

Indonesia Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: A stabilisation of the regional economic outlook and a forecast for a slightly stronger rupiah in 2016 resulted in a small upgrade to our consumer electronics device spending forecast for Indonesia. The market will return to USD growth in 2016, but it will be over the medium term that the market moves to a significantly stronger trajectory as economic growth accelerates and the rupiah strengthens, which will contribute to purchasing power gains for households that both deepens the market and increases higher value sales. This will be a marked contrast to the contraction in 2015, as we envisage a device spending CAGR of 9.7% over 2016-2020 in Indonesia.

Latest Updates & Industry Developments

Computer Hardware Sales: USD4.5.1bn in 2016 to USD7.6bn in 2020, compound annual growth rate (CAGR) of 10.2% 2016-2020. Low penetration and rising incomes should deepen the market substantially over the medium term, but there is downside should smartphone ownership cannibalise firsttime PC buyers.

AV Sales: Rising from USD2.1bn in 2016 to USD2.8bn in 2020, CAGR of 7.6% 2016-2020. Low penetration means there is still capacity in flat-panel TV set upgrades, while Smart and Ultra-HD technologies be positive factors for upgrade spending by higher income consumers.

Handset Sales: Rising from USD7.2bn in 2016 to USD10.5bn in 2020, a CAGR of 1.00% 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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