

# Brazil Retail Report Q4 2016

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## Abstracts

Includes 3 FREE quarterly updates

**BMI View:** Brazil is in the midst of the largest economic and political crisis in more than a decade. This is having an adverse impact on household incomes and consumer confidence. While a gradual recovery is expected to start in 2017, a weak labour market, elevated inflation and reduced access to consumer credit will continue weighing on the country's retail sector over the near term. As such, we expect consumer spending to remain concentrated on essential goods and services, with the preferences geared towards lower-range product categories across the board.

### Key Views & Developments

In USD terms, headline household spending is forecast to decline by 23.7% in 2016, negatively affected by the depreciation of Brazilian real against the US dollar as well as the protracted economic recession in the country. In local currency, terms total household spending is expected to register 5.3% growth during 2016. We forecast total household spending to rebound during 2017-2020, expanding by an annual average 8.3% in USD terms.

We expect transport and food & non-alcoholic drinks to remain the two largest spending categories, accounting for 20.1% and 17.4% of the total expenditure respectively in 2020.

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