

Mozambique Agribusiness Report Q2 2016

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Abstracts

BMI View: Mozambique's agricultural production is currently being significantly impacted by the 2015/16 El Nino episode which emerged in May 2015. The dry weather will dent grains, sugar and livestock production for a second consecutive year in 2016. We hold a relatively positive view on the agribusiness sector of Mozambique beyond 2017, as the country is able to produce most of its consumption needs. Mozambique has been attracting growing interest from foreign investors and the agribusiness sector will benefit from this trend in the coming years. However, although the country could be able to tap abundant and largely unexploited land and water resources, its production will not keep up with robust consumption growth. Self-sufficiency regarding corn and poultry will slowly decrease in the coming years, leading to increasing imports.

Key Forecasts

Sugar production growth to 2019/20: 24.0% to reach 527,000 tonnes. As one of Mozambique's key cash crops, long-term sugar production growth will reflect an increase in export-driven demand and the opening up of new markets; output is also expected to benefit from investment in biofuels.

Poultry consumption growth to 2020: 25.9% to 61,000 tonnes. Among the factors underpinning our strong growth expectations are Mozambique's expanding population and the country's rising standards of living.

Corn production growth to 2019/20: 17.4% to 2.2mn tonnes. Corn will remain one of Mozambique's most important food crops; it will also retain its status as an important source of feed for poultry and livestock. However, despite benefiting from efforts to raise production levels, the crop will remain vulnerable to variations in rainfall.

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