

Central America Food and Drink Report Q3 2016

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Abstracts

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BMI View: We hold a brighter consumer outlook for the Central American region, particularly for Guatemala and Honduras, due to stronger purchasing power. Good growth in the food and drink sector will be driven by rising disposable incomes, with Costa Rica presenting strong premiumisation opportunities on the back of its well-developed tourism industry. We expect to see increased investment from food manufactures in the region as consumer fundamentals decline in the rest of Latin America and maturation in the food sector sets in. Over the long term, Guatemala will hold the best opportunities in the region due to strengthening consumer fundamentals and favourable dynamics.

Key Trends & 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 over the long term, while a strong tourism sector will drive premiumisation in Costa Rica.

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