

Colombia Agribusiness Report Q2 2016

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Abstracts

BMI View: Colombia's agribusiness sector is being held back by a number of deep structural challenges - including the lingering consequences of internal armed conflict, structural inefficiencies, low competitiveness and poor policy choices. As a result, area cultivated and yields have stagnated over the past decade. But after several decades of disappointing growth in Colombia's agribusiness sector, the outlook for production and exports is brightening. The efforts made to resolve the conflict, coupled with the potential for upcoming agricultural reforms, have paved the way for the revival of Colombia's agribusiness. The coffee, fruits, sugar, palm oil and horticulture sectors offer the best opportunities. Colombian agriculture enjoys a large diversity thanks to abundant natural resources and diverse climates and topography. Although FTAs may undermine the livestock and dairy sectors, they also provide Colombia with large export markets. The US and EU, which are the main markets for Colombian agricultural products, will see their imports grow in the coming years with the decrease in tariffs.

Key Forecasts

Corn consumption growth to 2020: 18.4% to 7.1mn tonnes. Corn consumption will expand at a faster pace than production over the medium term, boosted by the growth in the livestock sector, especially in the poultry segment. The domestic corn deficit will reach 4.75mn tonnes by 2018/19, compared with 3.95mn tonnes in 2013/14.

Poultry production growth to 2019/20: 26.4% to 1.8mn tonnes. Poultry will record the strongest growth within the livestock sector over the coming five years, supported by a growing domestic demand for meat products at affordable prices.

Coffee production growth to 2019/20: 11.3% to 14.8mn bags. Programmes to

replace aging plantations and improve resistance to disease are starting to bear fruit and will support yields and lead to a pick up in planted area in the coming years. The various FTAs signed over recent years with the US, Canada and the EU will provide Colombia with large export markets.

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