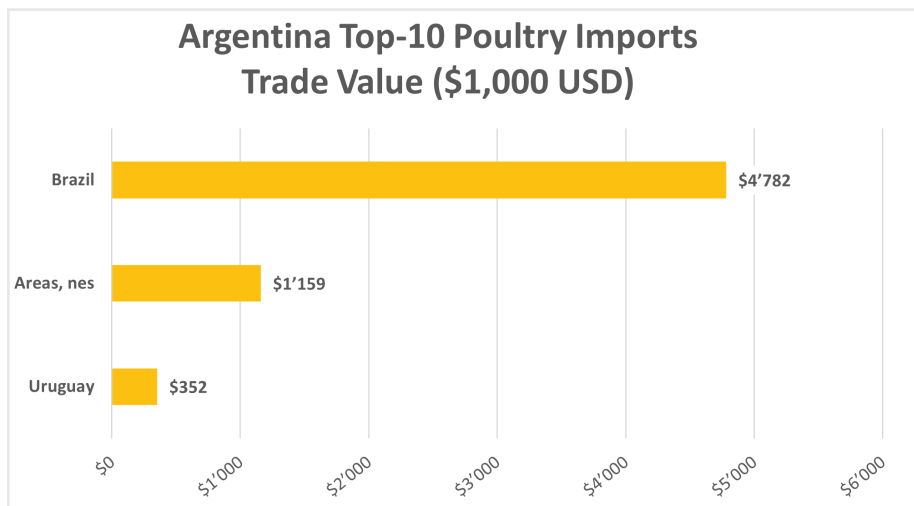


Figure 94. Argentina top 10 poultry imports, trade value

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).

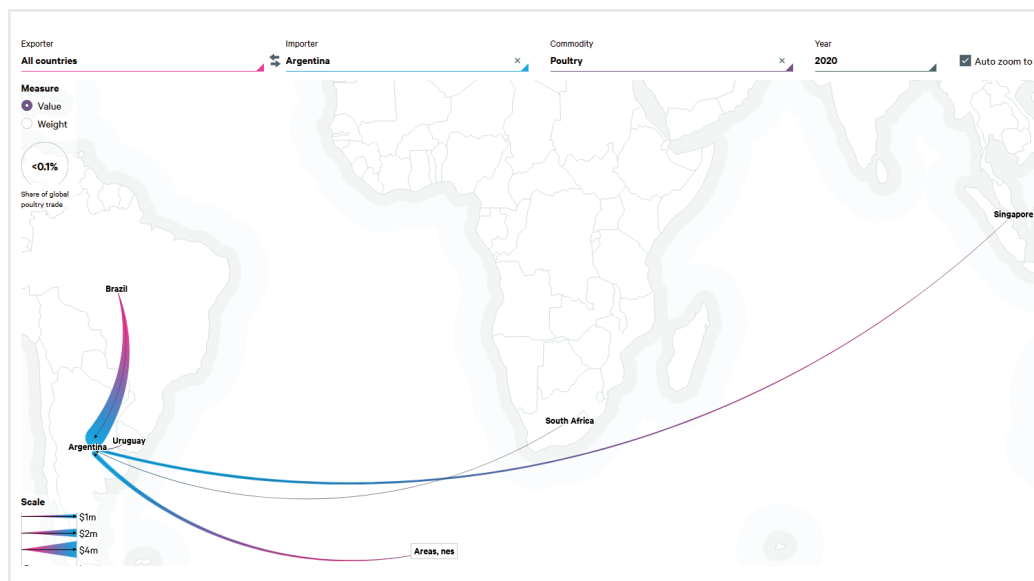


Figure 95. Argentina top 10 poultry exports, trade value

4.3.6 Brazil

4.3.6.1 Demographics

Brazil has more than 2.8 million poultry farms and 95% of the farms are household chicken farms. Commercial chicken farms were 5% of the total poultry farms in Brazil, with 143,125 farms classified as commercial (Figure 96). Brazil's 2.7 million household chicken farms had an average 54 chickens. There were an average 9,303 chickens on Brazil's commercial chicken operations. Household chicken farms had 54 chickens per farm, on average in 2020.

Brazil's poultry production and consumption have increased over the last 12 years. Poultry production has grown 16% since 2010. Over the last three years, production has kept a steady pace at 14.2 million metric tons, on average. Consumption of poultry in Brazil has increased 23% since 2010. Poultry consumption has averaged 10.2 million metric tons from 2019 to 2021. The large difference between poultry production and consumption allows Brazil to be the largest broiler exporter in the world.

In 2020, Brazil's poultry stocks included nearly 1.5 billion chickens, 31.3 million turkeys, and 3.4 million ducks. Since 2010, poultry stocks increased 19%, duck production declined 9%, and turkey production increased 16%.

Brazil's poultry slaughter totaled 6.1 billion head. Chicken slaughter was estimated at 6.0 billion head. Turkey slaughter was an estimated 86.7 million head. Brazil is the third largest chicken producer in the world. Brazil's poultry production in 2020 included 13.8 million metric tons of chicken, 584,000 metric tons of turkey, and 7,000 metric tons of duck. Since 2010, chicken production increased 29%, duck production declined 10%, and turkey production increased 20%.

