

Bulgaria Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: We have left our core outlook unchanged for the Bulgarian consumer electronics market in our Q2 2016 report update. 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 USD431mn in 2020, a CAGR of 4.3%. After a steep decline in 2015 we expect spending to recover 2016-2020, with underlying demand growth from low penetration rate and rising incomes boosted by deferred purchases from 2015.

AV Sales: USD171mn in 2016 to USD178mn in 2020, a CAGR of 0.9%. While the AV segment is forecast to recover 2016-2020, we expect it to be the underperforming segment as TV set price erosion and digital camera volume

cannibalisation act as drags on growth.

Handset Sales: USD400mn in 2016 to USD475mn in 2020, CAGR of 4.1%. Increased saturation of smartphone market will result in growth deceleration as compared to 2011-2014, but growth opportunities remain and potential for increase in premium device sales in the later years of the forecast period.

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