

Kuwait Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: The low oil price resulted in a further downward adjustment to our Kuwait consumer electronics devices forecast in the Q216 update. Our country risk team expects slower growth in private consumption over the medium term, at about half the rate of 2010-2015, while exacerbating the impact of this slowdown is the fact most device categories are saturated in Kuwait in 2016, including smartphones and tablets. These factors are behind our forecast for total device spending to contract at a CAGR of -0.8% 2016-2020. Despite the pressures on device spending, it will continue to be a lucrative market for vendors, with short replacement cycles and premium preference of Kuwaiti nationals supporting demand.

Latest Updates And Industry Developments

PC Sales: USD454mn in 2016 to USD428mn in 2020, corresponding to a CAGR of -1.4%. Weak consumption outlook in a saturated market will result in mild contraction of retail hardware spending.

AV Sales: USD324mn in 2016 to USD303mn in 2020, a CAGR of -1.4%. Although we envisage contraction, Ultra-HD TV set upgrades will underpin stronger performance 2016-2020 compared to 2015.

Handset Sales: USD557mn in 2016 to USD564mn in 2020, a CAGR of 0.1%. High smartphone penetration means growth potential is diminished, but the high replacement rate and premium preference of Kuwaiti nationals means the market will continue to be lucrative in per capita terms.

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