

Vietnam Consumer Electronics Report Q2 2015

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Abstracts

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BMI View: There is some downside risk to our consumer electronics spending outlook in 2015 due to an ongoing tightening of domestic credit conditions in the second half of 2014 due to a build of bad debts by Vietnamese banks. However, we maintain that Vietnam's consumer electronics market has a bright outlook as rising incomes and falling average device prices in key device categories over the medium term catalyse strong growth in spending. We maintain a positive outlook for the duration of our five-year forecast period, with CAGR of 4.8%. The country's vast, underpenetrated rural market offers the greatest growth potential, while Hanoi and Ho Chi Minh City accounted for the majority of sale. Across the country, growth areas include smartphones, particularly low-cost devices from Chinese and local brands, and LED TV sets as Vietnam transitions from analogue to digital broadcasting. Vietnam is also rapidly becoming a key destination in global consumer electronics supply chains, with large investments announced by Samsung Electronics, Nokia and LG Electronics in 2013 and 2014.

Headline Expenditure Projections

Computer Hardware Sales: USD1.41bn in 2014 to USD1.48bn in 2015, +5.5% in US dollar terms. The low penetration of PCs means vendors can still tap the first-time buyer market, with low-cost tablets from Chinese OEMs proving especially popular with consumers, but tightening credit conditions pose downside risk.

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