

# Venezuela Consumer Electronics Report Q2 2016

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## Abstracts

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**BMI View:** The depth of the economic crisis in Venezuela is behind our view that it will be the underperforming consumer electronics market globally in 2016 and over the medium term to 2020. Spiralling inflation, bolivar weakness, the low oil price, regulatory risks and political uncertainty all contribute to a bleak economic outlook that impacts the devices market. We expect a further squeeze on the affordability of devices in the short term, while lack of dollar access has resulted in product shortages, and the environment is so challenging as to also impact the local assembly industry. A mild recovery after a volume and value collapse are only cautiously predicted for the final years of the forecast, and even this scenario has risk weighted to the downside. We envisage a CAGR of -6.6% for US dollar consumer electronics device spending over 2016-2020.

### Latest Updates & Developments

Computer hardware; contraction from USD214mn in 2016 to USD172mn in 2020. Inflation to drive local currency growth, but outlook is bleak due to sharp reduction in affordability and product shortages as even local assembly has stalled due to extent of economic dislocation.

AV and gaming; contraction from USD246mn in 2016 to USD203mn in 2020. Device shortages in short term, and affordability squeeze over medium term, hurts the outlook for non-essential upgrades.

Handsets; USD578mn in 2016 to USD577mn in 2020. Handset segment forecast to begin recovery before other segments due to lower average selling price, large base of local production, and greater necessity of handset ownership.



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