

Hong Kong Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Hong Kong is a high-value consumer electronics market, particularly for smaller products such as smartphones, tablets and notebooks where the spending of visitors boosts the market. The maturity of the domestic market, in which most product categories have reached saturation, and an uncertain spending outlook for visitors, particularly from the mainland, combine to produce our modest growth forecast for consumer electronics device spending over the medium term. We envisage a CAGR of 0.5% over 2016-2020 to reach USD4.8bn in 2020, with elevated downside risk from the potential for a hard landing in China or a faster than expected shift in the spending habits of Chinese consumers away from purchasing as visitors in Hong Kong.

Latest Updates And Industry Developments

Computer Hardware Sales: USD1.2bn in 2016 to USD1.3bn in 2020. After the boom and bust in the tablet market in recent years we envisage a smoother growth trajectory, but the composition of replacement sales by form factor will still be determined to a significant degree by vendor innovation.

AV Sales: USD926mn in 2016 to USD1.0bn in 2020. The decline in digital camera spending is permanent, and so the AV segment is on a lower trajectory, but Ultra-HD TV set upgrades do offer upside to vendors.

Handset Sales: USD2.6bn in 2016 to USD2.5bn in 2020. A combination of smartphone market saturation, uncertainty about the spending outlook for visitors from China and price erosion dampen the outlook, but handsets will continue to be the largest device category in Hong Kong.

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