

Indonesia Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: We expect a second successive year of US dollar contraction for Indonesia consumer electronics device spending in 2016, but with a forecast contraction of just 0.1%, performance will be a considerable improvement over 2015. The medium term outlook is much stronger, with economic development driving up incomes, and a significant boost to our forecast across the board from rupiah appreciation against the USD envisaged for 2018-2020. We forecast a CAGR of 8.9% for 2016-2020 as a whole, to total spending of USD19.7bn in 2020. Underpinning our view for improved performance later in the forecast is pent-up demand from 2015 and 2016, which will be unlocked as economic growth strengthens and the household income profile registers a considerable improvement. 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.

Latest Updates & Industry Developments

Computer Hardware Sales: USD4.83bn in 2016 to USD7.61bn in 2020, compound annual growth rate (CAGR) of 12.0% 2016-2020. Depreciation remains a squeeze on affordability in 2016, but the medium term outlook is bright based on income growth that will deepen the market and ease price sensitivity in the middle class.

AV Sales: Rising from USD2.09bn in 2016 to USD2.76bn in 2020, CAGR of 7.2% 2016-2020. Flatpanel TV set upgrades still have growth momentum in Indonesia, while Smart and Ultra-HD technologies will trigger spending in among high income households.

Handset Sales: Rising from USD7.03bn in 2016 to USD9.29bn in 2020, a CAGR of 7.2% 2016-2020. Local content requirement generates some uncertainty but we are still bullish on smartphone growth in Indonesia where relatively low penetration of smartphones should see volume growth maintained over the medium term.

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