

Ukraine Agribusiness Report Q3 2015

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Abstracts

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BMI View: All agricultural markets will be negatively affected by 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. Particularly for the dairy and livestock industry, Russia's ban on imports from Ukraine will negatively weigh on production, as Russia represents one of Ukraine's largest agricultural export markets. Furthermore, significant currency depreciation will limit imports into the country, which will affect agricultural input usage and domestic investment. That said, we hold a positive view for the long-term production of corn in the country as yields come from a low base and the government is keen to develop production and export opportunities. The weak currency will also incentivise exports of cereals in the medium term.

Key Forecasts

Corn production decline 2013/14 to 2018/19: 12.6% to 27.0mn tonnes. Corn production will contract over this time period due to a particularly strong harvest in 2014 and weak growth in the following years owing to low farm incomes. Thereafter, we expect corn output to recover strongly.

Contents

BMI Industry View

SWOT

Agribusiness

Operational Risk

Industry Forecast

Grains Outlook

Table: Wheat Production & Consumption (Ukraine 2014-2019)

Table: Corn Production & Consumption (Ukraine 2014-2019)

Table: Barley Production & Consumption (Ukraine 2014-2019)

Table: Wheat Production & Consumption (Ukraine 2009-2014)

Table: Corn Production & Consumption (Ukraine 2009-2014)

Table: Barley Production & Consumption (Ukraine 2009-2014)

Dairy Outlook

Table: Milk Production & Consumption (Ukraine 2014-2019)

Table: Butter Production & Consumption (Ukraine 2014-2019)

Table: Cheese Production & Consumption (Ukraine 2014-2019)

Table: Milk Production & Consumption (Ukraine 2009-2014)

Table: Butter Production & Consumption (Ukraine 2009-2014)

Table: Cheese Production & Consumption (Ukraine 2009-2014)

Livestock Outlook

Table: Poultry Production & Consumption (Ukraine 2014-2019)

Table: Pork Production & Consumption (Ukraine 2014-2019)

Table: Beef Production & Consumption (Ukraine 2014-2019)

Table: Poultry Production & Consumption (Ukraine 2009-2014)

Table: Pork Production & Consumption (Ukraine 2009-2014)

Table: Beef Production & Consumption (Ukraine 2009-2014)

Commodity Price Analysis

Monthly Softs Strategy

Table: SELECT COMMODITIES - PERFORMANCE & BMI FORECASTS

Monthly Grains Strategy

Table: Select Commodities - Performance & BMI Forecasts

Upstream Analysis

Europe GM Outlook

Europe Machinery Outlook

Table: Select Companies - Sales Forecasts By Region (Company-based estimates)

Europe Fertiliser Outlook

Downstream Analysis

Food

Food Consumption

Table: Food Consumption Indicators - Historical Data & Forecasts (Ukraine 2012-2019)

Confectionery

Table: Confectionery Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Ukraine 2012-2019)

Prepared Food

Table: Meat Volume Sales, Production & Trade - Historical Data & Forecast (Ukraine 2014-2019)

Table: Jams & Jellies Volume Sales, Production & Trade - Historical Data & Forecast (Ukraine 2014-2019)

Table: Pasta Volume Sales, Production & Trade - Historical Data & Forecasts (Ukraine 2014-2019)

Dairy

Table: Dairy Volume Sales, Production & Trade - Historical Data & Forecasts (Ukraine 2014-2019)

Drink

Alcoholic Drinks

Table: Alcoholic Drinks Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Ukraine 2014-2019)

Soft Drinks

Table: Soft Drinks Sales, Production & Trade (Ukraine 2014-2019)

Hot Drinks

Table: Hot Drink Value/Volume Sales, Production & Trade - Historical Data & Forecasts (Ukraine 2014-2019)

Mass Grocery Retail

Table: Mass Grocery Retail Sales By Format - Historical Data & Forecasts (Ukraine 2014-2019)

Table: Grocery Retail Sales By Format (%)

Regional Overview

Competitive Landscape

Table: Main Agribusiness Players

Demographic Forecast

Table: Population Headline Indicators (Ukraine 1990-2025)

Table: Key Population Ratios (Ukraine 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Ukraine 1990-2025)

Table: Population By Age Group (Ukraine 1990-2025)

Table: Population By Age Group % (Ukraine 1990-2025)

Methodology
Industry Forecast Methodology
Sector-Specific Methodology

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