

Czech Republic Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: A small downgrade to the forecast in Q4 based on a softer economic outlook does not affect the Czech Republic's status as the most lucrative consumer electronics devices market in Central and Eastern Europe. We still expect income growth and koruna appreciation to result in relatively strong spending growth throughout the medium term, with a CAGR of 5.3% envisaged throughout 2016-2020. There will also be support from product cycles, which are expected become more favourable in the PC and AV segments compared to 2014-2015. However, in another reversal of the trend from recent years, in the smartphone segment we expect saturation to be a drag.

Latest Updates & Industry Developments

Computer Hardware Sales: USD1.06bn in 2016 to USD1.3bn in 2020, a compound annual growth rate (CAGR) of 5.2%. A more stable market expected after volatility in recent years, with growth set to be supported by rising incomes, but there is downside should increasingly powerful smartphones cannibalise PC replacement spending.

AV Sales: USD534mn in 2016 to USD632mn in 2020, a CAGR of 4.3%. Smart TV and Ultra-HD upgrade demand, alongside koruna appreciation will return the market to growth, but it will not come close to the heights of the flat-panel upgrade and digital camera boom.

Handset Sales: USD732mn in 2016 to USD923mn in 2020, a CAGR of 6.0%. Koruna appreciation should boost smartphone selling prices, but volume growth will decelerate significantly as the pool of first-time buyers continues to shrink.

Contents

BMI Industry View

SWOT

Industry Forecast

Table: Consumer Electronics Overview (Czech Republic 2014-2020)

Industry Risk/Reward Index

Table: Europe Consumer Electronics Risk/Reward Index, Q4 2016

Market Overview

Table: PC Sales (Czech Republic 2014-2020)

AV

Table: AV Sales (Czech Republic 2014-2020)

Mobile

Table: Mobile Communications (Czech Republic 2014-2020)

Industry Trends And Developments

Consumer Electronics Trade

Table: CEE Consumer Electronics Trade, 2010-2015

Table: Czech Republic Consumer Electronics Trade, 2010-2015

Consumer Electronics Industry Analysis

Table: Czech Republic Consumer Electronics Industry Performance, 2009-2014

Regulatory Development

Competitive Landscape

Czech Republic Consumer Electronics Companies

Consumer Electronics Vendors - EMEA, 2015

Table: Computer Hardware

Table: TV Sets

Table: Mobile Phones

Retailers

Table: Electronics Retailers

Table: E-Commerce Retailers

Demographic Data

Demographic Forecast

Table: Population Headline Indicators (Czech Republic 1990-2025)

Table: Key Population Ratios (Czech Republic 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Czech Republic 1990-2025)

Table: Population By Age Group (Czech Republic 1990-2025)

Table: Population By Age Group % (Czech Republic 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Consumer Electronics Risk/Reward Index Indicators

Table: Weighting Of Indicators

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