

Singapore Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: The maturity of Singapore's consumer electronics market means growth potential is limited, particularly when compared to emerging markets in APAC. High device penetration rates are a feature of the market, even for tablets and smartphones, and as such vendors will rely on replacement sales in the absence of any major product innovations. While growth potential is not strong, Singapore is one of the most lucrative per capita device markets in APAC and our household income forecast supports the view that high spending will continue to be a central characteristic of the market over the medium term. We forecast total consumer electronics device spending CAGR of 2.5% in Singapore over 2016-2020.

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. High incomes and replacement spending make for a lucrative market in per capita terms, but retail PC market saturation and erosion of enterprise infrastructure spending due the shift to the cloud present downside.

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

devices gain mass market traction.

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