

Czech Republic Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: The Czech Republic is the most affluent market in Central and Eastern Europe and this is reflected in high device spending per capita. Koruna depreciation hit device sales value in 2015 in US dollar terms, but we envisage a move to a stronger growth trajectory over the medium term to be enabled by household purchasing power gains. Alongside the potential easing of price sensitivity offered by koruna appreciation, product cycles are expected become more favourable in the PC and AV segments - though this upside is partially offset by the expected cooling of the smartphone market as saturation

Latest Updates & Industry Developments

Computer Hardware Sales: USD1.07bn in 2016 to USD1.41bn in 2020, a compound annual growth rate (CAGR) of 7.0%. Desktop market will underperform, but strong retail sales of notebooks and tablets expected as household incomes rise register significant increases.

AV Sales: USD540mn in 2016 to USD661mn in 2020, a CAGR of 5.2%. Smart TV and Ultra-HD upgrade demand, alongside koruna appreciation will return the market to growth, but it will not come close to the heights of the flat-panel upgrade and digital camera boom.

Handset Sales: USD705mn in 2016 to USD866mn in 2020, a CAGR of 5.3%. Smartphone market saturation will act as a brake on growth, but countering this will be purchasing power growth that boosts demand for flagship and mid-range smartphones.

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