

Russia Retail Report Q1 2016

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Abstracts

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BMI View: The Russian economy remains in recession as a result of international sanctions triggering significant monetary deflation. Together with the knock-on effect on inflation in the country and the rapid decline of oil prices reducing government revenues, Russia has seen investment levels stall and the country risk profile deteriorate. The current climate will see reduce growth forecasts across the retail space until 2017 and retailers will be faced with tough headwinds over this period.

Instead of a widely anticipated recovery, Russia's economy fell into the deepest recession since 1998. The local currency stopped falling against the US dollar and the euro and oil prices stabilised at the lowest level since 2009. There are few indicators which could suggest that either one will start increasing again before mid-2016. The Russian middle class was and will be hit the hardest: in USD terms, net income per household decreased by 11.7% in 2014 and is forecast to plunge even further by 31.4% in 2015. Retailers began adjusting shelf prices to rouble's value in the international market, making imported products significantly less affordable for the Russian middle class. A large share of groceries and non-food product consumption has remained buoyant by households exchanging and using their foreign currency reserves (keeping some US dollar savings has been widespread among Russian households since the breakup of the Soviet Union), however, they are dissipating at an alarming rate.

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