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Abstracts

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BMI View: Corn and soybean production will decline year-on-year in the upcoming 2016/17 season, yet will still count among the largest crops in US agricultural history. Livestock will see some mild improvement in production growth 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 soybean 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 2014/15 to 2019/20: 8.2% to 11.7mn tonnes. Production will improve over our forecast period due to heavier animal weights and as the sector's rebuilding phase is largely complete.

Poultry production growth to 2019/20: 9.3% 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 2019/20: 3.3% to 373.2mn tonnes. Corn production growth will slow over the next five years as opportunities to increase yields (such as through the adoption of genetically modified seeds) are waning. Most of the gains will be due to base effects.

Soybean production growth to 2019/20: 3.5% to 109.9mn tonnes. Soybean production growth will also slow prices due to reduced growth in plantings, while

yields will suffer due to reduced input usage.

2016 real GDP growth: 2.2% y-o-y, down from 2.4% in 2015.

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