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India Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: India trails much of APAC in terms of device penetration rates and household incomes - but with our Country Risk team's positive outlook for household income, we expect the market to exhibit robust medium-term growth at a CAGR of 6.3% over 2015-2019. We expect to see more than 50mn additional Indian households gain the purchasing power to be full consumer electronics market participants over the medium term, supplementing existing replacement demand from the large premium segment. Meanwhile, increased local device manufacturing, fostered by the 'Make in India' initiative, and the focus of established and emerging market device brands on India as a volume growth opportunity will ensure the supply of lowcost devices in the smartphone, tablet, notebook and TV set markets. This increase in supply will interact with income growth to deepen the market, but also presents downside due to the potential for overcapacity and considerable price erosion, which we caution will mean vendor margins are likely to be very thin in India's devices market over the medium term.

Latest Updates And Industry Developments

Computer Hardware Sales: USD18.9bn in 2016 to USD23.8bn in 2019. Tablet and notebook volume growth will drive overall hardware spending growth as huge numbers of households acquire the income to buy PCs for the first time, but we caution that price sensitivity will remain high, limiting vendor margins.

AV Sales: USD15.1bn in 2016 to USD16.3bn in 2019. AV segment forecast to underperform over the medium term due to TV set price erosion and digital camera volume cannibalisation.

Handset Sales: USD18.4bn in 2016 to USD22.9bn in 2019. Historical data

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revised down in Q116 to reflect extent of smartphone price erosion in 2014-2015, but medium-term growth outlook remains robust as smartphone market forecast to deepen considerably over 2016-2019.

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