



MARKET TRENDS & FORECASTS

A young couple is standing on a bridge, looking out over the River Thames in London. The woman is in the foreground, wearing a grey knit beanie, a grey scarf, and a light-colored trench coat. She is smiling and looking towards the right. The man is standing behind her, with his arm around her shoulder, looking in the same direction. In the background, the Tower Bridge is visible, illuminated with blue and white lights. The water of the river is calm, and there are some boats in the distance. The sky is overcast.

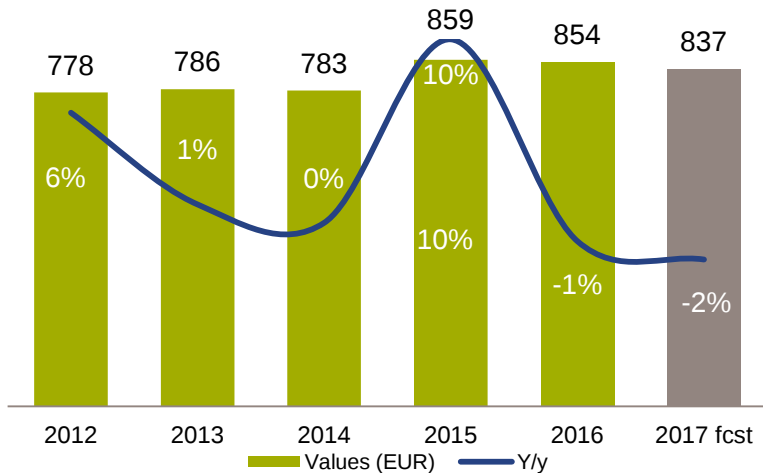
RUSSIA VS EUROPE

**GENERAL MARKET
TRENDS**

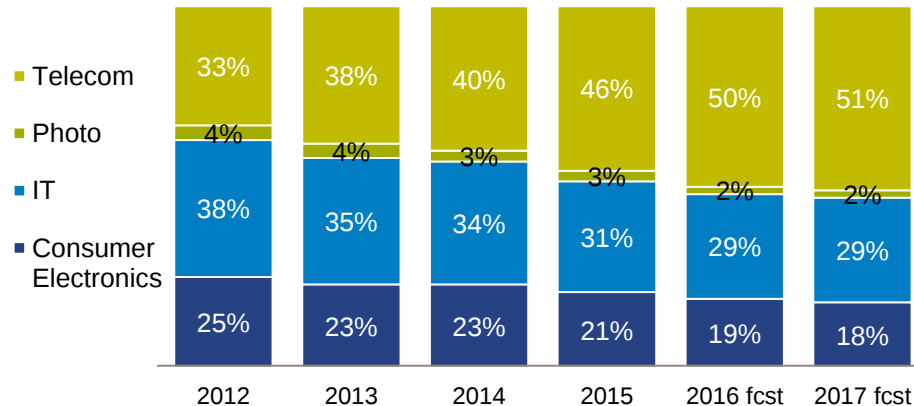
The global digital market is likely to see a YoY value decrease based on traditional categories in 2017. Photo remains stable in share.



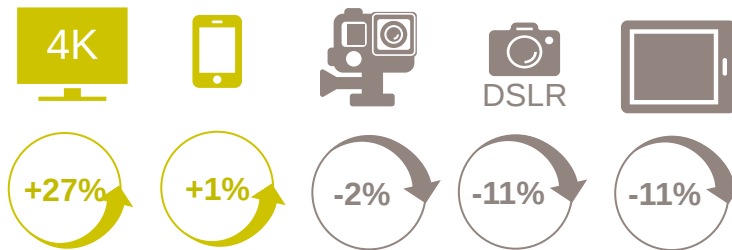
Global digital world values (EUR bn)



Global digital world values share by category



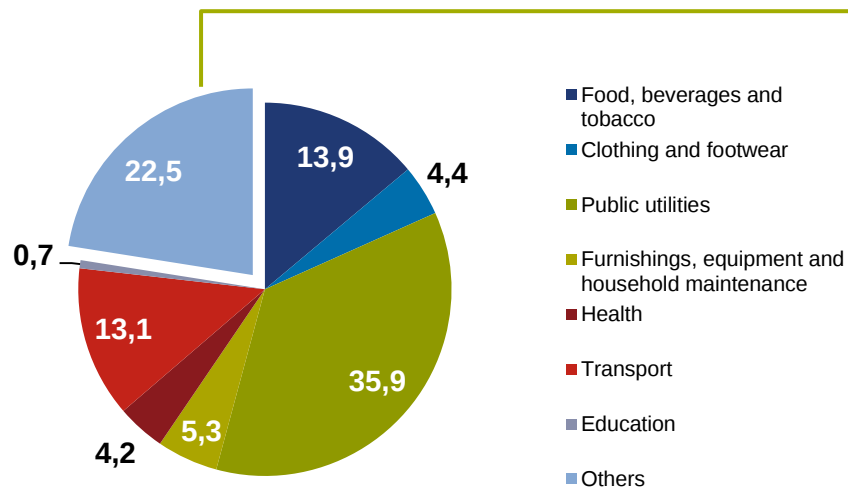
Expected value growth in 2017 for selected categories (i.e. 4K TVs, smartphones, action cameras, DSLR cameras, media tablets)



