

Russia Agribusiness Report Q3 2016

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Abstracts

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BMI View: Russia's poultry and pork sectors will perform strongly as consumer demand is growing and domestic production is looking to bridge the gap left by EU imports, which will not resume until H216. Wheat will outperform the grains complex out to 2020 due to elevated farmgate prices in rouble terms and strong opportunities on the domestic and export markets, which will maintain production incentives. The Russian dairy sector will benefit from growth momentum until 2017 due to the EU embargo. In particular, cheese production will see solid gains in a bid to gain market share. Afterwards, dairy producers will face lower subsidies and lower prices, which will lay the foundations for consolidation in the industry.

Key Forecasts

Wheat production growth in 2016/17: 1.6% y-o-y to 62.0mn tonnes. We maintain our 2016/17 wheat production forecast at 62.0mn tonnes. Higher winter wheat acreage and warm weather over Q415-Q116 underpin our bullish view on the 2016/17 harvest.

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