

# Kazakhstan Agribusiness Report Q4 2016

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## 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 Forecasts

Wheat production growth to 2019/20: -2% to 13.4mn tonnes. Yields will support modest annual increases in output beyond 2016/17. This is despite declining acreage due to subsidies incentivising sowings of other field crops. The main reason for the decline is low base effects.

Milk consumption growth to 2020: 16.0% to 5.3mn tonnes. Demand will be held back in the short term by a challenging macroeconomic environment, but we expect strong growth to return in the later years of our forecast period.

2016 real GDP growth: 1.5%, down from 1.3% in 2015, predicting to average 4% out to 2020.

2016 average consumer price inflation: 12.8% y-o-y, up from 7.0% y-o-y in 2015.



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