

United Kingdom Food and Drink Report Q3 2016

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Abstracts

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BMI View: Household spending in the UK is set to outperform most Western European markets. Nonetheless, existing high levels of consumption and the ongoing price war in the food retail sector will continue to put downward pressure on nominal sales. In addition, rising health awareness and the introduction of a tax on sugary drinks from 2018 will have a negative impact on the soft drinks industry.

Key Trends & Industry Developments

With consumption accounting for a large share of household income and high leverage, any external shock could significantly affect our growth prospects.

The price war in the food retail sector will continue to impact nominal sales. German discounters Aldi and Lidl continue to invest heavily in the UK, taking market share away from legacy retailers.

We expect the carbonated soft drinks segment to underperform, negatively impacted by rising healthconsciousness and by the introduction of a tax on sugary drinks from 2018.

Craft beer and premium spirits (especially gin) will outperform the alcoholic drinks complex as consumers favour quality over quantity.

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