

South Korea Consumer Electronics Report Q1 2016

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Abstracts

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BMI View: We have left our forecasts unchanged in the Q1 2016 report update for the South Korean consumer electronics market. We had downgraded our forecast for the South Korean consumer electronics market in the Q4 2015 update, with weak H1 2015 sales and deteriorating economic confidence after the slide in regional equity markets in August 2015. South Korea saw a very steep decline in 2015, with the market contracting by almost 13%. In 2016, we estimate a minor contraction of under 2%, with total market value reaching USD17.9bn. The South Korean market remains complex and saturated. For instance, in the smartphone market, not only is penetration high, but LTE handsets and phablets have also already passed through the initial boom phase. Meanwhile, in the AV segment, HD TV set ownership is widespread, and in the PC market, all core markets are saturated. Although market maturity means South Korea will significantly underperform emerging markets in the region, we stress that it will remain lucrative in per capita spending terms and will offer vendors higher margin sales opportunities than much of the rest of Asia Pacific.

2016 Headline Expenditure Projections:

Computer Hardware Sales: Decline of 6.3% with total market value reaching USD8.8bn.

AV Sales: Growth of 3.5% with total market value reaching USD2.82bn.

Handset Sales: Growth of 2.5% with total sales exceeding USD6.28bn.

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