

Canada Agribusiness Report Q2 2016

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Abstracts

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BMI View: We retain a positive outlook for the Canadian agricultural sector. The Canadian grains and beef sectors will be among the winners of the Trans-Pacific Partnership and these expanded export opportunities will support output growth to 2020. However, beef production will be constrained in the short term by tight cattle supplies. The dairy sector will witness less-than-spectacular growth over the course of our forecast period whereas the Canadian sugar production industry will be under pressure from low prices and global production from Brazil and Asia.

Key Forecasts

Barley production growth in 2015/15: 15.5% to 8.23mn tonnes. Output will increase as the crop recovers from the significant losses last years.

Poultry production growth in 2015/16: 1.8% to 1.13mn tonnes. This will be due to consumers' increasing shift away from red meat, making poultry the most consumed meat in Canada.

2016 real GDP growth: 1.4% y-o-y. An increase compared with 1.2% in 2015.

2016 consumer price inflation: 1.5% y-o-y average. An increase compared with 1.1% in 2015.

BMI universe agribusiness market value: 0.6% y-o-y increase to USD37.0bn in 2016. Forecast to increase by an average of around 1.5% annually between 2016 and 2020.

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SWOT

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