

Taiwan Consumer Electronics Report Q2 2016

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Abstracts

BMI View: Taiwan is a mature devices market with high penetration in most device categories, including smartphones and tablets, and consequently its growth potential is smaller than those of emerging markets in the region. However, the medium-term forecast, with a CAGR of 3.5% over 2016-2020, is an improvement over 2014-2015 with the economy expected to strengthen, while product trends in the computer hardware and AV segments turn positive. We identify the most prominent opportunity as premium device sales - ie flagship smartphones and tablets, hybrid notebooks and Ultra-HD TV sets - based on our analysis of household income trends, which will go some way in compensating for the wider limitations posed by saturation.

Latest Updates & Industry Developments

Computer Hardware Sales: USD2.2bn in 2016 to USD2.6bn in 2020, a compound annual growth rate (CAGR) of 4.1%. A stabilisation of the tablet market after the initial boom and pent-up upgrade demand in traditional form factor market are both positive for demand growth, particularly in the context of rising incomes.

AV Sales: USD1.2bn in 2016 to USD1.4bn in 2020, a CAGR of 3.2%. Smart and Ultra-HD TV set upgrades will counteract saturation and price erosion in the core flat-panel TV set market, while the cannibalisation of digital camera sales is set to slow with smartphone ownership already widespread by 2016. The market will not however return to previous highs, and is forecast to be 29% below 2012 peak even in 2020.

Handset Sales: USD2.1bn in 2016 to USD2.4bn in 2020, a CAGR of 2.9%. The smartphone upgrade growth engine will extinguish over the medium term as ownership becomes ubiquitous, but stronger demand for flagships will provide

some growth momentum as incomes rise at the high end in Taiwan over 2016-2020.

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