

# Russia Food and Drink Report Q3 2016

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## Abstracts

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BMI View: Russia's food and drink sector will contract in real terms over 2016 due to a sluggish consumer outlook. Household incomes will remain under pressure as nominal wage growth remains below inflation. Premiumisation trends will remain on hold as consumers become price conscious. Economically priced goods will perform well as consumers trade down price points.

### Key Trends & Industry Developments

Our consumer outlook for Russia remains weak for the next five years, with private consumption set to contract in real terms in 2016 and household incomes remaining under pressure.

Russia's beer industry will remain challenging on the back of a weak consumer outlook and adverse regulations. This will continue to affect Carlsberg's revenue, as the company is heavily reliant on the Russian market.

We believe that the discount segment will outperform other store categories amid high levels of inflation. Leading retailers like Magnit will fare relatively better than smaller retailers, due to higher financial capacities to resist shocks.

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