

# Hong Kong Retail Report Q4 2016

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## Abstracts

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**BMI View:** Retail sales in Hong Kong have been declining for several quarters in a row, mostly on account of declining tourist arrivals from Mainland China. Struggling residential real estate market and poor external demand present additional headwinds, which will continue weighing on Hong Kong's economic and retail sector's performance over the coming year. As a result, we forecast 2016 total household spending growth to record the lowest levels since 2011.

### Key Views And Developments

Overall household spending is forecast to average 5.1% growth during 2016-2020. Alcoholic drinks and tobacco sector is expected to register the strongest. Nonetheless, the sector will still account for a relatively small 1.6% share in the total household spending pie.

Supported by rising household incomes and tourism, total spending share on non-essential goods and services will increase from 48.8% in 2015 to 49.9% in 2020. Personal, insurance & other will remain the largest and the second-fastest growing category in terms of household expenditure.

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