

Brazil Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: Economic and political crisis in Brazil has hit consumer electronics spending hard, with steep declines in 2015 and 2016. The outlook is subdued as a result of a sluggish economic recovery that means a bounce back in device spending is unlikely, with the purchasing power forecast to be well below the 2013-2014 peak, even by 2020. Nonetheless, the device market is forecast to return to growth from 2017 as the economic environment at least becomes less hostile, and we identify the handset segment as the largest opportunity where there is still capacity for first-time smartphone purchases to drive value growth. However, for the market as a whole we now forecast that spending will increase at a CAGR of just 3.6% over 2016-2020.

Latest Updates & Industry Developments

Computer Hardware Sales: USD8.1bn in 2016 to USD8.7bn in 2020. Outlook lowered as a result of the negative impact of smartphone ownership on PC replacement spending.

AV Sales: USD5.2bn in 2016 to USD5.7bn in 2020. A weak economic recovery will constrain the AV market where flat-panel TV sets are big-ticket items, and digital camera cannibalisation will continue to be a drag.

Mobile Handset Sales: USD9.4bn in 2016 to USD11.7bn in 2020. A dip in smartphone upgrade momentum in 2015 and 2016 means there is still upgrade potential over the medium term, which we believe will make handsets the outperforming segment to 2020.

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