

Saudi Arabia Retail Report Q2 2016

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Abstracts

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BMI View: Saudi Arabia contains strong fundamentals for sustained growth in the retail sector over the medium-term, but the recent slump in oil prices will weigh on the economic growth and government spending in 2016. This has prompted a downward revision to our 2016 household expenditure growth in the retail sector from 8.1% to 7.8%.

Key Views & Developments

Our Country Risks team has recently revised down Saudi Arabia's growth forecasts for 2016 and 2017 reflecting the economically disruptive nature of the government's 2016 budget and the further collapse in global energy prices. The economic headwinds are expected to have a negative effect on the retail sector, as illustrated by point-of-sale transactions, which growth has slowed from the high of 42.5% in February 2015 to just 6.5% at the end of 2015.

Numerous government subsidy cuts on fuel, water, electricity, ethane and gas will raise consumer price inflation levels from 2.2% in 2015 to 3.5% in 2016 and 4.0% in 2017. Regional plans to introduce valueadded tax from 2018 onwards pose a further risk to our forecast. This could negatively affect household spending, especially in the non-essentials category.

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