

Kuwait Retail Report Q4 2015

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Abstracts

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BMI View: Kuwait is a small market for retailers due to its small population size. However, high levels of urbanisation, disposable income and household spending mean there are opportunities, particularly in the higher-end segment. Modern retail formats are increasingly popular, as the comfort of malls offers protection from extreme weather conditions. Foreign brands are also on the rise, driven by the high number of foreign workers in the country.

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 2.5% and 1.9% 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 and the slowdown of the last two years is evidence of that. 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 2.2% 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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