

Turkey Retail Report Q3 2016

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Abstracts

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BMI View: The impact of Russian sanctions, the refugee crisis and terrorist attacks will be marked on the Turkish retail sector. Economic confidence began to improve again late in Q116 and is likely to continue to grow throughout the year. We expect a healthy increase in retail spending this year despite a lethargic tourism sector and more cautiousness among retailers. An improving labour market and rising household incomes will enable expansion beyond 2016 too.

Key Views & Developments

After a sharp deterioration in Turkey-Russia relations and the Islamic State attack in Istanbul, economic confidence rebounded in March, registering a 9.5% m-o-m increase, according to Turkish Statistical Institute. It will likely enable a stronger economic recovery from 2016 onwards.

Online retail is on the rise as Hepsiburada, the largest player in the market, opened its marketplace to conventional retailers, and Trendyol, an online retailer of fast fashion, announced a plan of initial public offering in 2017.

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