

# Thailand Consumer Electronics Report Q4 2016

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## Abstracts

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**BMI View:** An expanding and increasingly-affluent middle class in Thailand will boost the consumer electronics market over the medium term, and represents a break away from the trend over 2014-2016 when economic and political factors were drags on the market. However, the outlook is not wholly positive because of product trends, where there is increasing concern about the potential negative impact of smartphones on PC sales and across the market as a whole. Global industry overcapacity could make it difficult to achieve satisfactory margins. Meanwhile, for Thailand's large domestic electronics industry, particularly with regards hard disk drive manufacture, there is a risk that low-cost production centres in the region could lead to operations moving out of the country.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** USD2.23bn in 2016 to USD2.54bn in 2020, a compound annual growth rate (CAGR) of 3.3%. Forecast downgraded in Q416 after the negative impact of smartphones on PC sales, particularly tablets, in H116 exceeded our expectations.

**AV Sales:** USD1.33bn in 2016 to USD1.45bn in 2020, a CAGR of 2.3%. Although we forecast a return to growth and more favourable product trends, saturation and price competition means the market will not return to previous highs even by 2020.

**Handset Sales:** USD3.27bn in 2016 to USD3.77bn in 2020, a CAGR of 3.6%. Smartphone saturation is approaching, which will see growth slow, but some upside from baht appreciation and rising incomes in terms of average selling

prices.

## Contents

BMI Industry View

SWOT

Consumer Electronics Market

Industry Forecast

Latest Updates

Structural Trends

Table: Consumer Electronics Overview (Thailand 2014-2020)

Industry Risk Reward Index

Industry Risk/Reward Index

Table: Asia-Pacific CE Risk/Reward Index, Q4 2016

Market Overview

Computers

Table: PC Sales (Thailand 2014-2020)

Table: Thailand PCs Per 100 Households - Breakdown By Device Type And Region, 2012-2014

AV Devices

Table: AV Sales (Thailand 2014-2020)

Mobile Devices

Table: Mobile Communications (Thailand 2014-2020)

Industry Trends And Developments

Electronics Trade

Table: Emerging APAC Consumer Electronics (CE) Trade, 2010-2015

Table: Thailand Consumer Electronics (CE) Trade, 2010-2015

Operational Risk And Government Policy

Industry Breakdown

Table: Thailand Electronics Production Value Index

Regulatory Development

Table: IT Regulatory Authority

Regulatory Developments

Competitive Landscape

Thailand Consumer Electronics Companies

Consumer Electronics Vendors - APAC, 2015

Table: Computer Hardware

Table: TV Sets

Table: Mobile Handsets

Retailers

Table: Selected Electronics Retailers

Table: Selected E-Commerce And Online Marketplaces  
Demographic Forecast

Table: Population Headline Indicators (Thailand 1990-2025)

Table: Key Population Ratios (Thailand 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Thailand 1990-2025)

Table: Population By Age Group (Thailand 1990-2025)

Table: Population By Age Group % (Thailand 1990-2025)

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Consumer Electronics Risk/Reward Index Indicators

Table: Weighting Of Indicators

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