



OXFORD
ECONOMICS

MY OXFORD RESEARCH PORTAL

June 2022



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Icon Legend

- Our icons are designed to provide a clear and memorable representation of both geographical and domain context for our subscriber



Global	Africa	Middle East & North Africa	Europe	Asia Pacific	Latin America	North America
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Macro Economics	Models & Scenarios	Cities	Industry	Tourism	Real Estate	Construction	Consulting	Presentations
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A stylized map background with a grid of streets. A red pin is stuck into the map, with a blue text box overlaid on it. The text box contains the text 'Homepage navigation' and a blue horizontal line below it. The map shows various colored areas representing parks, water, and buildings.

Homepage navigation

Category tree

You can browse content via the category tree and category tree landing pages

The screenshot displays the Oxford Economics website interface. At the top, the logo and navigation menu are visible. The main header features the slogan "Global analysis, local expertise". Below this, a navigation bar includes links for Home, Research, My Clippings (5), Databanks, What's New, Events & Webinars, Release Calendar, and About. The left sidebar contains a "Quick Search" box, "Popular Searches" (Ukraine-Russia, Research Briefings, Cities, Africa, Coronavirus, Construction, GDP, Inflation, Electronics, United Kingdom, Macro, Industry, Detail, Technology, Agriculture, Climate change, Trade, Brexit, Oil), "Pinned Searches" (Hungary, real estate, Climate, spain, industrial productio...), and a "Contact Account Manager" section for Madeleine Henry, Senior Account Manager. The central area features a "Category tree" with expandable sections: Analysis by Region, Macro, Models & Scenarios, Climate, Cities, Industry, Tourism, Real Estate, Construction, Africa In Detail, Databanks, Consulting, and Presentations. The right side of the page shows a "MY SUBSCRIPTION RESEARCH" section with a list of articles, each with a date, a title, and a brief summary.

OXFORD ECONOMICS

Site Guide ⓘ My Profile

Home Research My Clippings (5) Databanks What's New Events & Webinars Release Calendar About

Global analysis, local expertise

Quick Search ⓘ

+ Advanced Search

Popular Searches

Ukraine-Russia | Research Briefings

Cities | Africa | Coronavirus

Construction | GDP | Inflation

Electronics | United Kingdom | Macro

Industry | Detail | Technology

Agriculture | Climate change | Trade

Brexit | Oil

Pinned Searches

Hungary | real estate

Climate | spain

industrial productio...

Contact Account Manager

Madeleine Henry
Senior Account Manager

Contact now

MY SUBSCRIPTION RESEARCH EVENTS & WEBINARS NOTES (17) MOST VIEWED RESEARCH ELSEWHERE ON MY OXFORD

1 Jun 2022 **Uganda: Food prices skyrocket, leading to elevated inflation reading**

In the latest consumer price index (CPI) publication from the Uganda Bureau of Statistics (Ubos), headline CPI inflation was recorded at 6.3% y-o-y for May – another acceleration after previously rising to 4.9% y-o-y in April.

1 Jun 2022 **Nordics: Divergent PMI readings as supply chain bottlenecks ease**

Sweden's manufacturing PMI ticked up by 0.3pts to 55.2 in May, with small improvements in new orders, output and employment after recent drops. Meanwhile, supply bottlenecks improved slightly, although delivery times and input prices remain at highly elevated levels.

1 Jun 2022 **UK: Manufacturing activity weakens, but inflation stays high**

Supply chain disruption, the war in Ukraine, and the squeeze on consumers' spending power were all cited as factors behind a drop in May's UK manufacturing PMI to a seven-month low of 54.6. And rises in cost and price pressures facing manufacturers remained close to record highs.

1 Jun 2022 **Asia Pacific: PMIs diverge in May on differing demand conditions**

Asia's manufacturing continued to expand in May. But with cost pressures rising across the board, the overall pace likely eased further, even as China's PMI improved, and Vietnam rebounded.

1 Jun 2022 **Ghana: Ban on grain exports extended**

Ghanaian authorities have opted to extend its ban on grain exports. The ban was initially introduced in September 2021 in an attempt to improve food security and boost domestic poultry and livestock production. Now it has been extended to September this year due to the impact that the Russia-Ukraine war has had on food prices and, in turn, inflation.

1 Jun 2022 **Taiwan: GDP growth of 2.8% forecast for 2022 despite Q2 disruption**

Taiwan's real GDP increased by 3.1% y/y in Q1 2022, with quarterly growth of 1.1% driven by a surprisingly strong export performance. We maintain a relatively conservative outlook and see GDP growing 2.8% in 2022 given that downside risks are considerable.

