

# Bahrain Retail Report Q1 2016

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## Abstracts

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**BMI View:** The Bahrain retail industry is one of the most prosperous in the world, boosted by an affluent and urban population (which is expected to grow in size due to an increased number of expats) and an increase in the level of income on the back of economic growth. Shopping centres are common in the capital of Manama, and the population is familiar with modern retail formats and informed on international brands. More shopping complexes are expected to be built in the future to support the growing demand. The food and drinks sector is less mature and has much room to grow, and retailers have a chance to establish themselves in this growing sector.

Bahrain's economy is expected to increase at a strong rate and reach USD45bn by 2019, seeing an increase of USD10bn from its level in 2015. Though the increase is impressive, it is not, in absolute terms, in the same league with some of its more illustrious Middle Eastern neighbours, such as the UAE or Qatar. This is mostly due to Bahrain's size, which is relatively small, and a population of only 1mn, which limits the market size for retailers. Like all the Gulf States, Bahrain was affected by the drop in oil prices in 2014, as Bahrain - though not a large producer of oil - has a large industry that processes and refines oil which comes from nearby producers. The decline in oil prices has stabilised, and while the growth in the economy will not be as strong as over 2011-2014, it will still be healthy and consistent. The high economic growth means that the average Bahraini is reasonably wealthy with per capita income of USD10,567 in 2015, which is further boosted by the fact that taxation is relatively low.

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