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Saudi Arabia Food and Drink Q4 2012

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Abstracts

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A host of recently released leading indicator data has reaffirmed our very positive view on Saudi Arabia's consumer sector, which looks set to experience strong growth moving ahead. These figures show that private consumption in Saudi Arabia will continue to grow at a healthy pace in the near term and demonstrate that the private sector – and retail in particular – is booming, with purchasing managers' index, sales and consumer confidence data all remaining strong. The figures are a clear demonstration of the positive impact that last year's US$110bn government stimulus package – which included hikes in public sector wages, as well as increased spending on infrastructure and social benefits – is having on consumer spending, as well as on the wider economy. Our positive outlook on Saudi Arabia's consumer sector is in line with our broader economic outlook for the country, with GDP growth of 5.2% forecast for 2012. We forecast private consumption growth of 6.0% in 2012, and expect the economy to remain a regional outperformer in the near term.

Headline Industry Data

2012 food consumption growth in local currency = 11.4%; forecast growth 2011-2016 = 55.3%

2012 confectionary value sales growth = 12.0%; forecast growth to 2016 = 46.5%

2012 mass grocery retail sales growth = 11.7%; forecast growth to 2016 = 66.6%

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Key Company Trends

Kraft Expanding Local Production: In June 2012 US-based multinational food group Kraft Foods announced the expansion of its Nabisco biscuit plant in Saudi Arabia. The expansion of the Dammam plant, a joint venture between Kraft and local conglomerate Olayan Group, will allow Kraft to more than double its production volumes, a Kraft spokesperson said. The expansion will add 8,500 square metres of space as well as a new production line that adds more capacity to produce Oreo and Nabisco biscuits. Savolo Posts Solid Results: In late July 2012 The Savola Group posted strong Q212 results ahead of analysts' forecasts. The company's net income for Q212 reached US$90.9mn, which represents a hike of 48% compared to the same period in 2011; operating profit touched a figure of US$160.97mn, representing a rise of 42.6% compared to the same quarter in 2011.

Key Risks To Outlook

Given the extent to which our forecasts rely on heavy government spending, and by extension elevated oil prices, a sharper-than-expected downturn in the global economy, if it was to translate into a substantial decline in oil prices, would pose significant downside risks to our forecasts for Saudi Arabia's fiscal and current account position, though it remains highly unlikely that either account will fall into the red in the near term.

Over the longer-term, as with most states in the Middle East, the main risk to outlook is that the government is replaced with one which is less friendly to the US, and hence to foreign investment in general. Saudi Arabia already has an Islamist government, but there are Islamist factions which are opposed to any foreign companies benefiting from Saudi oil wealth. If living standards dropped substantially, we would expect support for al-Qaeda to rise, and the government to find it harder to contain the threat.

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