

Vietnam Agribusiness Report Q2 2016

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Abstracts

BMI View: Recent developments in the country's economic and business environments add further weight to our positive view on Vietnam's agribusiness sector. The industry holds strong growth opportunities in terms of production, exports and retail sales, particularly with regard to the rice, coffee, livestock and dairy sectors. Moreover, economic and financial integration in South East Asia will benefit Vietnam's exports of rice, dairy and coffee. However, Vietnam is facing growing competition in its key markets. The fulfilment of its promising potential will only be achieved if the country steps up its competitiveness and improves both product quality and supply chain efficiency. Vietnam will have to significantly ramp up investments on crop productivity in order to not be left behind and, if it does, it will be able to produce more value-added crops and maintain its status as an export spearhead.

Key Forecasts

Sugar consumption growth to 2020: 23.0% to 2.4mn tonnes. Rising income, population and growing consumption of manufactured food products will help sugar consumption grow quickly in the coming years. Domestic production growth will not be able to keep up with consumption expansion.

Coffee production growth to 2019/20: 13.2% to 31.6mn 60kg bags. After more than a decade of strong output growth, coffee production expansion will slow down in the coming years. Low coffee prices and the attractiveness of alternative crops such as pepper will lead to a slowdown in new planted area growth.

Milk production growth to 2019/20: 61.9% to 876,000 tonnes. Dramatic increases in cattle numbers and increased public and private sector investment - part of the effort to reduce the country's growing import dependency - will be the

main boost to growth. Commercialisation will also play a key role as larger, more efficient farms come to play a greater role in milk production.

2016 BMI universe agribusiness market value: USD44.1bn (up from USD43.4bn in 2015; growth expected to average 3.3% annually between 2016 and 2019).

2016 real GDP growth: 6.6% (down from 6.7% expected in 2015; predicted to average 6.4% over 2015-2020).

2016 consumer price index: 2.1% y-o-y (up from 0.8% expected in 2015; predicted to average 4.3% over 2015-2020).

Contents

BMI Industry View

SWOT

Agribusiness

Industry Forecast

Grains Outlook

Table: Vietnam - Grains Production And Consumption Outlook

Table: Vietnam - Risks To Grains Outlook

Table: Corn Production & Consumption (Vietnam 2013-2020)

Rice Outlook

Table: Vietnam - Rice Production And Consumption Outlook

Table: Vietnam - Risks To Rice Outlook

Table: Rice Production & Consumption (Vietnam 2013-2020)

Dairy Outlook

Table: Vietnam - Dairy Production And Consumption Outlook

Table: Vietnam - Risks To Dairy Outlook

Table: Vietnam - Planned Investment In Milk Production Capacity

Table: Dairy Production & Consumption (Vietnam 2013-2020)

Livestock Outlook

Table: Vietnam - Livestock Production And Consumption Outlook

Table: Vietnam - Risks To Livestock Outlook

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

Coffee Outlook

Table: Vietnam - Coffee Production And Consumption Outlook

Table: Vietnam - Risks To Coffee Outlook

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

Commodities Price Analysis

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Asia GM Outlook

Table: Selected Countries - GM Crops Use (mn hectares)

Asia Machinery Outlook

Table: Select Countries - Average Size Of Farms, Hectares

Asia Fertiliser Outlook

Downstream Analysis

Food

Canned Food

Confectionery

Pasta

Dairy

Regional Overview

Table: Impact Of El Niño On Crops

Competitive Landscape

Table: Major Agribusiness Companies (USDmn)

Demographic Forecast

Table: Population Headline Indicators (Vietnam 1990-2025)

Table: Key Population Ratios (Vietnam 1990-2025)

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

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

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

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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