

South Africa Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: We have further downgraded our forecast for the South African consumer electronics market in 2016 in our Q316 report update to reflect our Country Risk team's outlook for a sharp depreciation of the rand this year. This will further squeeze demand for higher value PC and AV devices, which have been hardest hit by currency depreciation and weakened purchasing power in global markets over 2013-2015. However, following a 22.5% depreciation in 2016, we expect the rand to stabilise by 2020. This will allow rising demand for smartphones, tablets, supported by an increasing supply of low-cost devices, as well as previously deferred PC purchases, to drive a return to growth in US dollar terms.

Latest Updates And Industry Developments

We have made further downgrades to our forecast for the consumer electronics market in 2016 due to the stronger-than-anticipated depreciation of the rand against the US dollar, but expect the currency impact to stabilise somewhat and a return to growth from 2017.

Computer Sales: USD1.65bn in 2016 to USD1.83bn in 2020, a compound annual growth rate (CAGR) of -0.9. 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 USD984mn in 2020, a CAGR of 0.3%. Digital camera demand cannibalisation will continue to be a drag on growth, while the TV set market has a mixed outlook due to considerable scope for upgrades, but also intensifying price competition.

Handset Sales: USD3.79bn in 2016 to USD3.98bn in 2020, a CAGR of 1.5%. Handset spending growth forecast to slow as smartphone market saturation occurs, but it will continue to outperform and remain the largest segment of the South African consumer electronics market over 2016-2020.

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