

Romania Retail Report Q4 2012

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Abstracts

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The Romanian Retail Report examines the long-term potential of the local consumer market, but flags up short-term concerns about the impact on Romania's economic outlook of the domestic banking sector's exposure to deleveraging Western European parent banks.

The report examines how best to maximise returns in the Romanian retail market while minimising investment risk. It also explores the impact of renewed uncertainty over the future of the eurozone on the Romanian consumer and on the ability of producers and exporters to realise returns in the short term. We analyse the growth and risk management strategies being employed by the leading players in the Romanian retail sector as they seek to maximise the growth opportunities offered by the local market.

Romanian per capita consumer spending is forecast to increase by 35% to 2016, compared with a regional growth average of 44%. The country comes ninth out of 10 in BMI's Central and Eastern Europe (CEE) Retail Risk/Reward Ratings (RRRs), although it outperforms slightly on the rewards side.

Among all retail categories, mass grocery retail (MGR) will be the outperformer through to 2016 in growth terms, with sales forecast to grow by nearly 45%, compared with 22.3% for overall food sales. MGR is predicted to expand its share of the total food market to 58.6% by 2016, when value sales should reach US\$12.77bn.

In the competitive arena, BMI sees upside potential in the fact that large-scale infrastructure improvement is ongoing and that Romania will receive substantial influxes of EU funds and loans over the coming years. The EUR7.1bn (US\$9.2bn) investment into rural development during 2007-2013 forms part of the national budget.

Over the last quarter, BMI has revised the following forecasts/views:

BMI has revised down its forecasts for Romanian real GDP growth in 2012 and 2013. We now expect growth of 1.0% and 2.1% in 2012 and 2013 respectively, from a previous forecast of 1.4% and 2.3% growth. Renewed uncertainty over the future of the eurozone will weigh on Romania's trade and investment flows, while the domestic banking sector's exposure to deleveraging Western European parent banks is set to limit credit availability and weigh on headline growth.

BMI has moderately revised down its forecast for 2012 private consumption growth to 2.6%, from 2.8% previously. This remains higher than the 1.3% growth registered in 2011, and we reiterate our expectation for less austere fiscal policy to feed through to higher private consumption. We have similarly revised down our 2013 private consumption growth to 3.8%, from 4.0% previously.

BMI has revised down its short-term annual growth forecasts for foreign tourist arrivals to slight negative growth in 2012 of -1.2% (from -0.5% previously), with positive growth of 2.3% in 2013. The long-term outlook for arrivals is favourable, bolstered by the stimulus provided by the EU, the establishment of tourism promotion offices overseas and an enhanced marketing programme to boost interest in the country.

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How We Generate Our Industry Forecasts

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