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Saudi Arabia Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Consumer electronics device spending growth in Saudi Arabia is forecast to be modest, at a CAGR of just 1% over 2016-2020. By 2016 most device categories are mature, with high penetration rates for products that had been driving growth such as smartphones and tablets, meaning spending will be determined for the most part by replacement purchases. In addition, the uncertain economic outlook presents downside, particularly if the oil price turns down again and puts pressure on Saudi public spending programs. The overall outlook is quite weak, but there are select opportunities, for instance, highend smartphones and OLED TV sets.

Latest Updates & Industry Developments

Computer Hardware Sales: Set to decrease from USD4.29bn in 2016 to USD4.19bn in 2020, a CAGR of -0.6%. Saturation of the retail PC market and replacement spending cannibalisation by smartphones limits the potential of the computer hardware segment, which will be exacerbated by domestic economic weaknesses.

AV Sales: USD1.60bn in 2016 to USD1.73bn in 2020, a CAGR of +1.9%. UHD TV upgrades by high income households offer upside in a market where home entertainment is a popular lifestyle, and the market should recover over the medium term after three successive years of contraction in the wake of the initial flat-panel boom and digital camera volume cannibalisation.

Handset Sales: USD6.15bn in 2016 to USD6.61bn in 2020, a CAGR of 2.8%. Saudi Arabia's smartphone market regained momentum in 2015 as lower value handset availability deepened the market to migrant workers, but this upside will

not be sustained and we expect a deceleration over the medium term.

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