

Kuwait Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Kuwait's oil-centric economy means the economic and consumer electronics outlook is linked to expectations around price trends, and our country risk team expects slower growth in private consumption over the medium term, at about half the rate of 2010 to 2015. We believe a downturn in price, and so domestic economic sentiment, has put consumer electronics devices spending growth on a low trajectory, exacerbating an existing slowdown resulting from saturation in key device categories. 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 remains 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%. Population growth a positive but weak consumption outlook in a saturated market will outweigh this upside and 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%. The high replacement rate and premium preference of Kuwaiti nationals means the market will continue to be lucrative in per capita terms despite saturation.

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