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# Central America Food and Drink Report Q1 2016

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## Abstracts

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BMI View: Our consumer outlook for the region has brightened in recent quarters, as households benefit from low oil prices (which fuel their real purchasing power) and rising remittances flows from the US. Guatemala and Honduras, which have traditionally been vulnerable to structural macroeconomic weaknesses, will be the outperformers. Rising incomes will fuel growth in the food and drink sector, and the region will look increasingly attractive for food manufacturers as the rest of Latin America experiences a deteriorating consumer outlook and market saturation in the food sector. Thanks to its large and young consumer base, Guatemala will offer the strongest growth opportunities in Central America, while a strong tourism sector will drive premiumisation in Costa Rica.

Headline Industry Data (regional averages)

2015 food consumption (US dollar terms) growth = +3.9%; compound annual growth rate (CAGR) 2014 to 2019 = +5.6%.

2014 alcoholic drink sales (litres) growth = +5.6%; CAGR to 2019 = +4.9%.

2014 soft drink sales (litres) = +5.0%; forecast CAGR 2014 to 2019 = +4.6%.

2014 mass grocery retail sales (US dollar terms) growth = +2.1%; forecast CAGR to 2019 = +5.7%.

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