Tabs

The most recent research published

Events & Webinars

Shared notes by colleagues

The most viewed research across all available content

Explore non-subscribed Content

The screenshot shows the Oxford Economics website interface. At the top, there is a navigation bar with tabs: Home, Research, My Clippings (5), Databanks, What's New, Events & Webinars, Release Calendar, and About. Below this is a header with the text "Global analysis, local expertise". A secondary navigation bar contains tabs for "MY SUBSCRIPTION RESEARCH", "EVENTS & WEBINARS", "NOTES (17)", "MOST VIEWED RESEARCH", and "ELSEWHERE ON MY OXFORD".

On the left side, there is a search section with a "Quick Search" box and a "Poplar Searches" list. Below that is a "Pinned Searches" section. At the bottom left, there is a "Contact Account Manager" section for Madeleine Henry, Senior Account Manager, with a "Contact now" button.

On the right side, there is a list of research articles. The first article is titled "Uganda: Food prices skyrocket, leading to elevated inflation reading" dated 1 Jun 2022. The second is "Nordics: Divergent PMI readings as supply chain bottlenecks ease" dated 1 Jun 2022. The third is "UK: Manufacturing activity weakens, but inflation stays high" dated 1 Jun 2022. The fourth is "Asia-Pacific: PMI continues to show mixed conditions" dated 1 Jun 2022. The fifth is "Ghana: Ban on grain exports extended" dated 1 Jun 2022. The sixth is "Taiwan: GDP growth of 2.8% forecast for 2022 despite Q2 disruption" dated 1 Jun 2022.

Blue arrows from the text boxes on the left point to the following elements on the page:

- "The most recent research published" points to the "MY SUBSCRIPTION RESEARCH" tab.
- "Events & Webinars" points to the "EVENTS & WEBINARS" tab.
- "Shared notes by colleagues" points to the "NOTES (17)" tab.
- "The most viewed research across all available content" points to the "MOST VIEWED RESEARCH" tab.
- "Explore non-subscribed Content" points to the "ELSEWHERE ON MY OXFORD" tab.

Search

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Global analysis, local expertise

Quick Search ⓘ

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Popular Searches

Ukraine-Russia | Research Briefings

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Construction | GDP | Inflation

Electronics | United Kingdom | Macro

Industry | Retail | Technology

Agriculture | Climate change | Trade

Brexit | Oil

Pinned Searches

Hungary | real estate

Climate | spain

industrial productio...

Contact Account Manager

Madeleine Henry
Senior Account Manager

Contact now

MY SUBSCRIPTION RESEARCH EVENTS & WEBINARS NOTES (17) MOST VIEWED RESEARCH ELSEWHERE ON MY OXFORD

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Search across full report catalogue

Pin searches to easily access specific search parameters

Advanced search

Run an advanced search and filter down the search results by Category, Analyst, Published date etc

The screenshot displays the Oxford Economics website's advanced search interface. At the top, the navigation bar includes 'Home', 'Research', 'My Clippings (5)', 'Databanks', 'What's New', 'Events & Webinars', 'Release Calendar', and 'About'. The 'Advanced Search' section features a search bar, a 'Reset' button, and options to search for 'any word' (selected) or 'all words'. Below the search bar, there are two main filter sections: 'Find products about' and 'Other filters'. The 'Find products about' section lists various categories with expandable options (+): ANALYSIS BY REGION, MACRO, MODELS & SCENARIOS, CLIMATE, CITIES, INDUSTRY, TOURISM, REAL ESTATE, CONSTRUCTION, AFRICA IN DETAIL, DATABANKS, CONSULTING, PRESENTATIONS, KEY THEMES, and ANALYSTS. The 'Other filters' section includes PUBLISHED DATE and STATUS. At the bottom left, there is a 'Contact Account Manager' section for Madeleine Henry, Senior Account Manager, with a 'Contact now' button. The search results are displayed on the right, showing a list of articles with their dates, titles, and authors. The articles include: 'Sierra Leone: Growth should persist despite mounting external pressures' by Pieter Scribante; 'Uganda: Food prices skyrocket, leading to elevated inflation reading' by Greg Struyweg; 'Nordics: Divergent PMI readings as supply chain bottlenecks ease' by Daniel Kral; 'UK: Manufacturing activity weakens, but inflation stays high' by Andrew Goodwin; and 'Asia Pacific: PMIs diverge in May on differing demand conditions' by Priyanka Kishore. Each article includes a small globe icon and a 'NEW' badge.

Search results

The screenshot shows the Oxford Economics website search results for the term "economy". The page features a navigation bar with links to Home, Research, My Clippings (5), Databanks, What's New, Events & Webinars, Release Calendar, and About. A search bar at the top left contains the term "economy". Below the search bar, there are tabs for "All", "Figures", and "Tables". The search results are displayed in a list format, with each result including a date, a title, a brief description, and the author's name. The results are: 27 May 2022: Egypt: Economy much weaker than we are being led to believe; 20 May 2022: Ireland: The economy continues to experience "growthflation"; 19 May 2022: Denmark: Economy begins 2022 with a small contraction; 25 May 2022: Syria: War-ravaged economy, currency crisis undermine outlook. On the left side, there is an "Advanced Search" sidebar with various filters such as "ANALYSIS BY REGION", "MACRO", "MODELS & SCENARIOS", "CLIMATE", "CITIES", "INDUSTRY", "TOURISM", "REAL ESTATE", "CONSTRUCTION", and "AFRICA IN DETAIL". At the bottom left, there is a "Contact Account Manager" section for Madeleine Henry, Senior Account Manager. On the right side, there are several charts and graphs, including "Egypt Real GDP growth" and "Section: Economic risk evaluation".

