

Slovenia Retail Report Q4 2016

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Abstracts

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BMI View: Slovenia is on track to register a strong year for both its economy and the retail sector. We expect euro value of total household spending to expand by 2.3% this year, an acceleration from both of the preceding years. Declining unemployment and rising wages in public and private sectors will ensure stable growth in household income, which will in turn boost non-essentials spending. On the other hand, the government could face challenges in preserving medium-term growth, as it is expected to stabilise the rises in minimum wages and privatise the banks its owns.

Key Views and Developments

Spar remains the only mass grocery retailer, which continues to expand its network: the firm plans to reach 100 stores this year (up from 97 in the end of 2015), as well as six new franchised stores.

Mercator and Tuš, the largest Slovenian mass grocery retailers, are seeking ways to stay profitable in the saturated market: the former continues to refurbish its existing network (with four stores revamped in Q116) and the latter has been proposed to be turned into a cooperative by public study, following financial problems caused by unfettered expansion.

Inditex and H&M, two of the three largest foreign clothing retail groups in Slovenia, are shifting competitive efforts to e-commerce as both firms opened online stores in the country in the first half of 2016 as a part of regional expansion.

Budget deficit and public debt are both due to shrink this year. However, IMF

has warned that both figures could rise in 2017 and later if the government carries on with the current policies - specifically, its refusal to privatise the banks it owns. Business sentiment increased by 0.7% m-o-m in June but remains down by 0.7% on y-o-y terms, according to the Statistical Office of the Republic of Slovenia.

Despite a 1.4% decline in its dollar value, total household spending will expand by 2.3% in euro terms this year, beating our inflation forecast of 1.0% and growing in real terms.

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