

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.

Contents

BMI Industry View

SWOT

Political

Economic

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Russia 2012-2019)

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

Table: Retail Sector Spending, % of GDP (Russia 2012-2019)

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

Retail Sector Forecast

Food, Drinks and Tobacco

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

Clothing and Footwear

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

Household Goods

Table: Household Goods Spending (Russia 2012-2019)

Personal Care and Effects

Table: Personal Care Spending (Russia 2012-2019)

Household Numbers and Income Forecast

Table: Household Income Data (Russia 2012-2019)

Table: Labour Market Data (Russia 2012-2019)

Demographic Forecast

Table: Total Population (Russia 2012-2019)

Table: Population: Babies (Russia 2012-2019)

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

Table: Population: Children (Russia 2012-2019)

Table: Population: Young Teens and Older Children (Russia 2012-2019)

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

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

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

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

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

Table: Population: Urban (Russia 2012-2019)

Macroeconomic Forecasts

Economic Analysis

Table: RUSSIA - Private Consumption Forecasts

- Table: RUSSIA - Government Consumption Forecasts
- Table: RUSSIA - Fixed Capital Formation Forecasts
- Table: RUSSIA - Net Exports Forecasts
- Industry Risk Reward Index
- Central And Eastern Europe Risk/Reward Index
 - Table: Central And Eastern Europe Retail Risk/Reward Index, Q116
- Russia - Risk/Reward Index
- Rewards
- Risks
- Market Overview
- Competitive Landscape
- Shopping Centres
- Mass Grocery Retail
- Fashion
- Home Improvement
- Pharmacies and Personal Care
- Glossary
- Methodology
- Industry Forecast Methodology
- Sources
- Risk/Reward Index Methodology
 - Table: Retail Risk/Reward Index Indicators
 - Table: Weighting Of Indicators

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