

Poland Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: We consider Poland's consumer electronics market has a bright outlook over 2016-2020, with a CAGR of 6.5% forecast to USD9.6bn in 2020. A more supportive economic environment is central to this view, including zloty appreciation forecast for 2017-2020, in contrast to 2015 when depreciation against the US dollar hit device spending. Polish income growth alongside appreciation will boost purchasing power and offers upside for device volumes and potential for an easing of price sensitivity, which will boost vendor performance. We also have a positive assessment of product trends, including a stabilisation of the PC market, smart and Ultra-HD TV set upgrades and price increases in the smartphone market.

Latest Updates & Industry Developments

Computer Hardware Sales: USD2.3bn in 2016 to USD3.2bn in 2020, a compound annual growth rate (CAGR) of 8.4% in US dollar terms. After a steep decline in 2015, rising incomes and global purchasing power growth will underpin expansion from 2016, with upside for PC unit prices in contrast to the declines over recent years.

AV Sales: USD1.9bn in 2016 to USD2.3bn in 2020, a CAGR of 5.1%. Smart and Ultra-HD TV sets improve the outlook for TV set upgrades, while digital camera volume declines are expected to slow? boosting the outlook.

Handset Sales: USD3.3bn in 2016 to USD4.1bn in 2020, a CAGR of 6.0%. Market dynamics expected to change as smartphone volume growth slows, but zloty appreciation provides upside for unit prices, in contrast to trends over 2012-2015.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Poland 2014-2020)

Industry Risk/Reward Index

Table: Consumer Electronics Ratings Regional Breakdown, Q216

Table: Europe Risk/Rewards Index - Q2 2016

Market Overview

Computers

Table: PC Sales (Poland 2014-2020)

AV Devices

Table: AV Sales (Poland 2014-2020)

Mobile Devices

Table: Mobile Communications (Poland 2014-2020)

Competitive Landscape

International Companies

Table: Dell

Table: Jabil Circuit Poland

Table: LG Poland

Table: Orion Poland

Table: Sharp

Table: TPV Displays

Local Companies

Table: Action SA

Table: Vobis

Industry Trends And Developments

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Poland 1990-2025)

Table: Key Population Ratios (Poland 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Poland 1990-2025)

Table: Population By Age Group (Poland 1990-2025)

Table: Population By Age Group % (Poland 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Consumer Electronics Risk/Reward Index Indicators

Table: Weighting Of Indicators

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