

Taiwan Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Taiwan is one of the leading global producers of consumer electronics and the industry is very important for economic performance. In terms of domestic spending, Taiwan is less significant due to a relatively small population and growth opportunities are diminished due to its mature market status with high penetration in most device categories. We do however envisage an upturn in device spending trends over 2016-2020, with a CAGR of 3.5% forecast. After contraction in 2014 and 2015 due to product cycles and weaker economic performance, we expect rising household incomes, pent-up upgrade and replacement demand and product innovation to drive spending on devices in Taiwan.

Latest Updates & Industry Developments

Computer Hardware Sales: USD2.2bn in 2016 to USD2.6bn in 2020, a compound annual growth rate (CAGR) of 4.2%. The core market is saturated, but innovation in the notebook and tablet segment should return the segment to growth through upgrade spending over the medium term.

AV Sales: USD1.2bn in 2016 to USD1.4bn in 2020, a CAGR of 3.3%. Smart and Ultra-HD TV set upgrades a growth area but the cannibalisation of digital cameras means the AV segment will not return to previous highs and is forecast to be 29% below the 2012 peak, even in 2020.

Handset Sales: USD2.1bn in 2016 to USD2.4bn in 2020, a CAGR of 3.0%. Premium smartphones will become the main area of growth as incomes rise, while over the medium term the mass market smartphone upgrade growth engine will continue to deplete.

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