

Mexico Agribusiness Report Q3 2016

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Abstracts

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BMI View: We have made some minor forecast adjustments in our Q3 2016 Mexican agribusiness report update. We retain our positive outlook for various segments of the industry till then end of our forecast period in 2020. Growth rates will begin to weaken compared to previous years but we foresee positive trends in domestic production and consumption of the dairy sector, livestock sector and coffee segment. We hold a subdued forecast for the grains market due to corn production volatility this year as the crop is expected to decline by over 5% in terms of yield. Rising per capita disposable incomes will continue to deliver demand-side growth, but we hold our opinion that competitiveness remains an issue for the Mexican agricultural sector as a whole, particularly in the grains, livestock and sugar subsectors.

Key Forecasts

We estimate that Mexican corn production will decline by 7.8% in 2015/16 to reach 24.0mn tonnes. Nevertheless, we estimate that the crop yields will recover over the course of our forecast period. Corn consumption, already high in Mexico, will continue to witness modest growth rates of under 1% to 2020.

We forecast strong production growth in all three livestock sectors in Mexico, with pork production outpacing poultry and beef and veal. Consumption growth will be stable in poultry and pork whereas higher cost will dampen beef and veal growth prospects in 2016.

The Mexican dairy sector will expand in terms of production in 2016 with domestic cheese demand and supply outpacing growth in liquid milk and butter sectors.

Rising per capital incomes and discretionary spending powers will boost food consumption in 2016 and beyond, over the course of our forecast period.

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