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## Colliers international agribusiness research and forecast report

Driven by global food demand, favourable growth conditions and a low Australian dollar, rural property values are expected to be firm in 2020, despite the threat that COVID-19 poses to global supply chains. The outlook for agribusiness in Australia is positive and supported by global population growth, the more affordable nature of Australian land values compared to other countries and the increase in global demand for Australian food production, said Karina Salas, associate research director at Colliers International and one of its 2020 Agribusiness Research and Forecast Report. After a record year of trading in 2019, when transaction volume increased by 30%, to \$4.3 billion, Ms Salas said the forecast for 2020 was for the stability of overall value, perhaps with some firming of rural land values at the end of 2020, after the completion of winter crop harvest. Underlying asset values, she said, has been rising demand for Australian agricultural products, good rainfall in significant areas of the country this year and, in general, solid commodity prices. [dm-listing-recomm recommend experimentname="midcontent-listings" positiononpage="midcontent"] The properties that produce beef, citrus, cereals, lamb, wool and macadamia nuts have the strongest prospects of asset demand for 2020, according to the real estate firm. Despite the positive outlook for most sectors, the report warns that risks are increased this year due to the threat that COVID-19 poses to staff working in processing plants and global food supply chains. The latter is particularly worrying, given that more than three quarters of Australia's annual agricultural production worth (78% or \$62.2 billion) is exported, according to the Department of Agriculture (ABARES). Other strong winds include higher direct competition sectors, such as cotton-faced from U.S. export activity to China as part of phase one of the U.S.-China trade agreement signed in January. There is also the potential for declining demand for some discretionary, high-value agricultural products, after it was seen in the rock lobster sector in the south, where trade with China has stopped. As far as buyers demand is concerned, market conditions in 2020 would favour sophisticated domestic investors with net worth. In previous years, global institutional capital has poured into Australian farmland, including Canadian and American pension funds. The outlook for the agribusiness investment market in 2020 is constant and largely driven by the steady increase in demand for agricultural products quality, said Rawdon Briggs, head of agribusiness at Colliers International. [dm-listing-proposition experimentname="below-content-listings" positiononpage="belowContent"] May 2020 Department of Agriculture, Water and Environment: Vol. 10 - May 2020 DAWA Agricultural Trade Implications of COVID-19 Department of Agriculture, Water and Environment: Vol. 9 - May 2020 DAWA Agricultural Trade Implications of COVID-19 COVID-19 Department of Agriculture, Water and Environment: Vol. 8 - May 2020 DAWA Agricultural Trade Implications of COVID-19 Department of Agriculture, Water and Environment: Vol. 7 - May 2020 DAWA Agricultural Trade Implications of COVID-19 Department of Agriculture, Water and Environment: Vol. 6 - May 2020 DAWA Agricultural Trade Implications of COVID-19 April 2020 Department of Agriculture, Water and Environment: Vol. 5 - Apr 2020 DAWA Agricultural Trade Implications of COVID-19 AUSTRALIA - Covid-19 Aid and Recovery Fund: International Airfreight Support for Agriculture, Fisheries and Horticulture Industries Factsheet Department of Agriculture, Water and Environment: Vol. 4 - Apr 2020 DAWA Agricultural Trade Implications of COVID-19 Prime Super: Volatility in Australian and Global Markets Department of Agriculture, Water and Environment: Vol. 3 - Apr 2020 DAWA Agricultural Trade Implications of COVID-19 Department of Agriculture, Water and Environment: Vol. 2 - Apr 2020 DAWA Agricultural Commercial Implications of COVID-19 March 2020 Department of Agriculture, Water and Environment: Vol. 1 - March 2020 DAWA Agricultural Trade Implications of COVID-19 2019 ACIL Allen Consulting: Agriculture - A \$100b sector by 2030? 2018 Deloitte Access Economics: Economic activity attributable to crop protection products National Farmers Federation: Talking 2030 2017 Productivity Commission: Transitioning Regional Economies Millist, Chancellor and Jackson ABARES Research Report 17.11: Rural Research, Development and Expansion Investments in Australia IBISWorld: Agribusiness in Australia: Market Research Report Australian Academy of Science: The Decadal Plan for Australian Agricultural Sciences 2017 - 2026 CSIRO : Food and Agribusiness : A roadmap for unlocking value-added growth opportunities for Australia's Australian Trade and Investment Commission: Investment Opportunities in Australian Agribusiness and Food Lindsey Hogan ABARES Research Report 17.7: Food Demand in Australia : Trends and Food Security Issues Food Innovation Australia Ltd (FIAL): Sector Competitiveness Plan: Food and Agribusiness Growth Centre Colliers International (Australia): Rural and Agribusiness Research and Forecast Report 2016 Productivity Commission : Australian Agriculture Regulation Australian Farm Institute: A Review of Farm Funding Models and Business Structures in Australia Ansell, Gibson and Salt (eds) Australian National University: Learning from Agri-Environment Schemes in Australia Senated Committee for Agriculture and Industry: Smart farming - inquiry in agriculture Australian Farm Institute: A Sustainable &amp; National Coordinated Plant Biosecurity R&D&amp;E System Australian Farm Institute: The implications of digital agriculture and big data for Australian agriculture Australian Farm Institute: Review of Australian Agriculture's Trade Performance 2016 KPMG (Australia): Innovation and trends in the working document Federal Treasury Agribusiness: Foreign Investment in The Australian government: Our North, Our Future: White Paper on the Development of Northern Australia University of Canberra: Regional Well-being survey Agricultural Appointments: Agrifood Talent Report 2015 Business Advice of Australia: Building Australia's Comparative Advantages: a 21st Century Agri-food Sector Centre for Policy Development: From Vicious to Virtuous Cycles - A Sustainable Future for Australian Agriculture Australian College of Leaved Academies: Australia's Agricultural Future Senate Rural and Regional Affairs and Transport Committee: Review of the taxes of the Agricultural Competitiveness White Paper 2014 Australian Farm Institute: Opportunities to improve the effectiveness of Australian farmers' advocacy groups - a comparative Deloitte Australia report: Get out of your own way: Unleashing Productivity Deloitte Australia: Positioning for Prosperity - Catching the Next Wave 2013 Australian Farm Institute: Is counting farmers harder than counting sheep? A comparison of agricultural statistical systems in Australia, United States and France National Farmers Federation: Blueprint for Australian Agriculture 2013-2020 2011 Jacqueline Williams and Paul Martin, CSIRO Publishing: Defending the Social License of Agriculture: Issues, Challenges and New Directions for Agriculture 2005 Productivity Commission: Trends in Australian Agriculture International References KPMG (NZ): Agribusiness Agenda 2017 National Farmers Union (UK) : Vision of the Future for Farming (2017) Geoff Kaine Research (NZ): Influence the Political Option (2015) Improve your perspective on agribusiness ownership and market analysis by reading the latest research and forecasting report. We have covered a wide variety of agricultural subsectors in both Australia and New Zealand, including viticulture, water, horticulture, sheep, beef, forestry, greenfield horticultural development, dairy, poultry and Australian Agri Investments. The following five key themes are discussed based on industry conversations: Globalization influences - China-United States war tariffs and unresolved Brexit issues Macroeconomic impact - Forecast of a weaker Australian dollar supporting agricultural export activity The story of funding - Australian Royal Commission banking highlights changes in offshore investment in New Zealand - Changes in the foreign investment rule in November 2017 Weather outlook - Significant extreme weather events have had an impact on most of Australia in 2019, but the industry remained resilient and close to peak capital numbers. For the latest information about the Agribusiness market, download our report today. INSTITUTIONAL investors have continued to find Australian agricultural assets attractive, according to Colliers International. The real estate company, which specialises in large-scale, high-value assets whose clients are usually corporate farmers and investors, released a research and forecast report that said agriculture has provided institutional investors diversification and long-term returns. While corporate and investor activity is an important part of the market, Colliers International Associate Research Director Karina Sales, who is one of the report's authors, said that agricultural families still dominated the sector because of their historical presence, ability and preparation to go into seasonal and market cycles and their know-how sector. In recent years there has been a steep increase in players involved in the Australian agribusiness investment sector, particularly with Canadian and American pension funds. These actors generally have a long-term vision of drought and climate risks, remaining cautious and supporting investment decisions with a prudent feasibility analysis, including the identification of strategies relevant to risk mitigation, said Ms Sales. These players also have access to capital to finance asset acquisition and productivity upgrades using new technologies or process integration, which ultimately allows them to maximise their profitability. Investment appetite is expected to continue to grow among institutional buyers, in particular with regard to assets offering vertical integration opportunities, water licences/permits and favourable global trading conditions. Family ownership of farmland is also expected to remain strong. Despite the global uncertainty caused by the COVID-19 pandemic, Ms Sales forecast a market environment