

# Venezuela Consumer Electronics Report Q4 2015

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## Abstracts

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**BMI View:** We downgraded the consumer electronics market forecast in the Q415 update due to local retailers reporting a greater extent of disruption than we had anticipated. The main shift is a more bearish handset market outlook after reports that there were severe shortages due to operators being unable to import handsets through Telecom Venezuela. The downgrade is however relatively minor in the context of our pre-existing view for Venezuela to be the underperforming consumer electronics market globally due to devaluation and the impact on device affordability for local consumers where local wage inflation trails far behind device price inflation. 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 USD300mn 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, while additional reports of shortages of devices in retail outlets.

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