Filter by all results or by figures or tables with the search result in

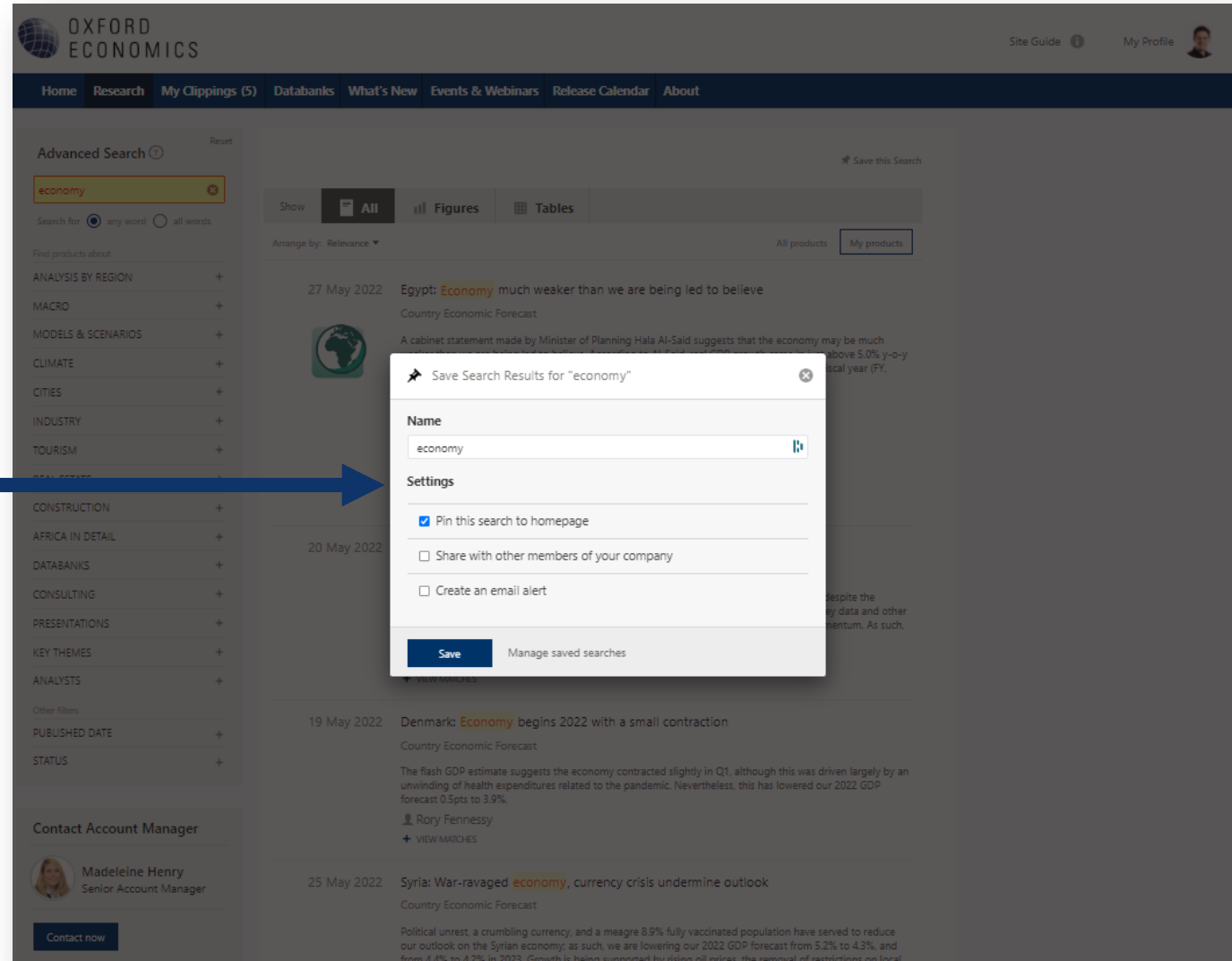
Toggle between content you have a license to or all content available

Quick Preview with search terms highlighted

Saved search alerts

Save an advanced search and:

