

# Peru Consumer Electronics Report Q4 2016

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## Abstracts

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**BMI View:** We revised up both the data for 2015 and the medium-term outlook for Peru's consumer electronics market in the Q416 update. The upgrade to 2015 reflects the latest import data that show the decline in the PC and AV segments was slightly below our expectations, but the more significant change is the more bullish outlook for the nuevo sol against the USD over 2017-2019 that has direct upside for our device forecast. Peru is reliant on device imports, so appreciation has a positive impact on affordability, with upside for volumes in a market where device penetration and average selling prices are still relatively low. This informs our upgraded forecast for total device spending to increase at a CAGR of 9.1% over 2016-2020 to USD4.1bn in 2020.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD914mn in 2016 to USD1.4bn in 2020, CAGR of +11.2% in US dollar terms. Volume and value growth potential exists, particularly in 2017 and 2018 when affordability increases and unlocks deferred spending from 2015-16, but there is downside should increasingly powerful smartphones cannibalise PC spending.

**AV Sales:** USD969mn in 2016 to USD1.3bn in 2020, CAGR of +7.9%. Flat-panel upgrade potential still exists, unlike developed and middle income markets, a fact that is coupled with strong purchasing power gains to inform the bullish AV outlook.

**Handset Sales:** USD1.0bn in 2016 to USD1.4bn in 2020, CAGR of +8.1%. Handset segment has outperformed during the smartphone boom, but positive impact of economic factors will be partially offset over the medium term by an

increasingly depleted pool of first-time smartphone buyers.

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