

Kuwait Consumer Electronics Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We downgraded the outlook for 2015 in our Q415 report update to reflect the drag on demand coming from a weak Kuwait economic outlook due to the prolonged global oil price slump, a factor that was weighing in on consumer confidence.

Nevertheless, we believe the market will return to positive growth in 2016 as population grows and the economy stabilises in 2016 and beyond, over the course of our forecast period. Opportunities will still remain limited compared to emerging markets due to the high penetration of smartphones and tablets, which means there remains only a small pool of first time buyers for vendors to target. Nevertheless, Kuwait has one of the highest GDP per capita levels in the world and consumers have demonstrated their preference for luxury items and fashionable brands such as Apple. We expect this trend to continue over the next four years, ensuring Kuwait's consumer electronics market remains highly lucrative in per capita terms.

Latest Updates And Industry Developments

PC Sales: USD407mn in 2015 to USD396mn in 2016. Economic weakness will exacerbate the negative trend due to contraction in the tablet market and a high degree of overall saturation.

AV Sales: USD333mn in 2015 to USD338mn in 2016, up 1.5% in US dollar terms. Forecast was downgraded in Q415, with economic weakness expected to result in deferred purchases and substitution for cheaper models. The market will return to growth in 2016 and remain positive until 2018.

Handset Sales: USD572mn in 2015 to USD584mn in 2016, an increase of 2.1% in US dollar terms.

Although smartphone penetration is high in Kuwait, which will see demand growth decelerate, the high replacement rate and premium orientation of Kuwaiti nationals will ensure the market remains buoyant in 2016.

Contents

BMI Industry View

Latest Updates And Industry Developments

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Kuwait 2013-2019)

Industry Risk Reward Index

Table: MEA Consumer Electronics Risk/Rewards Index, Q116

Market Overview

Recent Developments

Computers

Table: PC Sales (Kuwait 2013-2019)

AV

Table: AV Sales (Kuwait 2013-2019)

Mobile Handsets

Table: Mobile Communications (Kuwait 2013-2019)

Competitive Landscape

Local Companies

Table: Al-Babtain Electronics Company

Table: Alghanim Industries

Table: Almasa Holdings

Table: Redington Kuwait

International Companies

Table: Dell

Table: Toshiba

Regulatory Development

Table: Regulatory Authorities

Regulatory News

Demographic Forecast

Table: Population Headline Indicators (Kuwait 1990-2025)

Table: Key Population Ratios (Kuwait 1990-2025)

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

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

Table: Population By Age Group % (Kuwait 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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