1. Pin to the homepage
2. Share search with colleagues
3. Create a daily or weekly email alert



The screenshot displays the Oxford Economics website interface. At the top, the navigation bar includes 'Home', 'Research', 'My Clippings (5)', 'Databanks', 'What's New', 'Events & Webinars', 'Release Calendar', and 'About'. The main content area features an 'Advanced Search' section with a search input field containing the word 'economy'. Below the search bar, there are options for 'Show' (All, Figures, Tables) and 'Arrange by' (Relevance). A modal dialog box is open, titled 'Save Search Results for "economy"', with a close button in the top right corner. The dialog contains a 'Name' field with 'economy' entered, a 'Settings' section with three checkboxes: 'Pin this search to homepage' (checked), 'Share with other members of your company' (unchecked), and 'Create an email alert' (unchecked). At the bottom of the dialog are 'Save' and 'Manage saved searches' buttons. The background shows search results for 'economy', including articles from May 2022 such as 'Egypt: Economy much weaker than we are being led to believe' and 'Denmark: Economy begins 2022 with a small contraction'.



Report features

Report actions

The screenshot shows the Oxford Economics website interface. At the top left is the Oxford Economics logo. A navigation bar includes links for Home, Research, My Clippings (5), Databanks, What's New, Events & Webinars, Release Calendar, and About. A search bar contains the text 'economy'. The main content area features a report titled 'Egypt: Economy much weaker than we are being led to believe' by Callee Davis, dated 27 May 2022. An 'Actions' menu is open over the report, listing options: COPY TO CLIPPINGS, TRANSLATE, DOWNLOAD/PRINT, and COMPARE. Below the actions menu is an 'Attachments' section with a file named '20220527 Egypt CEF Appendix.pdf'. A sidebar on the left contains contact information for Madeleine Henry, Senior Account Manager, with a 'Contact now' button.

Add a full report or section to clippings

Translate the document to another language

Download the report
Office-branded templates

Compare this report against another report or chapter/section in a current report

Search within

Search within a document

OXFORD ECONOMICS

Site Guide My Profile

Home Research My Clippings (5) Databanks What's New Events & Webinars Release Calendar About

← Search for 'economy'

Egypt: Economy much weaker than we are being led to believe 27 May 2022 Edit

consumer

Contact Account Manager

Madeleine Henry Senior Account Manager

Contact now

Egypt: Economy much weaker than we are being led to believe

Country Economic Forecast

27 May 2022 by Callee Davis

- A cabinet statement made by Minister of Planning Hala Al-Said suggests that the economy may be much weaker than we are being led to believe. According to Al-Said, real GDP growth came in just above 5.0% y-o-y in Q1 2022, while the economy is expected to expand by around 6.2% y-o-y in the 2021/22 fiscal year (FY, ending in June). While these figures look impressive in annual terms, a closer look at the available data suggests that the economy is in recessionary territory. Given the strong economic growth recorded in Q3 2021 (+9.8% y-o-y) and Q4 2021 (+8.2% yoy), real GDP growth would have to contract by around 0.9% q-o-q in Q1 2022 and a further 1.8% q-o-q in Q2 2022 to reach the annual GDP figures quoted by Al-Said. We have therefore cut our real GDP growth forecast by 3.3 ppts to 1.3% this year, from 4.6% in the April forecast round.
- The economic slump is being driven by softening **consumer** demand as the period of exceptionally strong household consumption seen since the start of the Covid-19 pandemic comes to an end. While we had always expected **consumer** demand to soften over the next two years, this has been hastened by war-induced inflation. In April, headline inflation rose to 13% yo-y, from 10.5% y-o-y in March, and we do not expect price pressures to ease anytime soon. In fact, we see inflation peaking at around 18.5% y-o-y in August. Soaring inflation has prompted stronger-than-expected tightening by the Central Bank of Egypt (CBE) which will increase the cost of borrowing and further squeeze real incomes going forward.

Actions

- COPY TO CLIPPINGS
- TRANSLATE
- DOWNLOAD/PRINT
- COMPARE

Attachments

- 20220527 Egypt CEF Appendix.pdf

Other Users Also Viewed

Global: Why high inflation isn't here to stay

Research Briefing

27 May 2022

The big concern about inflation is no longer the level at which it will peak, but where it will settle in 2023 and after. In our view, concerns about a prolonged period of high inflation are overblown. We expect food and energy prices to remain high...

Egypt: Inflation to hurt economy the most

29 Apr 2022

Notes

Add a note for yourself or to share with colleagues

The screenshot displays the Oxford Economics website interface. At the top, the Oxford Economics logo is on the left, and 'Site Guide' and 'My Profile' are on the right. A navigation bar includes links for Home, Research, My Clippings (5), Databanks, What's New, Events & Webinars, Release Calendar, and About. Below the navigation bar, a search bar contains the text 'Search for 'economy''. A breadcrumb trail shows 'Egypt: Economy much weaker than we are being led to believe' dated 27 May 2022. A search filter for 'consumer' is active. On the left, a 'Contact Account Manager' section features Madeleine Henry, Senior Account Manager, with a 'Contact now' button. The main article is titled 'Egypt: Economy much weaker than we are being led to believe' and is categorized as a 'Country Economic Forecast'. It is dated 27 May 2022 and written by Callee Davis. The article text includes two bullet points: one discussing a cabinet statement by Minister of Planning Hala Al-Said regarding GDP growth forecasts, and another discussing the economic slump driven by softening consumer demand. On the right, a 'NOTES' sidebar is open, showing a text input field with the placeholder 'Add your notes here...', a 'Share note with users in your account' checkbox, and an 'Add note' button. A blue arrow points from the text box on the left to the 'Add note' button in the sidebar.

