Vietnam Agribusiness Report Q2 2016

Description: 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 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).

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