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Abstracts

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BMI View: We believe that, with export quotas for corn and wheat having been removed by the new government, soybeans will lose acreage to both crops and yields will decrease as farmers swap soybeans for wheat in early plantings. What is more, soybean hoarding will decrease due to a lower export tax and the peso devaluation. As such, we hold a bearish view on soybean production in Argentina through to the end of our forecast period in 2018/19. Meanwhile, we expect moderate output growth for corn over our forecast period to 2018/19, as we expect corn prices to increase from current levels, which will incentivise production. Over the same period we are also predicting wheat production to trend higher, although this will be largely due to base effects.

Key Forecasts

Sugar production growth to 2018/19: 43.3% to 2.6mn tonnes. The sharp decline in 2013/14 was due to a dry summer followed by severe frosts that impacted key sugar-growing regions and, as a result, the sector will enjoy growth coming from a low base.

Pork production growth to 2018/19: 26.1% to 557,300 tonnes. Over the long term, government efforts to reduce the proportion of beef in the local diet, in order to free up more for export, will lead to an increase in pork production.

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