

United Arab Emirates Retail Report Q4 2015

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Abstracts

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BMI View: Despite the fall in oil prices which damaged the oil dependent economy of the UAE, there are strong forecasts for growth in the region. With GDP expected to see growth of 4.0% in 2015, household spending is also expected to see strong growth during our forecast period. Most of this spending goes on housing and utilities, illustrating the high costs of living in the country; but there still exists a number of opportunities for retailers in the country.

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. However the prices have stabilised to around USD60 a barrel which looks to be the new normal, and the UAE economy continues to grow overall. 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 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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