

# Ukraine Agribusiness Report Q1 2016

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## Abstracts

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**BMI View:** All agricultural markets will be negatively affected by the poor macroeconomic fundamentals in Ukraine. There will be limited investment into the country over the coming quarters given the unstable situation, which will affect agricultural production over our forecast period. Russia's ban on imports from Ukraine will weigh on production for the dairy and livestock industries, as Russia represents one of Ukraine's largest agricultural export markets. Furthermore, significant currency depreciation will limit imports, hitting input usage and domestic investment. However, Ukrainian farmers will fail to benefit from the export opportunities linked to this weaker currency due to export restrictions and lack of resources to scale up production in the medium term.

### Key Forecasts

Corn production contraction 2013/14 to 2018/19: 12.6% to 27.0mn tonnes. Corn production will grow from 2016/17 onwards, but the sharp contractions in output in 2014/15 and 2015/16 will mean it will not come close to matching the record output of 2013/14.

Poultry consumption growth 2014 to 2019: 10.9% to 946,200 tonnes. Poultry demand will benefit from the recovery in corn production and its preferred status as a cheaper and healthier alternative to red meat.

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