

Bulgaria Consumer Electronics Q3 2012

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Abstracts

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BMI expects difficult trading conditions to persist in many segments of Bulgaria's consumer electronics market in 2012. The deterioration in the external environment and persistent concerns regarding the eurozone debt crisis will continue to weigh on Bulgarian consumer sentiment. We believe these factors will gradually subside as policy-makers attempt to tackle the debt issue. Growing affordability will drive consumer electronics purchases, with prices of key products such as notebooks and LCD TV sets dropping considerably. Growth areas in 2012 will include smartphones, TV sets and tablets.

Headline Expenditure Projections Computer Sales: US\$639mn in 2011 to US\$628mn in 2012, -2% in US dollar terms. Forecast in US dollar terms downwardly revised due to a sharp contraction in sales in Q411.

AV sales: US\$359mn in 2011 to US\$381mn in 2012, +6% in US dollar terms. Forecast in US dollar terms unchanged, with TV sets expected to provide the most dynamic development.

Handset sales: US\$226mn in 2011 to US\$264mn in 2012, +17% in US dollar terms. Forecast in US dollar terms unchanged with smartphones the main revenues growth driver. Risk/Reward Rating: Bulgaria's score was 40.8 out of 100.0. BMI expects rising penetration of consumer electronics devices such as smartphones and flat-screen TV sets and the country is in a favourable position to continue to improve its ranking over time.

Key Trends & Developments

BMI expects PC sales in 2012 to report a mild improvement on 2011, with modest growth in the notebook segment. Moreover, there should be a consolidation of prices, as vendors promote higher-end models. Tablets enjoyed rapid growth in the Bulgarian market, with a 50-fold increase in sales of the devices at the Multirama chain of consumer electronics retail stores.

The main AV growth area will be digital products such as flat-panel TV sets, which have become increasingly popular with consumers. As overall TV set sales have fallen, vendors and retailers have looked to product innovation to support revenues, with the introduction of LEDbacklit TV sets, 3D TV and smart TV sets.

Smartphones remain a relatively small segment of the Bulgarian mobile phone market, but the share of revenues is projected to equal that of feature phones by 2013, and to reach 70% by the end of the forecast period. The share of subscribers to Bulgarian mobile operator Vivacom's network that use smartphones increased to 50% during 2011.

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