

# Egypt Retail Report Q3 2016

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## Abstracts

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BMI View: Being the largest and still developing market in the Middle East and North Africa region, Egypt offers attractive opportunities for investors in the retail sector. However, despite its vast potential, growth will remain below its full potential, suffering from the protracted slump in the tourism sector as well as elevated unemployment and inflation levels. Moreover, the ongoing subsidy reform in the energy sector and gradual currency devaluation will be additional factors weighing on consumer spending in the near term.

### Key Views & Developments

Supported by rapidly growing population, the headline household spending is forecast to expand robustly over the coming five years, averaging 6.3% per annum between 2016 and 2020. That said, elevated inflation rates, fluctuating between 9% and 11% during the period, will suppress the household purchasing power.

Food and non-alcoholic drinks spending continues to dominate the household budgets, accounting for a forecast 35.6% of the total expenditure in 2016. While we expect this figure to decline gradually over the coming five years, food and non-alcoholic drinks expenditure will continue to dominate the household spending.

## Contents

BMI Industry View

SWOT

Egypt - SWOT

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Egypt 2013-2020)

Table: Retail Sector Spending, % Of Total (Egypt 2013-2020)

Table: Retail Sector Spending, % of GDP (Egypt 2013-2020)

Table: Headline Retail Sector Spending (Egypt 2013-2020)

Retail Sector Forecast

Food, Drink & Tobacco

Table: Food, Drink & Tobacco Spending (Egypt 2013-2020)

Clothing & Footwear

Table: Clothing & Footwear Spending (Egypt 2013-2020)

Household Goods

Table: Household Goods Spending (Egypt 2013-2020)

Personal Care & Effects

Table: Personal Care Spending (Egypt 2013-2020)

Household Numbers And Income Forecast

Table: Household Income Data (Egypt 2013-2020)

Table: Labour Market Data (Egypt 2013-2020)

Demographic Forecast

Table: Total Population (Egypt 2013-2020)

Table: Population: Babies (Egypt 2013-2020)

Table: Population: Young Children (Egypt 2013-2020)

Table: Population: Children (Egypt 2013-2020)

Table: Population: Young Teens and Older Children (Egypt 2013-2020)

Table: Population: Young People (Egypt 2013-2020)

Table: Population: Older Teenagers (Egypt 2013-2020)

Table: Population: 21yrs + (Egypt 2013-2020)

Table: Population: Young Adults (Egypt 2013-2020)

Table: Population: Middle Aged (Egypt 2013-2020)

Table: Population: Urban (Egypt 2013-2020)

Industry Risk/Reward Index

Middle East And North Africa Risk/Reward Index

Table: Middle East And North Africa Retail Risk/Reward Index, Q316

Egypt - Risk/Reward Index

Rewards

Risks

Market Overview

Competitive Landscape

Clothing & Footwear

Table: Selected Clothing & Footwear Retailers

Household Goods

Table: Selected Household Goods Retailers

Electronics

Table: Selected Electronics Retailers

Department Stores

Table: Selected Department Store Chains

E-commerce

Table: Selected Online Retailers

Pharmacies

Table: Selected Pharmacy Chains

Glossary

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Retail Risk/Reward Index Indicators

Table: Weighting Of Indicators

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