

Pakistan Food and Drink Report Q3 2012

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Abstracts

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Our near-term domestic demand outlook for Pakistan is looking brighter than before. Declining costs of credit and disinflationary pressures should prove supportive of domestic demand. However, we acknowledge a near-term risk to our domestic demand outlook, which is the impact of deteriorating macroeconomic conditions on remittance inflows. Should a slowdown in global demand weigh on remittance growth, this could dampen domestic consumption in the near term. Longer term, the business environment challenges of a destabilising insurgency, chronic lack of electricity generation capacity and an unskilled labour force will continue to hold back the consumer sector from realising its full potential. We therefore expect the liberalisation of the Pakistani consumer sector to occur at a glacial pace going forward.

Headline Industry Data

2012 food consumption growth = +12.1%, compound annual growth rate (CAGR) forecast to 2016 = +9.3%

2012 alcoholic drinks value sales growth = +19.0%, CAGR forecast to 2016 = +10.4%

2012 soft drinks value sales growth = +15.2%, CAGR forecast to 2016 = +8.8%

2012 mass grocery retail sales growth = +20.9%, CAGR forecast to 2016 = +12.2% Key Company Trends Pakistan A Fledgling But Growing Force On Global Halal Scene: Pakistan has not been able to gain much from its US\$2trn halal brand market, and has a small share in the global halal industry. The country's exports have improved from zero-level during the past two years;

however, it is still insignificant. However, with the Pakistani government now putting its weight behind the development of the domestic halal industry, there is certainly a cause for optimism in the sector's future prospects.

The Sindh Board of Investment has entered an agreement with the Halal Department of Malaysia to provide training of certification to its staff. The government also announced that it will be engaging in a project to ensure the credibility of the country's halal certifications in a bid to tap into the global halal market, which is valued at over US\$1trn.

BMI Bullish Coca-Cola's Prospects In Pakistan: US soft drinks giant The Coca-Cola Company is planning to invest another US\$280mn by 2013 in Pakistan. According to Coca-Cola, it plans to channel the bulk of its capital expenditures towards increasing the production of its existing brands as well as expanding its overall beverages portfolio. Coca-Cola plans to introduce more juices and mineral water in the Pakistani market over the coming years. This strategy could diversify Coca-Cola's presence beyond the carbonates sector and help it secure early footholds in the higher-value bottled water and fruit juice segments, which boast tremendous long-term promise.

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