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# Peru Consumer Electronics Report Q2 2016

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## Abstracts

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BMI View: After a contraction of the consumer electronics devices market in both 2015 and 2016 we envisage a return to growth over the medium term as Peruvian purchasing power increases, which is expected to deepen the market and help alleviate price sensitivity. This trend of households moving up the income scale will both deepen the market as Peruvians acquire sufficient disposable income for first-time device purchases, and present vendors the opportunity to generate wider margins as the middle-class expands. Our forecast for a device spending CAGR of 5.0% 2016-2020 is in contrast to the short-term outlook, with another year of contraction forecast for 2016, albeit with market conditions expected to be less challenging than 2015 when depreciation against the US dollar negatively affected demand through the erosion of purchasing power ie affordability of imported devices, which resulted in deferred purchases and heightened price sensitivity. While the overall outlook is strong, downside risk is elevated as Peru is exposed to a potential hard landing in China, though the latter is not currently our core scenario.

Latest Updates & Industry Developments

> Computer Hardware Sales: USD758mn in 2016 to USD1.12bn in 2020, CAGR of +6.1% in US dollar terms. After contraction in 2016 the market will experience strong growth as incomes rise, with an added boost from deferred spending in 2015 and 2016.

> AV Sales: USD905mn in 2016 to USD1.16bn in 2020, CAGR of +4.1%. Rising incomes will benefit AV demand, 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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Handset Sales: USD1.09bn in 2016 to USD1.32bn in 2020, CAGR of +4.9%. Growth will remain robust, but decelerate over the medium term as smartphone upgrade momentum cools as the pool of first time buyers diminishes and becomes more concentrated among low-income consumer groups.

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## Contents

BMI Industry View
SWOT
Consumer Electronics Market
Industry Forecast
Latest Updates
Structural Trends
  Table: Consumer Electronics Overview (Peru 2014-2020)
Industry Risk Reward Index
  Table: CE RRI Regional Scores Breakdown, Q216
  Table: Americas Risk/Rewards Index, Q2 2016
Market Overview
Recent Developments
Computers
  Table: PC Sales (Peru 2014-2020)
AV Devices
  Table: AV Sales (Peru 2014-2020)
Mobile Handsets
  Table: Mobile Communications (Peru 2014-2020)
Competitive Landscape
International Companies
  Table: Dell
  Table: Lenovo
Local Companies
  Table: Grupo Leafar
  Table: Deltron
Industry Trends And Developments
Key Developments
Regulatory Development
Demographic Forecast
Demographic Outlook
  Table: Population Headline Indicators (Peru 1990-2025)
  Table: Key Population Ratios (Peru 1990-2025)
  Table: Urban/Rural Population & Life Expectancy (Peru 1990-2025)
  Table: Population By Age Group (Peru 1990-2025)
  Table: Population By Age Group % (Peru 1990-2025)
Methodology
Industry Forecast Methodology

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Sector-Specific Methodology
Sources
Risk/Reward Index Methodology
Sector-Specific Methodology
  Table: Consumer Electronics Risk/Reward Index Indicators
  Table: Weighting Of Indicators

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