

Russia Agribusiness Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

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 the end of 2017. 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 2018 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 accelerate 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, as the winter wheat harvest is in full swing. The wheat crop is shaping up to be a record high and we might revise upward our 2016/17 forecast in our Q117 report, once both winter and spring wheat harvests are complete.

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