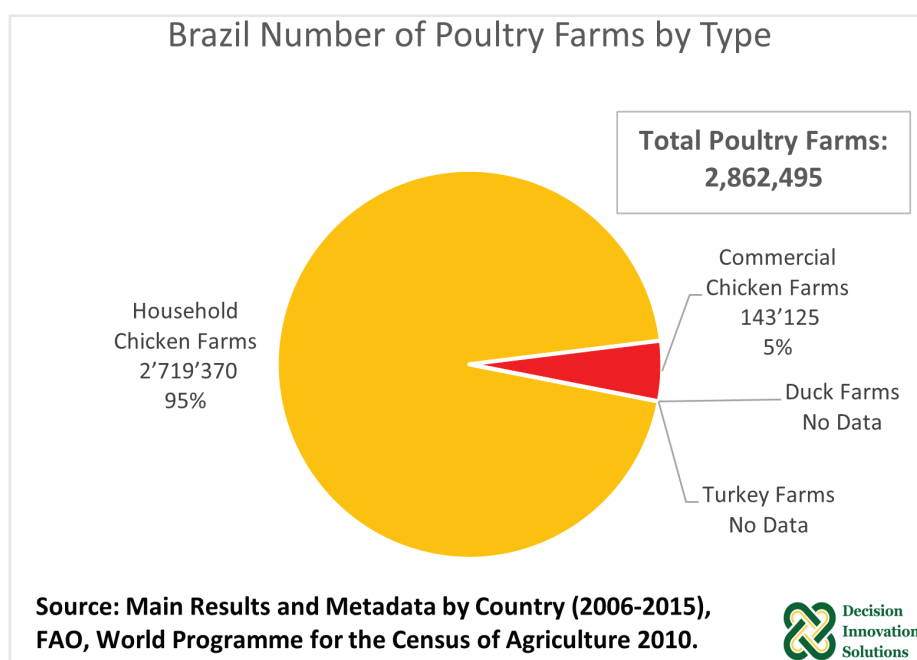


Figure 96. Brazil number of poultry farms by type

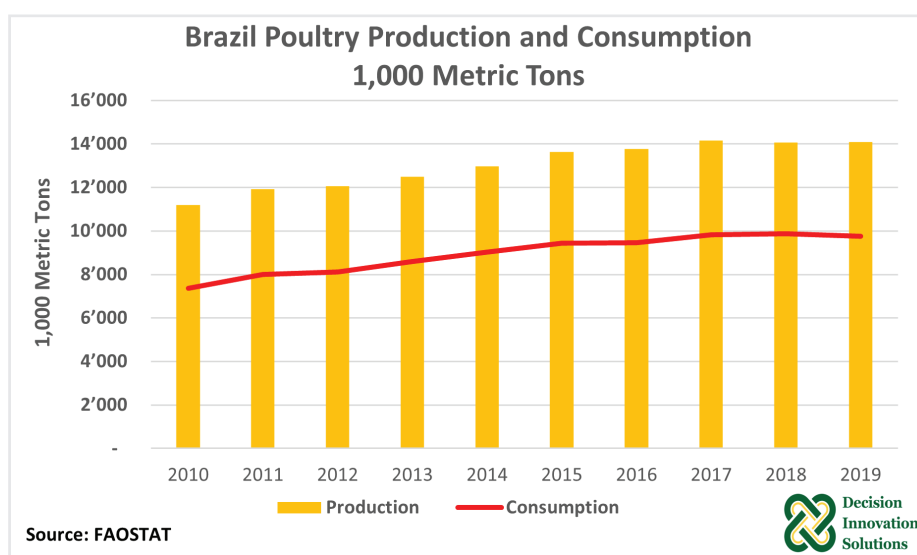


Figure 97. Brazil poultry production & consumption

BRAZIL POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	1'479'363	3'356	31'279	1'513'998
Producing Animals/Slaughtered	6'006'415	5'367	86'706	6'098'488
Production (1,000 MT)	13'845	7	160	14'012

Sources: FAO, 2020 , ABPA 2021 Report

Table 25. Brazil poultry stocks, slaughter & production

4.3.6.2 GDP and Value of Production

The total value of Brazil's GDP was an estimated \$1.4 trillion in 2020. The agricultural production sector represented about 10% of the total Brazilian GDP with nearly \$86.7 billion derived from crop production, alone. Red meat production was valued at \$40 billion and represented 3% of the total GDP. Chicken production was valued at more than \$14.8 billion or 1% of the total GDP in Brazil. Brazil's turkey production was an estimated \$1.01 billion sector contributing less than 1% to the total GDP. Duck production was also less than 1% of the total GDP but valued at \$8 million (Figure 98).

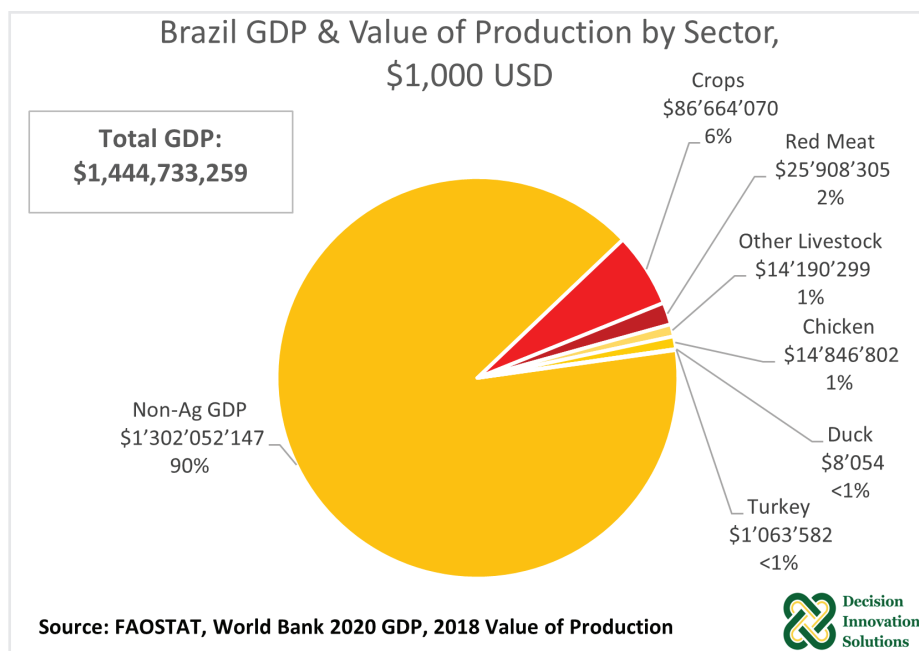


Figure 98. Brazil GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Brazil are estimated to be \$304.6 billion. Of this amount, \$39.9 billion comes from the poultry industry, with \$37.2 billion from chicken meat production, \$20.2 million from duck production, and \$2.7 billion from turkey production. Agriculture pays a net value of \$8.0 billion in taxes, \$926.9 million of which is estimated to be from the poultry industry (Table 26).

ECONOMIC EFFECTS - BRAZIL (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$142'681'112	\$161'953'976	\$304'635'088	\$7'974'552
Livestock	\$56'017'042	\$63'583'627	\$119'600'669	\$3'130'833
Poultry	\$15'918'438	\$24'005'005	\$39'923'443	\$926'856
Chicken	\$14'846'802	\$22'388'977	\$37'235'779	\$864'460
Duck	\$8'054	\$12'145	\$20'199	\$469
Turkey	\$1'063'582	\$1'603'882	\$2'667'464	\$61'927

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

Table 26. Economic effects - Brazil

4.3.6.3 Labor

An estimated 96.5 million people were employed in Brazil's labor force in 2020. Of that total, 55.2 million were male and 41.3 million were female. An estimated 88.1 million people were employed in non-agricultural sectors. The agricultural sector employed 8.4 million people in 2020.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - BRAZIL			
	Total	Female	Male
Total Country Labor	96'539'743	41'315'498	55'224'245
Non-Agricultural Labor	88'091'461	39'666'913	48'424'548
Agricultural Labor	8'448'282	1'648'585	6'799'697
Total Non-Poultry Agricultural Labor	7'495'102		
Total Poultry Labor	953'180		
Chicken Labor	889'012		
Turkey Labor	63'686		
Other Poultry Labor	482		
Wages (\$1,000 USD)			
Total Meat Processing Labor	577'601	\$4'403'079	
Livestock Processing Labor	357'777	\$2'727'354	
Poultry Processing Labor	219'824	\$1'675'726	

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

Table 27. Agricultural labor force characteristics - Brazil

Within the agricultural industry, 953,180 people worked in the poultry sector. Meat processing labor accounted for 577,601 jobs in Brazil. Wages earned from meat processing totaled \$4.4 billion. Livestock processing accounted for most of the labor from meat processing. Livestock meat processing employed 62% of the meat processing sector with 357,777 jobs in total. An estimated \$2.7 billion in wages earned were derived from livestock processing. About 38%, or 219,824 of the meat processing jobs were from poultry processing, collectively earning \$1.7 billion in wages.

