

# Hong Kong Consumer Electronics Report Q4 2016

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## Abstracts

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**BMI View:** Our core scenario is for consumer electronics device spending to remain flat over the medium term in Hong Kong, with a CAGR of -0.1% forecast over 2016-2020. The domestic market is saturated across all core product categories, and we do not currently see any mass market upgrade triggers, though are watching the wearables category closely for vendor innovation and pricing strategies that could drive sales growth. There is, however, also downside for spending in Hong Kong should economic trends in China either derail domestic growth or result in a contraction in the number of mainland visitors shopping for devices in Hong Kong.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD1.2bn in 2016 to USD1.2bn in 2020. A stable outlook, reflecting the maturity of the market, but downside risks remain should increasingly powerful smartphones cannibalise PC replacement spending.

**AV Sales:** USD944mn in 2016 to USD973mn in 2020. After three successive annual contractions, smart and UHD TV set upgrades will return the segment to growth but even by 2020 it will be below the value peak from 2012.

**Handset Sales:** USD3.1bn in 2016 to USD3.0bn in 2020. Apple's move into phablets boosted performance in 2015, but over the medium term the depleted pool of potential smartphone upgrades means the outlook is much weaker.

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