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# India Consumer Electronics Report Q3 2016

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## Abstracts

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BMI View: India is a leading global opportunity for medium-term consumer electronics spending growth. Low penetration rates, even compared to other emerging markets, mean there is potential to sell to firsttime buyer households, as well as replacement devices to the middle class. We expect this potential to be unlocked over the medium term by a positive transformation of India's household income profile, with the number of USD5,000-plus annual income households expected to increase by over 72mn during the 2016-2020 period. Another positive is the increase in local assembly of handsets and tablets, with further upside if this extends to manufacture of components, and if the government broadens the incentive packages of the 'Make In India' initiative to other device categories.

Latest Updates And Industry Developments

Computer Hardware Sales: USD17.8bn in 2016 to USD23.6bn in 2020, a CAGR of 6.3%. Rising incomes the foundation for robust medium-term outlook, with further upside if computer production hardware incentives are extended under the 'Make In India' initiative.

AV Sales: USD15.2bn in 2016 to USD20.0bn in 2020, a CAGR of 6.3%. Large LCD/LED upgrade opportunity remains, in contrast to most of emerging APAC, but there will be a slight drag from digital camera volume cannibalisation as smartphone ownership widens.

Handset Sales: USD18.1bn in 2016 to USD24.4bn in 2020, a CAGR of 9.0%. Smartphone market will maintain robust volume growth over the medium term, and drive handset segment outperformance, but we caution overcapacity could

ultimately put pressure on margins.

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