

# Croatia Food and Drink Report Q4 2016

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## Abstracts

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**BMI View:** Our outlook for Croatia's food and drink industry will be modest over 2016, stemming from positive-though-moderate economic growth in 2015 following a six-year recession. Spending on essentials will experience an uptick through to 2020 driven by growing demand for private-labels. As a result, the MGR sector will boast stronger growth for the discount store format owing to the low-cost strategy, amid growing price-consciousness.

### Key Trends & Industry Developments

We forecast headline household spending to return to positive territory in 2016, although we caution that growth will remain low throughout our forecast period to 2020. Our long-term consumer outlook is also negatively affected by negative long-term demographic dynamics, including emigration and an aging population.

Despite an improving consumer outlook, households will remain highly price-conscious as income growth will be weak, benefiting discount retail.

A bright spot for consumption will come from a thriving tourism industry, which will be particularly favourable to the expansion of the alcohol segment.

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