4.3.6.4 Cost of Production

In Brazil, the cost of feed represents the largest share of broiler production total costs (69% in 2017). Day-old chicks is the second largest cost component at 14%, followed by housing (8%), and other variable costs (heating, electricity, litter, and animal health, 5%). Labor cost accounts for 3% of total costs, which is below Argentina's at 4%. The costs at farm level for insurance, bookkeeping, consultancy, telephone, and transport represent 1% of total costs (see Figure 99).

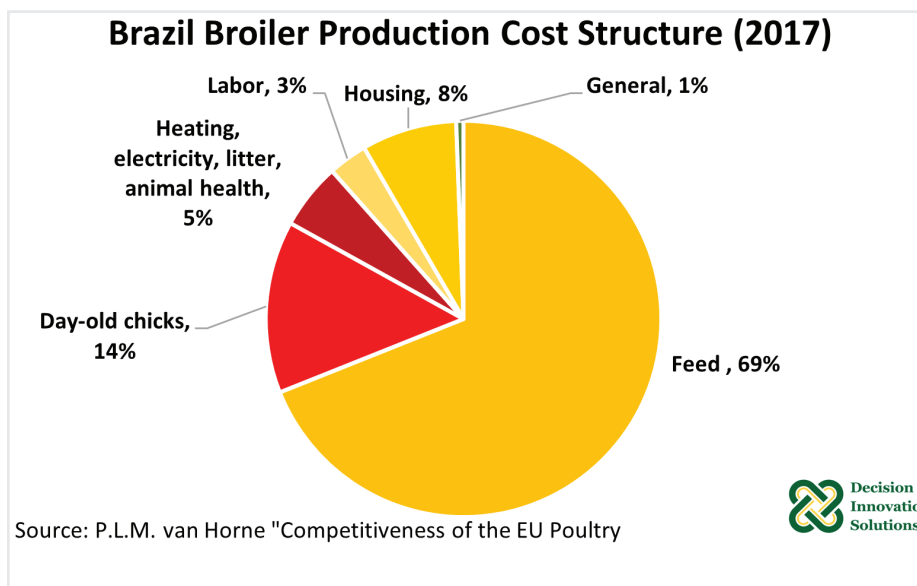


Figure 99. Brazil broiler production cost structure

4.3.6.5 Trade

Brazil is the second largest producer of broiler meat globally, after the USA, and is the top exporter of broiler meat in the world. Overall, the value of poultry meat exported to the world was estimated at \$5.8 billion in 2020. The value of poultry meat shipped to China made up about 22% (\$1.269 billion) of the total value exported by Brazil in 2020. The value of poultry exported to Saudi Arabia and Japan represented 12% (\$688.3 million) and 11.8% (\$667.8) of the total value of Brazil poultry exports, respectively (see Figure 100 and Figure 101).



Figure 100. Brazil top 10 poultry exports, trade value

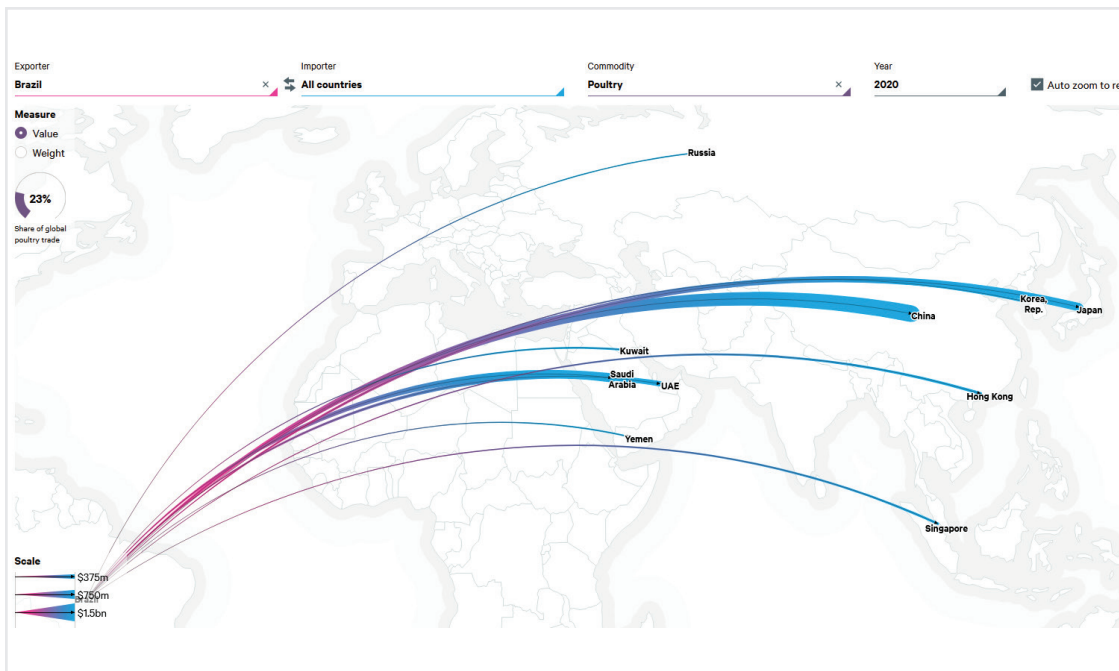


Figure 101. Brazil poultry export flows

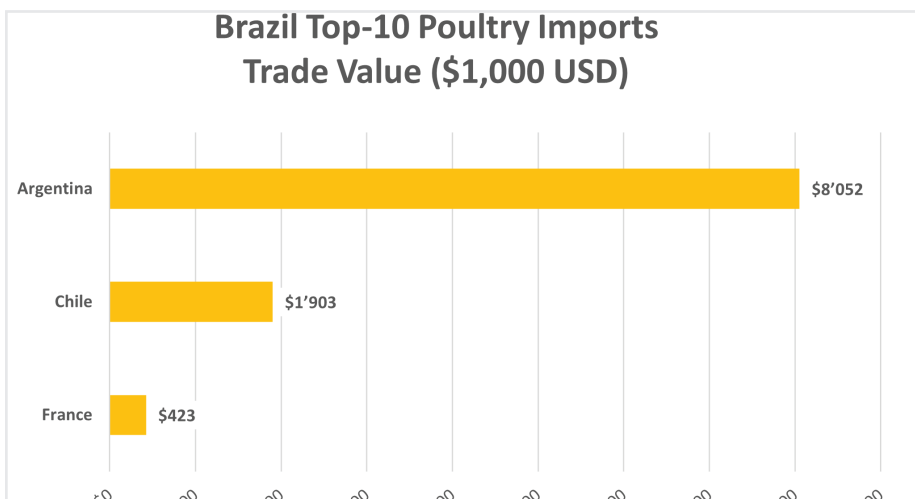


Figure 102. Brazil top 10 poultry imports, trade value

Brazil imported 5,171 MT of poultry meat with an estimated value of \$10.4 million in 2020. About 78% (4,030 MT) of the poultry meat imported by Brazil in 2020 was shipped from Argentina. Chile ranked second for supplying \$1.9 million of poultry meat to Brazil in 2020. Poultry imports from France totaled \$423,000 in 2020 (see Figure 102 and Figure 103).

