

Indonesia Agribusiness Report Q4 2016

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Abstracts

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BMI View: Indonesia's agriculture holds a great amount of promise and sub-sectors such as livestock, sugar and palm oil will experience significant growth opportunities. However, 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.

BMI Key Forecasts

Cocoa production growth between 2014/15 and 2019/20: 3.1% to 335,000 tonnes. Production growth will slightly accelerate from 2018 onwards, 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: 33.8% to 11.2mn 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: 19.2% to 2.5mn tonnes. The strong growth rate is mainly due to base effects, as production declined in 2014/15. Moderate expansion in plantations, improved yields and higher sucrose content in cane will drive growth. However, it will be held back by poor cane recovery rates, harvest management and infrastructure issues.

BMI universe agribusiness market value: USD141.2bn in 2016 (up from USD129.3bn in 2015; forecast to grow annually by 6.8% on average between 2016 and 2020).

2016 real GDP growth: 5.2%, up from 4.8% in 2015 and compared with the 2011-2015 year average growth of 5.5%; forecast to grow annually by 5.8% on average between 2016 and 2020.

2016 consumer price index: 4.2%, down from 5.9% in 2015 and compared with the 2011-2015 year average growth of 6.0%; forecast to grow annually by 4.8% on average between 2016 and 2020.

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