

Philippines Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: The Philippine consumer electronics market is considered to have among the strongest growth potential in the region over the medium term. Our bullish outlook for device sales is based on our Country Risk team's view for robust and broad based income growth, and our assessment of low device penetration rates and declining device prices, which will combine to drive a marked deepening of the market over the medium term. We forecast the overall market will grow at a CAGR of 5.4% 2015-2019 to reach USD7.96bn in 2019. In the short-term we envisage continued handset value growth outperformance as the smartphone boom raises handset spending, but by the latter years of the forecast when there will be vastly diminished numbers of smartphone first-time buyers, we expect PC sales to outperform. There is also a regional dimension to our forecast; with many provincial markets are relatively untapped territories and rural populations containing the largest number of potential first-time device purchasers.

Latest Updates & Industry Developments

Computer Sales: USD2.1bn in 2015 to USD2.2bn in 2016, +4.7% in US dollar terms. Growth forecast to accelerate slightly from 2015, with strong demand expected in the retail market for both notebooks and tablets.

AV Sales: USD1.0bn in 2015 to USD1.1bn in 2016, +4.4% in US dollar terms. Stabilisation of the digital camera market will allow for an increase in the growth rate in 2016, but due to TV set price competition it will continue to be the underperforming segment.

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