

Brazil Food and Drink Report Q1 2016

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Abstracts

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BMI View: The impact of the weakening macroeconomic environment and low consumer confidence is beginning to be felt by consumer goods businesses in the food and drink sector. Premium category products in particular are seeing a slowdown in sales, as more consumers opt for discount brands. This is likely to be the case over 2016 as well, as we see little scope for a rebound. The positive for the market will be an influx of high-spending tourists in August-September 2016 for the Rio Olympic Games.

A less favourable external environment (in light of an ongoing slowdown in Chinese growth), a poor domestic business environment and a lack of export competitiveness all pose significant headwinds to growth. Although we previously argued that Brazil was in the early stages of an economic policy shift with the appointment of an investor-friendly Finance Minister Joaquim Levy, we expect investor pessimism to rise, on the back of the economic recession, high inflation, currency weaknesses and the potential for delay in fiscal reforms. We also believe that a moderation in input prices (grains) could help margins for these companies to recover in coming months.

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