

Turkey Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: The latest trade data for Turkey's consumer electronics market reinforces our assessment that lira depreciation against the dollar resulted in a contraction of domestic demand due to reduced affordability, meaning consumers substituted for cheaper models and deferred purchases. 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. We forecast 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% over 2016-2020 to USD6.61bn.

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