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Croatia Consumer Electronics Report Q2 2016

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Abstracts

BMI View: The Croatian consumer electronics market has been a regional underperformer with the economy in recession over 2009-2014, accompanied by kuna depreciation against the US dollar that extended into 2015. Our medium-term outlook is brighter, enabled by a return to GDP and consumption growth and kuna appreciation forecast for 2017-2020, that will underpin a consumer electronics CAGR of 3.7% over 2016-2020. Stronger sentiment and rising household incomes will boost the market as a whole, while we identify more specific opportunities in device categories with relatively low penetration rates such as tablets, hybrid notebooks, smartphones and smart TVs.

Latest Updates & Industry Developments

Computer Hardware Sales: USD265mn in 2016 to USD307mn in 2020, a CAGR of 3.7%. The market is replacement centric, with PC ownership widespread, and as such it is personal devices that we expect to benefit from a more supportive economic environment over the medium term.

AV Sales: USD232mn in 2016 to USD268mn in 2020, a CAGR of 3.6%. Smart TV upgrades, Ultra-HD in the high income niche, and a slower rate of digital camera cannibalisation will support stronger performance.

Handset Sales: USD315mn in 2016 to USD350mn in 2020, a CAGR of 3.8%. Smartphone upgrade demand will underpin handset outperformance, but as the market becomes increasingly saturated the growth rate will decelerate in the later years of the forecast.

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Contents

BMI Industry View
Latest Updates & Industry Developments
SWOT
Consumer Electronics Market
Industry Forecast
Latest Updates
Structural Trends
  Table: Consumer Electronics Overview (Croatia 2014-2020)
Industry Risk Reward Index
  Table: Consumer Electronics Ratings Regional Breakdown, Q216
  Table: Europe Risk/Rewards Index - Q2 2016
Market Overview
Recent Developments
Computers
  Table: PC Sales (Croatia 2014-2020)
AV Devices
  Table: AV Sales (Croatia 2014-2020)
Mobile Handsets
  Table: Mobile Communications (Croatia 2014-2020)
Industry Trends And Developments
  Table: Croatian Distributors For Leading Brands
Regulatory Development
Competitive Landscape
  Table: Combis
  Table: HG Spot Informatika
  Table: IN2 Group
  Table: M SAN Grupa
Demographic Forecast
  Table: Population Headline Indicators (Croatia 1990-2025)
  Table: Key Population Ratios (Croatia 1990-2025)
  Table: Urban/Rural Population & Life Expectancy (Croatia 1990-2025)
  Table: Population By Age Group (Croatia 1990-2025)
  Table: Population By Age Group % (Croatia 1990-2025)
Methodology
Industry Forecast Methodology
Sector-Specific Methodology
Sources

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Risk/Reward Index Methodology
Sector-Specific Methodology
Table: Consumer Electronics Risk/Reward Index Indicators
Table: Weighting Of Indicators

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