

Iran Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: We expect that the Iranian consumer electronics market will move into a stronger era of growth from 2017 as a result of the easing of sanctions that will contribute to stronger economic performance and increase competition as international vendors re-enter the market. We forecast that this shift will support a device spending CAGR of 4.3% over 2016-2020, but caution that downside risk is still significant due to the potential for further oil price declines. There are also bottlenecks within the devices market such as high tariffs on the import of finished devices and a large informal devices market, so there is also upside should the government enact pro-market reforms.

Latest Updates & Industry Developments

Computer Sales: USD2.5bn in 2016 to USD2.8bn by 2020, corresponding to a compound annual growth rate (CAGR) of 2.6%. Smartphones are proving a more significant threat to PC spending than previously envisaged and as a result we lowered the growth outlook in the Q416 update.

AV And Gaming Device Sales: USD1.5bn in 2016 to USD1.7bn in 2020, a CAGR of 3.2%. Local supply of TV sets means the market was less affected by sanctions, but there is still some potential remaining for flat-panel TV set upgrades.

Handset Sales: USD3.9bn in 2016 to USD4.9bn in 2020, a CAGR of 5.7%. Underpenetrated smartphone market informs our outlook for sustained upgrade momentum to underpin value growth.

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