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Venezuela Consumer Electronics Report Q3 2015

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Abstracts

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BMI View: after the negative impact of exchange rate reforms enacted in February 2015 became clearer in H115 we made a downward revision to the forecast for Venezuela's consumer electronics market. The reforms are effectively a devaluation and will have a negative impact on IT market growth in 2015 by dramatically increasing the cost of imported products, solutions and components. Additional economic challenges in 2015 include inflation forecast at almost 75% and GDP to contract by 3.6% in real terms. Meanwhile, the push by the government to implement the 'fair price' law in H114, which restricted vendor margins to 30%, means vendors face continued political as well as economic risk factors. The law adds to a hostile business environment and exacerbates existing challenges for vendors including currency weakness and economic, political and security risks that are weighing on purchasing power and consumer confidence.

Headline Expenditure Projections

> Computer Hardware Sales: USD917mn in 2014 to USD360mn in 2015. Sharp contraction forecast in value and volume terms in the PC market in 2015 due to the impact of currency reforms, which raised the cost of imported PCs and components. AV Sales: USD934mn in 2014 to USD532mn in 2015, -43% in US dollar terms. Demand for flat-panel TV sets hit by currency weakness and we expect the market will continue to contract beyond 2015 as digital camera volumes decline due to the proliferation of smartphone ownership.

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