

Bahrain Retail Report Q2 2016

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Abstracts

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BMI View: Bahrain's retail industry has become one of the most prosperous in the world, owing to the country's young and wealthy population (which is further boosted by the growing number of affluent expats). Spending on non-essential items is growing and we expect this trend to continue throughout our forecast period. The shopping mall remains the most popular format in the capital of Manama, where modern retail outlets dominated by famous international brands are commonplace. The MGR sector however, remains less saturated with significant room for growth.

Key Views And Developments

We expect household consumption to continue to climb, thanks to a robust economy and higher wages. This will be further supported by low inflation rate, which stood at 2.0% in 2015, which will help support real purchasing power.

The share of households in the USD50,000-plus income bracket will continue to expand, reaching 51.8% in 2016.

Bahrain's population will grow rapidly by 1-2% annually throughout the forecast period due to growing expat community.

Housing & utilities will be the largest sub-sector of household spending, accounting for approximately 26.1% of the total in 2016.

We expect total household spending growth to pick up notably over our forecast period and average 7.02% per annum between 2016 and 2020. Increasing household incomes bodes well for the nonessentials spending, which are

expected to see its share in the total household spending constitute 41.0% of spending throughout our forecast period.

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