

Zimbabwe Agribusiness Report Q2 2016

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Abstracts

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BMI View: We expect Zimbabwe to remain a net corn importer over the longer term. Over the next five years, we expect production of the grain to demonstrate moderate growth, although production will remain well below the totals seen in the early 2000s and much of the growth will be in the form of a recovery. We are more optimistic regarding the sugar sector, where access to key markets and potential for productivity improvements will drive production over the long term. Although we forecast a domestic sugar market surplus, the sector remains below potential and our forecasts are relatively subdued despite our expectations for higher average prices than current levels in the coming years.

Key Forecasts

Corn production to 2019/20: 31% on the 2015/16 level to 1.1mn tonnes. We project relatively strong growth over the long term, but the country will remain a net importer, as most of this growth is due to base effects.

Sugar production to 2019/20: 17% on the 2015/16 level to 584,800 tonnes. An overall improvement in sugarcane yields, greater efficiency of mills and long-term access to export markets will be key drivers of production growth.

2016 real GDP growth: 1.1%, up from -0.9% in 2015, forecast to average 2.9% between 2016 and 2020.

2016 consumer price deflation: 1.3% annual average (compared to -2.1% in 2015).

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SWOT

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