

Venezuela Food and Drink Report Q4 2015

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Abstracts

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BMI View: In view of the substantial headwinds facing the Venezuelan economy, we have downgraded our real GDP forecasts for the country for 2015 and 2016, seeing contractions of 5.6% and 2.9% respectively. The economy's outlook will continue to be dimmed by poor macroeconomic governance, high inflation, low oil prices and significant political uncertainty. We expect household consumption to continue to be constrained by high inflation - which has substantially eroded purchasing power (we forecast headline consumer price inflation of 78.3% y-o-y for 2015) - and government price controls, which create market inefficiencies that significantly reduce productivity (and, by extension, income). As a result, food consumption will suffer in US dollar terms over the short term.

Headline Industry Data (US dollar terms):

Per capita food consumption compound annual growth rate (CAGR) forecast 2014 to 2019 = -14.0%.

Alcoholic drink sales CAGR forecast 2014 to 2019 = +9.0%.

Soft drink sales CAGR forecast 2014 to 2019 = +9.1%.

Mass grocery retail sales CAGR forecast 2014 to 2019 = -13.3%.

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