

South Korea Consumer Electronics Report Q2 2015

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Abstracts

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BMI View: We expect the South Korean consumer electronics market to plateau in terms of market value over the medium term. Growth will be slow due to market maturity and significantly underperform emerging markets in the region, but crucially will remain lucrative in per capita spending terms. In the short term, high household debt levels will be a constraint on consumer spending and over the medium term high penetration rates in almost all device categories means there will be no surge in demand as first-time buyers enter the market. Phablets, convertible/hybrid notebooks and emerging technologies such as OLED and ultra-HD TV sets and wearable computing devices offer medium-term growth potential.

Headline Expenditure Projections

Computer Hardware Sales: USD10.8bn in 2014 to USD10.5bn in 2015, -3.5% in US dollar terms. Tablet volume growth slow as a result of saturation, limiting overall PC market value growth with the notebook and desktop markets also saturated.

AV Sales: USD3.33bn in 2014 to USD3.38bn in 2015, 1.5% in US dollar terms. The stabilisation of the of digital camera market and increased share of TV sales accounted for by UHD sets will tip the market back into positive growth territory.

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