

China Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Currency depreciation and wider economic uncertainty have impacted our headline market forecasts for 2016. However, we maintain a positive medium-term outlook on the sector. This hinges on an anticipated rise in household income, which will offset losses in sales volume with gains in value, and will create a key opportunity for vendors to target the expanding premium market. That said, a hard landing in China remains a downside risk to our outlook.

Latest Updates & Industry Developments

Computer Hardware Sales: USD74.7bn in 2016 to USD87.3bn in 2020, a compound annual growth rate (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%. The AV segment is 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 over 2016-2020.

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