

Bulgaria Consumer Electronics Report Q4 2015

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Abstracts

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BMI View: We revised both historical data and our forecast for consumer electronics spending in the Q415 update. Lev depreciation against the US dollar in 2015 will erode Bulgarian household purchasing power and therefore reduce the affordability of imported hardware. We expect the handset market will be the only segment to expand in 2015, with smartphone sales growth, the greater necessity of handset ownership and the ability of vendors and retailers to absorb some of the cost increase ensuring spending continues to grow in US dollar terms. The challenging operating environment is expected to ease over the medium term, with all three market segments expected to return to growth in 2016 and we highlight opportunities in the smartphone, flat panel TV set and low-cost Android tablet markets 2015-2019. 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.

Headline Expenditure Projections

Computer Sales: USD418mn in 2014 to USD349mn in 2015, a decline of 16.5%. Depreciation will hit PC sales through reduced affordability, while the decline in tablet sales will be exacerbated by the drop in volumes after rapid diffusion of ownership among the core consumer group.

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