

Bulgaria Consumer Electronics Report Q1 2016

<https://marketpublishers.com/r/B5A6743D5DEEN.html>

Date: November 2015

Pages: 64

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

ID: B5A6743D5DEEN

Abstracts

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BMI View: Lev depreciation against the US dollar hit consumer electronics demand in Bulgaria hard in 2015 through the erosion of household purchasing power and therefore reduce the affordability of imported hardware. We expect a recovery in 2016, albeit a limited one with growth of 1.6% forecast for the market as a whole, but with all three segments returning to growth. There will however be stronger growth over the medium term as economic conditions become more favourable, which will have a considerable impact on PC and AV sales that were hit hardest by lev depreciation. Low penetration across most device categories will allow vendors to tap into the first-time buyer and upgrade/replacement markets as incomes rise and confidence returns among households. Meanwhile, in the handset segment the growth trend will be determined to a greater extent by product adoption trends. As the smartphone market becomes more saturated, with first-time buyers accounting for a smaller share of annual sales, the overall market growth rate will slow.

Latest Updates & Industry Developments Computer Sales: USD350mn in 2016 to USD420mn in 2019, a CAGR of 6.4%. After a steep decline in 2015 we expect spending to recover 2016-2019, with underlying demand growth from low penetration rate and rising incomes boosted by deferred purchases from 2015.

AV Sales: USD171mn in 2016 to USD180mn in 2019, a CAGR of 1.9%. While the AV segment is forecast to recover 2016-2019, we expect it to be the underperforming segment as TV set price erosion and digital camera volume cannibalisation act as drags on growth.

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