

Kenya Agribusiness Report Q2 2016

<https://marketpublishers.com/r/KE98D7D0013EN.html>

Date: February 2016

Pages: 56

Price: US\$ 1,295.00 (Single User License)

ID: KE98D7D0013EN

Abstracts

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BMI View: Kenya will continue to underperform its regional peers with regard to the development of its agricultural sector. Despite COMESA granting a one-year extension to the sugar import safeguard, which will provide a short-term boost, we expect the country's sugar sector to remain regionally inefficient and therefore to post very limited growth over the coming years. However, we continue to forecast steady coffee production growth due to relatively high domestic prices and improvement in husbandry techniques. Kenya will largely bypass the El Nino-related droughts currently affecting SSA, but the country will face more expensive corn imports due to higher regional corn prices.

Key Forecasts

Corn production growth 2014/15 to 2019/20: 16.5% to 3.1mn tonnes. Corn production growth will be fairly limited as subdued prices relative to previous years will limit plantings, while yield growth will be poor. Most of the gains will be due to base effects.

Wheat consumption growth 2016 to 2020: 15.5% to 2.1mn tonnes. Kenyans already have a high rate of wheat consumption by regional standards. Improvements in availability and growth in population and incomes will drive consumption.

Coffee production growth 2015/16 to 2019/20: 8.9% to 980,000 60kg bags. Growth will be driven by increased financial support from the government in the form of funds and debt relief. In addition, new coffee varieties are likely to help boost yields.

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