

# Central America Agribusiness Report Q1 2016

<https://marketpublishers.com/r/CF7310BB5EEEN.html>

Date: January 2016

Pages: 97

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

ID: CF7310BB5EEEN

## Abstracts

Includes 3 FREE quarterly updates

**BMI View:** We believe that Central America's agribusiness industry will continue to grow - albeit inconsistently across sectors - through to the end of our forecast period in 2019. Along the way, the different sectors of the market will be forced to grapple with an array of headwinds that will directly impact output growth across some countries in the region. As a result of rising incomes and growing populations, as well as an improving real GDP outlook for the region, we expect consumption output to outstrip supply in the livestock sector. Future risks for the agribusiness market include disease (predominantly coffee rust disease, or roya) and the potential impact of El Niño on food security in the region.

### Key BMI Forecasts

Coffee production growth 2013/15 to 2018/19: 35.6% to 15.9mn 60kg bags. As the effects of roya have eased and regional prices remain elevated, output will accelerate. We expect output in the region to increase over our forecast period to 2019.

2015 real GDP growth (regional average): 3.7% (unchanged from our last quarterly update)

2015 consumer price inflation (regional average): 2.3% (down from 4.0% in 2014).

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