

# Peru Consumer Electronics Report Q3 2016

https://marketpublishers.com/r/P1B9DBB3B97EN.html Date: May 2016 Pages: 60 Price: US\$ 1,295.00 (Single User License) ID: P1B9DBB3B97EN

## **Abstracts**

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BMI View: With Peru's consumer electronics market highly dependent on imported devices, nuevo sol depreciation was a drag on demand growth, and we expect there to be further pressure on affordability in 2016. The medium-term outlook is, however, brighter and we envisage a return to a stronger device demand trend from 2017. As Peruvian households move up the income scale there will be deepening of the market as consumers acquire sufficient disposable income for first-time device purchases, and vendors could tap wider margins as the middle-class expands and price sensitivity gradually diminishes. Our forecast is for a device spending CAGR of 6.9% over 2016-2020 to a total of USD3.6bn in 2020.

Latest Updates And Industry Developments

Computer Hardware Sales: USD758mn in 2016 to USD1.12bn in 2020, CAGR of +10.2% in US dollar terms. After a 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 +6.4%. Rising incomes will benefit AV demand, with particular opportunities for TV set vendors as incomes rise and digital migration drives upgrades.

Handset Sales: USD1.09bn in 2016 to USD1.32bn in 2020, CAGR of +5.0%. Growth will continue in 2016 as smartphone demand outweighs the impact of depreciation, but over the medium term a diminished pool of first-time smartphone buyers will see the market cool.



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