

# Singapore Retail Report Q1 2016

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## Abstracts

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**BMI View:** Despite short-term headwinds, we believe that strong economic fundamentals will continue to drive growth in Singapore's retail market. We forecast headline household spending to increase by a compound annual growth rate (CAGR) of 4.9% over the next five years, reaching USD144.9bn in 2019. Consumer spending in will remain largely concentrated on four categories - housing and utilities, personal and insurance, recreation and culture as well as transport - which together are forecast to represent 62.3% of the total household expenditure in 2019. Rising incomes, highly developed financial services sector and cost-efficient public services will continue to fuel spending on luxury and non-essential goods and services.

Singapore is home to some of the most modern retail formats on the globe, with a large number of shopping mall complexes relative to country's rather small population size. Many shopping malls are adjoined to the subway (MRT) stations throughout the city. Orchard Road is the key shopping area for retailers of the traditional formats with a plethora of shopping malls and high-end shops and state of the art infrastructure and complimentary services. It is also the main shopping district, particularly for tourists, as shoppers look to take advantage of the low rate of sales tax in the country. Despite continued dominance of traditional retailers, e-commerce is starting to lift-off despite the slow initial growth. Online sales have a lot of potential to expand as smart-phone penetration rates in Singapore are exceptionally high. That said, considering small size of the city-state, the physical stores are rarely out of reach for consumers.

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