

Iran Agribusiness Report Q2 2016

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Abstracts

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BMI View: The removal of almost all sanctions on Iran's economy in January will herald a new era for the country. In terms of agriculture, the return of economic growth will have the most rapid and direct impact on consumption. Production and investment in the supply chain will also benefit, but over the longer term. Therefore, production expansion will be slower than consumption growth in the coming years and Iran will remain a large and growing importer of key commodities. The lifting of sanctions will also lead to a normalisation of trade flows, which will encompass a rise in imports and the re-diversification of suppliers.

Key Forecasts

Wheat production growth to 2019/20: 17.0% to 15.4mn tonnes. Wheat yields are expected to improve owing to the modernisation of technology, including hardier grains variants, greater access to relevant inputs and a larger area of the country benefiting from new irrigation facilities.

Sugar consumption growth to 2020: 27.6% to 3.1mn tonnes. Sugar demand will be mainly driven by population growth and the improved macroeconomic conditions following the lifting of sanctions from 2016.

Poultry production growth to 2019/20: 15.2% to 957,000 tonnes. Growth will be driven by domestic demand and the effects of increased investment.

BMI universe agribusiness market value: USD69.1bn in 2016 (up 6.1% compared with 2015, growth forecast to average 3.6% annually between 2016 and 2020).

2016 real GDP growth: 2.8% (up from 0.4% expected in 2015; predicted to average 4.0% from 2016 to 2020).

2016 consumer price inflation: 11.0% y-o-y (up from 15.0% in 2015; predicted to average 9.4% y-o-y from 2016 to 2020).

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