

Slovenia Food and Drink Report Q1 2016

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Abstracts

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BMI View: We forecast positive growth in Slovenia's food and drink industry, led by the mass grocery retail sector growing by 4.8% over our five-year forecast to 2019. Growth will be supported by the increasing trend of acquisitions seen across the industry. In 2014 and 2015, a number of foreign players bought majority stake in local companies and we expect the trend to continue into 2016. The acquisitions will allow for decreased prices as companies benefit from economies of scale. However, overall food consumption growth will be subdued, underperforming other categories.

Headline Industry Data

Food consumption (local currency) growth (y-o-y) in 2015: +0.4%; compound annual growth rate (CAGR) 2014-2019: +1.0%.

Per capita food consumption (local currency) growth (y-o-y) in 2015: +0.2%; CAGR 2014-2019: +0.9%.

Alcoholic drinks value (local currency) sales growth (y-o-y) in 2015: 0.0%; CAGR 2014-2019: +1.9%.

Soft drinks value (local currency) sales growth (y-o-y) in 2015: +0.9%; CAGR 2014-2019: +2.5%.

Total mass grocery retail value (local currency) sales growth (y-o-y) in 2015: +4.0%; CAGR 2014-2019: +4.8%.

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Droga Kolinska (Atlantic Grupa)

Engrotus

ETA Zivilska Industrija d.d.

Fructal

Ljubljanske Mlekarne

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