

Venezuela Retail Report Q4 2015

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Abstracts

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BMI View: Our projections have been downgraded for growth rates across all sub-sectors of the retail sector. High inflation is a key driver behind this trend. The government has implemented price controls on certain goods, subsidising basics such as milk and soap. However, there are now severe shortages for many basic products and food staples, which has led to many retailers to limit the number of purchases consumers are able to make. The issue of chronic shortages has been compounded by currency controls which have restricted the number of dollars available for the purchase of imports.

As a result of high inflation and a chronic shortage of basic goods in Venezuela, together with an unstable economic outlook we maintain our negative outlook for household spending trends over the remainder of 2015 and the first half of 2016, and this will weigh on the retail sector's growth potential. Moreover, the tough regulatory environment looks set to remain a barrier to entry for international investors within the retail sector until 2019, while the difficulties surrounding importing items poses a significant risk, as does the ever thriving domestic black market. However, as the economy recovers, we expect the burgeoning middle-class with higher disposable incomes to stimulate growth across the retail sector.

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