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Site Guide My Profile

Home Research My Clippings (5) Databanks What's New Events & Webinars Release Calendar About

← Search for 'economy'

Egypt: Economy much weaker than we are being led to believe 27 May 2022

consumer

Contact Account Manager

Madeleine Henry Senior Account Manager

Contact now

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NOTES

Add your notes here...

Share note with users in your account

Add note

Clippings

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Your Clippings (2)

Clear clippings

Expand All Collapse All

Israel: Our GDP growth forecasts remain at 5.2% this year and 4.2% in 2022 despite the recent rise in Covid cases (26 Aug 2021)

Despite better-than-expected annualized growth of 15.4% in Q2, we have kept our 2021 GDP growth forecast at 5.2% due to the recent rapid spread of the Delta variant and rising number of infections amid mounting evidence of lower efficacy of vaccines over the long term. New daily infections rose to over 7,000 in late-August. On 1 August, Israel became the first country in the world to begin offering third vaccine doses to people over 60, and by mid-August to those over 40. On the political front, the three-month old Naftali Bennett coalition government had an early win as the cabinet unanimously approved a state budget for 2021-22 in August, over three years since the government last passed a budget. But passage through the very divided parliament may still prove challenging.

Source: Israel: Our GDP growth forecasts remain at 5.2% this year and 4.2% in 2022 despite the recent rise in Covid cases > 20210825_CEF_ISRAEL.pdf

Egypt: Economy much weaker than we are being led to believe (27 May 2022)

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Save Selection

OR

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Reports Made by Other Oxford Economics Ltd Users

Demo report	17 May 2022
demo report	3 May 2022
Lazard Africa	29 Mar 2022
Clipping Selection TEST	4 Mar 2022
Feb 2022	

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Interactive data

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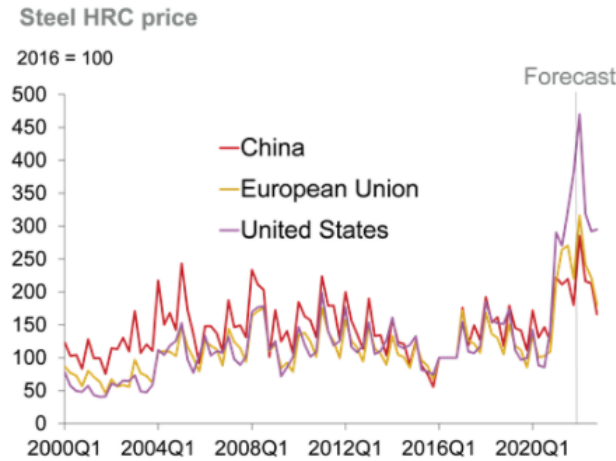
 **Fabian Krug**
Associate Director

Contact now

Source: Oxford Economics

The lack of materials has also been constraining US firms. According to the US Census Bureau Quarterly Survey of Plant Capacity Utilization, one-third of manufacturing firms reported that “insufficient supply of materials” was the reason for reduced production in Q2 2021. In recent interviews with executives at consumer technology companies, senior managers report shortages not only of semiconductors, but of basic components like transistors and glue. The sectors grappling with the leanest inventories are leather, machinery, computers and electronics, electrical equipment, and textile manufacturing. Input limitations are not only driven by physical constraints but also by surging prices. Since the onset of the pandemic, US steel prices, for instance, have nearly doubled, with a reversal expected to start only from Q1 2022 (Chart 4).

