

# Turkey Consumer Electronics Report Q2 2016

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## Abstracts

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**BMI View:** Turkey's consumer electronics market is estimated to have contracted by almost 10% in US dollar terms in 2015 as the lira depreciated sharply against the dollar, while deferred purchases due to political unrest were an additional drag. We forecast another year of contraction in 2016 as depreciation continues, with the impact of any global economic crises presenting additional downside due to Turkey's economic fragilities. In contrast to this challenging short-term outlook, we expect a return to growth from 2017 as the lira stabilises, which should return the market to a growth trajectory based on rising incomes and vendors tapping low penetration rate opportunities. We forecast a CAGR of 1.0% over 2016-2020 to USD13.04bn in 2020.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** Demand for PCs declined sharply in 2015 as device replacements and upgrades were deferred, and it will only be from 2018 that the PC market returns to growth. . BMI forecasts a 1.1% CAGR for computer hardware sales in USD terms over 2016-2020.

**AV Sales:** There has been a sustained period of contraction in AV sales due TV set price erosion and digital camera and mp3 player demand cannibalisation - all in a climate of eroding household purchasing power. The market is however expected to return to growth from 2017, with a CAGR of 1.5% forecast for 2016-2020.

**Handset Sales:** The handset market has been the outperforming segment of the consumer electronics market since the beginning of the smartphone boom in 2010-2011, but as a result of smartphone market saturation we expect growth to

slow sharply. We forecast a CAGR of 0.8% 2016-2020 to USD6.6bn.

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