

Pakistan Consumer Electronics Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Pakistan's consumer electronics market presents many operating challenges to vendors and is a regional laggard in terms of device spending per capita and penetration rates - but we believe it is moving to a stronger growth trajectory as several positive trends converge. The rollout of 3G services and supply of cheap smartphones saw a handset spending boom take-off in 2014-2015, while rising incomes and increased local production are positive for the PC market. At the same time investments in retail and distribution are formalising operations and all these factors underpin our view that vendors grow revenues by driving up penetration rates over 2016-2020, a period during which we forecast total device spending will grow at a CAGR of 9.1%. This will make Pakistan a regional outperformer in device spending growth as markets in East Asia decelerate due to increasing saturation.

Latest Updates & Industry Developments

Computer Sales: from USD1.1bn in 2016 to USD1.5bn in 2020, a CAGR of 6.8%. As incomes rise the addressable market will expand rapidly, and we expect low-end tablet and notebooks will register the strongest volume growth.

AV Sales: USD1.2bn in 2016 to USD1.4bn in 2020, a CAGR of 4.4%. Flat-panel TV set upgrade potential still exists in Pakistan, but price erosion and digital camera volume cannibalisation will make AV segment the underperformer over the medium term.

Handset Sales: USD2.9bn in 2016 to USD4.5bn in 2020, a CAGR of 11.8%. The smartphone boom kicked off in 2014, but with penetration only reaching 15% of adults at YE15 we believe upgrade momentum will be sustained over the

medium term and drive robust overall handset spending growth.

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