

Poland Agribusiness Report Q1 2016

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Abstracts

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BMI View: Milk prices remained low into H215, but production in Poland has increased regardless as dairy farmers take advantage of the end of the quota scheme. The Polish government is lobbying for EU support on behalf of the dairy industry; however, in the long run it will take the exploitation of overseas markets to secure the future well-being of the sub-sector. We are less optimistic about the sugar segment, which will struggle to increase yields sufficiently to thrive in the post-quota environment. Grain yields will fall sharply on the back of this summer's drought, but our longer-term view is for improved farming practices to continue to boost output per hectare. The livestock segment is adjusting to the fallout from Russian sanctions and the outbreak of African swine fever. We are now confident that pork and poultry producers will enjoy export-led growth, although low prices are a concern for pig farmers.

Key BMI Forecasts

Wheat production growth to 2018/19: 5.3% to 10.0mn tonnes. Expansion in output will be relatively sluggish, though coming from a high base.

Pork consumption growth to 2019: 8.8% to 1.8mn tonnes. Demand for pork will grow in response to lower prices.

2015 real GDP growth: 3.4%, down from 3.6% in 2014.

2015 consumer price inflation (ave): -0.4% y-o-y, down from 0.0% in 2014.

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