

Spain Agribusiness Report Q3 2016

<https://marketpublishers.com/r/S46C00F029CEN.html>

Date: July 2016

Pages: 69

Price: US\$ 1,295.00 (Single User License)

ID: S46C00F029CEN

Abstracts

Includes 3 FREE quarterly updates

BMI View: The outlook for the Spanish agricultural sector is mixed. The dairy sector will be under intense pressure after the removal of the European dairy quota and the dairy production industry will have to compete directly with German dairy farmers, historically known to be far superior in terms of efficiency and competitiveness. The dairy sub-sector is now adapting to the end of the quota and this will most likely impose significant competitive pressures on producers. For grains, wheat will record the strongest growth out to 2020 as farmers begin to substitute away from corn and barley. The livestock sector will witness a modest upward trend in terms of production, driven by strong export demand for pork. We see pork as the outperforming livestock segment, followed by poultry and beef.

Key Forecasts

Average annual wheat production growth 2015/16-2019/20: 1.6% to 7.0mn 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.

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