

Vietnam Mobile Device Retail Comprehensive Report Q1.2017

<https://marketpublishers.com/r/V6E578C024BEN.html>

Date: February 2017

Pages: 119

Price: US\$ 2,495.00 (Single User License)

ID: V6E578C024BEN

Abstracts

Before booming and strong development of technology, global electronic devices retail is growing and growing, expanding scale. Although the pace of industry development is still relatively low, especially with the slight decline in 2015 compared to 2014, but the growth trend of the industry is still very clear in the past 5 years due to the development of emerging markets and the consolidation in developed markets, leading to more shoppers buying more electronic devices. Leading the retail mobile market globally is China, after passing the United States in 2013 due to more favorable conditions such as having the largest number of population, abundant resources of consumption, high rate of exposure to major technology items due to high number of urban residents...

Contributed significantly to the growth of the electronic devices retail are smart phones and computers. Explosion of new technologies, consumers are changing their consumption trends, switch to using integrated products which are more functional and convenient. In 2012, total global phones consumption sharply declined due to the decline of ordinary telephone lines and conversion trends in customer tastes into smartphones; however, phone consumption again ascends in recent years due to rapid increase in smartphones consumption. The trend to use alternative tablets for laptops and desktops is spreading across the world thanks to the usability and mobility. However, the number of laptops are expected to decline due to strong development of detachables (type of removable computer screen).

In Vietnam, in all the fields of business, mobile retail is one of the fiercest competition and quickest elimination. With revenue of more than VND 65,000 billion in 2015 and promises to be robust in the coming years. Giant retailers are planning to put in a larger amount of money to expand market share. In recent years, rate of closure of small mobile stores is increasing. According to GfK, 3,000 mobile stores nationwide had to

close in 2015 due to the expansion of large retail chains. Many small mobile stores chose to avoid confrontation with big businesses by selecting used phones, cheap portable phones or expanding business with repair services, selling accessories or toys such as speakers, camera lens attached to smartphones...

In the market today there are many retailers of mobile phone, featured as Mobile World Group, FPT Shop, Vien Thong A, Viettel Store... Retailers compete fiercely for market share by not only constantly expanding chain of retail stores which have beautiful locations in the downtown area of the city and small-town, after-revenue service are also focused more. Online retail trend is gradually thrive due to benefits from the increase in income and consumer awareness, the growth potential of types of cheap smartphones and internet usage rate in Vietnam.

However, mobile devices retail market are expected to saturate in the near future, making market penetration and expanding market share become more difficult. Therefore, companies in the industry shift to promote to other businesses more potential as Mobile World Group invested heavily in green electronics chains and green groceries, FPT intends to sell stock in FPT Retail, FPT shop associated with Vinamilk to share retail space, Vien Thong A try doing business with unique products like model toys... In addition, the Mobile World Group also pushes to expand into new markets through retail system development abroad. Now they are planning to open the first shop selling mobile phones overseas such as Cambodia, Laos.

Contents

EXECUTIVE SUMMARY

I. Business Environment

1.1. Macroeconomic Situation

Figure 1. GDP Growth, 2011-2016E

Figure 2. GDP per capita of Vietnam, 2010 - 2016E

Figure 3. Vietnam's population and growth rate, 2006-2016

Figure 4. Urbanization rate in Vietnam, 2005-2016

Figure 5. Retail revenue of goods, 2010 - 2016E

Figure 6. Proportion of consumer electronics in retail revenue, 2010 - 2016E

Figure 7. Structure of imports, 2016

Figure 8. Structure of import market: Computers, electronic products and components, 2016

Figure 9. Structure of import market: Phones and types of components, 2016

Figure 10. USD/VND exchange rate, 2015-2016

Figure 11. CNY/VND and KRW/VND exchange rate, 2016

1.2. Legal framework

1.2.1. General rules

1.2.2. The impact of Free Trade Agreements

1.2.3. Assessing the impact of legal framework for domestic retail businesses

Figure 12. Assessing difficulties in the retail sector of enterprises

1.3. M&A in the industry

II. Market overview

2.1. Global market

2.1.1. Main products and activities in industry

2.1.2. Industry's supply chain

1.1.1. Market feature

Figure 13. Retail revenue of consumer electronics per capita consumption (ARPU), 2015 - 2021F

Figure 14. Global retail revenue of consumer electronics, 2010-2015

Figure 15. The number of phones sold, 2010 - 2018F

Figure 16. Market share of smartphone retail by area, 2013 - 2016E

Figure 17. Number of PC retail, 2010 - 2020E

Figure 18. Retail revenue of tablets by area, 2010 - 2015E

Figure 19. Consumption of electronic devices by age, 2015

Figure 20. Industry turnover in some countries, 2015

Figure 21. Retail revenue of technical consumer goods in China, Q1/2013 - Q3/2016

