

Kuwait Retail Report Q1 2016

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Abstracts

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BMI View: As a highly oil-dependent country, Kuwait has been and will be facing an economic slowdown. The decrease of commodity prices has come before the economy diversified significantly and households in the country have few reasons to expect sizeable income gains. Non-essentials retailers will be hit the hardest as Kuwait's consumer will shift a large part of their budgets to the housing sub-sector.

After a tough year due to the turbulence in the petroleum markets which led to lower oil prices - with oil the overwhelmingly dominant industry of the Kuwaiti economy - we expect the country to post 2.6% and 2.4% real GDP growth in 2015 and 2016, respectively. Kuwait's dependence on oil and oil-related activities as a driver for economic growth does make it vulnerable which was underlined by the slowdown in the last two years. Despite these frailties and the volatility in the oil industry, the Kuwaiti economy is expected to continue posting healthy, though not spectacular, growth figures during our forecast period - averaging 2.4% over the next five years. Overall the country has a solid financial foundation, after accumulating many budget surpluses over the years, meaning government debt is low, while they continue to invest abroad with their sizeable sovereign wealth fund.

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