

South Africa Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: Consumer electronics device spending growth in South Africa has been negatively impacted by economic weakness 2013-2015, with the squeeze on spending from rand depreciation against the US dollar most significant in the PC and AV segments. Rand depreciation eroded South African household purchasing power in global markets, though with the trend of depreciation forecast to ease over the medium term it will to some extent be offset by an increasing supply of low-cost smartphones and tablets. Such low-cost smart devices have proved the most resilient device categories, as demonstrated by the popularity of smartphones launched by MTN and Vodacom, and we expect this to remain the case over the medium term.

Latest Updates & Industry Developments

Computer Sales: USD1.87bn in 2016 to USD1.97bn in 2019, a compound annual growth rate (CAGR) of 0.4%. Rand depreciation represents downside risk by squeezing household purchasing power, resulting in deferred purchases and substitution for cheaper models.

AV Sales: USD941mn in 2016 to USD983mn in 2019, a CAGR of 0.4%. Digital camera demand cannibalisation will continue to be a drag on growth, while TV set market has a mixed outlook due to considerable scope for upgrades, but also intensifying price competition.

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