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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 2014/15 and 2019/20: 5.3% to 368,000 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.

Palm oil consumption growth between 2015 and 2020: 30.1% to 12.6mn tonnes. Relatively recent refining and biodiesel policies (B15 mandate) will continue to inflate domestic consumption of palm oil in the coming years.

Sugar production growth between 2014/15 and 2019/20: 36.4% to 3.0mn tonnes. The strong growth rate is mainly due to base effects as production declines in 2014/15. Moderate expansion in plantations will help output grow in the coming years, but production growth will be held back by poor cane recovery

rates, harvest management and infrastructure issues.

Contents

BMI Industry View

SWOT

Agribusiness

Industry Forecast

Rice Outlook

Table: Indonesia - Rice Production & Consumption Outlook

Table: Risks To Outlook

Table: Rice Production & Consumption (Indonesia 2013-2020)

Table: Rice Production & Consumption (Indonesia 2011-2019)

Grains Outlook

Table: Indonesia - Grains Production & Consumption Outlook

Table: Risks To Outlook

Table: Grains Production & Consumption (Indonesia, 2013-2020)

Sugar Outlook

Table: Indonesia - Sugar Production And Consumption Outlook

Table: Risks To Outlook

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

Livestock Outlook

Table: Indonesia - Livestock Production & Consumption Outlook

Table: Risks To Outlook

Table: Livestock Production & Consumption (Indonesia 2013-2020)

Coffee Outlook

Table: Indonesia - Coffee Production & Consumption Outlook

Table: Risks To Outlook

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

Cocoa Outlook

Table: Indonesia - Cocoa Production & Consumption Outlook

Table: Risk To Outlook

Table: Cocoa Production & Consumption (Indonesia 2013-2020)

Palm Oil Outlook

Table: Indonesia - Palm Oil Production & Consumption Outlook

Table: Indonesia - Risks To Palm Oil Outlook

Table: Indonesia - Minimum Wage ('000 IDR) & Palm Oil Production By Province, 2012-2016

Table: Palm Oil Production & Consumption (Indonesia 2013-2020)

Table: Palm Oil Production & Consumption (Indonesia 2011-2019)

Commodities Price Analysis

Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Asia Machinery Outlook

Table: Select Countries - Average Size Of Farms, Hectares

Asia GM Outlook

Table: Selected Countries - GM Crops Use (mn hectares)

Asia Fertiliser Outlook

Downstream Analysis

Food

Table: Food Consumption Indicators - Historical Data & Forecasts (Indonesia 2012-2019)

Canned Food

Confectionery

Table: Confectionery Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Indonesia 2012-2019)

Regional Overview

Table: Impact Of El Niño On Crops

Competitive Landscape

Table: Major Agribusiness Companies

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Indonesia 1990-2025)

Table: Key Population Ratios (Indonesia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Indonesia 1990-2025)

Table: Population By Age Group (Indonesia 1990-2025)

Table: Population By Age Group % (Indonesia 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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