

Hungary Retail Report Q4 2016

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Abstracts

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BMI View: Hungary's economic growth is becoming more reliant on domestic demand, with retail sales performing strongly in recent months. Consumer optimism is being driven by falling unemployment, growing real wages and low inflation, while credit is also becoming easier to access. All this bodes well for Hungary's retailers, as done the relaxation in March 2016 of a partial ban on Sunday trading. However, over the long-term opportunities in the retail sector could be restricted by the declining population, and the medium-term - shrinkage of the key spending demographic of those aged between 20 and 39 years is a concern.

Key Views And Developments

We forecast total household retail spending will fall slightly in US dollar terms in 2016, down 1.2% to USD59.79bn. However, over the rest of our medium-term forecast period to 2020, the picture is brighter, with spending reaching USD90.02bn by that year.

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