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South Africa Consumer Electonics Report Q4 2010

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Abstracts

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South Africa’s consumer electronics devices market, defined as the addressable market for computing devices, mobile handsets and video, audio and gaming products, is projected at US$6.8bn in 2010. This expected to increase to US$9.8bn by 2014, driven by demographics, product innovation, rising incomes, and rising computer penetration.

Consumer electronics sales were on an upwards curve in H110 boosted by spending associated with the 2010 FIFA World Cup in South Africa, as well as lower interest rates and improved credit availability. BMI forecasts that consumer electronics spending growth will remain in the high single digits in 2010. The consumer recovery could prove fragile however, with higher household indebtedness and rising unemployment acting as restraints on growth.

Computers

Computer hardware accounted for about 61% of South African consumer electronics spending in 2009. BMI projects South African domestic market computer hardware sales of US$4.1bn in 2010, up from US$3.7bn in 2009. Computer hardware’s compound annual growth rate (CAGR) for 2010-2014 is forecast at about 10% as a result of rising computer penetration, falling prices and vendor and retailer promotions.

AV

Audio/video (AV) devices accounted for about 18% of South Africa’s consumer electronics spending in 2009. South Africa’s domestic AV device market is projected at US$1.20bn in 2010. This market is also expected to grow at a CAGR of 11% between

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2010 and 2014, to a value of US$1.80bn, driven by new technologies and digital TV transition, which is due to be complete by 2015. Sales of LCD and Plasma TV sets were reported by retailers to be up by as much as 50% ahead of the start of the FIFA World Cup tournament in June 2010, compared with the same period of 2009.

Mobile Handsets

Mobile handset sales accounted for 22% of South Africa’s consumer electronics spending in 2009. South African handset sales are expected to grow at a CAGR of 5% to US$1.8bn by 2014, when mobile subscriber penetration is expected to reach 106%. The replacement market will be increasingly important and demand for 3G handsets has exceeded expectations, while lower prices have boosted sales of smartphones.

Contents

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