

# Malaysia Consumer Electronics Report Q1 2016

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## Abstracts

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**BMI View:** The Malaysian consumer electronics market was hit hard by ringgit depreciation and wider economic uncertainty in 2015, with a sharp contraction in US dollar terms, but the outlook is considerably brighter over the medium term. As the ringgit stabilises and confidence strengthens we expect all three device segments to return to growth from 2016 onwards, with an added boost from deferred purchases during 2015. Our bullish outlook is based on our Country Risk team's forecast for household income growth, which will translate to an expanding middle and upper middle class. This will present an opportunity for volume growth as well as an easing of price sensitivity that vendors can exploit in the form of higher value sales and wider margins. There is, however, downside risk that vendor competition will see price erosion continue, mirroring the trend in the LED/LCD market in recent years, or that a hard landing in China could derail the wider economic growth story.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD2.20bn in 2016 to USD2.58bn in 2019, a compound annual growth rate (CAGR) of 5.2%. Ringgit stabilisation in 2016 and income growth over 2016-2019 will deepen the market, as well as offer vendors higher margin opportunities as price sensitivity eases.

**AV Sales:** USD804mn in 2016 to USD940mn in 2019, a CAGR of 4.5%. Price pressures in the TV set market and further digital camera demand cannibalisation will be drags on AV market growth, but even so the market is expected to strengthen markedly over 2016-2019 due to a more supportive economic backdrop.

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