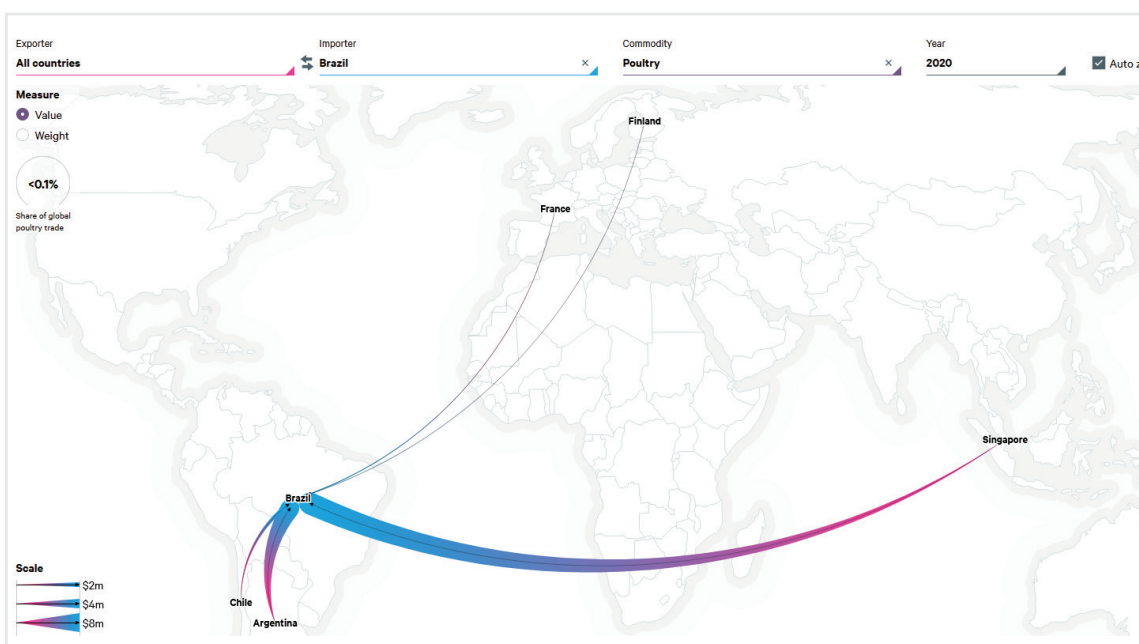


Figure 103. Brazil poultry import flows

4.3.7 Chile

4.3.7.1 Demographics

An estimated 12,262 poultry farms are located in Chile. About 53%, or 6,483, of the poultry farms were commercial chicken farms. Turkey farms are the next largest share of poultry farms with 47% or 5,778 farms (see Figure 104). The average number of chickens on commercial farms in Chile was 46,522 head in 2020. Turkey farms had an average 5,536 turkeys per farm.

Chile's poultry production and consumption have been consistently rising during the last 12 years. From 2010 to 2021, poultry production and consumption were up 35% and 28%, respectively. From 2019 to 2021, 93% of poultry produced in Chile was domestically consumed. Note however, that in 2021 poultry production increased 2.4% year-over-year while domestic poultry consumption declined 1.5%, leaving at least 10% of production available for the export market (Figure 105).

The total number of poultry stocks in Chile was 146.5 million head. About 78% or 114.5 million head of poultry stocks were chickens. The remaining 22% or 32.0 million head of poultry stocks were turkeys (see Table 28). Compared to 2010, Chile's chicken stocks increased 141% and turkey stocks increased by 7%.

Chile Number of Poultry Farms by Type

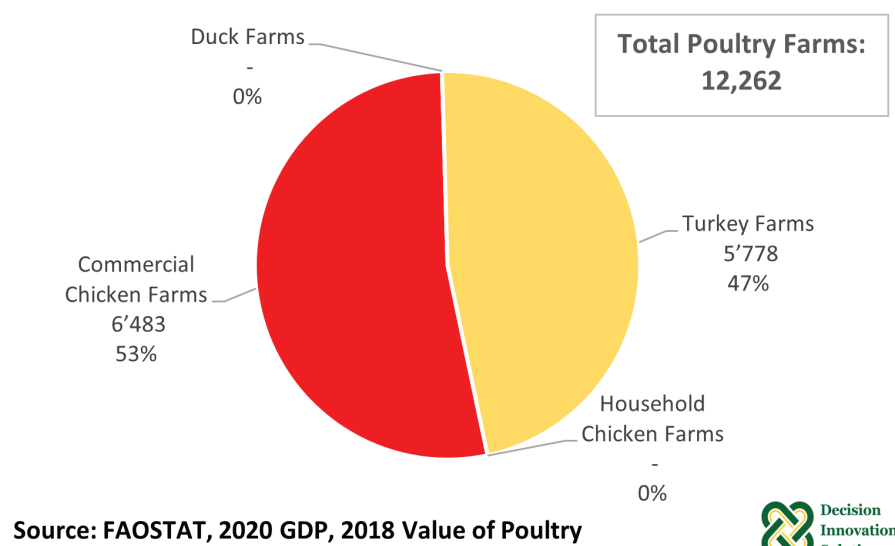


Figure 104. Chile number of poultry farms

Chile Poultry Production and Consumption
1,000 Metric Tons

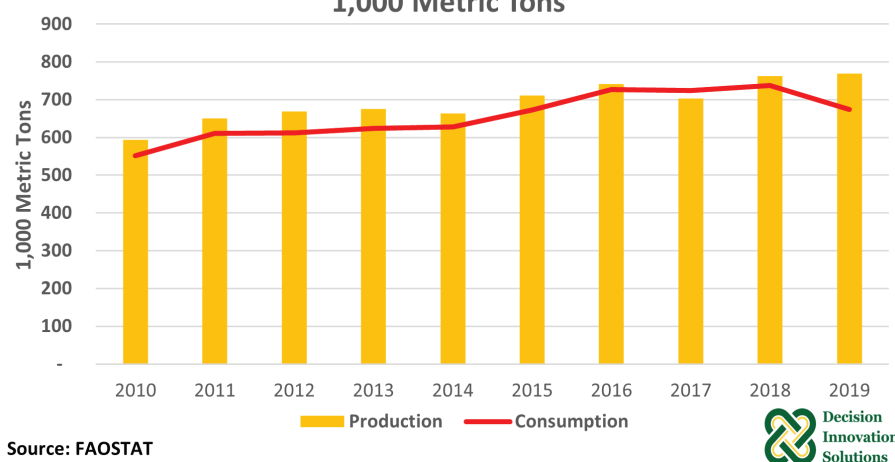


Figure 105. Chile poultry production & consumption

CHILE POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	114'523		31'985	146'508
Producing Animals/Slaughtered	291'985		5'912	297'897
Production (1,000 MT)	696		71	767

