

Croatia Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We maintain a modestly subdued outlook for the Croatian consumer electronics market in our Q116 report update. We revised downwards our projections of the market in the Q415 report to capture the negative impacts of the kuna depreciation against the US dollar. In 2016, we believe the market will begin to stabilize and recover from the negative shocks of 2015. This year, the market will contract by a modest -0.4% before returning to positive growth in 2017 and beyond. There are however areas of opportunity, particularly from 2017, as vendors will be better positioned to tap into comparatively low penetration rates in device categories including tablets, hybrid notebooks, smartphones, smart TVs and UHD TV sets.

Headline Expenditure Projections

Computer Hardware Sales: USD310mn in 2015 to USD299mn in 2016. Kuna depreciation in 2015/16 will result in deferred purchases and the substitution for cheaper models, meaning the value decline will exceed that for PC volumes. Another drag on market value is the shift in sales towards cheaper tablets, which have lower average selling prices compared to the notebook units being cannibalised.

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