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Abstracts

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BMI View: China's weight in the global agricultural sector is swelling, as the country has a growing impact on international production balances and prices. China will maintain its appetite for key commodities for the foreseeable future, with particular potential for production growth in sugar, dairy and livestock. High demand growth, strong government support and the potential for investment and consolidation in these industries will help them outperform in the coming years. However, the agribusiness sector is experiencing challenging times, seen in the slowdown in meat and milk powder consumption in 2015.

Key Forecasts

Corn production growth to 2019/20: 12.3% to 242mn tonnes. Given the decrease in public support to corn production, output expansion will be driven by a steady improvements in corn yields and the probable adoption of GM corn in the coming years. China's production deficit will amount around 6mn tonnes by the end of our forecast period.

Pork production growth to 2019/20: 16.1% to 65.5mn tonnes. Increased production continues to be encouraged on the back of elevated local livestock prices. The increased availability of vaccinations and the ongoing commercialisation of the industry are also likely to boost output.

Sugar consumption growth to 2020: 18.5% to 20mn tonnes. Consumption will be boosted by rising income, which will support demand for products in key industries, such as the confectionery, dairy, beverage, and food processing

BMI universe agribusiness market value: USD1,410mn in 2016 (up 4.7% compared with 2015, growth forecast to average 4.2% annually between 2016 and 2020).

2016 real GDP growth: 6.3% (down from 6.9% expected in 2015, forecast to average 5.7% between 2016 and 2020).

2016 consumer price inflation: 1.5% y-o-y ave (up from 1.3% expected in 2015, forecast to average 2.3% between 2016 and 2020).

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