

# Brazil Agribusiness Report Q2 2016

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## Abstracts

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**BMI View:** We believe that grains production growth over the next five years will slow relative to the preceding five. Soybean production will outpace that of corn, as lower production costs for soybean relative to corn will make the commodity more attractive to grow. However, we see limited growth out to 2019/20 given the scarcity of area available for expansion, as well as high import costs for fertilisers. We hold a more positive view on the sugar industry now than we have held in the past, due to reforms in the ethanol sector and the significant depreciation in the real over the past several months. Real weakness will be a net positive for the country's agricultural sector.

### Key Forecasts

Soybean average production growth 2015/16 to 2019/20: 1.9% to 106.0mn tonnes. We see limited growth out to 2019/20 given the scarcity of area available for expansion, as well as high import costs for fertilisers.

Poultry average consumption growth to 2020: 3.6% to 11.1mn tonnes. Brazilian poultry consumption will outperform the country's general livestock complex over the coming years, particularly beef which will suffer from the poor economic environment.

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