Chart 4: Rise in input prices has exacerbated physical goods shortages



Steel HRC price
2016 = 100

Forecast

— China
— European Union
— United States

2000Q1 2004Q1 2008Q1 2012Q1 2016Q1 2020Q1

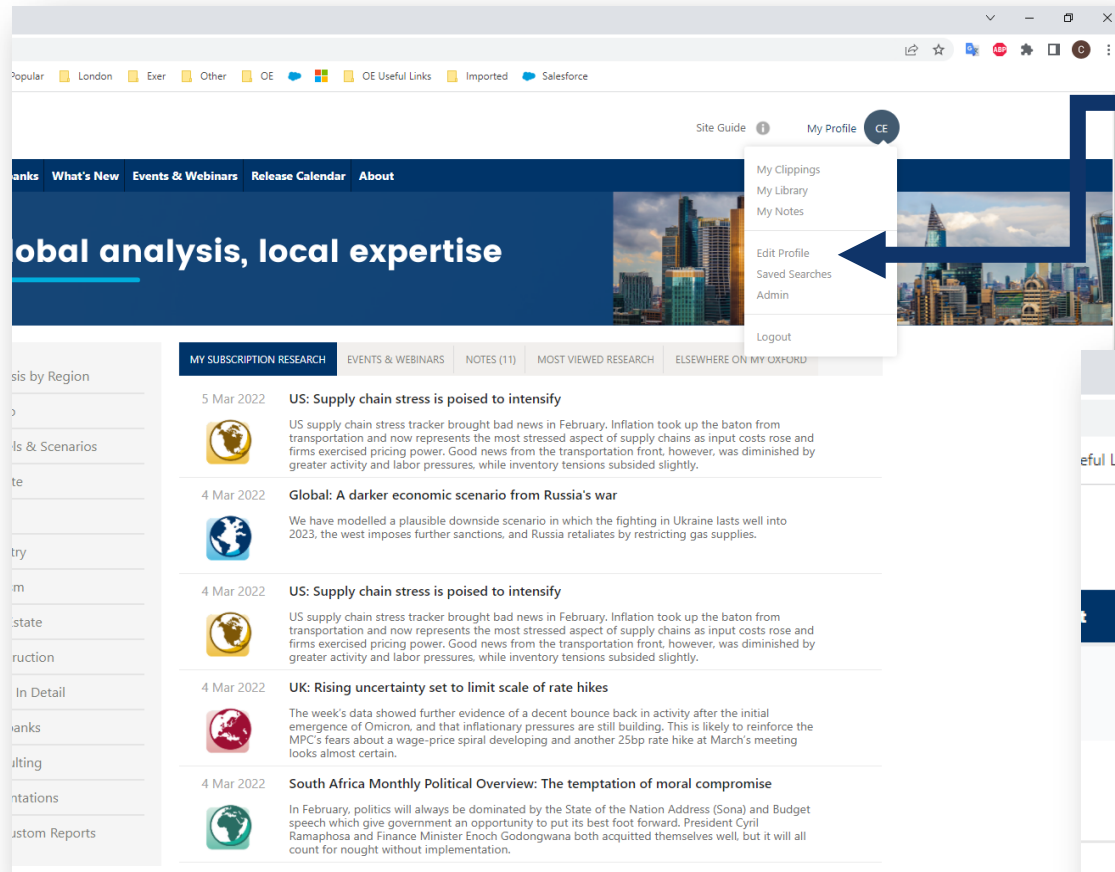
Source: Oxford Economics

Access interactive data when included as part of chart exhibits and view or download direct to Excel



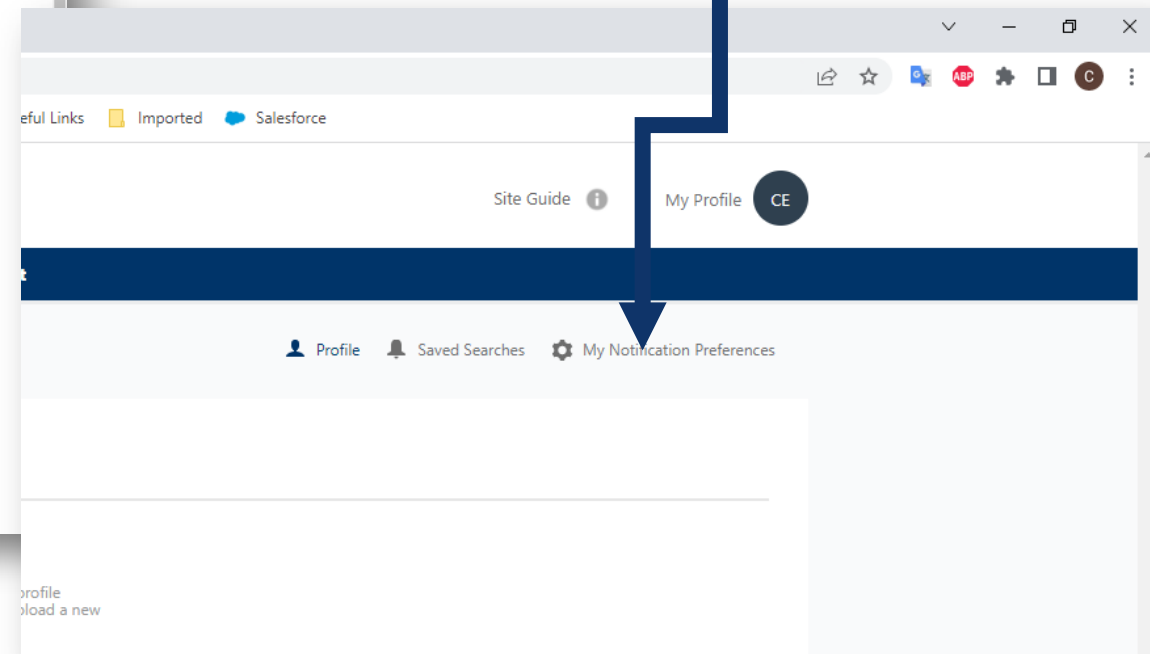
Email Notifications

Access Notification Settings



Select and update email notification preferences:

