

Taiwan Consumer Electronics Report Q4 2016

<https://marketpublishers.com/r/TADF6AECB02EN.html>

Date: August 2016

Pages: 68

Price: US\$ 1,295.00 (Single User License)

ID: TADF6AECB02EN

Abstracts

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BMI View: The era of booming consumer electronics sales has passed in Taiwan, where high penetration rates across the spectrum of devices means that market performance is set to rely on replacement sales throughout the medium term. However, we expect an improvement over the contraction in 2014-15, as the market returns to growth in 2016 and accelerates slightly throughout the medium term. A stronger economic environment is a positive sign for consumer sentiment and purchasing power, while device trends are also expected to be less hostile after key product categories were affected by a dip in volumes in 2014-15, derived from a steep fall in first-time buyers due to the pace of ownership proliferation.

Latest Updates & Industry Developments

Computer Hardware Sales: USD2.2bn in 2016 to USD2.5bn in 2020, a compound annual growth rate (CAGR) of 3.0%. After deferred spending there is scope for vendors to tap pent-up demand, and hybrid notebooks could fare well, but we caution that notebook/tablet replacement spending could be cannibalised by increasingly powerful smartphones over the medium term.

AV Sales: USD1.2bn in 2016 to USD1.3bn in 2020, a CAGR of 1.7%. 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 around 30% below the 2012 peak even in 2020.

Handset Sales: USD2.1bn in 2016 to USD2.4bn in 2020, a CAGR of 3.2%. Although the smartphone market is mature in Taiwan, we believe vendors can target value growth through flagship/premium model sales through a

combination of innovation and aided by local household purchasing power growth.

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