

Bahrain Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: Bahrain has proved to be a lucrative consumer electronics device market for vendors, however the result of high incomes and demand for the latest products is that by 2016 most product categories are saturated - and so growth potential is limited. Over the medium term we expect to see a market where volume and value growth is modest, with a small boost from an expanding working age population, but also downside from form factor innovation that could see smartphones cannibalise demand for standalone devices such as tablets. Our core scenario is for total device spending to increase at a CAGR of 1.3% over 2016-2020.

Latest Updates & Industry Developments

Computer Sales: from USD143mn in 2016 to USD140mn in 2020, at a compound annual growth rate (CAGR) of -0.4%. PC saturation and tablet cannibalisation by smartphones means the market will enter a period of modest decline over the medium term.

AV Sales: from USD106mn in 2016 to USD115mn in 2020, at a CAGR of 1.9%. High-value Ultra-HD TV set upgrades by wealthy consumers will support growth as the market emerges from the post flatpanel boom contraction over the medium term.

Handset Sales: We forecast a growth from USD292mn in 2016 to USD316mn in 2020, at a CAGR of 1.9%. After a dip in 2016 as the smartphone market adjusts to replacement spending after the rapid proliferation of ownership, we forecast slow and steady growth based on an expanding population.

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