

# Central America Food and Drink Report Q2 2016

<https://marketpublishers.com/r/C98E35A8C69EN.html>

Date: March 2016

Pages: 77

Price: US\$ 1,295.00 (Single User License)

ID: C98E35A8C69EN

## Abstracts

**BMI View:** Our consumer outlook for the region has brightened in recent quarters, especially as households benefit from low oil prices (boosting real purchasing power). 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 deteriorating consumer outlooks and market saturation in the food sector.

### Latest Updates & Industry Developments

Our outlook for the Central American food and drink sector has brightened in recent quarters, as household purchasing power benefits from low oil prices. The region is also looking increasingly attractive given the slowdown in several Latin American markets and market saturation.

Given the young population, the drinks industry will experience solid growth. In alcoholic drinks, we expect beer sales to rise at a steady pace while in soft drinks, all segments will do well.

Although incomes are rising, we believe that households will remain relatively price-conscious throughout our forecast period to 2020, which will continue to favour the discount format in the mass grocery retail sector.

Breaking down by country, Guatemala will offer the strongest growth opportunities in Central America, while a strong tourism sector will drive premiumisation in Costa Rica.

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