

Indonesia Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: Depreciation of the rupiah against the US dollar was a drag on consumer electronics spending growth in Indonesia in 2014 and 2015 - and we expect it will continue to erode the affordability of imported devices for Indonesian households in 2016. There is however a much stronger medium term outlook, with devices spending growth forecast to accelerate markedly from 2017 as economic growth strengthens and the rupiah appreciates significantly against the US dollar 2017-2019. Other factors making a positive contribution to the consumer spending growth story will include favourable demographic dynamics, rising levels of urbanisation, and declining device prices. Overall, market growth will see the market reach USD18.09bn in 2019, equal to a compound annual growth rate of 6.3% in US dollar terms 2015-2019.

Latest Updates & Industry Developments

Computer Hardware Sales: USD4.68bn in 2016 to USD6.95bn in 2019, compound annual growth rate (CAGR) of 8.1% 2016-2019. Short term outlook downgraded to reflect economic weakness, including drag of depreciation on affordability, but over the medium term underlying income growth will deepen the market as large numbers of households gain the disposable income for PC purchases for the first time.

AV Sales: Rising from USD2.13bn in 2016 to USD2.41bn in 2019, CAGR of 3.5% 2015-2019. Rising incomes will drive spending growth, particularly in the TV set markets as households upgrade to LED/ LCD models, but this will be partially offset by the squeeze on audio device and digital camera demand from the rise of multi-functional smartphones.

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