

# India Agribusiness Report Q3 2016

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## Abstracts

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**BMI View:** We hold a positive view on the outlook for India's agribusiness sector, as the country will remain an agricultural powerhouse and should be able to maintain high levels of self-sufficiency for major food crops. Production growth of various commodities will be driven by strong government support and robust demand growth for manufactured foodstuff. We see significant growth opportunities in sub-sectors such as dairy, coffee and livestock. However, India will be increasingly vulnerable to exceptional weather phenomena and serious water shortages. Moreover, the country will remain prone to erratic government interventions, which seriously hamper its reputation as an international provider.

### Key Forecasts

Sugar production growth to 2019/20: 7.6% to 31.2mn tonnes. Inefficiencies in the pricing policy will constrain growth. Output expansion will mainly come from the liberalisation of the market, of which the first signs can be observed.

Palm oil consumption growth to 2020: 31.0% to 11.8mn tonnes. Domestic palm oil consumption will be propelled by strong demand for domestic food use, which makes up about 80% of total domestic palm oil demand.

Beef & veal production to 2019/20: 23.5% to 5.2mn tonnes. Growth will be driven by the improvements in breeding techniques, and by the robust expansion of the milk sector. Export demand for Indian beef will also support investment in the sector.

Agribusiness market value: USD256.4bn in 2016 (up from USD245.0bn in 2015;

forecast to grow annually by 5.9% on average from 2016 to 2020).

2016 real GDP growth: 7.2% (down from 7.3% expected in 2015; predicted to average 6.8% from 2016 to 2020).

2016 consumer price inflation: 4.8% y-o-y ave (down from 5.1% expected in 2015; forecast to average 4.4% from 2016 to 2020).

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