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Singapore Consumer Electronics Report Q2 2016

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Abstracts

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BMI View: Singapore is a low-growth but lucrative consumer electronics devices market, with saturation reached even in newer device categories such as tablets and smartphones. Though growth potential is limited compared to most APAC markets, Singapore is fertile ground for premium-oriented vendors, most notably Apple and Samsung Electronics, that dominate the market with flagship models - and we believe vendors will continue to benefit from these higher margin sales over the medium term. There are also a select device categories where there is also volume growth potential, for instance Ultra-HD TV sets once the supply of content increases, and wearable devices if vendors can make significant progress on functionality and price to truly move into the mass market.

Latest Updates & Industry Developments

Computer Hardware Sales: USD1.6bn in 2016 to USD1.8bn in 2020, a compound annual growth rate (CAGR) of 2.5% in US dollar terms. Return to growth envisaged as tablet market stabilises, with hybrid notebooks emerging as a significant opportunity for vendors.

AV Sales: USD618mn in 2016 to USD671mn in 2020, a CAGR of 2.1%. Smart and Ultra-HD TV set upgrades will provide some growth momentum after the multi-year contraction that followed the initial LED boom, but the market will not return to previous peaks.

Handset Sales: USD730mn in 2016 to USD815mn in 2020, a CAGR of 2.8%. Smartphone segment is highly lucrative in per capita terms, where Apple and Samsung's flagship devices dominate, and there is upside risk should wearable

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devices gain mass market traction.

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