

Hong Kong Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We already held a negative outlook for Hong Kong's consumer electronics market in 2015 due to diminished growth prospects and unfavourable product proliferation cycles converging, but this was exacerbated by economic uncertainty and declining spending from visitors combining for an 8% decline in spending. The medium-term outlook is brighter as the tablet, notebook, TV set and digital camera markets stabilise; however, growth opportunities will still be limited due to saturation. Vendors will need to focus on upgrade/replacement sales, a sizeable opportunity in Hong Kong given the high income bias in the household income mix and an embedded preference for premium products. We forecast total consumer electronics spending will grow at a CAGR of 0.9% over 2015-2019, with upside should wearable devices gain mass market traction, but downside from the potential for a hard landing in China.

Latest Updates And Industry Developments

Computer Hardware Sales: USD1.2bn in 2016 to USD1.3bn in 2019. A more stable growth trajectory forecast over the medium term based on household income growth and replacement sales, after the boom and bust in the tablet market derived from the rapid diffusion of ownership.

AV Sales: USD926mn in 2016 to USD1.0bn in 2019. After contraction over 2013-2015, we expect the market to stabilise as the decline in digital camera volumes plateaus and Ultra-HD TV sets provide some upgrade momentum, but the market will not return to previous highs.

Handset Sales: USD2.61bn in 2016 to USD2.55bn in 2019. A combination of smartphone market saturation and price erosion will mean the handset market

contracts in value terms, but it will remain the largest segment and highly lucrative in per capita terms.

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