

Peru Consumer Electronics Report Q3 2016

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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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