

Israel Retail Report Q3 2016

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Abstracts

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BMI View: We hold our positive outlook for Israel's retail sector and forecast total household spending to grow by 4.6% in 2016. The recent VAT cuts and reduction of water and public transportation tariffs, combined with historically low bank interest rates and a strong labour market situation, will boost household spending across all retail sectors over the coming year. However, we note that housing & utilities will absorb the majority of spending growth as Israeli households will feel increasingly confident to purchase new homes or invest their savings into real estate.

Key Views And Developments

Total household spending is forecast to register a compound annual growth rate of 7.5% between 2016 and 2020. This will lift the absolute spending figure to USD169.1bn, up from USD117.9bn in 2015. Despite its current dominance, housing & utilities will be the fastest growing segment in absolute and proportional terms during our forecast period.

The essential products and services will continue to account for the majority of household spending over the next five years, with expenditures on housing and utilities, food & drink and transport together amounting to more than 60% of the total budget.

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