- Figure 22. Structure of retail revenue by product group, 9M/2016
- Figure 23. The biggest exports of China, 2015
- Figure 24. Retail revenue of technical consumer goods in Korea, Q3/2014 - Q3/2016
- Figure 25. The biggest exports of Korea, 2015
- Figure 26: Structure of revenue by product, 9M/2016
- 1.1.2. Factors affecting mobile devices consumption
- Figure 27. GDP per capita in the world, 2009-2015
- Figure 28. The number of smartphone users in the world, 2014 - 2022F
- Figure 29. The average selling price of smartphones in the world, 2010 - 2019F
- Figure 30. Percentage of Internet users in the world, 2010 - 2016e
- Figure 31. Revenue of global e-commerce retailers, 2014 - 2020f
- 1.1.3. Market situation in Southeast Asia
- Figure 32. Turnover of electronic devices retail in some countries in the region, Q3/2014 - Q2/2016
- Figure 33. Revenues by product group of six ASEAN countries, 9M/2016
- Figure 34. Proportion of smartphone users in some countries in the region, 2014 - 2019F
- Figure 35. Growth in the middle class in Southeast Asia, 1991 - 2017f
- 1.1.4. Industry's key players
- Table 1. Top 10 largest retailers of consumer electronics in the world, 2015
- 1.2. Vietnam market
- 1.2.1. Some consumer electronics retailing business models in Vietnam
- 1.2.2. Value chain of electronics retail in Vietnam
- Figure 36. The number of mobile phone manufactured in Vietnam, 2013 – 11M/2016
- 1.2.3. Scope, industry revenue and market share
- Figure 37. Scope of mobile consumer electronics retail, 2012-2016
- Figure 38. Market share of mobile retailers, 2016
- Figure 39: Revenue growth by quarter, Q1/2012 - Q3/2016
- Figure 40. Retail revenue of technical consumer goods in each industry group, 9M/2016
- Figure 41. Retail revenue of mobile phones, Q3/2013 - Q3/2016
- Figure 42. Market share of mobile phones in Vietnam by manufacturer, H1/2016
- Figure 43. Market share of mobile phones by price, H1/2015 – H1/2016
- Figure 44. Market share of mobile phone retail, 9M/2016
- Figure 45. Retail revenue of information technology products, Q3/2013 – Q3/ 2016
- Figure 46. Market share of laptops retail, 9M/2016
- Figure 47. Market share in Vietnam by manufacturer, H1/2016
- 1.2.4. Industry driving forces
- Figure 48. Structure of Vietnam's population, 2016

Figure 49. GDP and phone ownership rate per capita in Vietnam, 2009 - 2016F

Figure 50. Rental price movement, Q3/2016

Table 2: The average price decline rate of tablets, 2015-2018

II. Competitive Analysis

2.1. Mobile World

Figure 51. Number of stores of Thegioididong.com, 2004-2016

Figure 52. Revenue and average revenue/store of TGDD, 2011-2016

Figure 53. Revenue, net profit and the number of new stores opened of TGDD, 2016

Figure 54. Average revenue/store by month, 2016

Figure 55. EBT and EBT/shop, 2011-2016

Figure 56. Market share of mobile phone retail of TGDD, H1/2016

Figure 57. Revenue from online revenue and proportion, 2011-2016

Figure 58. Structure of revenue of Mobile World, 2015

2.2. FPT shop

Figure 59. Proportion of commercial activities in the total turnover of FPT, 2009-2016

Figure 60. Average Revenue and Revenue/shop, 2012-2016

Figure 61. Average EBT and EBT/shop, 2013-2016

Figure 62. Number of FPT shops, 2012-2016

Figure 63. Online revenue and proportion in total revenue, 2013-2016

2.3. Viettel Store

Figure 64. Number of retail stores of Viettel Store, 2012-2016

Figure 65. Revenue of goods and services provided by Viettelimex, 2012-2016

Figure 66. Earnings before tax of Viettelimex, 2012-2016

Table 3. Detailed prices applied for iPhone 7 32GB at Viettel Store

2.4. Vien Thong A

Figure 67. Number of retail stores of Vien Thong A, 2011 - 2016

Figure 68. Revenue and average revenue/store Vien Thong A, 2011-2016

Figure 69. Average EBT and EBT/store of Vien Thong A, 2011 - 2016

Figure 70. The total area of retail space and revenue m² of retail floor of Vien Thong A, 2011-2016

2.5. Retail system comparison

Figure 71. Average Revenue and EBT/store of mobile retail chains, 2016

Figure 72. Number of store retailers, 2015-2016

Figure 73. Effectiveness of exploitation of ground of retail chains, 2012-2016

Figure 74. The total area of retail space and revenue/m² of retail floor of Vien Thong A, 2011-2016

Table 4. Comparison of returns policies of retailers

Table 5. Comparison of iPhone 6S price at some retail stores

III. Risk analysis

IV. Corporate finance analysis

Figure 75. Net revenue and growth, 2015

Figure 76. Gross profit and gross profit margin, 2015

Figure 77. Selling expenses and selling expenses/net revenue, 2015

Figure 78. G&A expenses and G&A expenses /net revenue, 2015

Figure 79. Structure of assets, 2015

Figure 80. Structure of debt, 2015

Figure 81. Effectiveness of use of property, 2015

Figure 82. Liquidity ratio, 2015

Figure 83. ROS, 2015

Figure 84. ROA and ROE, 2015

V. Forecasts and recommendations

5.1. Development trends of mobile devices retail market

5.2. Forecasts

Figure 85. The number of phones sold in Vietnam, 2013 - 2019F

Figure 86. The number of smartphone users in Vietnam, 2015 - 2021F

Figure 87. Forecast for retail revenue of information technology products, 2015 - 2020F

Figure 88. Forecast for laptop and tablets consumptions in Vietnam, 2012 - 2019F

Figure 89. Forecast for retail revenue of mobile phones group, 2015 - 2020F

5.3. Recommendations

I would like to order

Product name: Vietnam Mobile Device Retail Comprehensive Report Q1.2017

Product link: <https://marketpublishers.com/r/V6E578C024BEN.html>

Price: US\$ 2,495.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/V6E578C024BEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970