

Saudi Arabia Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: The outlook for the Saudi consumer electronics market was downgraded again in Q116 as the downturn in oil markets extended right through 2015, negatively impacting the economic outlook. Weaker consumer confidence will exacerbate the drag on consumer electronics spending due to saturation in device categories such as tablets and LED/LCD TV sets. This underpins our forecast for subdued growth in the Saudi consumer electronics market over 2016-2019 at a compound annual growth rate of 1.0%. While the overall environment will be challenging we identify lucrative opportunities for vendors in the premium segment, namely high end smartphones and OLED TV sets, due to high incomes and a fashion-conscious domestic consumer base. The low end of the market may however be constrained due to the exit of a considerable number of migrant workers under the governments 'Saudisation' policy.

Latest Updates and Forecasts

Computer Hardware Sales: Set to decrease from USD3.75bn in 2016 to USD3.72bn in 2019, a CAGR of -0.2%. The market outlook was already subdued due to high device penetration and the potential for price erosion, including in the tablet market, but this was exacerbated by the weaker economic outlook and we now expect the market to contract over the medium term.

AV Sales: USD1.60bn in 2016 to USD1.68bn in 2019, a CAGR of +1.4%. After three successive years of contraction we envisage a return to growth, although not to previous highs due to cannibalisation of digital camera volumes, with the increased popularity of OLED TV sets providing a boost to market value.

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