

Turkey Retail Report Q1 2016

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Abstracts

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BMI View: While Turkey's economy has underperformed over the past few years, the recently elected AK Party has vowed to initiate a series of reforms to boost the economy and ensure the country retains its reputation as one of the world's most important economies. Furthermore we believe that new legislation, a recovery of the country's main trade partners as well as steady growth of household income will help generate new growth opportunities in the highly promising Turkish retail sector over the course of our forecast period.

While Turkey is expected rank as the fastest-growing economy among Organization for Economic Cooperation and Development (OECD) member countries in 2017, the economy has distantly underperformed in the past few years. The growth of the country's real GDP slowed to 2.2% in 2015 and is forecast to reach only 2.7% this year. With this level of growth, Turkey is facing problems more characteristic of mature EU economies rather than the world's most promising emerging retail markets.

Unemployment in Turkey reached a four-year high in 2015 and is forecast to average 10.5% throughout 2015. Some of the jobs that were created during the economic expansion, such as in the construction sector, are no longer needed, which has resulted in mismatches between labour supply and demand. Unemployment is particularly problematic among young people: youth (15-24 years) unemployment reached the 17.0% mark in July 2015, suggesting structural problems in Turkish labour infrastructure and career guidance. The higher levels of unemployment and more modest economic growth than expected are going to result in a weaker growth in household income over the coming few years.

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