

India Agribusiness Report Q4 2016

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Abstracts

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BMI View: India will remain an agricultural powerhouse over our forecast period 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 foodstuffs. 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: 3.7% to 30.1mn 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: 31.8% to 11.9mn 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 5.1mn tonnes. Growth will be driven by 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: USD256.7bn in 2016 (up from USD244.9bn in 2015; forecast to grow annually by 6.0% on average from 2016 to 2020).

2016 real GDP growth: 7.2% (down from 7.6% 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% in 2015; forecast to average 4.4% from 2016 to 2020).

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