

Ukraine Agribusiness Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We retain our generally negative outlook for Ukraine's agricultural sector in 2016 owing to a range of concerns. 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 political and economic 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 use and domestic investment. However, we believe that Ukrainian farmers will fail to benefit from the 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 will decline by 18.0% in 2015/16 to reach a total value of 23.3mn tonnes.

We are estimating the wheat crop in 2016/17 to decline by 8.3% to reach 25.0mn tonnes.

The livestock and dairy sectors will perform poorly in 2015/16 owing to unsound macroeconomic conditions.

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