

Pakistan Agribusiness Report Q2 2016

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Abstracts

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BMI View: We take a cautious view of the prospects for the Pakistani agribusiness sector. There are numerous challenges facing producers of all commodities covered by this report, chief among them a dire security situation, erratic power supply, lack of availability of finance and vulnerability to extreme weather events. The sugar industry is the sub-sector we view as least promising due to its high production costs and poor relations between growers and processors. Nevertheless, the government has taken some positive steps to improve the availability of higher quality seeds for rice, wheat and corn which should raise yields in the medium term. Our expectation for rising prices out to 2020 also gives some grounds for optimism regarding the key export commodities of rice and cotton.

Key BMI Forecasts

Cotton consumption growth to 2020: 4.4% to 11.1mn 480lb bales. Favourable trade agreements with the EU have seen an increase in demand from the textile industry, but higher prices will see growth rates moderate in the latter years of the forecast period.

Wheat production growth to 2019/20: 9.6% to 28.5mn tonnes. Production growth will be relatively modest as farmers struggle with rising input costs, particularly fertiliser.

2016 real GDP growth: 4.3%. Up from 4.2% in 2015. Forecast to grow annually by 4.2% to 2020.

Consumer price inflation (ave): 4.5% in 2016 (unchanged from 4.5% in 2015).

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