

# Poland Consumer Electronics Report Q3 2016

<https://marketpublishers.com/r/PC4677D9B32EN.html>

Date: June 2016

Pages: 61

Price: US\$ 1,295.00 (Single User License)

ID: PC4677D9B32EN

## Abstracts

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**BMI View:** Poland is a large domestic market for consumer electronics and is one of the main production centres for devices in the region. While the electronics industry faces pressures from changing consumer preferences and low-cost production centres, we are more positive about local spending on devices. We consider Poland's consumer electronics market to have a bright outlook over 2016-2020, with a CAGR of 6.5% forecast to USD9.6bn in 2020. Strong economic growth and zloty appreciation are expected to drive purchasing power gains for households that have the potential to increase multiple device ownership, shorten replacement cycles and ease price sensitivity. 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. Pent-up demand from 2015 should be unlocked as economic environment strengthens and boost the market, but increasingly powerful smartphones could shift device usage patterns and presents downside.

**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, but with the digital camera market on a permanently lower trajectory the AV segment is expected to underperform.

**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 due to saturation, but zloty appreciation provides upside for unit prices, in contrast to trends over 2012-2015.

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