

Uganda Agribusiness Report Q1 2016

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Abstracts

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BMI View: We see potential for output growth in corn and coffee, two of the main crops in Uganda. For coffee, we see Uganda as an East African leader in terms of exports, largely owing to government support for the sector and new disease-resistant trees. Moreover, coffee prices are higher y-o-y, meaning farmers will be able to invest in their crops. We expect Uganda to remain a net corn exporter in coming years, although most of its corn will be shipped regionally. The country is unlikely to compete with South Africa and Zambia to become one of Sub-Saharan Africa's largest corn exporters.

Key Views

Coffee production growth to 2018/19: 5.8% to 4.1mn 60kg bags. The Uganda Coffee Development Authority's production campaign has developed new disease-resistant coffee trees, which are expected to boost yields over our forecast period. However, lower average coffee prices over the medium term will act as a constraint on production growth.

Corn consumption growth to 2019: 21.4% to 3.0mn tonnes. Growth in demand will come from the country's livestock sector, which is growing in response to higher demand. Overall, however, corn consumption will largely be guided by changes in population.

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