

Venezuela Agribusiness Report Q2 2016

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Abstracts

BMI View: The operating environment for the agribusiness sector has deteriorated significantly over recent years, due to the poor macroeconomic climate, a shortage of foreign currency for input purchases and general government mismanagement. Venezuela's economy will continue to be under extreme downward pressure in 2016 amidst low international oil prices. The growing headwinds to the economy will weigh on agricultural production and consumption in the coming years, and we forecast most of the commodities to stagnate out to 2020. Producers of agricultural goods will struggle as rising production costs and controlled prices at the farm level reduce margins. As such, the divergence between Venezuela and its neighbouring countries in terms of agricultural sector development will continue to grow in the coming years.

Key Forecasts

Coffee production growth to 2019/20: 7.2% to 536,000 60kg bags. Venezuela's coffee sector suffers from many structural weaknesses and is on the decline. Low profitability (due to government-mandated prices), the lack of private and public investment and rust disease will impede production from growing.

Poultry production growth to 2019/20: -5.2% to 578,000 tonnes. The sector is held back by a lack of profitability due to high input costs, inflation and government price controls, along with increased competition from imports. The poultry industry will fare somewhat better than the beef sector, for which the outlook is especially bleak.

Corn consumption growth to 2020: 4.6% to 3.8mn tonnes. Grains consumption is also feeling the pinch of economic woes and the decrease in foreign exchange, as Venezuela encounters problems with importing grains. Demand in the medium term will remain lacklustre, amidst low domestic grains supply and

the weak growth in the livestock sector.

2016 BMI universe agribusiness market value: USD26.63bn (down 2.6% from 2015; forecast to grow annually by 1.7% on average from 2016 to 2020).

2016 real GDP growth: -6.2% (up from -7.5% expected in 2015; forecast to grow annually by 0.4% on average between 2016 and 2020).

2016 consumer price index: 252.9% y-o-y (up from 116.2% expected in 2015; forecast to grow annually by 133.2% on average between 2016 and 2020).

Contents

BMI Industry View

SWOT

Agribusiness

Industry Forecast

Grains Outlook

Table: Venezuela - Grains Production And Consumption Outlook

Table: Risks To Outlook

Table: Grains Production & Consumption (Venezuela 2013-2020)

Coffee Outlook

Table: Venezuela - Coffee Production And Consumption Outlook

Table: Risks To Outlook

Table: Coffee Production & Consumption (Venezuela 2013-2020)

Livestock Outlook

Table: Venezuela - Livestock Production And Consumption Outlook

Table: Risks To Outlook

Table: Livestock Production & Consumption (Venezuela 2013-2020)

Table: Beef Production & Consumption (Venezuela 2010-2015)

Commodity Strategy

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Americas Machinery Outlook

Table: Select Companies - Sales Forecasts By Region (Company-based estimates)

Americas GM Outlook

Americas Fertiliser Outlook

Downstream Analysis

Food

Latest Updates

Structural Trends

Confectionery

Regional Overview

Table: TPP - Main Winners And Losers For Agriculture

Competitive Landscape

Table: Venezuela Agribusiness Competitive Landscape

Demographic Forecast

Demographic Outlook 2015

Table: Population Headline Indicators (Venezuela 1990-2025)

Table: Key Population Ratios (Venezuela 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Venezuela 1990-2025)

Table: Population By Age Group (Venezuela 1990-2025)

Table: Population By Age Group % (Venezuela 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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