Sources: FAO, 2020

Table 28. Chile poultry stocks, slaughter & production

Chickens represented the largest share of Chile's poultry slaughter with an estimated 292.0 million head or 98% of poultry slaughter. Approximately 5.9 million turkeys were slaughtered, accounting for 2% of the total poultry slaughter in Chile. Poultry production included 696,000 metric tons of chicken and 71,000 metric tons of turkey. Since 2010, chicken production increased 38% and turkey production declined 21%.

4.3.7.2 GDP and Value of Production

In 2020, GDP for Chile was \$252.9 billion. Non-agricultural GDP was an estimated \$234.7 billion or 93% of the total GDP. The agricultural production sector was an estimated 7% of the total GDP with crop production contributing 5% or \$13.4 billion. Red meat production was valued at \$3.6 billion or 1% of the total GDP. Approximately \$3.6 billion or 1% of the total GDP was derived from chicken production. Turkey production was valued at \$165.4 million or less than 1% of GDP in Chile (Figure 106).

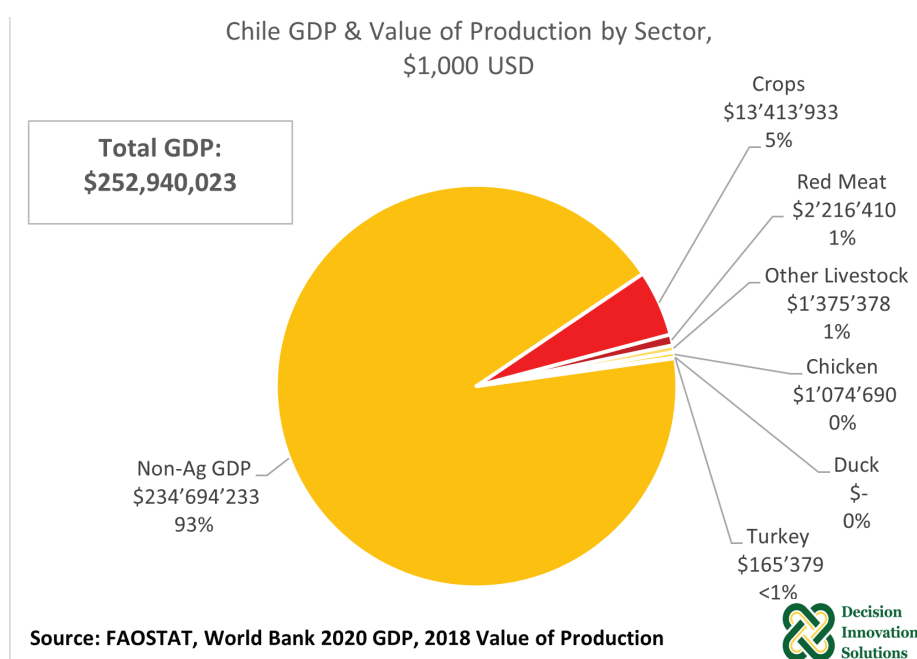


Figure 106.

Chile GDP & value of production by sector

ECONOMIC EFFECTS - CHILE (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$18'245'790	\$19'854'719	\$38'100'509	\$501'493
Livestock	\$4'831'857	\$5'257'934	\$10'089'791	\$132'806
Poultry	\$1'240'069	\$1'688'974	\$2'929'043	\$32'583
Chicken	\$1'074'690	\$1'463'728	\$2'538'418	\$28'238
Duck	-	-	-	-
Turkey	\$165'379	\$225'246	\$390'625	\$4'345

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

Table 29. Economic effects - Chile

The combined (direct and indirect) effects of agricultural production in Chile are estimated to be \$38.1 billion. Of this amount, \$2.9 billion comes from the poultry industry, with \$2.5 billion from chicken meat production and \$390.6 million from turkey production. Agriculture pays a net value of \$500.1 million in taxes, \$32.6 million of which is estimated to be from the poultry industry (Table 29).

4.3.7.3 Labor

In 2020, 8.5 million people worked in the labor force for Chile (Table 30). More than 5.0 million were male, and 3.5 million were female. The non-agricultural sectors employed nearly 7.9 million people in 2020. The agricultural sector employed less than 1% or 670,998 people in the labor force. Of that total, 48,436 jobs were from poultry production.

Meat processing labor accounted for 143,450 jobs and more than \$327.1 million in wages earned during 2020. Approximately 64% or 91,985 jobs in meat processing were derived from livestock meat processing. Wages earned from livestock meat processing totaled \$209.8 million. Poultry processing accounted for the remaining 36% share or 51,465 meat processing jobs in Chile. The value of wages earned from poultry processing was \$117.4 million in 2020.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - CHILE			
	Total	Female	Male
Total Country Labor	8'537'487	3'514'251	5'023'236
Non-Agricultural Labor	7'866'489	3'364'870	4'501'619
Agricultural Labor	670'998	149'381	521'617
Total Non-Poultry Agricultural Labor	622'562		
Total Poultry Labor	48'436		
Chicken Labor	41'976		
Turkey Labor	6'460		
Other Poultry Labor	-		
Wages (\$1,000 USD)			
Total Meat Processing Labor	143'450		\$327'132
Livestock Processing Labor	91'985		\$209'768
Poultry Processing Labor	51'465		\$117'364

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

Table 30. Agricultural labor force characteristics - Chile

4.3.7.4 Trade

The USA, China, and Mexico were the three largest markets for Chile's poultry meat exports in 2020. Chile exported over \$113 million in poultry products to the USA. The value of poultry products shipped to China was estimated at \$85 million, whereas Mexico's shipments reached over \$55 million (Figure 107 and Figure 108).

