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Abstracts

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BMI View: South Korea is a global leader in the consumer electronics industry and home to some the largest vendors in the AV and handset segments. The outlook for device spending is positive, as we envisage a combination of pent-up demand after contraction throughout the 2014-2016 period, won appreciation and income gains for premium households. These factors will drive replacement and upgrade spending opportunities in higher value devices such as flagship smartphones, UHD TV sets and hybrid notebooks. However, there is a broad limitation on robust growth potential due to the maturity of South Korea's consumer electronics, where there is high penetration in virtually all device categories.

Latest Updates And Industry Developments

Computer Hardware Sales: USD8.0bn in 2016 to USD10.3bn in 2020, a CAGR of 6.4%. There is pentup demand after contraction throughout 2013-2015 and premium income gains are another positive factor. However, there is downside from potential PC sales cannibalisation by smartphones.

AV Sales: USD2.7bn in 2016 to USD3.0bn in 2020, a CAGR of 2.9%. The AV segment will be subdued as the flat-panel boom has long since passed, but TV set product trends will become more supportive as Ultra-HD and OLED sets trigger high value upgrades.

Handset Sales: USD8.0bn in 2016 to USD10.3bn in 2020, a CAGR of 6.4%. Smartphone and phablets markets are mature, while 4G upgrade driver is also diminished, resulting in a low-growth outlook. In a regional perspective, the handset segment will have high value in per capita term.

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