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Iran Consumer Electronics Report Q3 2016

https://marketpublishers.com/r/I0BD653D9C2EN.html
Date: May 2016
Pages: 61
Price: US$ 1,295.00 (Single User License)
ID: I0BD653D9C2EN

Abstracts

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BMI View: The easing of sanctions has increased optimism about the medium-term prospects of Iran's consumer electronics market through an increase in international vendor competition and an improved economic outlook. The breakthrough in international relations has however coincided with a steep decline in the oil price, and some bottlenecks to market development still exist - for instance, very high tariffs on the import of finished devices and a large informal devices market. Nonetheless, we expect the Iranian consumer electronics devices market will move to a higher growth trajectory, particularly from 2017, as rising incomes and increased supply of devices see vendors tap low device penetration rates in key categories such as notebooks, tablets and smartphones. Our core scenario is for a CAGR of 5.8% over 2016-2020 to a value of USD10.1bn in 2020.

Latest Updates & Industry Developments

Computer Sales: USD2.6bn in 2016 to USD3.5bn by 2020, corresponding to a compound annual growth rate (CAGR) of 7.0%. In a market with an installed base weighted towards locally assembled desktops there is a huge opportunity for notebook and tablet vendors.

AV And Gaming Device Sales: USD1.5bn in 2016 to USD1.8bn in 2020, a CAGR of 4.0%. Local supply of TV sets means the market was less affected by sanctions, but as the market opens, price erosion and cannibalisation of digital camera volumes will mean the segment underperforms.

Handset Sales: USD3.9bn in 2016 to USD4.9bn in 2020, a CAGR of 5.6%. Low smartphone penetration presents a large opportunity to vendors in contrast to

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much of the region, where smartphone market saturation will result in decelerating growth and even contraction.

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