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Abstracts

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We have considerably downgraded our outlook for medium-term growth across the general Russian agricultural sector. A currency crisis leading to a severe deterioration in the fiscal situation of the Russian government will result in lower subsidies to the developing dairy and livestock industries. As such, we have revised down our outlook for both out to 2018/19. That said, the country's ban on agricultural imports from certain countries will provide a boon to production over the coming year, as domestic producers take advantage of the lack of competitive imports. We believe that grains production will post positive growth over the coming years, though will decline in 2015/16 owing to poor weather over the planting season. On August 7 2014, Russia introduced a one-year ban on imports of certain agricultural products from select countries. We outline the major implications of the trade sanctions below:

Multilateral food trade will, generally speaking, be relatively unaffected.

The US poultry and Norwegian fish sectors will be the biggest losers.

The Brazilian meat sector and Belarus's agricultural industry will be the main beneficiaries.

The import ban is likely to marginally increase Russian food price inflation, which will provide added impetus for Russia's central bank to raise interest rates in the coming months.

The ban adds downside price pressure to world grain markets.

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