

Australia Food and Drink Report Q1 2016

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Abstracts

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BMI View: The Australian economy continued to slow in Q215, coming in at a subdued rate of 2.0% y-o-y. We continue to see headline GDP growth coming in at subdued levels over the coming quarters due to domestic and external economic weaknesses. The country's worsening terms of trade and unwinding investment boom continue to act as major headwinds to growth. Back in 2011, global food manufacturer Heinz publically criticised the structure of the retail market and said it was a very difficult environment for suppliers. Although spending levels are high on a per capita basis, the relatively small size of the consumer market (population of 23mn) and the structure of the retail market will continue to temper Australia's appeal for global manufacturers.

Headline Industry Data (local currency)

2015 per capita food consumption = +0.7%; forecast compound annual growth rate (CAGR), 2014 to 2019 = +1.3%.

2015 soft drinks sales = +2.3%; forecast CAGR 2014 to 2019 = +2.6%.

2015 alcoholic drinks sales = +2.0%; forecast CAGR 2014 to 2019 = +2.4%.

2015 mass grocery retail sales = +3.3%; forecast CAGR 2014 to 2019 = +4.1%.

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