

Indonesia Consumer Electronics Report Q4 2012

<https://marketpublishers.com/r/I99AC95E7E3EN.html>

Date: September 2012

Pages: 56

Price: US\$ 1,295.00 (Single User License)

ID: I99AC95E7E3EN

Abstracts

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BMI View: Indonesia's consumer electronics market is forecast to grow around 16% in 2012, driven by economic growth and strong demand for smartphones and flat-panel TV sets. The consumer story in Indonesia continues to be one of the brightest in the world and Indonesia's consumer electronics market remains one of the most untapped markets in Asia. In 2012, strong wage growth looks set to continue, and the government has announced it will shelve plans to reduce fuel subsidies for at least the remainder of 2012, alleviating concerns that higher fuel prices would hit consumers' wallets. Despite the challenging nature of distribution in the country, due to its archipelagic structure, a PC penetration rate of less than 2% and digital camera household penetration of less than 20% offer a continued growth opportunity.

Headline Expenditure Projections

Computer hardware sales: US\$3.8bn in 2011 to US\$4.2bn in 2012, +10.0% in US dollar terms. Forecast in US dollar terms downwardly revised due to analyst adjustment with growing affordability and credit availability driving sales in the consumer segment.

AV sales: US\$3.7bn in 2011 to US\$4.5bn in 2012, +21% in US dollar terms. Forecast in US dollar terms unchanged as the flat-screen TV set market continues to grow strongly year-on-year (y-o-y). Handset sales: US\$2.1bn in 2011 to US\$2.3bn in 2012, +6% in US dollar terms. Forecast in US dollar terms unchanged with smartphones now accounting for around 15% of the local handset market. **Risk/Reward Ratings:**

Indonesia's score is 49.2 out of 100.0. Indonesia ranks an unchanged ninth in the Asia region in our latest RRR table, ahead of regional peers, such as the Philippines and Thailand. Indonesia's vast size and currently low penetration across a range of consumer electronics product categories should see the country rise in the rankings

over time.

Key Trends & Developments

Indonesian computer industry association Apkomindo has targeted 40% growth in 2012 for its members and Indonesia is again expected to be one of the fastest-growing regional PC markets, continuing the double-digit growth of recent years. Rising PC penetration points to exceptional growth potential with the main drivers being growing affordability and more credit availability.

TV sets will be the main driver of AV category sales growth over the forecast period as Indonesian consumers upgrade their CRT sets. TV set penetration is estimated at around 75% in Indonesia, leaving room for continued growth. A booming market in the past few years has spurred the development of a local TV set manufacturing industry and led to a fall in imports even as the market soared.

The Indonesian market has also seen a surge in popularity of smartphones, but, as in other emerging Asian markets, however, the grey sector remains a significant feature of the market, with cheap knock-off models, many from China, ubiquitous in the market. The number of mobile users will continue to expand, fuelled mainly by younger people, among which the popularity of social networking applications has prompted an explosion in mobile phone ownership.

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