

Central America Agribusiness Report Q3 2016

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Abstracts

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BMI View: Central America's agribusiness industry will continue to grow - albeit inconsistently across sectors - through to the end of our forecast period in 2019/20. Along the way, the different sectors of the market will be forced to fight against 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, demand will outstrip supply in the livestock and grains sectors over the next five years. Future risks for the agribusiness market include disease (predominantly coffee rust disease, or roya) and the potential impact of La Niña (which has a 50-75% chance of appearing in H216 and lingering into H117) on food security in the region.

Key Forecasts

We expect coffee production in the key producer nation of Guatemala for 2015/16 to reach 3.32mn 60kg bags. As the effects of roya have eased and regional prices remain elevated, output will accelerate across the region to 2019/20.

We see demand for corn in Guatemala reaching a level of 2.6mn tonnes in 2016 and 2.7mn tonnes in 2017.

We see pork output in Panama reaching 35,500 tonnes by 2020 and consumption reaching 59,100 tonnes by the same date. These figures have been revised upwards thanks to an increase in US Department of Agriculture (USDA) data for pork consumption and production in Panama for 2015, which shifted our views for the subsequent years in the local livestock sector.

Our forecast for sugar output in 2015/16 in the key producer nation of Guatemala is 2.97mn tonnes. By 2020 output will reach a level of 3.13mn tonnes.

2016 real GDP growth (regional average): 3.8% (down from 3.9% in 2015)

2016 consumer price inflation (regional average): 2.2% (up from 1.7% in 2015)

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