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Argentina Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We hold the view that 2016 will witness the Argentine consumer electronics market decline significantly in US dollar terms due to the sharp devaluation of the peso. We had changed our forecasts in the Q415 report to reflect on the positive growth in 2015 but we expect the market to again be disrupted by significant peso depreciation against the US dollar in 2016, which will have the most severe impact on the PC and AV segments, extending the run of handset spending outperformance. We believe the outlook for Argentina is stronger over the medium term, particularly from 2017-2019. Areas of growth we identify include smartphones, tablets, hybrid notebooks and smart TVs. However, we highlight there is considerable downside risk with Argentina vulnerable to external shocks should the global economic climate become more hostile.

Headline Expenditure Projections

Computer Hardware Sales: USD1.99bn in 2015 to USD1.72bn in 2016, a decrease of 13.5%. Peso devaluation will hamper the growth of the PC market significantly in 2016.

AV Sales: USD2.19bn in 2015 to USD1.81bn in 2016, a contraction of 16.8%. AV sales are expected to underperform in 2016 as a result of negative impact of peso depreciation being exacerbated by the fact TV set demand was brought forward to 2014 by the FIFA World Cup.

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