

Australia Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Macroeconomic conditions will continue to weigh on the Australian consumer electronics market in 2016, with another year of contraction forecast in US dollar terms. The outlook is however brighter than 2015 and we envisage a return to growth in local currency terms in 2016 as product trends become more supportive. The market is expected to continue to strengthen over the medium term, albeit with only slow and stable growth due to the maturity of the market and most product categories reliant on replacement spending. We envisage a CAGR of 2.4% over 2016-2020 to a total of USD12.4bn in 2020.

Latest Updates And Industry Developments

Computer Hardware Sales: USD4.5bn in 2016 to USD4.8bn in 2020. After an ageing of the PC stock over recent years, there is potential for an uptick in spending as economic conditions strengthen, but cannibalisation of demand by mobile represents downside.

AV Sales: USD2.4bn in 2016 to USD2.7bn in 2020. Ultra-HD TV set upgrades will be a positive at the high-end of the market, while stabilisation of the digital camera market after steep declines in recent years will also support stronger performance.

Handset Sales: USD4.4bn in 2016 to USD5.0bn in 2020. The strength of demand for flagship smartphones, short-replacement cycles and upside from wearable devices underpins our expectation that the handset segment will outperform.

Contents

BMI Industry View

Latest Updates And Industry Developments

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Australia 2014-2020)

Industry Risk Reward Index

Table: Asia Pacific CE Risk/Reward Index, Q3 2016

Market Overview

Recent Developments

Computers

Table: PC Sales (Australia 2014-2020)

AV Devices

Table: AV Sales (Australia 2014-2020)

Table: Mobile Communications (Australia 2014-2020)

Industry Trends And Developments

Consumer Electronics Trade

Table: Developed APAC Consumer Electronics (CE) Trade, 2010-2015

Table: Australia Consumer Electronics (CE) Trade, 2010-2015

Consumer Electronics Industry Analysis

Regulatory Development

Table: Government Authority

Competitive Landscape

Retailers

Table: Selected Electronics Retailers

Table: Selected E-Commerce And Online Marketplaces

Consumer Electronics

Table: LG

Table: Olympus

Table: Panasonic

Table: Allphones

Table: Harvey Norman

Table: JB Hi-Fi

Table: The Good Guys

Demographic Forecast

Table: Population Headline Indicators (Australia 1990-2025)

Table: Key Population Ratios (Australia 1990-2025)

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

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

Table: Population By Age Group % (Australia 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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