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Qatar Consumer Electronics Report Q1 2016

https://marketpublishers.com/r/Q5A2F083B0DEN.html
Date: January 2016
Pages: 55
Price: US$ 1,295.00 (Single User License)
ID: Q5A2F083B0DEN

Abstracts

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BMI View: We continue to maintain a positive outlook for the Qatari consumer electronics market and the macroeconomic landscape of the country in general.

Qatar will not feel the finch of the prolonged global oil price slump.

The economic activity in the country will be bolstered by high incomes, a strong discretionary spending power level, a steady population growth from the influx of migrant workers and the government's continued commitment to investment in the ICT sector.

The upcoming FIFA 2022 World Cup taking place in Qatar is also a source of growth at this point and we estimate that it will fuel growth over the next five years.

In contrast to other early adopting markets, we envisage medium term growth for device categories including high-end smartphones, tablets and TVs due to the extremely high disposable incomes of Qataris and the strength of the fashion oriented culture of conspicuous consumption.

Meanwhile, at the other end of the market the government's expansionary policies have resulted in a rapidly growing population of migrant workers to support the construction and hospitality sectors.

This is in turn driving volume growth in the consumer electronics market, while an expanding tourism sector is boosting demand for AV devices.

Latest Updates & Industry Developments

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Computer Hardware Sales: We forecast sales of USD771mn in 2014 and forecast this to rise to USD1.0bn in 2019, a compound annual growth rate (CAGR) of 5.5% in US dollar terms. After a decline in tablet volumes in 2014 we expect the market will return to growth over the medium term, but significantly slower than during the initial boom, while notebook upgrades will make an important contribution to value growth 2015-2019.

AV Sales: We forecast growth to increase from USD332mn in 2014 to USD392mn in 2019, a CAGR of 3.4% in US dollar terms. The TV market is stagnant in volume terms, but an increased share of UHD sets in the sales mix will have a disproportionate impact on market value and underpin value growth.

Handset Sales: We forecast growth to rise from USD558mn in 2014 to USD732mn in 2019, a CAGR of 5.6% in US dollar terms. Unlike other regional markets, the premium preference of Qatari consumers means price erosion is not a key dynamic, and therefore value growth will be sustained 2015-2019 by population growth and smartphone upgrades.

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