

# China Agribusiness Report Q4 2016

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## Abstracts

Includes 3 FREE quarterly updates

BMI View: China's weight in the global agricultural sector is growing, as the country has an increasing impact on international production balances and prices. China will maintain its appetite for key commodities for the foreseeable future, with particular potential for production growth in sugar, dairy and livestock. High demand growth, strong government support and the potential for investment and consolidation in these industries will help them outperform in the coming years. However, the agribusiness sector is experiencing challenging times, seen in the slowdown in meat and milk powder consumption in 2015.

### Key Forecasts

Soybean production growth to 2019/20: 0.9% to 12.3mn tonnes. In spite of the increase in production in 2016/17, soybean production will remain low in China as the crop lack attractiveness for farmers.

Pork production growth to 2019/20: 13.0% to 62.1mn tonnes. Increased production continues to be encouraged on the back of elevated local livestock prices. The increased availability of vaccinations and the ongoing commercialisation of the industry are also likely to boost output.

Sugar consumption growth to 2020: 16.7% to 19.6mn tonnes. Consumption will be boosted by rising income, which will support demand for products in key industries, such as the confectionery, dairy, beverage, and food processing

BMI universe agribusiness market value: USD1,327mn in 2016 (up 2.9% compared with 2015, growth forecast to average 4.3% annually between 2016

and 2020).

2016 real GDP growth: 6.3% (down from 6.9% in 2015, forecast to average 5.8% between 2016 and 2020).

2016 consumer price inflation: 1.8% y-o-y average (up from 1.5% in 2015, forecast to average 2.3% between 2016 and 2020).

2016 Central Bank policy rate: 4.10% eop (down from 4.35% eop in 2015; forecast to average 4.10% eop between 2016 and 2020).

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