

Malaysia Retail Report Q1 2016

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Abstracts

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BMI View: The retail market will begin to bounce back in 2016 after a rough year during 2015, characterised by the weak ringgit, removal of subsidies and the lowest consumer confidence levels seen in 10 years. The short-term outlook is bearish and we expect that it will take a number of years to alter spending habits away from saving and paying down high levels of consumer debt, back towards retail spending.

As a highly oil & gas dependent country, Malaysia has been hit by the changing oil price landscape in 2015. Fossil fuels directly contribute to 30% of all government revenues in Malaysia and a 40% drop in oil price in 12 months requires the country to rebalance its budget. First, fuel subsidies were removed allowing petrol price to rise. Consumers and businesses are facing higher transportation costs, and due to inelastic nature of demand for petrol, Malaysians will see their disposable incomes decline in 2015-2016. Second, the government moved further in rebalancing the budget and introduced a Goods and Services Tax (GST) in April 2015. Most of the retail products qualify for the new 6% tax which is in turn squeezing profit margins for retailers and decreasing the purchasing power of Malaysian wages. As a result, consumer sentiment fell to a six-year low in July 2015, according to the Malaysian Institute of Economic Research. The holy month of Ramadan, which typically generates large volumes of sales as stores launch promotions in order to attract customers, was disappointing for retailers, some of whom faced 20% declines in sales compared with last year. Consequently, we forecast that total household spending will have fallen by 5.2% in US dollar terms by the end of 2015.

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