

Indonesia Retail Report Q4 2015

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Abstracts

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BMI View: Indonesia is home to the fourth largest population in the world and possesses one of the fastest growing economies in the world. Total household spending in the world's largest Muslim country will grow annually by 9.4 % on average over our forecast period. As a result, retailers increasingly perceive the country as a lucrative investment destination. Nevertheless, the number of foreign retailers remains somewhat limited with local Indonesian brands playing an important role in the competitive landscape.

Indonesia will experience a slight slump in domestic consumption this quarter owing to higher fuel prices - the result of subsidy cuts implemented by the government earlier this year - as well as a depreciating currency. Weakened demand from major trading partners such as China will also hamper economic growth resulting in lower consumer demand in the retail sector. This trend will be exacerbated by the decision to raise taxes on around 870 imported non-food consumer goods from 2.5% to 7.5% in 2014, and further to 10% in mid-June 2015. However, in June the government also exempted most goods from a luxury-goods tax of up to 75%, aiming to boost consumption, revive faltering economic growth and reduce foreign purchases. The tax no longer applies to categories such as electrical appliances, sports equipment and branded goods, but still applies on expensive cars, yachts, aircrafts, guns, alcoholic beverages and larger properties. Nevertheless, we remain confident in Indonesia's long-term growth prospects and believe that improving economic conditions and falling oil prices will see stronger retail spending in 2015-2019.

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