

# Pakistan Consumer Electronics Report Q4 2016

<https://marketpublishers.com/r/PFA49E83CF7EN.html>

Date: September 2016

Pages: 61

Price: US\$ 1,295.00 (Single User License)

ID: PFA49E83CF7EN

## Abstracts

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**BMI View:** Pakistan has one of the strongest device spending growth outlooks in APAC over the medium term, where an expanding population and rising incomes will allow vendors to tap the huge opportunities offered by low device penetration rates across all three market segments. There are however still major risks due to the operating environment, as well as some unfavourable device market trends such as high mobile sales taxes and the cannibalisation of PC demand by smartphones. This downside is outweighed by the potential for strong spending growth and we expect total device spending will increase at a CAGR of 8.1% over 2016-2020.

### Latest Updates & Industry Developments

**Computer Sales:** From USD1.08bn in 2016 to USD1.22bn in 2020, a compound annual growth rate (CAGR) of 3.0%. Forecast lowered in Q416 as a result of the cannibalisation of PC, particularly tablet, spending due to the success of smartphones, which consumers are increasingly using as standalone computing devices.

**AV Sales:** USD1.23bn in 2016 to USD1.51bn in 2020, a CAGR of 5.2%. Unlike most markets, flat-panel TV set upgrade potential still exists in Pakistan in the middle class, which will make it a regional AV outperformer.

**Handset Sales:** USD2.86bn in 2016 to USD4.34bn in 2020, a CAGR of 11.0%. Pakistan is a smartphone late adopter, and penetration reached just 17% of adults at YE15, so we believe smartphone upgrade momentum will be maintained over the medium term and drive up handset segment value.

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