

# India Consumer Electronics Report Q4 2015

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## Abstracts

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BMI View: India's status as a large emerging market that is making progress on the policy environment for a range of sectors, combined with its late developer status in terms of consumer electronics device adoption rates, means we expect it to be a regional outperformer over the medium term. We expect the market to remain on a strong growth trajectory 2015-2019, with particularly robust demand growth for computer hardware and handsets expected. We forecast the total consumer electronics spend in India will increase by 6.7% in US dollar terms in 2015 to USD69.4bn, and then reach USD90.3bn in 2019. We expect mediumterm growth will be driven by rising incomes, declining device prices and the fact that 45% of India's population is under 25.

Headline Expenditure Projections:

Computer Hardware Sales: USD19.8bn in 2014 to USD20.8bn in 2015; +5.0% in US dollar terms. The tablet market is expected to return to growth after a contraction in 2014, but it will be on a slower growth trajectory than during the initial boom and rapid diffusion of ownership among the core market.

AV Sales: USD14.2bn in 2014 to USD14.7bn in 2015; +3.3% in US dollar terms. AV forecast downgraded in Q3 2015 after slower than expected TV set value growth and we expect it to be the underperforming segment of the market again in 2015.

Handset Sales: USD31.1bn in 2014 to USD33.9bn in 2015; +9.3% in US dollar terms. The smartphone boom will ensure handset sales are again the outperforming category in 2015, but a penetration plateau and price erosion mean the growth rate is expected to be surpassed by the PC market over the

medium term.

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