

Bahrain Consumer Electronics Report Q2 2016

<https://marketpublishers.com/r/BA2E80D05F5EN.html>

Date: February 2016

Pages: 53

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

ID: BA2E80D05F5EN

Abstracts

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BMI View: A combination of market saturation and economic uncertainty means the growth prospects for consumer electronics device spending growth in Bahrain are limited over 2016-2020. It will however continue to be a lucrative market for vendors with high incomes reflected in premium device bias, high prices and wide margins. Our forecast envisages growth in USD50,000+ annual income households will support some growth at the premium end of the market, but overall saturation in most device categories mean there is little low-hanging fruit for vendors. Under our core scenario, we envisage total device spending will grow at a CAGR of 1.5% over 2016-2020, but we caution that risks are weighted to the downside, with a sustained low in the oil price the most significant risk, but political unrest could also derail our core scenario.

Latest Updates & Industry Developments

Computer Sales: The market will increase from USD150mn in 2016 to USD165mn in 2019, at a CAGR of 2.5%. An ageing desktop and notebook stock and deferred purchases from 2015 and 2016 are behind our expectation that computer sales will register the strongest growth once economic conditions become more supportive.

AV Sales: The market will increase from USD125mn in 2016 to USD130mn in 2019, at a CAGR of 1.0%. Smart and Ultra-HD TV set upgrades will put the market on a stronger trajectory compared to recent years, but digital camera volumes will not recover after cannibalisation by smartphone proliferation.

Handset Sales: We forecast a growth from USD267mn in 2016 to USD279mn in 2019, at a CAGR of 1.1%. Saturated smartphone market means growth will be

far below the rates in the initial boom phase, but premium bias and short replacement cycles will nonetheless mean vendors can benefit.

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