

# Brazil Retail Report Q1 2016

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## Abstracts

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**BMI View:** A weakening labour market, elevated inflation and tightening credit conditions will continue to weigh on Brazilian retail sales over 2016, with the non-essentials segment suffering in particular. That said, the country remains the largest market in Latin America and we expect a more pronounced recovery in consumer sentiment from 2017 onwards.

Brazil's economy is poised to deteriorate even further in the coming months on the back of additional job losses and elevated inflation in 2016. Labour market rigidity had long precluded rises in unemployment; even as the economy began to weaken in 2014, unemployment remained below 5.0%. Since then, we have seen a considerable deterioration, with unemployment rising to nearly 8.0% as of October 2015. Moreover, the public sector has yet to see the significant job losses endured by commodity producers, and therefore any fiscal austerity measures by the Brazilian government will likely lead to the government cutting its workforce. As such, we see scope for unemployment to head as high as 10.0% within the first half of 2016.

## Contents

BMI Industry View

SWOT

Retail SWOT

Political

Economic

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Brazil 2012-2019)

Table: Retail Sector Spending, % Of Total (Brazil 2012-2019)

Table: Retail Sector Spending, % of GDP (Brazil 2012-2019)

Table: Headline Retail Sector Spending (Brazil 2012-2019)

Retail Sector Forecast

Food, Drink And Tobacco

Table: Food, Drink & Tobacco Spending (Brazil 2012-2019)

Clothing And Footwear

Table: Clothing & Footwear Spending (Brazil 2012-2019)

Household Goods

Table: Household Goods Spending (Brazil 2012-2019)

Personal Care

Table: Personal Care Spending (Brazil 2012-2019)

Household Numbers And Income Forecast

Table: Household Income Data (Brazil 2012-2019)

Table: Labour Market Data (Brazil 2012-2019)

Demographic Forecast

Table: Total Population (Brazil 2012-2019)

Table: Population: Babies (Brazil 2012-2019)

Table: Population: Young Children (Brazil 2012-2019)

Table: Population: Children (Brazil 2012-2019)

Table: Population: Young Teens and Older Children (Brazil 2012-2019)

Table: Population: Young People (Brazil 2012-2019)

Table: Population: Older Teenagers (Brazil 2012-2019)

Table: Population: 21yrs + (Brazil 2012-2019)

Table: Population: Young Adults (Brazil 2012-2019)

Table: Population: Middle Aged (Brazil 2012-2019)

Table: Population: Urban (Brazil 2012-2019)

Macroeconomic Forecasts

Economic Analysis

Industry Risk/Reward Index

Latin America Risk/Reward Index

Table: Latin America Retail Risk/Reward Index, Q116

Brazil - Risk/Reward Index

Rewards

Risks

Market Overview

Competitive Landscape

Glossary

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Retail Risk/Reward Index Indicators

Table: Weighting Of Indicators

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