

# Philippines Agribusiness Report Q3 2015

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## Abstracts

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**BMI View:** We hold a positive view on Philippines agribusiness sector in the long term, given the country's potential for new sectors expansion, such as palm oil. We particularly like the outlook for sugar production, and believe the livestock sector will continue to show healthy growth rates. The Philippines' vast consumption market, along with strong government support will foster domestic and foreign investment and favour output expansion. However, backyard farming and infrastructure problems, especially transport costs, will continue to hamper the sector's growth. These inefficiencies will become increasingly crippling as South East Asia moves towards the ASEAN Economic Community, which is supposed to lead to trade and investment liberalization in the region. Although the Philippines' government appears to have taken the measure of the challenge and is now supporting rice and sugar production, agriculture in the country remains uncompetitive. As such, the sector is at risk of low cost imports from its neighbours over the medium term.

### Key Forecasts

Sugar production growth to 2018/19: 19.6% to 2.9mn tonnes. Sugar production growth will be driven by improvements in yields. The government approved the Sugarcane Industry Development Act, which is aimed at diversifying the sugar sector towards more value-added products and will provide financing to farmers.

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