1. Edit Profile
2. My Notification Preferences



Select Notification Settings

The screenshot shows the 'Emailing Service' configuration page. At the top, there are tabs for different categories: MACRO, CITIES, INDUSTRY, TOURISM, CONSTRUCTION, MODELS & SCENARIOS, CLIMATE, REAL ESTATE, and AFRICA IN DETAIL. Below these are 'Select All' and 'Select None' buttons. The main area contains a grid of notification categories, each with a 'Select Your Options' dropdown and 'Include all'/'Remove all' buttons. At the bottom, there are sections for 'Notification Frequency' (Instant, Daily Digest, Weekly Digest) and 'Notification Format' (Full Report, Report Summary), followed by a 'Save' button and a footer with a support email address.

Choose when to receive email alerts

Navigate between research lines

Choose which geographies/sectors/asset classes for which you want to receive notifications

Select to receive full report or executive summary

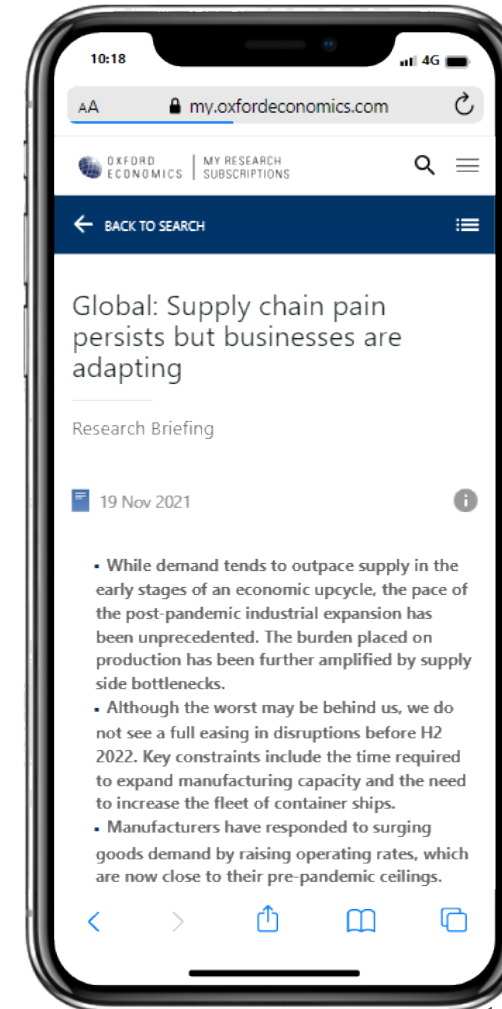
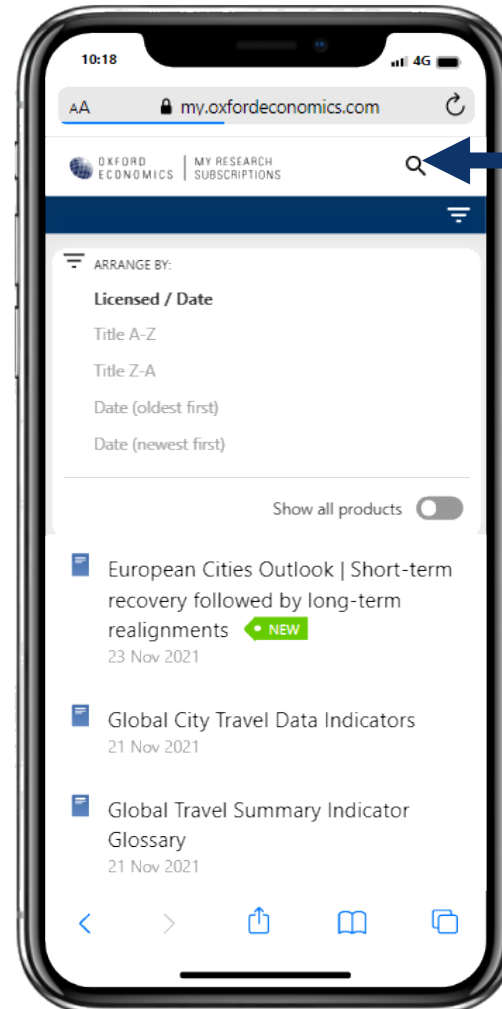
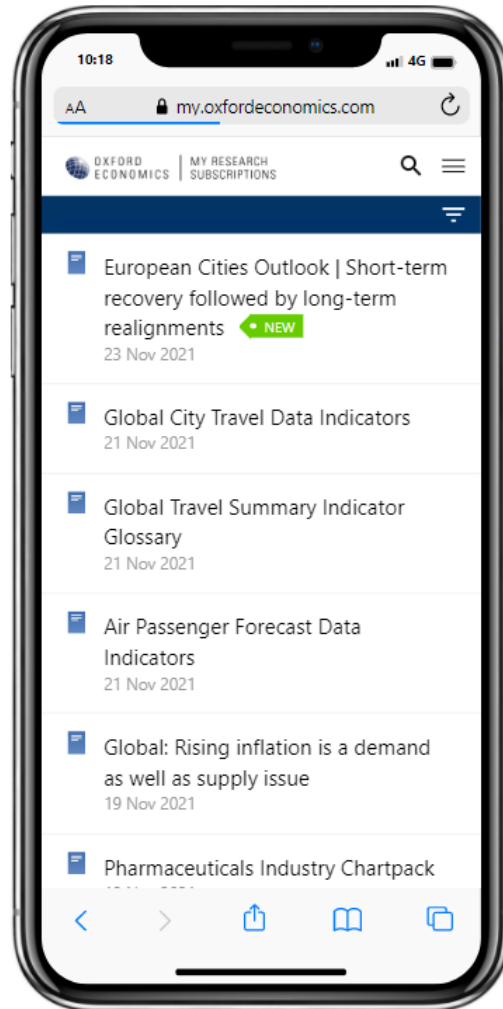
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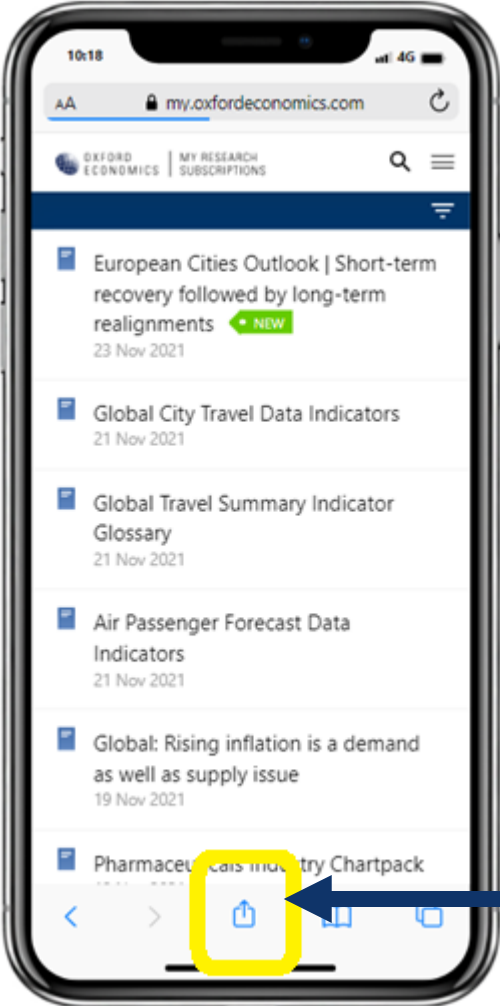
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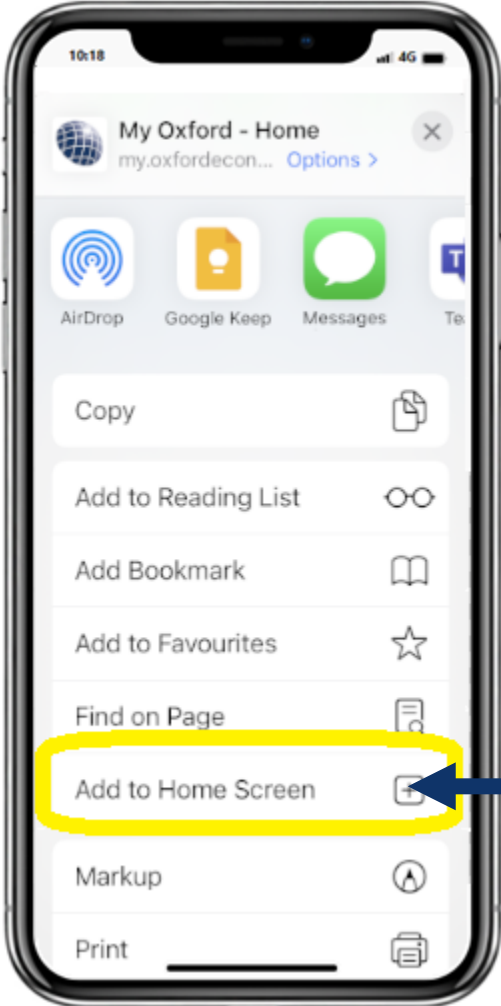
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