

Israel Retail Report Q4 2016

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Abstracts

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BMI View: We maintain our positive outlook for Israel's retail sector and forecast total household spending to grow by 4.6% in 2016. Elevated domestic and regional security threats, while continuing to suppress tourism receipts, look unlikely to have any significant negative impact on our forecast strong growth in consumer spending. While the balance of household spending between essentials and non-essentials will have changed very little in 2016, strong growth in spending on non-essentials categories like restaurant & hotels indicates that consumer confidence remains high.

Key Views And Developments

Total household spending is forecast to reach USD123.3bn in 2016, with housing & utilities spending being the fastest growing category in the essentials segment, increasing by 5.0% across the year.

The forecast growth in disposable household incomes will lead to a marked improvement in total spending per household, which is expected to stand at USD50,796 by the end of 2016. Per capita spending is forecast to increase to USD15,051 across the same period.

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