

Brazil Agribusiness Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

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 comparatively 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. The eventual return of 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.

Beef average production growth to 2019/20: 2.3% to 10.6mn tonnes. Beef production growth will strengthen as more cattle come online and beef producers are induced to supply growing export markets.

Milk average production growth to 2019/20: 4.1% to 41.9mn tonnes. Efficiency gains in the sector and growing export opportunities will boost output.

2016 real GDP growth: -4.0% (down from -3.8% in 2015, forecast to average 0.1% from 2016 to 2020).

2016 consumer price inflation: 9.0% average (same as 2015).

BMI universe agribusiness market value: 0.4% y-o-y increase to USD222.7bn in 2016, forecast to increase by an average of 3.6% annually between 2015/16 and 2019/20.

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