

Egypt Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We hold a positive outlook for the Egyptian consumer electronics market in our Q1 2016 report update. We had made modest downwards revisions in our Q415 report update to better reflect the negative impact of currency depreciation on consumer electronics sales. In 2016, we are anticipating the market to post stable growth of 5.8% to reach a total market value of USD3.9bn. Over the medium term, we expect the market to settle on a slower growth rate, with the wave of deferred purchases unlocked in 2014 not to be repeated. Overall, we have a positive medium-term outlook for Egypt's consumer electronics market, with a young population, low device penetration rates, rising incomes and the falling cost of devices to drive growth. We expect government, vendor and operator-led investment in supporting infrastructure such as telecoms networks and retail/distribution networks to further encourage growth and drive accelerating demand for connected devices such as smartphones and tablets. We expect total spending to increase at a compound annual growth rate of 5.5% 2015-2019, with total spending expected to rise from USD3.47bn in 2014 to USD4.54bn in 2019.

Latest Updates & Industry Developments

Computer Hardware Sales: USD916mn in 2015 to USD965mn in 2016, up 5.3% in US dollar terms.

AV Sales: USD648mn in 2015 to USD671mn in 2016, up 3.5% in US dollar terms.

Handset Sales: USD2.12bn in 2015 to USD2.26bn in 2016, increasing 6% in US dollar terms.

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