

Mexico Agribusiness Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We retain our generally positive outlook for the Mexican agricultural sector in our latest Q4 2016 report update. We have made some minor forecast revisions this quarter to account for production variations. Growth rates will begin to weaken compared to previous years, but we see positive trends in domestic consumption and production in the dairy and livestock sector. Grains will also begin to recover and post a generally upwards trend. Nevertheless, we remain concerned about the severity of the roya rust that is negatively impacting the coffee crops in the country. Mexican coffee production has seen consecutive years of declines and we have made further negative revisions based on the worsening rust problem. On the demand side, 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 1.9% in 2015/16 to reach 25.0mn 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 to 2020.

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

Contents

BMI Industry View

SWOT

Industry Forecast

Livestock Outlook

Table: Mexico Livestock Production, Consumption & Trade Outlook

Table: Risks to Outlook

Table: Livestock Production & Consumption (Mexico 2013-2020)

Sugar Outlook

Table: Mexico - Sugar Production & Consumption Outlook

Table: Risks to Outlook

Table: Sugar Production & Consumption (Mexico 2012-2020)

Coffee Outlook

Table: Mexico Coffee Production & Consumption Outlook

Table: Risks to Outlook

Table: Coffee Production & Consumption (Mexico 2012-2020)

Dairy Outlook

Table: Mexico Dairy Production & Consumption Outlook

Table: Risks to Outlook

Table: Dairy Production & Consumption (Mexico 2013-2020)

Grains Outlook

Table: Mexico Production & Consumption Outlook

Table: Risks to Outlook

Table: Grain Production & Consumption (Mexico 2013-2020)

Commodities Price Analysis

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Americas Machinery Outlook

Table: Select Companies - Sales Forecasts By Region (Company-based estimates)

Americas GM Outlook

Americas Fertiliser Outlook

Downstream Analysis

Food

Latest Updates

Structural Trends

Table: Food Sales (Mexico 2013-2020)

Regional Overview

Competitive Landscape

Table: Mexico Competitive Landscape

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Mexico 1990-2025)

Table: Key Population Ratios (Mexico 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Mexico 1990-2025)

Table: Population By Age Group (Mexico 1990-2025)

Table: Population By Age Group % (Mexico 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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