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Russia Consumer Electronics Report Q2 2015

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Abstracts

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BMI View: Despite positive fundamentals for medium- to long-term growth in consumer electronics spending in Russia, such as relatively low device penetration rates and rising incomes, the growth story will be obscured in 2015, with spending expected to contract by 13.8% in US dollar terms. The imposition of sanctions against Russia in mid-2014 have resulted in economic crisis and sharp depreciation of the rouble against the US dollar, hitting Russian consumer purchasing power, as well as leading to some vendors cutting supply of devices due to uncertainty. Although there is short-term downside, we expect to see growth in Russian Consumer Electronics over the medium term as the political and economic environment stabilises - although this may not occur until 2017. One trend that could be accelerated by sanctions and heightened price sensitivity is the share of sales captured by local low cost vendors such as YotaDevices, Explay and FLY, which all made major inroads in terms of market share in 2013 and 2014.

Headline Expenditure Projections

Computer Hardware Sales: USD12.4bn in 2014 to USD9.6bn in 2015, -22.4% in US dollar terms. A combination of rouble depreciation, tighter credit market conditions (meaning a drag on big-ticket purchases) and fact consumers moved demand forward to 2014 ahead of anticipated price rises will make computer spending growth the underperforming market segment in 2015.

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