Chile Top-10 Poultry Exports Trade Value (\$1,000 USD)

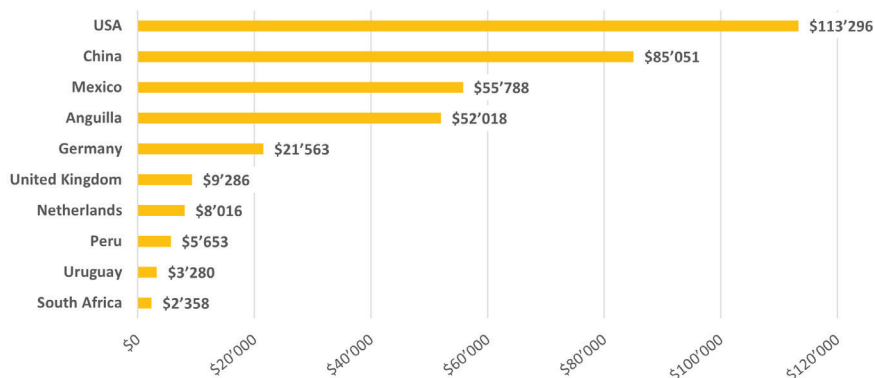


Figure 107. Chile top 10 poultry exports, trade value

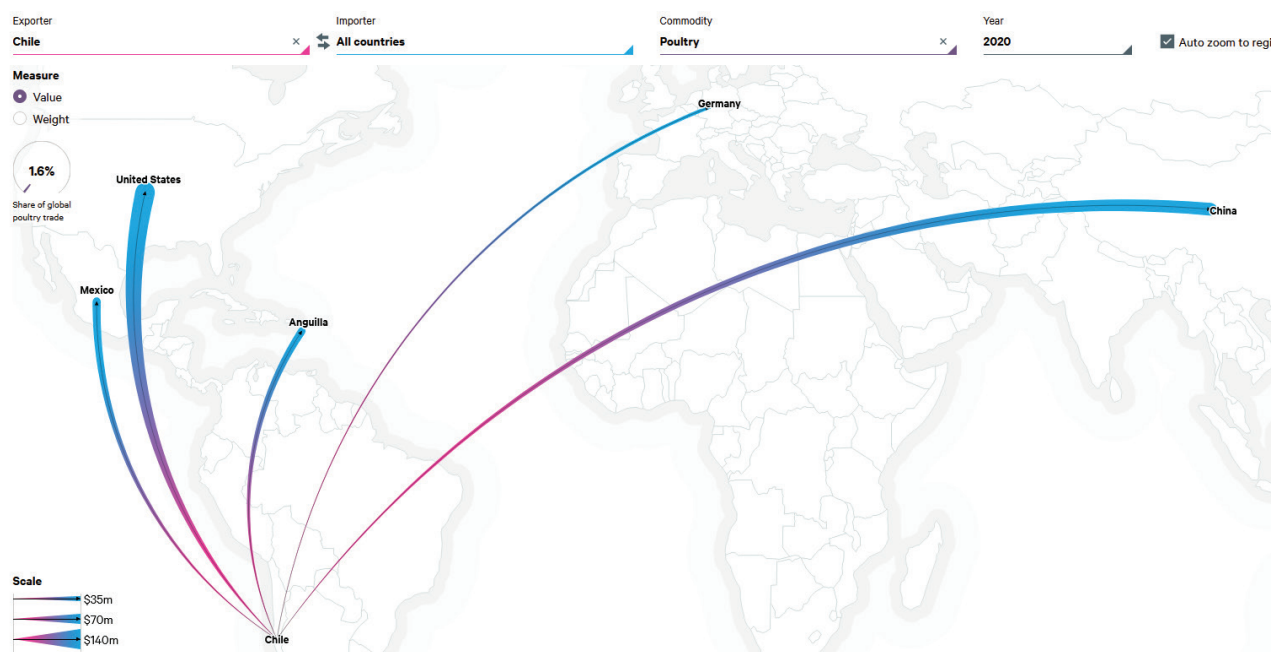


Figure 108. Chile poultry export flows

In 2020, most of the poultry meat imported by Chile was shipped from Brazil (92.4 million). Other important suppliers of poultry meat for Chile were the USA (\$53 million), and Argentina (\$25.8 million). Poultry meat imported from the remaining countries totaled \$644,703 in 2020 (see Figure 109 and Figure 110).



