

United States Agribusiness Report Q1 2016

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Abstracts

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BMI View: Corn and soybean production season will decline year-on-year in the upcoming 2016/17, yet will still be among the largest crops in US agricultural history. Livestock will see some mild improvement in production growth in 2015/16, mainly owing to the poultry and beef sectors. Over the long term, the poultry sub-sector will remain the outperformer in the livestock complex and we see the strongest production growth potential for soybeans among the grains complex. We believe grains production will stagnate overall due to a lower planted area on the back of lower prices.

Key Trends

Beef production growth 2013/14 to 2018/19: 7% to 11.9mn tonnes. The length of the cattle cycle means we expect production to stagnate until the end of our forecast period, but we expect improvements in production starting in 2016.

Poultry production growth to 2018/19: 7% to 23.3mn tonnes. The US is the world's second-largest poultry exporter, behind Brazil. As such, increased global demand for poultry, particularly from emerging markets, is likely to serve as a powerful production incentive.

Corn production growth to 2018/19: 4.0% to 360.7mn tonnes. Corn production growth will slow over the next five years as opportunities to increase yields (such as through the adoption of GM seeds) are waning.

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SWOT

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