

Hong Kong Retail Report Q4 2010

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Abstracts

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The Q410 BMI Hong Kong Retail report forecasts that total retail sales for the Chinese special administrative region (SAR) will grow from a forecast HKD286.71bn (US\$36.93bn) in 2010 to HKD340.33bn (US\$43.83bn) by 2014. Rising disposable incomes and a strong tourism industry are key factors behind the forecast growth.

Hong Kong's nominal GDP is forecast to be US\$221.3bn in 2010. We predict average annual GDP growth of 3.3% through to 2014. With the population increasing from 7.0mn to 7.3mn over this period, GDP per capita is forecast to rise from US\$31,131 in 2010 to US\$37,060 by 2014. Our forecast for consumer spending per capita is for an increase from US\$18,488 in 2010 to US\$22,078 by 2014. Tourist spending contributes significantly to Hong Kong retail sales, and the Hong Kong Tourist Board (HKTB) has provisionally reported that total tourism arrivals for 2009 stood at 29.59mn, an increase of 0.3% on 2008. Based on data from the World Travel & Tourism Council (WTTC), we forecast tourism expenditure to reach US\$25.05bn in 2010 – up from an estimated US\$20.87bn in 2009 – and to hit US\$33.40bn by 2014.

Retail sub-sectors that are forecast to achieve healthy sales growth throughout the forecast period include automotives, which are predicted to increase by nearly 27%, from US\$1.28bn in 2010 to US\$1.62bn by 2014. Over the counter (OTC) pharmaceuticals sales are forecast to rise by more than 20%, from US\$0.24bn in 2010 to US\$0.30bn by 2014. Consumer electronics sales are predicted to grow from US\$3.82bn in 2010 to US\$4.53bn, a rise of nearly 18%, by the end of the forecast period.

Retail sales for the BMI universe of Asian countries in 2010 are a forecast US\$2.66trn. China and India are predicted to account for almost 91% of regional retail sales in 2010,

and by 2014 their share of the regional market is expected to be more than 92%. Growth in regional retail sales for 2010-2014 is forecast by BMI at 72.2%, an annual average 14%. India should experience the most rapid rate of growth, followed by China. For Hong Kong, its forecast market share of 1.4% in 2010 is expected to ease to 1.0% by 2014.

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