

South Korea Agribusiness Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: The South Korean agricultural sector holds a modestly subdued outlook over our forecast period. The livestock industry has been plagued with various disease outbreaks in the past that have largely been contained since. Government-led efforts will benefit the industry over the longer term and help it to remain relevant. These include the expansion of education and financial support for farmers to allow them entry into the food processing business; plans to modernise traditional methods of food production; the creation of new agricultural food districts for exporters; and the introduction of state designation of food exporting companies.

Key Forecasts

Cheese consumption growth to 2020: 22.8% to 153,500 tonnes. As Western food has become more popular in Korea, demand for cheese has expanded rapidly. The majority of cheese is consumed in restaurants and fast food outlets, and comes in the form of processed cheese. Exporters with the lowest prices, such as the US, have gained market share in supplying the South Korean cheese industry.

Poultry meat production growth to 2019/20: 29.1% to 1.07mn tonnes. Poultry production will record relatively strong growth driven by increased export opportunities as the country recovers from several outbreaks of avian influenza in 2013-2015

Rice consumption growth to 2020: 2.8% to 4.5mn tonnes. As South Koreans substitute their carbohydrate intake with bread instead of rice, consumption of the grain is expected to post only weak growth.

BMI universe agribusiness market value: USD33.65bn in 2016 (up 1.1% compared with 2015, growth forecast to average 2.5% annually between 2016 and 2020).

2016 real GDP growth: 2.8% (up from 2.6% in 2015, forecast to average 3.2% between 2016 and 2020).

2016 consumer price inflation: 1.6% y-o-y ave (up from 0.7% in 2015, forecast to average 2.1% between 2016 and 2020).

2016 central bank policy rate: 1.25% y-o-y ave (down from 1.50% in 2015, forecast to average 1.75% between 2016 and 2020).

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