

Zimbabwe Agribusiness Report Q3 2015

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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 this will partly be due to base effects; production will remain well below the totals seen in the early 2000s. 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 2018/19: 33.7% on the 2013/14 level to 1.8mn tonnes. We project relatively strong growth over the long term, but the country will remain a net importer.

Sugar production to 2018/19: 14.7% on the 2013/14 level to 562,000 tonnes. An overall improvement in sugar cane yields, greater efficiency of mills and long-term access to export markets will be key drivers of production growth.

2015 real GDP growth: 2.9% (up from an estimated 1.9% in 2014); forecast to average 3.5% between 2014 and 2019.

2015 consumer price inflation: 0.6% annual average (compared to deflation of 0.2% in 2014).

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