

# Peru Consumer Electronics Report Q1 2016

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## Abstracts

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BMI View: Depreciation against the US dollar negatively affected the consumer electronics spending growth trend in Peru in 2015, but we expect this to be a minor dip and growth should move back to a stronger growth trajectory from 2016. We hold a bullish outlook for medium-term growth in devices in Peru, based on the fundamentals of low device penetration rates and our Country Risk team's forecast for broad based economic growth 2015-2019, which will result in considerable numbers of households acquiring the disposable income to make first device purchases or upgrade to higher value devices. Despite the positive foundations for growth over the medium term we continue to caution that downside risks exist through global economic headwinds, most notably the potential for a hard landing in China which would undermine Peruvian economic growth.

### Latest Updates & Industry Developments

Computer Hardware Sales: USD897mn in 2015 to USD955mn in 2016, +6.4% in US dollar terms. After nuevo sol depreciation hit the PC market in 2015 we expect a return to growth in 2016, with a slight boost from deferred purchases during 2015.

AV Sales: USD973mn in 2015 to USD1.03bn in 2016, +5.3% in US dollar terms. Forecast to return to growth after contraction in 2015, but we envisage it being the underperforming segment as digital camera volume cannibalisation by smartphones will continue to be a drag on spending.

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