Kenya Agribusiness Report Q4 2016

Description:
View: Kenya will continue to underperform its regional peers with regard to the development of its agricultural sector. Despite COMESA granting another extension to the sugar import safeguard, which will provide a short-term boost, the country's sugar sector is expected to remain regionally inefficient and to post very limited growth over the coming years.

However, steady coffee production growth is expected to continue due to improvements in husbandry techniques. Kenya will largely avoid the El Niño-related droughts that affected grain production in southern Africa, but the country will face more expensive corn imports due to higher regional prices.

Key Forecasts
- Corn production growth 2014/15 to 2019/20: 16.5% to 3.1mn tonnes. Corn production growth will be fairly limited, as subdued prices relative to previous years will limit plantings, while yield growth will be poor. Most of the gains will be due to base effects.

- Wheat consumption growth 2015 to 2020: 15.5% to 2.1mn tonnes. Kenyans already have a high rate of wheat consumption by regional standards. Improvements in availability and growth in population and incomes will drive consumption.

- Coffee production growth 2014/15 to 2019/20: 3.7% to 809,000 60kg bags. Growth will be driven by increased financial support from the government in the form of funds and debt relief. In addition, new coffee varieties are likely to help boost yields. the lower 2020 figure is due to low base effects stemming from a poor 2015/16 crop related to El Niño.

- 2016 real GDP growth: 6.5% (up from 5.6% in 2015). Forecast to average 6.3% between 2016 and 2020.

- 2016 consumer price inflation average: 7.2%, up from 6.6% in 2015.
Sugar Outlook

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Middle East & Africa Regional Overview

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Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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