

# Australia Consumer Electronics Report Q4 2016

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## Abstracts

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**BMI View:** We downgraded the consumer electronics spending forecast for Australia in the Q416 update, and now envisage total device spending will grow at a CAGR of 0.5% over 2016-2020 to USD12.5bn. Our USD forecast was affected by a revised AUD/USD outlook that no longer envisages AUD appreciation over 2018-2020. The device trend assessment is however largely unchanged and we still expect subdued volume growth across the market as a consequence of maturity, but with pockets of opportunity for vendors such as hybrid notebooks and Ultra-HD TV sets.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD5.2bn in 2016 to USD5.0bn in 2020. Hybrid notebooks are expected to be a growth area in what will otherwise largely be a flat market based on replacement device sales.

**AV Sales:** USD2.6bn in 2016 to USD2.6bn in 2020. AV market will not return close to previous highs, but after multi-year decline in value Ultra-HD TV set upgrades are a positive at the high-end of the market that should return the segment to modest growth from 2016.

**Handset Sales:** USD4.5bn in 2016 to USD4.9bn in 2020. A lucrative market based around flagship smartphones from Apple and Samsung, with upside from wearable devices, but core scenario is for only modest medium term growth due to smartphone saturation.

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