

Kazakhstan Agribusiness Report Q2 2016

<https://marketpublishers.com/r/KEB799E99DCEN.html>

Date: March 2016

Pages: 61

Price: US\$ 1,295.00 (Single User License)

ID: KEB799E99DCEN

Abstracts

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BMI View: The interest of foreign investors in the Kazakhstan livestock industry supports our view that this is the sub-sector with most growth potential. Poultry production in particular is expected to perform well over the next five years. The development of the livestock industry ties into another key trend we expect to take hold over our forecast period: the diversification of arable production away from the bedrock commodity, wheat. Feed grains will assume greater importance, particularly corn, in the grains complex. The dairy industry is growing from a weaker base than that enjoyed by meat producers, so we expect statefunded schemes to play a more significant role in its medium-term development and modernisation.

Key BMI Forecasts

Wheat production growth to 2019/20: 12.7% to 14.6mn tonnes. Much of this growth will be due to base effects, but improving yields will also support modest annual increases in output. This is despite declining acreage due to subsidies incentivising sowings of other field crops.

Milk consumption growth to 2020: 17.0% to 5.3mn tonnes. Demand will be held back in the short term by the challenging macroeconomic situation, but we expect strong growth to return in the later years of our forecast period.

2016 real GDP growth: 1.0%, down from 1.3% in 2015.

2016 average consumer price inflation: 12.5% y-o-y, up from 7.0% y-o-y in 2015.

Contents

BMI Industry View

SWOT

Agribusiness

Industry Forecast

Dairy Outlook

Table: Kazakhstan - Dairy Production & Consumption Outlook

Table: Risks To Outlook

Table: Dairy Production & Consumption (Kazakhstan 2012-2020)

Livestock Outlook

Table: Kazakhstan - Livestock Production & Consumption Outlook

Table: Risks To Outlook

Table: Livestock Production & Consumption (Kazakhstan 2012-2020)

Grains Outlook

Table: Kazakhstan - Grains Production & Consumption Outlook

Table: Risks To Outlook

Table: Grains Production & Consumption (Kazakhstan 2012-2020)

Commodities Price Analysis

Global - Global Commodities Strategy

Table: Select Commodities - Performance And BMI Forecasts

Upstream Analysis

Europe Machinery Outlook

Table: Select Companies - Sales Forecasts By Region (company-based estimates)

Europe Fertiliser Outlook

Europe GM Outlook

Downstream Analysis

Food

Latest Updates

Structural Trends

Regional Overview

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Kazakhstan 1990-2025)

Table: Key Population Ratios (Kazakhstan 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Kazakhstan 1990-2025)

Table: Population By Age Group (Kazakhstan 1990-2025)

Table: Population By Age Group % (Kazakhstan 1990-2025)

Methodology

Industry Forecast Methodology
Sector-Specific Methodology

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