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Poland Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: The consumer electronics market was hit by zloty depreciation in 2015, but the medium-term outlook is much brighter. We expect a further squeeze in 2016, but to a much lesser extent than in 2015, and 2017-2019 we believe that device spending growth will once again be determined by rising incomes and an expanding middle class in Poland. This will yield opportunities for vendors operating in all three device segments over the medium term, through a deepening of the market and potential for an easing of price sensitivity, though vendor competition could limit the extent to which vendors can exploit wider margins as consumers switch to higher value devices. BMI forecasts device spending will increase at a CAGR of 4.1% 2016-2019 to a value of USD9.69bn in 2019.

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Computer Hardware Sales: USD3.03bn in 2016 to USD3.87bn in 2019, CAGR of +5.3% in US dollar terms. After a steep decline in 2015 resulting from product cycles and zloty depreciation, we expect the market to return to growth over the medium term, with strong momentum in the later years of our forecast.

AV Sales: USD2.04bn in 2016 to USD2.19bn in 2019, CAGR of +2.2%. The AV market is on a permanently lower plane as a result of digital camera volume cannibalisation in recent years, but smart and Ultra-HD TV sets offer some upgrade potential for vendors over the medium term.

Handset Sales: USD3.25bn in 2016 to USD3.62bn in 2019, CAGR of +4.1%. handset segment has outperformed since the beginning of the smartphone boom, but growth will decelerate over the medium term as the segment

becomes saturated.

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