

Turkey Agribusiness Report Q1 2016

<https://marketpublishers.com/r/T6334E953A7EN.html>

Date: November 2015

Pages: 69

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

ID: T6334E953A7EN

Abstracts

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BMI View: We favour the sugar sector in Turkey because of the strong growth potential of the country's confectionery industry and our belief that large changes to the country's sugar production quotas are likely to occur in the coming years. We continue to see resilient growth in the livestock sector on the back of continued government support. Grains and rice production will recover in the 2015/16 season following the drought in 2014.

Key Forecasts

Wheat production growth 2013/14 to 2018/19: 0.0% to 19.00mn tonnes. We expect the country to remain an importer of wheat up to 2017, despite reasonably strong domestic production growth following the drought-hit harvest of 2014/15.

Sugar consumption growth 2014 to 2019: 1.9% to 2.4mn tonnes. This growth outlook will improve on the effective implementation of sugar reforms and efficiency gains.

2016 real GDP growth: 3.5%, up from 2.8% in 2015.

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