

Colombia Food and Drink Report Q3 2012

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Abstracts

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As we believe that economic growth will remain strong further into the year, we have revised up our 2012 forecast for real GDP growth in Colombia, from 4.5% to 4.7%. Growth will be driven by a combination of private consumption and fixed investment, supported by strong foreign direct investment.

Indeed, the major accelerator for Colombian real GDP growth will continue to be private consumption; we expect this to continue over the next few years, boosted by strong credit expansion and low unemployment. In addition, Colombia's large proportion of low-income consumers means the country has one of the lowest per-capita food consumption rates within the region, leaving much room for growth.

Headline Industry Data (in local currency):

2012 per capita food consumption = +13%; forecast to 2016 = +38.1%.

2012 alcoholic drink sales = +6%; forecast to 2016 = +20.3%.

2012 soft drink sales = +8.1%; forecast to 2016 = +27.4%.

2012 mass grocery retail sales = +15.5%; forecast to 2016 = +47.7%.

Key Company Trends Nutresa Modernises and Expands: Colombia's largest food and drink company Grupo Nutresa (formerly Nacional de Chocolates) has recently announced plans to invest US\$100mn in order to expand its production capacity and modernise some of its food plants. On the international front the group has not ruled out

further acquisitions during the year. According to senior officials the company has up to US\$100mn firepower for possible takeovers and is actively searching for potential candidates. At least one or two purchases, possibly in Mexico or Central America, are likely during 2012.

Exito Forges Ahead: Colombia's largest retailer Almacenes Exito (controlled by French giant Casino) has recently reported buoyant results for 2011 driven by strong domestic consumption. Net profit rose by over 52% for the year, whilst group sales rose by almost 18% to exceed COP8.8bn. The retailer expects to maintain this rate of performance in 2012 with a plan to open more than 100 stores over the year.

Accordingly the retailer is to invest COP200mn over the year to open new stores under the Surtimax, Pomona and Express banners, concentrating on intermediate sized population catchment areas of over 40,000. The group is also launching into new businesses such as opening shopping centres under the Viva banner.

Key Risks To Outlook Monetary Policy: At the domestic level, monetary policy and banking sector regulation could pose important downside risks to our outlook. A sharp rise in private consumption following a policy rate cut would pose an upside risk to our imports forecast, and by extension it would likely result in a larger than expected current account deficit.

Potential Impact Of External Slowdown: Externally, if oil prices decline significantly in response to a larger than expected slowdown in Europe or China, it would pose a downside risk to our exports forecast.

Moreover, a global slowdown could also dry up foreign investment, further damaging Colombia's ability to finance its current account shortfall.

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