

East Africa Agribusiness Report Q4 2012

<https://marketpublishers.com/r/EBD5E6069AFEN.html>

Date: September 2012

Pages: 136

Price: US\$ 1,295.00 (Single User License)

ID: EBD5E6069AFEN

Abstracts

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BMI View: Uganda's coffee sector is expected to see limited production growth in the short term, as the country's coffee trees have long surpassed their peak potential. However, we remain positive about the sector's expansion in the longer run, as tree yields are likely to improve, as will crop resistance to disease. We are less optimistic regarding the grains sector and expect production to increase only slightly in the long term, mainly as a result of increased export demand. Uganda's food security is expected to remain relatively stable, as the price of rice, which is considered a staple good in the country, is cooling off. Corn prices are also likely to decline in the coming weeks as the bulk of newly harvested crops reaches the main markets.

Key Views

Coffee production growth to 2015/16: 17.7% to 2.7mn tonnes. The Uganda Coffee Production Campaign has developed new disease-resistant coffee trees; this is expected to boost yields over our forecast period. High coffee prices will very likely encourage greater fertiliser use.

Corn production growth to 2016: 19.5% to 1.6mn tonnes. Growth will mainly come from greater export potential, as the country is the main corn exporter in the region save South Africa.

BMI universe agribusiness market value: US\$1.1mn in 2012; growth to average 4.9% annually between 2010/11 and 2015/16.

2012 real GDP growth: 4.8% (down from 5.9% in 2011; predicted to average 6.8% over 2011- 2016).

Consumer price inflation: 7.1% year-on-year (y-o-y) annual average in 2012 (up from 27% y-o-y in 2011).

Key Developments

We continue to forecast a reduction in Uganda grains production for the 2011/12 season, largely due to the late onset of the rainy season, which lasts from March to May. Recent weather forecasts indicate that the country is expected to receive slightly below-average rainfall for the duration of the 2011/12 season. Nevertheless, the country is still expected to be a net corn exporter, a relatively rare feat for countries in the region. The Ugandan corn harvest is a significant part of regional food security and is harvested at several different times of the year starting in June and ending in October. As a result of sufficient 2012 aggregate grain output in the country, overall food security in the country is expected to be stable. In the capital, Kampala, maize prices are relatively high as the lean season progresses and household stocks are gradually being depleted. That said, prices are likely to decline in the coming weeks as the bulk of newly harvested crops reaches Uganda's main markets.

For the 2011/12 and 2012/13 seasons, we are forecasting slightly higher coffee production in Uganda, as farmers have increased purchases of fertilisers in recent years on the back of high prices. Even though fertilisers and other inputs remain expensive by historical standards, robusta prices peaked at approximately the same time as arabica prices, meaning that the profitability of the entire sector encouraged farmers to risk purchasing additional inputs. Strong export demand will also support production, as exports are a key source of revenue for Uganda's coffee sector. Moreover, coffee exports contribute around 30% of all foreign exchange earnings for Uganda.

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