Figure 109. Chile top 10 poultry imports, trade value

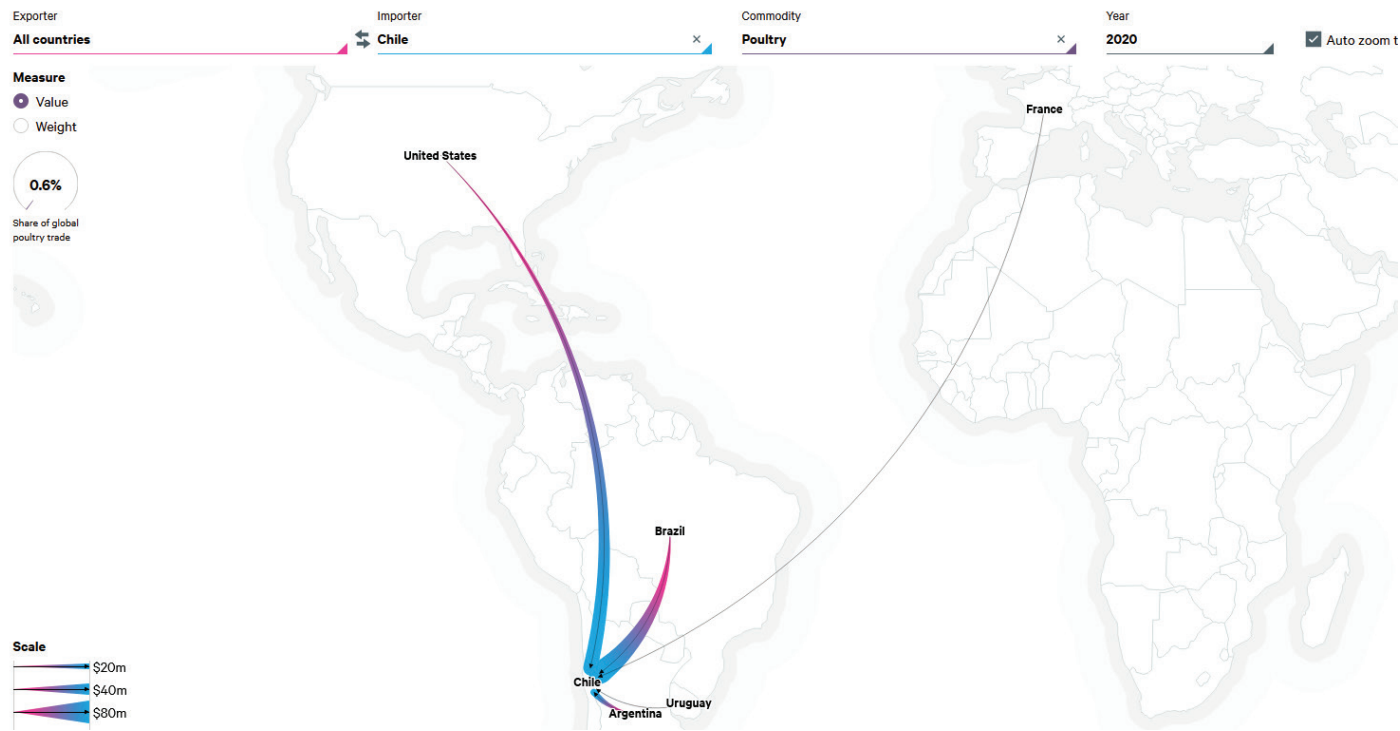


Figure 110. Chile poultry import flows

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

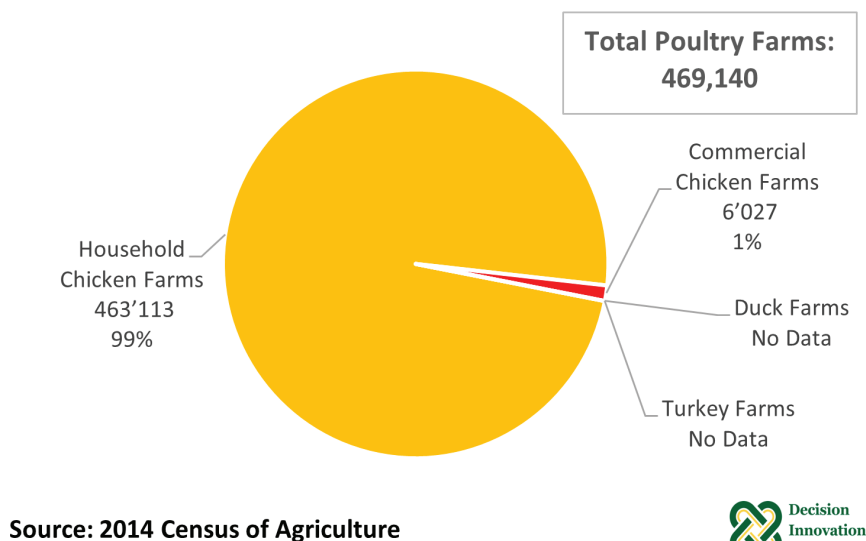


Figure 111. Colombia number of poultry farms by type

Colombia Poultry Production and Consumption
1,000 Metric Tons

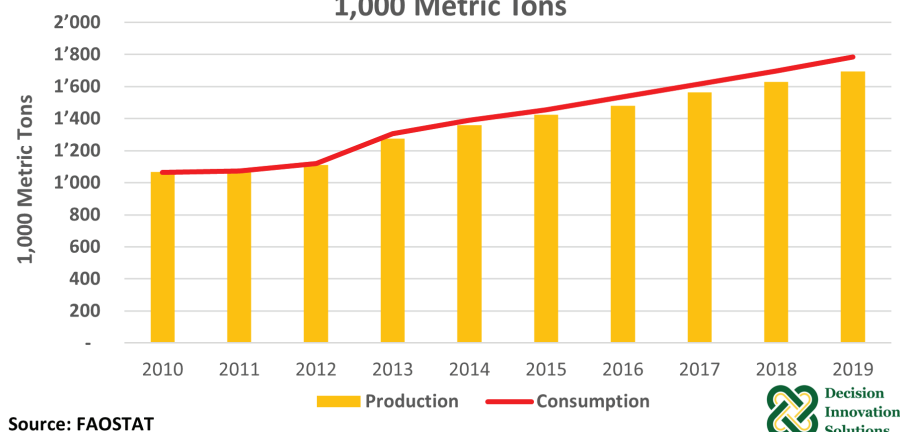


Figure 112. Colombia poultry production & consumption

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).

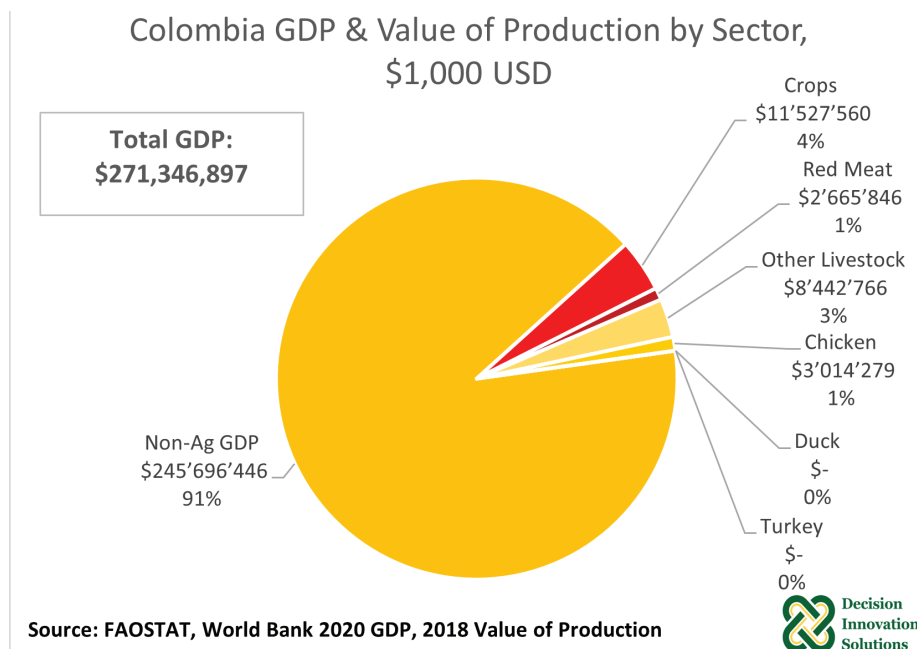


Figure 113. Colombia GDP & value of production by sector

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).

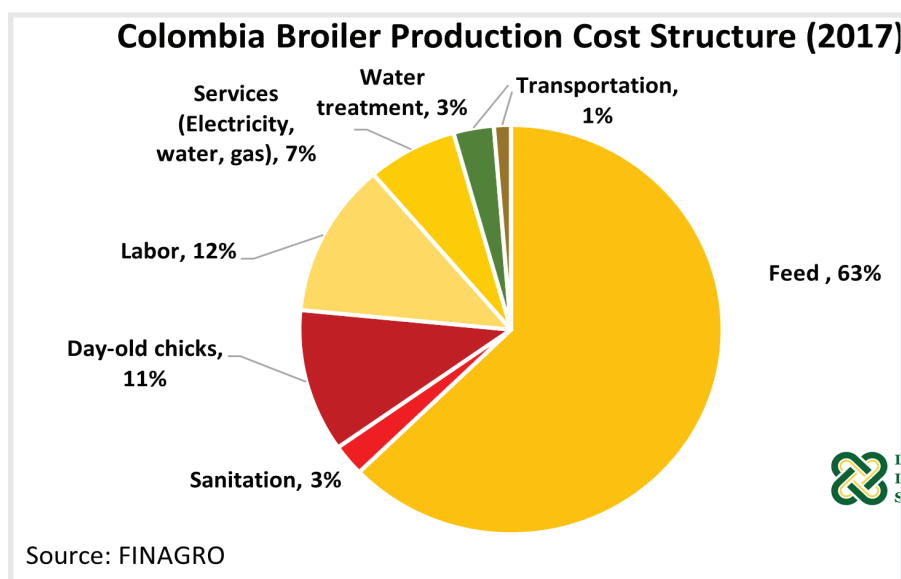


Figure 115. Colombia broiler production cost structure

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).

