

# Czech Republic Retail Report Q4 2015

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## Abstracts

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**BMI View:** The mature Czech retail sector will benefit heavily from the economic growth until 2019. Rising real GDP will translate to lower unemployment and higher household incomes. As consumer confidence rises, retailers will see their incomes grow. High saturation of the retail market will limit network expansion opportunities and major players will be investigating merger and acquisition opportunities.

In European Union, which has been dealing with major challenges, including the Greek debt impasse, rising illegal immigration and China downturn in Q2-Q3 2015, the Czech Republic emerged as the bloc's fastest growing economy. With a projected real GDP growth rate of 3.5% it is set to lead the economic union of 28 countries. This follows a contraction in 2012-2013 and a modest 1.9% expansion in 2014 and is a sign of a strong and consistent recovery. The economic recovery, which started last year, is already visible across a variety of indicators relevant for retailers: unemployment rate will have declined from 7.0% to 5.7% during 2014-2015, while retail sales grew by the highest rate in seven years in July 2015. The Czechs are becoming more willing to big large purchases, such as cars, whose sales grew by the fastest pace since early 2008 this summer. Growing employment allows the Czech households to accumulate more savings and make more non-essential purchases bringing growth to clothing and household goods sub-sectors. The decline of oil prices, which translated into cheaper fuel, increased disposable incomes for the Czechs and is helping groceries and non-food retailers.

## Contents

BMI Industry View

SWOT

Retail SWOT

Political

Economic

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Czech Republic 2012-2019)

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

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

Table: Headline Retail Sector Spending (Czech Republic 2012-2019)

Retail Sector Forecast

Food, Drink & Tobacco

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

Clothing & Footwear

Table: Clothing & Footwear Spending (Czech Republic 2012-2019)

Household Goods

Table: Household Goods Spending (Czech Republic 2012-2019)

Personal Care

Table: Personal Care Spending (Czech Republic 2012-2019)

Household Numbers and Income Forecast

Table: Household Income Data (Czech Republic 2012-2019)

Table: Labour Market Data (Czech Republic 2012-2019)

Demographic Forecast

Table: Total Population (Czech Republic 2012-2019)

Table: Population: Babies (Czech Republic 2012-2019)

Table: Population: Young Children (Czech Republic 2012-2019)

Table: Population: Children (Czech Republic 2012-2019)

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

Table: Population: Young People (Czech Republic 2012-2019)

Table: Population: Older Teenagers (Czech Republic 2012-2019)

Table: Population: 21yrs + (Czech Republic 2012-2019)

Table: Population: Young Adults (Czech Republic 2012-2019)

Table: Population: Middle Aged (Czech Republic 2012-2019)

Table: Population: Urban (Czech Republic 2012-2019)

Macroeconomic Forecasts

Economic Analysis

- Industry Risk Reward Index
- Central And Eastern Europe Risk/Reward Index
  - Table: Central And Eastern Europe - Retail Risk/Reward Index
- Czech Republic Risk/Reward Index
- Rewards
- Risks
- Market Overview
- Competitive Landscape
- MGR
- Home Improvement
- Consumer Electronics
- Clothing & Footwear
- Online
- Glossary
- Methodology
- Industry Forecast Methodology
- Sources
- Risk/Reward Index Methodology
  - Table: Retail Risk/Reward Index Indicators
  - Table: Weighting Of Indicators

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