

United Arab Emirates Retail Report Q1 2016

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Abstracts

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BMI View: We retain optimistic growth forecasts for the UAE's retail market.

The next four years leading to Dubai Expo 2020 will give a boost to the economic diversification, as gargantuan infrastructural and private projects pick up steam.

Consumer confidence is likely to remain intact and inbound tourism is set to persist, both of which will continue rewarding retailers with unparalleled opportunities until 2019.

The UAE is highly reliant on oil revenue; as a result, the fall in oil prices during the end of 2014 and beginning of 2015 resulted in a damage to the UAE economy.

After a shock, the real GDP increased by 3.9% in 2014, a marked improvement from growth of just 1.6% in 2010.

We expect to see real GDP growth reach 4.0% in 2015 and this will bode well for growth in the UAE's retail market.

Household spending is expected to increase as GDP increases due to higher levels of income.

The increase in household spending is driven by the increase in total households as well as the increase in households in the high-income bracket.

However, the increase in household spending is offset by the fact that almost 40% of it is consistently taken up on expenditure on housing and utilities due to the extremely high rates of rent in the UAE.

Outside of spending on housing and utilities, spending on food and drink represents the largest area of spending, whilst spending on clothing and footwear represents the fastest growing sub-sector during our forecast period.

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