

# Thailand Consumer Electronics Report Q3 2016

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## Abstracts

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**BMI View:** Thailand is both a large domestic market for consumer electronics devices and an important production centre for global industry, particularly with regards hard disk drive manufacture. After a difficult few years we believe Thai consumer electronics spending will return to growth in 2016, and then strengthen over the medium term, with a CAGR of 3.7% forecast for 2016-2020. Our core view for the medium term continues to be based on our positive assessment of household income trends in Thailand that will support a deepening of the market and expanding middle class, which could alleviate some price sensitivity, and offer volume growth opportunities in the context of relatively low device penetration rates in the PC and handset segments in Thailand.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD2.33bn in 2016 to USD2.87bn in 2020, a compound annual growth rate (CAGR) of 5.3%. After deferred spending in 2014 and 2015 there is significant growth potential as income profile strengthens from 2016, with personal device sales of notebooks and tablets expected to outperform.

**AV Sales:** USD1.37bn in 2016 to USD1.51bn in 2020, a CAGR of 2.5%. After contraction over 2012-2015, we expect a return to growth from 2016, but the market will not reach previous highs due to TV set price erosion and the digital camera market being on a lower trajectory due to the proliferation of smartphone ownership.

**Handset Sales:** USD3.27bn in 2016 to USD3.69bn in 2020, a CAGR of 3.1%. Handset spending growth forecast to pick-up in 2016, but decelerate over the

medium term due to a depleted pool of potential smartphone first-time buyers which will see the upgrade growth engine diminish.

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