similar to that of 2019. She expected the market to remain closely held and, as such, there could be an increase in off-market transactions. The director of the agribusiness services company, Jesse Manuel, reiterated that he anticipated that the market would remain strong in Australia. At this stage we have seen no evidence of a market slowdown, Mr Manuel said. In many respects it is business as usual, however an obstacle that we face today is the restrictions around traveling with buyers who want to cross borders to inspect properties. Mr Manuel said COVID-19 could prolong some lawsuits, but did not reduce interest rates or investigations. COVID-19 has indeed stepped up the importance of food and agriculture and there is currently a real spotlight on the sector, not only from existing operators who want to expand, but there are investors outside the industry who want to get a share of the action, so we expect the food and agriculture sector to be a safe haven, he said. Changes to the foreign investment review framework, as announced by the federal government in March, extended the assessment criteria of the Foreign Investment Assessment Commission (FIRB) on purchases of agricultural land and which will extend the procurement process up to six months. The impact of these measures on future offshore agricultural real estate purchases is still uncertain, although, first of all, we are considering the possibility of national institutions enjoying pension funds to expand investment in the Australian agribusiness sector, said Ms Sales. Mr Manuel said the FIRB changes were not likely to discourage foreign buyers from investing in Australian agriculture. These sophisticated institutional investors are used to the process and due diligence, so they see this as another part of their procurement process, Mr Manuel said. While the extent of the impact of COVID-19 on the Australian economy and capital markets for agribusiness assets is still unquantifiable, Ms Sales has speculated on some possible effects. Potential effects could include halting investment opportunities in the market, disrupting capital flows, international and state border restrictions limiting on-site inspections and loss of market value of companies listed on stock markets, she said. Despite the current global uncertainty, the fundamentals of demand in the agribusiness sector are very strong and supported by the non-discretionary nature of many agri-food products, the steady growth of the population requiring high-quality food and the low level of the Australian dollar that improves the competitiveness of the Australian agri-industrial sector. Colliers International has estimated capital investments of over \$5 billion on farmland to be well diversified in Australia's states, however WA and Tasmania were the only states that did not see an increase in foreign investment in 2019. Beef: Despite the severe drought in Eastern Australia, the Northern Territory and WA, demand for cattle properties remained strong in 2019. Colliers International expected this demand to continue throughout the year 2020, especially for opportunities of scale, including for animals. The buyer profile in this sector includes individuals with high net worth, corporate and family companies, as well as foreign investors and pension funds. Mr Manuel said large-scale beef transactions in 2019 were concentrated in other states because the WA market was well organised. If a reasonably scale quality asset hit the market in such a limited supply period, it would gain strong interest, he said. Grain: Dry presidents in all eastern states have not alleviated the demand for crop assets in 2019. The market is considered to be on two levels at present, with a strong appetite from local agricultural families who are prepared to pay a premium in value for nearby or adjacent plots. There has also been strong demand from corporate buyers looking for larger-scale deals that have brought significantly higher prices. Below-average rainfall in Australia has negatively affected crop production and low earnings, which could dampen buyers' demand for however, the company still expected the demand for crop properties to be firm in 2020, with a premium in highly valued regions. If positive seasonal conditions predominate, there is likely to be an increase in the number of listings. Given that land values reach record levels in some areas, there may be a in the adoption of leases in an effort to maintain scale without operators increasing their debt burdens. Sheep, lamb and wool: Land values for sheep grazing country are expected to increase, as landowners will seek to increase their existing holdings in an attempt to capitalize on the current strong yields of lamb and sheepmeat. Properties affecting the market are expected to increase, especially in areas that receive good rainfall, which will not affect land values but will give buyers greater variety and optionality in an attempt to expand grazing operations. Colliers International said global forces will play a role in the industry during 2020, with the threat of both human and animal diseases having an impact on export opportunities. Opportunities.

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