

# Israel Consumer Electronics Report Q4 2016

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Date: August 2016

Pages: 57

Price: US\$ 1,295.00 (Single User License)

ID: IFA7E7C9DABEN

## Abstracts

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**BMI View:** We downgraded the forecast for consumer electronics devices spending growth in Israel in the Q416 update to reflect a slightly weaker economic outlook, but our core scenario for a recovery from the contraction of 2015-16 and modest medium term growth remains in place. We envisage a device spending CAGR of 3.1% over 2016-2020 to USD3.3bn in 2020. Although the market is mature and volume growth potential limited, shekel appreciation in 2017 and 2018 should be a positive and there will be pockets of opportunity for vendors, for instance in hybrid notebooks, smart and UHD TV sets, and premium smartphones.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** USD1.0bn in 2016 to USD1.2bn in 2020, corresponding to a CAGR of 3.4% in US dollar terms. Volume growth potential is limited by maturity, and smartphones could cannibalise replacement spending, but our core scenario is for shekel appreciation to support the market over the medium term.

## 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

Industry Risk Reward Ratings

Table: Middle East And Africa Consumer Electronics Risk/Reward Index, Q4 2016

Market Overview

Recent Developments

Computers

Table: PC Sales (Israel 2014-2020)

AV Devices

Table: AV Sales (Israel 2014-2020)

Mobile Handsets

Table: Mobile Communications (Israel 2014-2020)

Industry Trends And Developments

Electronics Trade

Table: Middle East Consumer Electronics (CE) Trade, 2009-2014

Table: Israel Consumer Electronics (CE) Trade, 2010-2015

Electronics Industry Analysis

Table: Israel Electronics Industry

Regulatory Development

Table: Regulatory Authorities

Competitive Landscape

Israel Consumer Electronics Companies

Consumer Electronics Vendors - EMEA, 2015

Table: Computer Hardware

Table: TV Sets

Table: Mobile Phones

Retailers

Table: Major Electronics Retailers

Table: Major Online Retailers

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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