

China Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We had downgraded our forecast in the previous report to reflect the general economic slowdown and the diminished growth prospects due to saturation in key categories such as smartphones, tablets and television sets. However, we hold a positive view of the Chinese consumer electronics market in 2016 and beyond as the sheer size of the market coupled with various rising consumer segments will lead to overall growth in the market. We believe vendors will be able to capitalize on economic trends and increase sales. Income growth and socioeconomic reforms announced by the government in late 2013 will boost consumption in the medium term and allow retailers to target higher margin premium device sales growth.

Headline Expenditure Projections

Computer hardware sales: USD77.5bn in 2015 to USD78.5bn in 2016, +1.3 in US dollar terms. Weaker than expected demand for notebooks and tablets reported by retailers in H115 resulted in a downgrade to the 2015 outlook but demand will begin to resume in 2016.

AV sales: USD30.14bn in 2015 to USD30.72bn in 2016, +1.9 in US dollar terms. Forecast downgraded in the Q4 update, but we continue to highlight significant upside in the games console market following the removal of the 15-year ban on the sale of such devices in China in July 2015 as these subsectors will begin to grow in 2016.

Contents

BMI Industry View

SWOT

Industry Forecast

Table: Consumer Electronics Overview (China 2013-2019)

Industry Risk Reward Ratings

Risk/Reward Index

Table: Asia CE Risk/Reward Index - Q116

Market Overview

Computers

Table: PC Sales (China 2013-2019)

AV Devices

Table: AV Sales (China 2013-2019)

Mobile Handsets

Table: Mobile Communications (China 2013-2019)

Competitive Landscape

International Companies

Table: Apple

Table: Foxconn (Hon Hai)

Local Companies

Table: TCL

Table: Founder Technology Group

Regulatory Development

Demographic Forecast

Table: Population Headline Indicators (China 1990-2025)

Table: Key Population Ratios (China 1990-2025)

Table: Urban/Rural Population & Life Expectancy (China 1990-2025)

Table: Population By Age Group (China 1990-2025)

Table: Population By Age Group % (China 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Consumer Electronics Risk/Reward Index Indicators

Table: Weighting Of Indicators

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