

Colombia Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We forecast the Colombian consumer electronics market to rebound modestly in 2016 following a period of sharp contraction in 2015 due to significant peso depreciation vis-a-vis the US dollar. The medium-term outlook is significantly stronger however, with the exchange rate expected to stabilise from 2016, enabling the Colombian consumer electronics market to return to a robust growth trajectory based on rising incomes and modernisation. This will allow vendors to tap into the relatively low penetration rates in key device categories such as PCs, smartphones and flat panel TVs. One potential risk we highlight is our expectation that oil revenues are set to head lower in the coming years, which will force the government into a decision between cutting spending or relaxing its fiscal consolidation targets.

Headline Expenditure Projections

Computer Hardware Sales: USD1.3bn in 2015 to USD1.366bn in 2016; +5.2 in US dollar terms. The market will begin its recovery this year after a sharp decline in 2015.

AV Sales: USD1.257bn in 2015 to USD1.339bn in 2016; +6.5% in US dollar terms. AV segment will begin a recovery this year but we anticipate TV sales to be slow as the 2014 FIFA World Cup lead to significant TV upgrades.

Handset Sales: USD1.79bn in 2015 to USD1.99bn in 2016; +11.1% in US dollar terms. Higher margins for retailers and vendors compared to the PC and AV segments will help to insulate the handset segment this year against the worst ravages of depreciation in 2016 but consumer substitution for cheaper models will nonetheless result in value contraction in US dollar terms.

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