

Colombia Agribusiness Report Q3 2016

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Abstracts

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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: 18.0% 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: 11.1% to 14.8mn bags. Programmes to replace ageing 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.

BMI universe agribusiness market value: USD23.72bn in 2016; up from USD23.46bn in 2015; growth to average 5.0% annually between 2016 and 2020.

2016 real GDP growth: 2.4%; down from 3.1% in 2015. Forecast to average 3.1% from 2016 to 2020.

2016 consumer price index: 6.9%; up from 5.0% in 2015. Forecast to average 4.3% from 2016 to 2020.

Contents

BMI Industry View

SWOT

Agribusiness

Industry Forecast

Grains Outlook

Table: Colombia - Grains Production And Consumption Outlook

Table: Colombia - Risks To Grains Outlook

Table: Colombia - Select Grains Production & Consumption, 2013-2020f

Sugar Outlook

Table: Colombia - Sugar Production And Consumption Outlook

Table: Colombia - Risks To Sugar Outlook

Table: Sugar Production & Consumption (Colombia 2013-2020)

Coffee Outlook

Table: Colombia - Coffee Production And Consumption Outlook

Table: Colombia - Risks To Coffee Outlook

Table: Coffee Production & Consumption (Colombia 2013-2020)

Cocoa Outlook

Table: Colombia - Cocoa Production And Consumption Outlook

Table: Colombia - Risks To Cocoa Outlook

Table: Cocoa Production & Consumption (Colombia 2012-2020)

Dairy Outlook

Table: Colombia - Dairy Production And Consumption Outlook

Table: Colombia - Risks To Dairy Outlook

Table: Milk Production & Consumption (Colombia 2012-2020)

Livestock Outlook

Table: Colombia - Livestock Production And Consumption Outlook

Table: Colombia - Risks To Livestock Outlook

Table: Livestock Production & Consumption (Colombia 2014-2020)

Commodities Price Analysis

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Featured Analysis

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Americas GM Outlook

Americas Machinery Outlook

- Table: Select Companies - Sales Forecasts By Region (Company-based estimates)
- Americas Fertiliser Outlook
- Downstream Analysis
- Food
 - Latest Updates
 - Structural Trends
 - Table: Food Sales (Colombia 2013-2020)
 - Regional Overview
 - Competitive Landscape
 - Table: Key Agribusiness Players
- Demographic Forecast
 - Table: Population Headline Indicators (Colombia 1990-2025)
 - Table: Key Population Ratios (Colombia 1990-2025)
 - Table: Urban/Rural Population & Life Expectancy (Colombia 1990-2025)
 - Table: Population By Age Group (Colombia 1990-2025)
 - Table: Population By Age Group % (Colombia 1990-2025)
- Methodology
 - Industry Forecast Methodology
 - Sector-Specific Methodology

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