

Venezuela Consumer Electronics Report Q1 2016

<https://marketpublishers.com/r/V21074DCFD0EN.html>

Date: December 2015

Pages: 65

Price: US\$ 1,295.00 (Single User License)

ID: V21074DCFD0EN

Abstracts

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BMI View: We had downgraded our forecasts for the Venezuelan consumer electronics market in our Q4 2015 report to reflect the nature of the macroeconomic crisis the country. We have left our forecasts for the market unchanged in our Q116 report update. We are now anticipating a modest recovery to take place in the market in 2016 as economic conditions improve. Nevertheless, we are cautious in our forecasts and hold the opinion that if the macroeconomic fundamentals of Venezuela deteriorate over the coming weeks, we will undertake another significant downwards revision of our forecast for our upcoming update.

Our previous downgrade was, however, relatively minor in the context of our pre-existing view for Venezuela to be the underperforming consumer electronics market globally. This view was based on devaluation and the impact on device affordability for local consumers where local wage inflation trails far behind device price inflation. Meanwhile, the push by the government to implement the 'fair price' law in H114, which restricted vendor margins to 30%, means vendors face continued political as well as economic risk factors. The law adds to a hostile business environment and exacerbates existing challenges for vendors, including currency weakness and economic, political and security risks that are weighing on purchasing power and consumer confidence.>

Contents

BMI Industry View

Latest Updates & Developments

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Venezuela 2013-2019)

Industry Risk Reward Index

Table: Americas Risk/Rewards Index, Q1 2016

Market Overview

Recent Developments

Computers

Table: PC Sales (Venezuela 2013-2019)

AV Devices

Table: AV Sales (Venezuela 2013-2019)

Mobile Handsets

Table: Mobile Communications (Venezuela 2013-2019)

Competitive Landscape

International Companies

Table: Samsung Electronics

Local Companies

Table: S?ragon

Table: Venezolana De Industria Technologica (VIT)

Table: Venezolana de Telecomunicaciones (Vtelca)

Regulatory Development

Table: Regulatory Authority

Demographic Forecast

Demographic Outlook 2015

Table: Population Headline Indicators (Venezuela 1990-2025)

Table: Key Population Ratios (Venezuela 1990-2025)

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

Table: Population By Age Group (Venezuela 1990-2025)

Table: Population By Age Group % (Venezuela 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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