

Spain Agribusiness Report Q1 2016

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Abstracts

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BMI View: Livestock prices have held up relatively well in the EU despite the impact of Russia's embargo. We therefore expect to see continued growth for pork, Spain's most important livestock commodity. Meanwhile, we expect a lower wheat harvest, as droughts will offset good plantings. The dairy sub-sector is adapting to the end of the EU production quota, which will increase competitive pressure on Spanish producers and lead to a subdued outlook for the sector's growth.

Key Forecasts

Wheat production growth to 2018/19: 3.6% growth on 2014/15 level to 6.9mn tonnes. Wheat will record the strongest growth in the grains complex as farmers will moderately substitute away from corn and barley due to the crop diversification required by the new Common Agricultural Policy (CAP) support scheme.

Poultry consumption growth to 2019: 3.3% on the 2015 level to 1.3mn tonnes. Cash-strapped consumers will favour this relatively cheap livestock commodity.

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