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United States Food and Drink Report Q3 2016

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Abstracts

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BMI View: We hold a favourable outlook for the US consumer over the next five years, with private consumption growth outperforming most developed markets. This will create premiumisation opportunities in the food and drink sector. Nonetheless, shifts in consumer preferences will continue to pose significant challenges for legacy food and drink manufacturers, as consumers turn away from categories such as commercial beer, carbonated soft drinks and prepared meals.

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A stronger private consumption outlook will lead to a return of the premiumisation trend in the United States over the next five years. Nonetheless, this improving outlook will not benefit all categories equally. Legacy food companies, such as General Mills, Campbell Soup and Kellogg's, will continue to struggle to grow their sales as their products do not match shifting consumer preferences. This will continue to pressure companies to cut costs.

In the drinks segment, formerly dominant categories such as commercial beer and carbonated soft drinks will continue to experience stagnating sales, as consumers increasingly favour more personalised products (craft beer) or healthier alternatives (mineral waters, fruit juices). High-end spirits, especially whiskey and rum, will be another outperformer.

Lastly, the country's mass grocery retail sector - which was traditionally less competitive than its Western European peers - is becoming increasingly competitive amid consolidation and the growing popularity of online pure players.

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