

Kuwait Retail Report Q3 2016

<https://marketpublishers.com/r/KE6E5932DFAEN.html>

Date: June 2016

Pages: 59

Price: US\$ 1,295.00 (Single User License)

ID: KE6E5932DFAEN

Abstracts

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BMI View: Kuwait's oil-dependent economy is facing a notable slowdown, following a recent drop in global oil prices. This is negatively affecting business and consumer confidence levels, forcing households to re-allocate their spending priorities on essential goods and services. We believe that elevated inflation, triggered by removal of fuel subsidies and persisting housing shortages, will continue weighing on consumer spending power over the coming quarters.

Key Updates and Forecasts

Total household spending in the retail sector is expected to average 4.0% per annum during 2016-2020. Except for housing and utilities sub-sector, all other spending categories will see their shares declining in terms of overall household expenditures over the next five years.

Household expenditures will shift towards essential goods and services, with spending on housing and utilities leading the way. Despite relative affluence of the Kuwaiti population, we believe that essentials will account for nearly three quarters of total household spending by the end of 2020.

The share of households earning above USD10,000 will remain at around 80% across our forecast period to 2020.

In early 2016, US-based department stores retailer Macy's revealed that it will open a 93,000 square foot Bloomingdales outlet at Kuwait's 360 Mall in spring 2017. The company has signed a strategic partnership agreement with the UAE-based Al Tayer Group.

In March 2016, Paris-based luxury fashion retailer Karl Lagerfeld opened its first 75 square metre concept store at Avenues Mall in Kuwait.

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