

Iran Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We made revisions for the Iran consumer electronics market in our Q415 report to better reflect the growth potential and historical data in the market. Following the nuclear deal in July 2015, we have also revised the potential for future prospects. Under our revised outlook we expect consumer electronics spending growth to accelerate from 2016 as the easing of sanctions makes a positive contribution through increased supply of devices and formalisation of retail, which will drive down prices and catalyse volume growth, enabling vendors to tap into positive fundamentals including population and income growth. We do, however, continue to stress downside risk and uncertainty surrounding the outlook for Iran, including political and operational risk and the challenging economic environment.

Headline Expenditure Projections

Computer sales: USD2.8bn in 2014 to USD3.1bn by 2019; Even after easing of sanctions relatively high cost of devices will continue to be a drag on growth, but economic recovery and more competition should see the market move to a higher growth trajectory.

AV and gaming device sales: USD1.6bn in 2014 to USD1.7bn in 2019; Demand is likely to be weakest in this segment as TV market saturation and price erosion and cannibalisation of digital camera volumes, will offset the growth dividend from sanctions being rescinded.

Handset sales: USD3.7bn in 2014 to USD4.7bn in 2019; the handset market is forecast to outperform as an easing of sanctions and formalisation of retail will accelerate growth, particularly in the handset market where under sanctions the

premium segment was primarily served by black market goods acquired overseas.

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