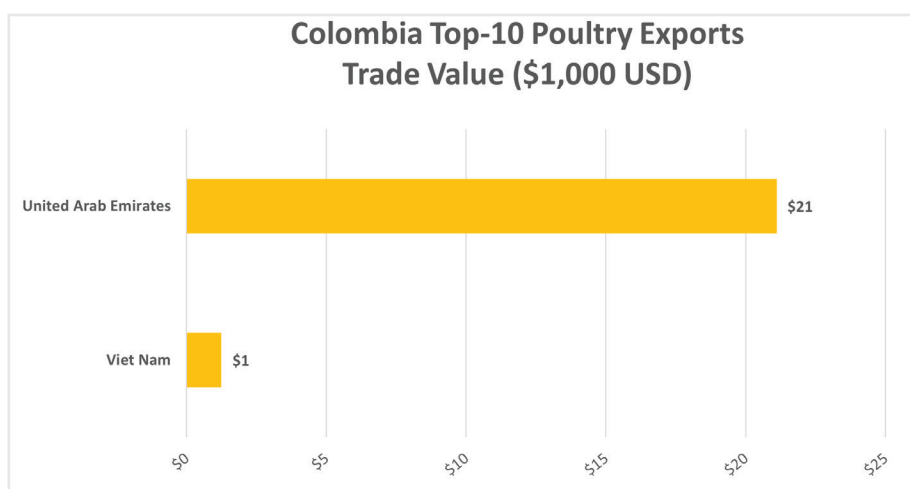


Figure 114. Colombia top 10 poultry exports, trade value

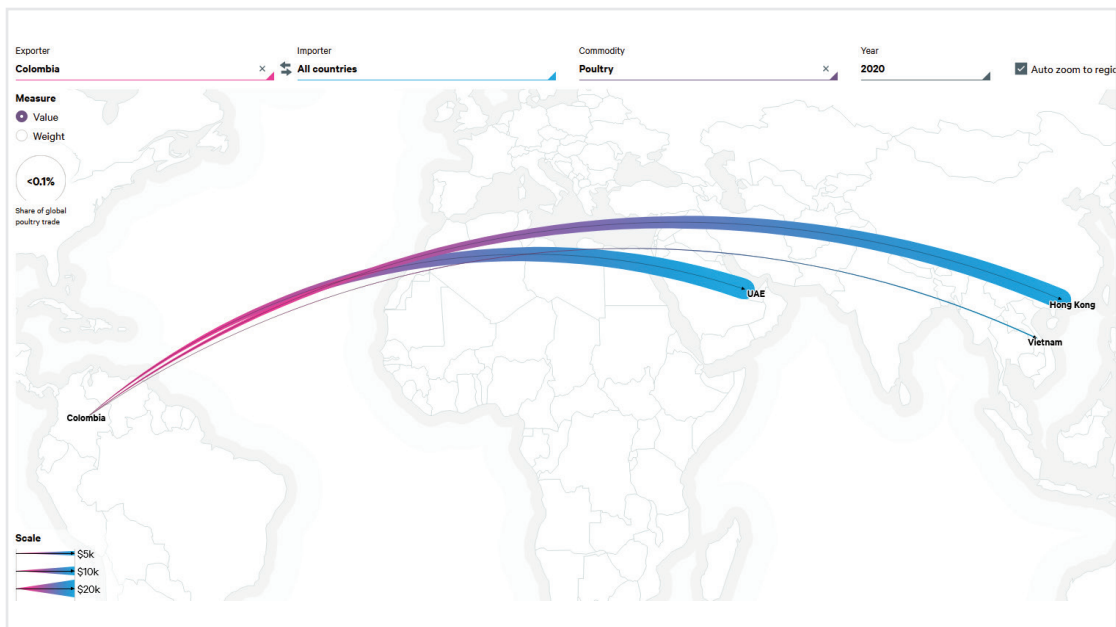


Figure 116. Colombia poultry export flows

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

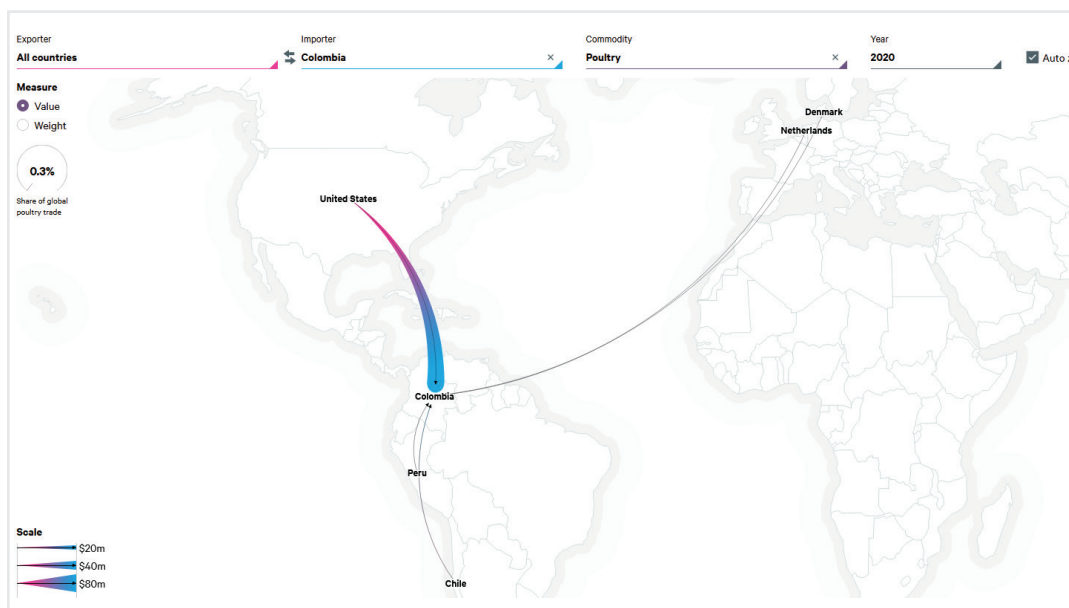


Figure 118. Colombia poultry import flows