

# Central America Food and Drink Report Q4 2016

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## Abstracts

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**BMI View:** An improved consumer outlook in the Central American region will drive growth in the food and drink industry over our forecast period. Rising disposable incomes will support industry growth in Guatemala and Honduras, while a well developed tourism sector will support premiumisation in Costa Rica. Throughout the coming years, we expect Central America's mass grocery retail sector to attract investment on the back of rising incomes and favourable demographics. We hold the view that Guatemala's long-term prospects will position the country to be a bright spot in the region.

### 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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