

Kuwait Retail Report Q2 2016

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Abstracts

BMI View: Kuwait's economy has been forced to shift its focus dramatically, following the recent drop in oil prices. While the country has a robust financial foundation, the economy is not diversified and this will minimise the possibility of sizable income gains in Kuwait households. The non-essential purchases will be impacted the hardest, with many Kuwaiti's shifting a large part of their budget to the housing sub-sector throughout our forecast period.

Key Updates and Forecasts

We expect household consumption to continue to climb, thanks to increasing affluence and wages.

The share of households in the USD50,000 plus income bracket will continue to expand, reaching 16.4% in 2016.

Kuwait's population will grow rapidly by 2.1% annually throughout the forecast period, due to growing immigration of both skilled and unskilled labour.

Housing & utilities will be the largest sub-sector of household spending, accounting for approximately 29.3% of the total in 2016, due to rising rental prices and increased spending on houses and apartments.

We expect total household spending growth to pick up notably over our forecast period and average 4.4% per annum between 2016 and 2020. Increasing household incomes bodes well for the retail sector on the whole however non-essentials spending will post much slower growth than that of essential spending.

Contents

BMI Industry View

SWOT

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Kuwait 2013-2020)

Table: Retail Sector Spending, % Of Total (Kuwait 2013-2020)

Table: Headline Retail Sector Spending (Kuwait 2013-2020)

Table: Retail Sector Spending, % of GDP (Kuwait 2013-2020)

Retail Sector Forecast

Food, Drink & Tobacco

Table: Food, Drink & Tobacco Spending (Kuwait 2013-2020)

Clothing & Footwear

Table: Clothing & Footwear Spending (Kuwait 2013-2020)

Household Goods

Table: Household Goods Spending (Kuwait 2013-2020)

Personal Care

Table: Personal Care Spending (Kuwait 2013-2020)

Household Numbers And Income Forecast

Table: Household Income Data (Kuwait 2013-2020)

Demographic Forecast

Table: Total Population (Kuwait 2013-2020)

Table: Population: Babies (Kuwait 2013-2020)

Table: Population: Young Children (Kuwait 2013-2020)

Table: Population: Children (Kuwait 2013-2020)

Table: Population: Young Teens and Older Children (Kuwait 2013-2020)

Table: Population: Young People (Kuwait 2013-2020)

Table: Population: Older Teenagers (Kuwait 2013-2020)

Table: Population: 21yrs + (Kuwait 2013-2020)

Table: Population: Young Adults (Kuwait 2013-2020)

Table: Population: Middle Aged (Kuwait 2013-2020)

Table: Population: Urban (Kuwait 2013-2020)

Industry Risk Reward Indexes

Middle East And North Africa Risk/Reward Index

Table: Middle East And North Africa Retail Risk/Reward Index, Q216

Kuwait Industry Risk/Reward Index

Rewards

Risks

Market Overview

Competitive Landscape

Clothing & Footwear

Table: Selected Clothing & Footwear Retailers

Household Goods

Table: Selected Household Goods Retailers

Electronics

Table: Selected Electronics Retailers

Department Stores

Table: Selected Department Stores

E-commerce

Table: Selected E-Commerce Retailers

Pharmacies

Table: Selected Pharmacies

Glossary

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Retail Risk/Reward Index Indicators

Table: Weighting Of Indicators

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