

Hungary Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Our Hungary Country Risk team forecasts significant forint appreciation against the dollar over 2016-2020, which supports our forecast for a consumer electronics device spending CAGR of 7.7% to USD2.3bn. Growth will be more modest in local currency terms, but by either measure we anticipate a marked improvement in performance over the medium-term when compared to recent years when first domestic economic malaise and then forint depreciation against the US dollar were drags on demand. Increases in household purchasing power offer upside through reduced price sensitivity, as well as the potential to unlock deferred purchases from 2013-2016. There is however still downside, with Hungary's economy potentially susceptible to shocks from global headwinds, and regional or national political risks.

Latest Updates And Industry Developments

Computer Hardware Sales: USD652mn in 2016 to USD925mn in 2020, a compound annual growth rate (CAGR) of 9.1%. After forint depreciation there is pent-up upgrade demand, which should be unlocked as household purchasing power growth accelerates from 2017.

AV Sales: USD367mn in 2016 to USD499mn in 2020, a CAGR of 8.0% in US dollar terms. The market will not return to previous peak at height of flat-panel TV set and digital camera boom, but smart TV and Ultra-HD set upgrades will boost the market over the medium term.

Handset Sales: USD706mn in 2016 to USD899mn in 2020, a CAGR of 6.2% in US dollar terms. Positive impact of forint appreciation will be countered by the depletion of the smartphone upgrade engine, resulting in the handset segment

underperforming the growth trend prior to 2014 during the initial smartphone boom.

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