

United Kingdom Food and Drink Report Q4 2016

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Abstracts

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BMI View: Given inelastic demand for food and drink products, the sector will be among the most resilient amid the overall slowdown in the economy that we are forecasting following the UK's decision to leave the EU. We have downgraded our forecasts for food sales, and non-alcoholic and alcoholic drinks consumption; however, we still expect growth to outperform overall household spending. Health consciousness, product innovation and an emphasis on quality ingredients will continue to play an important role in the industry, even as spending slows. Food price inflation is likely to return to the market, providing reprieve to retailers, which have been locked in damaging price wars for the past two years.

Key Trends & Industry Developments

We have downgraded our forecasts for food, non-alcoholic drinks and alcoholic drinks as a result of the Brexit decision.

In July 2016, Diageo acquired a minority stake in Seedlip, a pioneering start-up that claims to produce the world's first distilled non-alcoholic spirit. While leading producers have prioritised premiumisation as a means of maintaining sales in mature markets, we believe innovations in non-/low-alcohol offerings will provide an alternative growth driver for the industry over the long term.

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