

Hong Kong Retail Report Q1 2016

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Abstracts

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BMI View: While Hong Kong retains its reputation as one of Asia's retail hotspots, the city state is facing a number of headwinds owing to its over-dependence on tourism. Declining visitor and spending amounts from mainland China have negatively impacted retail sales figures and this is expected to continue in 2016 with China's economic slowdown set to become more apparent. Despite this, Hong Kong households continue to enjoy increasing levels of disposable income and this helps offer some support for the retail sector throughout our forecast period.

Hong Kong's retail environment is deeply influenced by economic conditions in mainland China. The city state's reputation as a world class retail destination generates substantial amounts of retail sales from Chinese visitors alone. The city state received 47mn Chinese tourists in 2014, however, Chinese visitor numbers were down 10%, year-on-year, in July 2015. Visitors have also spent less during 2015 and these factors have lead to a fall in a number of sectors. Apparel saw a plunge. Local Hong Kong consumers, on the other hand, continue to exhibit resilient spending habits, in part due to their relatively stable economy and rising income levels. Total household spending is expected to grow by 7.94% this year and it will expand by over 6.5% each year for the rest of our forecast period. This helps ensure that mid-range spending remains stable and provides important support for the retail sector as a whole.

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