

Philippines Retail Report Q1 2016

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Abstracts

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BMI View: Owing to favourable economic conditions, the Philippines has successfully managed to elevate a large number of its population out of poverty and also increase overall disposable household incomes, particularly in urban areas. These economic improvements, as well as a relatively young population, are affected by the developments we now see in the Philippines retail market. Nevertheless, the country's rural areas have experienced much slower growth, with traditional retail formats prevailing. Pavement vendors and open-air markets will continue to play a crucial role in the rural retail landscape and we foresee less dramatic changes in this area over our forecast period.

We retain our positive outlook for the Philippine economy, with real GDP growth forecasted at 6.0% in both 2015 and 2016, resulting in an increased employment and disposable incomes. However, a large part of the country's population remains employed in low-wage jobs in the agricultural and industrial sectors and will continue to be reliant on remittance inflows from Filipinos working overseas. We expect this to rise further over the coming quarters as more Filipinos move away and seek better job opportunities abroad. These trends will bode well for the retail sector. Not only will poverty in the country decline further over our five-year forecast period, but affluence levels will also increase, resulting in higher spending on the retail sector and strong growth in non-grocery and non-essential segments over the medium term.

Contents

BMI Industry View

SWOT

Political

Economic

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Philippines 2012-2019)

Table: Retail Sector Spending, % Of Total (Philippines 2012-2019)

Table: Retail Sector Spending, % Of GDP (Philippines 2012-2019)

Table: Headline Retail Sector Spending (Philippines 2012-2019)

Retail Sector Forecast

Food, Drink & Tobacco

Table: Food, Drink & Tobacco Spending (Philippines 2012-2019)

Clothing & Footwear

Table: Clothing & Footwear Spending (Philippines 2012-2019)

Household Goods

Table: Household Goods Spending (Philippines 2012-2019)

Personal Care

Table: Personal Care Spending (Philippines 2012-2019)

Household Numbers And Income Forecast

Table: Household Income Data (Philippines 2012-2019)

Demographic Forecast

Table: Total Population (Philippines 2012-2019)

Table: Population: Babies (Philippines 2012-2019)

Table: Population: Young Children (Philippines 2012-2019)

Table: Population: Children (Philippines 2012-2019)

Table: Population: Young Teens And Older Children (Philippines 2012-2019)

Table: Population: Young People (Philippines 2012-2019)

Table: Population: Older Teenagers (Philippines 2012-2019)

Table: Population: 21yrs+ (Philippines 2012-2019)

Table: Population: Young Adults (Philippines 2012-2019)

Table: Population: Middle Aged (Philippines 2012-2019)

Table: Population: Urban (Philippines 2012-2019)

Macroeconomic Forecasts

Economic Analysis

Table: Economic Activity (Philippines 2010-2019)

Industry Risk/Reward Index

Asia Risk/Reward Index

Table: Asia Pacific Retail Risk/Reward Index, Q116

Philippines Risk/Reward Index

Rewards

Risks

Market Overview

Competitive Landscape

Department Store Groups

Mass Grocery Retail

Fashion

Consumer Electronics

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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