

China Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: The forecast for China's consumer electronics devices market was negatively impacted by a revision in the assessment for the CNY/USD exchange rate in the Q216 update, with our Country Risk team now expected more extensive depreciation. While affected headline market value figures, depreciation and wider economic uncertainty does not change our positive medium term outlook that continues to be based on the migration of Chinese households up the income scale over the medium term. We believe this will help to offset the slowdown in volumes that results from increased market saturation, and will provide vendors with opportunities for selling a larger share of premium devices over the medium term, if the pitfall of overcapacity is avoided. The core scenario continues to be positive in the Q216 update, however we do recognise increased uncertainty and significant downside to demand were a hard landing to materialise in China.

Latest Updates & Industry Developments

Computer Hardware Sales: USD74.7bn in 2016 to USD87.3bn in 2020, a CAGR of 4.0% in US dollar terms. Market maturity means growth will be slower than the decade to 2013, but rising incomes has upside for vendors to focus on higher price and margin PCs in the retail market.

AV Sales: USD28.9bn in 2016 to USD31.3bn in 2020, a CAGR of 2.0%. AV segment expected to underperform as digital camera and mp3 demand continues to fall, but smart and Ultra-HD TV sets will provide a more positive upgrade dynamic for the largest component of the market.

Handset Sales: USD103.8bn in 2016 to USD115.2bn in 2020, a CAGR of 2.6%.

Smartphone market saturation meant growth began to decelerate since 2014 but we expect handset sales to be the outperforming segment as shift towards flagships/premium smartphones raises the average selling price slightly 2016-2020.

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