

Central America Agribusiness Report Q2 2016

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Abstracts

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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 2020. 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

We have revised downwards our forecast for coffee output in the key producer nation of Guatemala for 2015/16. We now expect production to reach 3.32mn 60kg bags

We have revised upwards our forecast for sugar output in 2015/16 in the key producer nation of Guatemala, to 2.97mn tonnes. Production growth will rise, predominantly due to increasing yields, owing to the adoption of more productive sugarcane varieties, as well as better pest control and irrigation.

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 2020.

2016 real GDP growth (regional average): 3.6%

2016 consumer price inflation (regional average): 1.8%

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