

Turkey Retail Report Q4 2016

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Abstracts

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BMI View: Turkey's retail industry benefits from a large urban population that is enjoying steadily rising incomes. Over our five-year forecast period to 2020 we expect economic growth to be fairly slow but steady, averaging 3.3% a year. This growth will support a rise in net household incomes from USD12,375 in 2016 to USD15,049 by 2020. However, in the medium term the retail sector will be held back by political and security concerns that will dampen both investor and consumer confidence, and that have already damaged Turkey's tourism industry. In the long term, though, significant opportunities will remain, particularly as retailers expand into second-tier cities.

Key Views And Developments

Total household spending is set to fall by 1.8% y-o-y in US dollar terms in 2016, although it will continue growing in lira terms, as the currency weakens against the dollar. However, over the rest of our forecast period to 2020 growth will pick up, growing by an average of 5.63% a year in US dollar terms.

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