

Peru Retail Report Q4 2016

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Abstracts

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BMI View: Household spending is likely to receive another boost in the medium term, following the election of pro-market ex-banker Pedro Pablo Kuczynski as Peru's next president. The projected solid growth is likely to become less risky under Kuczynski's leadership, which will likely have a positive effect on Peru's economy and consumer incomes. As for the supply side, the ongoing nationwide construction of shopping centres - led by a few large retail conglomerates - is rapidly increasing the availability of modern real estate, which is becoming more coveted by both regional and international clothing, household goods and department store brands. Consequently, Peru's retail sector will continue enjoying sustained growth, underlined by 8.2% sol-denominated growth in household spending this year.

Key Trends & Developments

Pedro Pablo Kuczynski won the runoff of the Peruvian presidential election - edging out Keiko Fujimori, the daughter of Peru's former controversial president Alberto Fujimori, by a quarter of a percentage point in June. Kuczynski is expected to follow a pro-market agenda with a strong focus on modernising the public sector and curbing corruption. However, his initiatives will be challenged in Congress, where his party will have less than 15% of all seats.

Shopping centre construction pipeline remains active thanks to Cencosud, Mall Aventura Plaza and E. Wong announcing new projects in Lima, Arequipa, Tacna and other towns. E. Wong's plan comes after opening Mall del Sur, a USD200mn shopping centre in Lima, in March 2016.

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