

Chile Consumer Electronics Report Q4 2015

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Abstracts

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BMI View: Chile is the most lucrative consumer electronics market in Latin America in per capita terms, supported by an affluent consumer base, particularly in and around Lima. Our analysis of household income trends supports our view for expansion of the market for consumer electronics devices over the medium term, with a deepening of the mass market expected to yield opportunities to vendors through both first-time buyers and upgrade sales. The outlook is markedly weaker in 2015 when we expect peso depreciation to be a drag on market value growth by eroding Chilean household purchasing power in global markets, i.e. for imported devices. This effect will, however, be somewhat countered by lower oil prices that should feed through to a higher spending power at the consumer level. Despite some ambiguity, we expect 2015 to be the weakest year of growth in the forecast period due to peso depreciation, before a recovery in spending that strengthens in the latter years of our forecast period.

Headline Expenditure Projections

Computer Sales: USD1.26bn in 2014 to USD1.18bn in 2015, -6.1% in US dollar terms. A combination of peso depreciation and contraction of the tablet market after the initial boom and a lengthening of replacement cycles will result in a contraction of PC market spending in 2015.

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