

Qatar Consumer Electronics Report Q4 2016

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Abstracts

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BMI View: Qatar's consumer electronics market is one the most lucrative in the world, where high incomes and a strong consumption culture mean replacement cycles are short and device prices high. It also fared better than its oil-producing peers in 2015, a trend we expect will continue over the medium term as population growth and large investment projects create new opportunities that help to compensate for the underlying diminished-volume growth potential in a market where saturation has already been reached in most device categories. We forecast total device spending will increase at a CAGR of 4.1% over 2016-2020 to USD1.88bn in 2020.

Latest Updates & Industry Developments

Computer Hardware Sales: USD622mn in 2016 to USD744mn in 2020, a compound annual growth rate (CAGR) of 4.6%. Hybrid notebooks are an area of strong growth, while tablet demand has fared better in the face of competition from tablets than in most markets.

AV Sales: USD252mn in 2016 to USD302mn in 2020, a CAGR of 4.5%. After underperformance in 2015 - when TV set spending contracted - we have a brighter outlook as UHD TV sets act as an upgrade trigger in the high-value premium segment.

Handset Sales: USD732mn in 2016 to USD838mn in 2020, a CAGR of 3.4%. In 2015 lower-cost smartphone availability deepened the market to a larger share of migrant workers, which resulted in an upward revision to the volume outlook, but this upside is countered in the value forecast by the declining average selling price for smartphones.

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