

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.

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