

Poland Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: Our Country Risk team forecasts zloty appreciation from 2017 to provide significant support to our outlook for Poland's consumer electronics devices market. We expect purchasing power gains to accrue to Polish households throughout the 2017-2020 period. In the context of a contraction in 2015 that saw deferred spending, this could unlock pent-up demand. The volume growth outlook is soft due to maturity in most product categories, but upgrades and higher average selling prices could benefit vendors throughout the medium term. We forecast total device spending will increase at a CAGR of 5.3% throughout 2016-2020.

Latest Updates & Industry Developments

Computer Hardware Sales: USD2.3bn in 2016 to USD2.9bn in 2020, a compound annual growth rate (CAGR) of 6.7% in US dollar terms. Pent-up demand and zloty appreciation present upside for PC sales, but replacement cannibalization by increasingly powerful smartphones.

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 and the bulk of the flat-panel upgrade boom having passed the AV market will not return to previous highs.

Handset Sales: USD3.1bn in 2016 to USD3.7bn in 2020, a CAGR of 4.5%. Handset segment outperformance forecast to end throughout the medium term, as the growth slowdown resulting from smartphone saturation offsets some of the upside from zloty appreciation.

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