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Malaysia Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: The Malaysian consumer electronics market contracted sharply in 2015 as the introduction of the Goods and Sales Tax exacerbated the negative impact of ringgit depreciation. Households deferred spending and substituted product purchases for cheaper models. Ringgit depreciation will continue to be a drag in 2016, resulting in a contraction in spending in US dollar terms. However, the market will gain momentum and we expect the major device segments to return to growth from 2017. The medium term outlook is much stronger as an expanding and increasingly affluent middle class, alongside pent-up demand, will drive device spending. We forecast total device spending will increase at a CAGR of 5.8% throughout the 2016-2020 period.

Latest Updates And Industry Developments

Computer Hardware Sales: USD1.9bn in 2016 to USD2.6bn in 2020, a compound annual growth rate (CAGR) of 7.3%. PC penetration is relatively high for an emerging market, but there is pent-up upgrade demand, particularly for mobile form factors.

AV Sales: USD737mn in 2016 to USD886mn in 2020, a CAGR of 4.7%. After double-digit rate of decline in 2014 and 2015 the AV market will recover as purchasing power increases, but digital cameras are on a permanently lower trajectory and so the market will underperform.

Handset Sales: USD2.6bn in 2016 to USD3.1bn in 2020, CAGR of 4.9%. Boost from ringgit appreciation and income growth trends will be offset as the smartphone boom runs out of steam in an increasingly saturated market.

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