

Israel Consumer Electronics Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

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.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Israel 2014-2020)

Industry Risk Reward Index

Table: CE RRI Regional Score Breakdown, Q216

Table: MEA Consumer Electronics Risk/Rewards Index, Q216

Market Overview

Recent Developments

Computers

Table: PC Sales (Israel 2014-2020)

AV Devices

Table: AV Sales (Israel 2014-2020)

Mobile Devices

Table: Mobile Communications (Israel 2014-2020)

Competitive Landscape

International Companies

Table: Apple

Table: Hewlett-Packard

Table: Intel

Table: Samsung Electronics

Local Companies

Table: PointGrab

Regulatory Development

Demographic Forecast

Table: Population Headline Indicators (Israel 1990-2025)

Table: Key Population Ratios (Israel 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Israel 1990-2025)

Table: Population By Age Group (Israel 1990-2025)

Table: Population By Age Group % (Israel 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Consumer Electronics Risk/Reward Index Indicators

Table: Weighting Of Indicators

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