

Hungary Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: Although macroeconomic challenges will continue to be a drag on the consumer electronics devices market in Hungary in 2016, we envisage a much stronger growth trajectory from 2017, enabled by significant appreciation of the forint against the US dollar. We forecast device spending will increase at a CAGR of 6.7% throughout 2016-2020 to USD2.2bn, as households make purchasing power gains. This should unlock pent-up replacement spending from 2015-2016, and also has upside for average device prices in global currency terms as affordability in local currency terms increases throughout 2017-2019.

Latest Updates And Industry Developments

Computer Hardware Sales: USD646mn in 2016 to USD867mn in 2020, a compound annual growth rate (CAGR) of 7.6%. There is pent-up replacement spending waiting to be unlocked, which should occur from 2017 and boost retail PC spending, but potential cannibalisation of notebook and tablet sales by increasingly powerful smartphones presents downside.

AV Sales: USD374mn in 2016 to USD463mn in 2020, a CAGR of 5.5% 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, especially ahead of major sporting events.

Handset Sales: USD690mn in 2016 to USD891mn in 2020, a CAGR of 6.6% in US dollar terms. A diminished pool of potential first-time smartphone buyers will see volume growth slow over the medium term, but there is potential for vendor

gains through flagship device sales and overall higher average selling prices in USD terms.

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