

Brazil Agribusiness Report Q4 2015

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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. Nevertheless, we forecast strong grains production growth through to the end of our forecast period. Soybean production will outpace that of corn, as lower production costs for soybean relative to corn will make the commodity more attractive to grow. We also see strong growth in the livestock and dairy sectors, as these will continue to benefit from Russia's ban on imports of US products, which has been extended to August 2016. 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 production growth 2013/14 to 2018/19: 10.7% to 96.0mn tonnes. Most of the growth will occur in 2014/15, as lower acreage growth and fertiliser usage constrain future production.

Contents

BMI Industry View

SWOT

Agribusiness

Operational Risk

Industry Forecast

Sugar Outlook

Table: Brazil - Sugar Production & Consumption Outlook

Table: Risks To Outlook

Table: Sugar Production & Consumption (Brazil 2011-2019)

Grains Outlook

Table: Brazil - Grains Production & Consumption Outlook

Table: Risks To Outlook

Table: Wheat Production & Consumption (Brazil 2011-2019)

Table: Corn Production & Consumption (Brazil 2011-2019)

Table: Barley Production & Consumption (Brazil 2011-2019)

Cocoa Outlook

Table: Brazil - Cocoa Production & Consumption Outlook

Table: Risks To Outlook

Table: Cocoa Production & Consumption (Brazil 2011-2019)

Dairy Outlook

Table: Brazil - Dairy Production & Consumption Outlook

Table: Risks To Outlook

Table: Milk Production & Consumption (Brazil 2011-2019)

Table: Cheese Production & Consumption (Brazil 2011-2019)

Table: Butter Production & Consumption (Brazil 2011-2019)

Table: Whole Milk Powder Production & Consumption (Brazil, 2011-2019)

Coffee Outlook

Table: Brazil - Coffee Production & Consumption Outlook

Table: Risks To Outlook

Table: Coffee Production & Consumption (Brazil 2011-2019)

Livestock Outlook

Table: Poultry Production & Consumption (Brazil 2014-2019)

Table: Pork Production & Consumption (Brazil 2014-2019)

Table: Beef Production & Consumption (Brazil 2014-2019)

Table: Poultry Production & Consumption (Brazil 2009-2014)

Table: Pork Production & Consumption (Brazil 2009-2014)

Table: Beef Production & Consumption (Brazil 2009-2014)

Cotton Outlook

Table: Brazil - Cotton Production & Consumption Outlook

Table: Risks To Outlook

Table: Cotton Production & Consumption (Brazil 2011-2019)

Soybean Outlook

Table: Brazil - Soybean Production & Consumption Outlook

Table: Risks To Outlook

Table: Soybean Production & Consumption (Brazil 2011-2019)

Commodities Price Analysis

Monthly Softs Update

Monthly Grains Update

Upstream Analysis

Americas GM Outlook

Americas Machinery Outlook

Table: Select Companies - Sales Forecasts By Region (Company-based estimates)

Americas Fertiliser Outlook

Downstream Analysis

Mass Grocery Retail

Table: Mass Grocery Retail Sales By Format - Historical Data & Forecasts (Brazil 2014-2019)

Table: Sales Breakdown By Retail Format Type (%)

Drink

Hot Drinks

Table: Hot Drink Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Alcoholic Drinks

Table: Alcoholic Drinks Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Soft Drinks

Table: Soft Drinks Sales, Production & Trade (Brazil 2014-2019)

Food

Food Consumption

Table: Food Consumption Indicators - Historical Data & Forecasts (Brazil 2012-2019)

Processed Food

Table: Pasta Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Table: Meat Volume Sales, Production & Trade - Historical Data & Forecast (Brazil 2014-2019)

Table: Jams & Jellies Volume Sales, Production & Trade - Historical Data & Forecast

(Brazil 2014-2019)

Table: Frozen Fruit & Vegetables Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Dairy

Table: Dairy Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Confectionery

Table: Confectionery Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2012-2019)

Table: Sweet Biscuits Volume Sales, Production & Trade - Historical Data & Forecasts (Brazil 2014-2019)

Regional Overview

Competitive Landscape

Table: Main Agribusiness Players

Company Profile

JBS

Table: JBS Financial Results

Demographic Forecast

Table: Population Headline Indicators (Brazil 1990-2025)

Table: Key Population Ratios (Brazil 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Brazil 1990-2025)

Table: Population By Age Group (Brazil 1990-2025)

Table: Population By Age Group % (Brazil 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

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