

# Poland Agribusiness Report Q2 2016

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## Abstracts

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BMI View: Milk prices have remained low into Q116, 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 the drought in summer 2015, but our longer-term view is for improved farming practices to continue to boost output per hectare. The livestock segment has adjusted well to the fallout from Russian sanctions and the outbreak of African swine fever. We are confident that pork and poultry producers will enjoy export-led growth, supported by domestic and foreign investment, although low prices remain a concern for pig farmers.

### Key BMI Forecasts

Wheat production growth to 2019/20: -4.7% to 11.1mn tonnes. Negative output growth is attributable to high base effects and low prices. We nevertheless expect to see improvements in yields.

Pork consumption growth to 2020: 3.6% to 1.8mn tonnes. As a staple of the Polish diet, demand for pork is quite inelastic, but rising incomes and low prices early in the forecast period will support modest demand growth.

2016 real GDP growth: 3.9%, up from 3.5% in 2015.

2016 consumer price inflation (ave): 0.6% y-o-y, up from -0.4% in 2015.



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