

Israel Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: After a contraction in consumer electronics device spending in 2015 when negative product trends, an economic slowdown and shekel depreciation all contributed to lower spending, we anticipate a modest recovery from 2016. The market is forecast to grow at a CAGR of 3.5% over 2016-2020 to USD3.3bn in 2020, with all three segments expected to return to growth from 2016. It is the computer segment that we expect to outperform over the medium term due to deferred purchases from 2015, low penetration of personal devices and strong income growth for higher earners in Israel envisaged by our country risk team. Meanwhile, AV spending will benefit from a more positive product cycle, with smart and Ultra-HD TV set upgrades countering price pressures evident in recent years - but the handset segment, which has outperformed since the launch of the iPhone, is expected to decelerate as a result of a depleted pool of potential first-time buyers.

Latest Updates & Industry Developments

Computer Hardware Sales: USD1.0bn in 2016 to USD1.2bn in 2020, corresponding to a CAGR of 4.6% in US dollar terms. Overall, market growth will be subdued in volume terms, but our income analysis points to a significant opportunity at the premium end of the retail PC market.

AV Sales: USD527mn in 2016 to USD603mn in 2020, at a CAGR of 3.4%. AV replacement spending contracted in 2015 in an environment of depreciation but performance will strengthen over medium term due to appreciation and upgrade to smart and Ultra-HD TV sets.

Handset Sales: USD1.3bn in 2016 to USD1.5bn in 2020, a CAGR of 2.5%. The



handset segment will grow much slower than prior to 2015 due to smartphone market saturation, but premium focused vendors could benefit from high-income earnings growth outperformance 2016-2020.



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