

# United Arab Emirates Consumer Electronics Report Q1 2016

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## Abstracts

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**BMI View:** The UAE is a lucrative consumer electronics devices market where high incomes and a culture of consumption are reflected in short replacement cycles and a large share for premium brands. This will continue over the medium term, but growth prospects are limited by the economic downturn as a result of the fall in oil prices in 2014 and 2015. This has filtered through to lower confidence levels and could impact the economy further over the medium term. Reflecting this, we downgraded our forecast for devices spending in Q116 and now envisage a compound annual growth rate of just 0.3% 2016-2019 to USD4.6bn.

While the market as a whole has a subdued outlook there are areas of stronger performance, for instance hybrid notebooks in the retail market, and TV set sales as hotel capacity has expanded ahead of the 2020 World Expo.

### Latest Updates & Industry Developments

**Computer Sales:** USD1.9bn in 2016 to USD1.9bn in 2019 at a CAGR of -0.5%. A combination of a saturated PC market, price erosion and an uncertain economic outlook will make hardware the underperforming segment.

**AV Sales:** USD818mn in 2016 to USD850mn in 2019 at a CAGR of 1.3%. After weak performance in recent years we believe Ultra-HD TV set upgrades and a stabilisation of the digital camera market will support a return to growth for the market as a whole.

Handset Sales: USD1.9bn in 2016 to USD1.9bn in 2019 at a CAGR of 0.7%. High level of premium smartphone demand will support a lucrative market in per capita terms, but overall growth will be limited by the continued slowdown in unit sales as a result of saturation.

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