

United Arab Emirates Consumer Electronics Report Q3 2016

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Abstracts

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BMI View: Consumer electronics device spending potential is limited in the UAE by the maturity of the core market, where device penetration rates are already very high, and the potential downside from an easing of sanctions on Iran, which could see a lower volume of visitor device shopping. These factors inform our forecast for total device spending to contract at a CAGR of -0.1% over 2016-2020 to USD4.57bn in 2020. The market will however continue to be lucrative for vendors in per capita terms due to high incomes and a culture of consumption, while population growth will also provide a small boost. New product categories such as Ultra-HD TV sets and wearables have the brightest outlook.

Latest Updates & Industry Developments

Computer Sales: USD1.9bn in 2016 to USD1.83bn in 2020 at a CAGR of -0.9%. A decline in visitor spending as sanctions on Iran are eased will be a drag given the core domestic market is saturated, outweighing the positive impact of population growth.

AV Sales: USD818mn in 2016 to USD879mn in 2020 at a CAGR of 1.8%. The AV segment underperformed in recent years, but Ultra-HD TV upgrade spending offers brighter prospects due to high incomes in the UAE and a culture of home entertainment.

Handset Sales: USD1.86bn in 2016 to USD1.86bn in 2020 at a CAGR of -0.1%. 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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SWOT

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