

Indonesia Agribusiness Report Q1 2016

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Abstracts

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BMI View: We hold an optimistic outlook towards Indonesia's agriculture sector and see significant growth opportunities in sub-sectors such as livestock, sugar and palm oil. The country's goal to become self sufficient in a large number of commodities is overly ambitious in light of the robust outlook for food and drink consumption. Agricultural production will struggle to expand in the coming years amidst scarce agricultural land, the lack of proper infrastructure and the existence of a large number of low-technology, small-scale farmers. While we believe that Indonesia will be able to reduce its dependence on rice imports in the coming years, sugar, corn and beef self-sufficiency are far-fetched. More worryingly, we expect coffee and cocoa production to record very weak production growth in the coming years.

BMI Key Forecasts

Cocoa production growth between 2013/14 and 2018/19: 5.3% to 411,000 tonnes. Production growth will slightly accelerate beyond 2018, as private grinders are slowly developing programmes to improve plantation management and foster best practices. Until then, output will see weak growth.

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SWOT

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