Private consumption expenditure by household, %

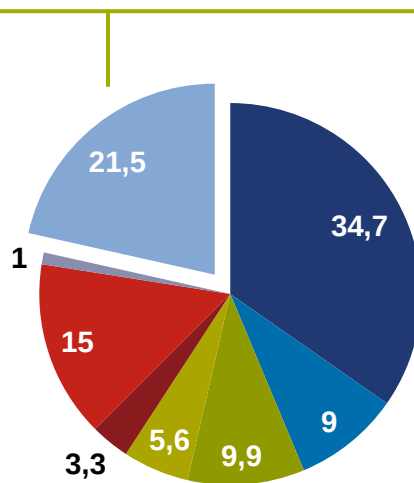


GERMANY



Disposable income – € 3.276
(per household)

RUSSIA

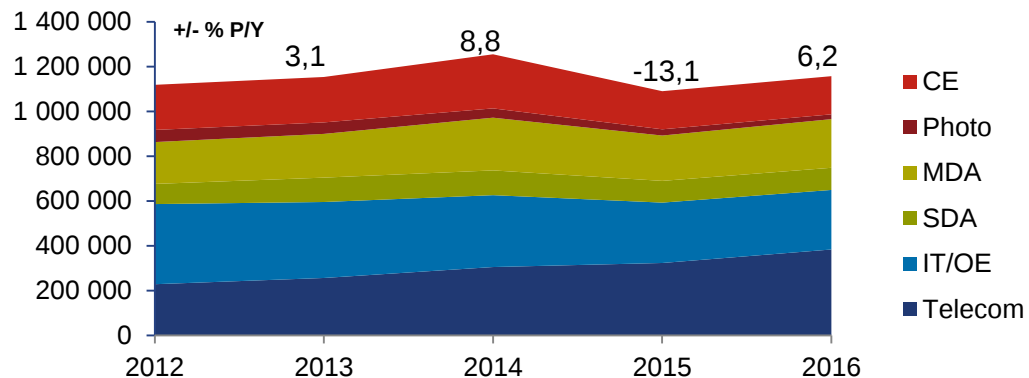


Disposable income – € 413
(per household)

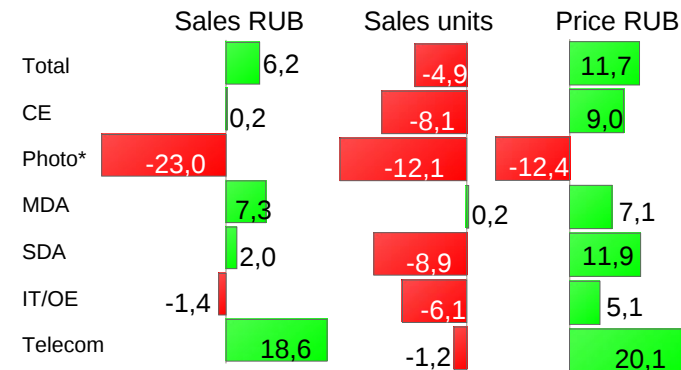
DE € 737
RU € 89

GfK Panelmarket Russia Sales Value Rub 2016

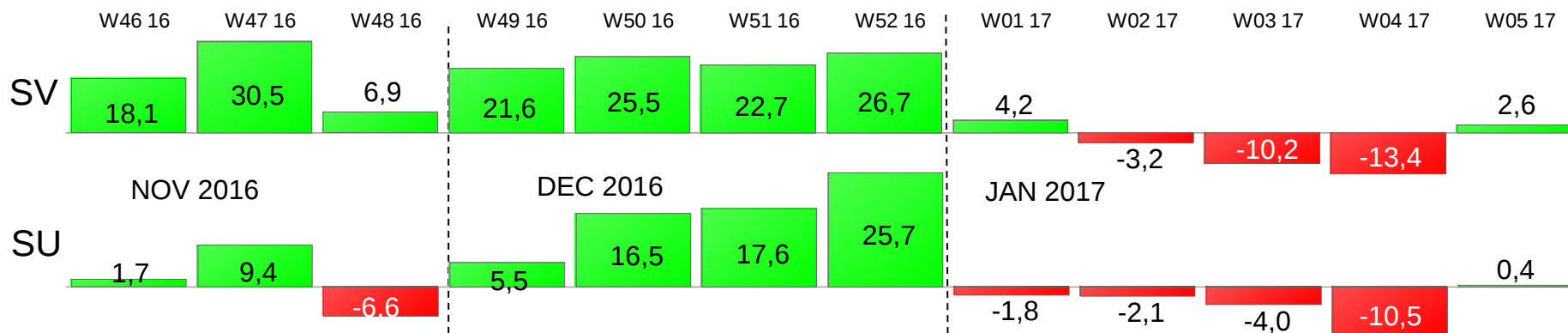
Trend Technical Consumer Goods



Growth Total market, % 2016

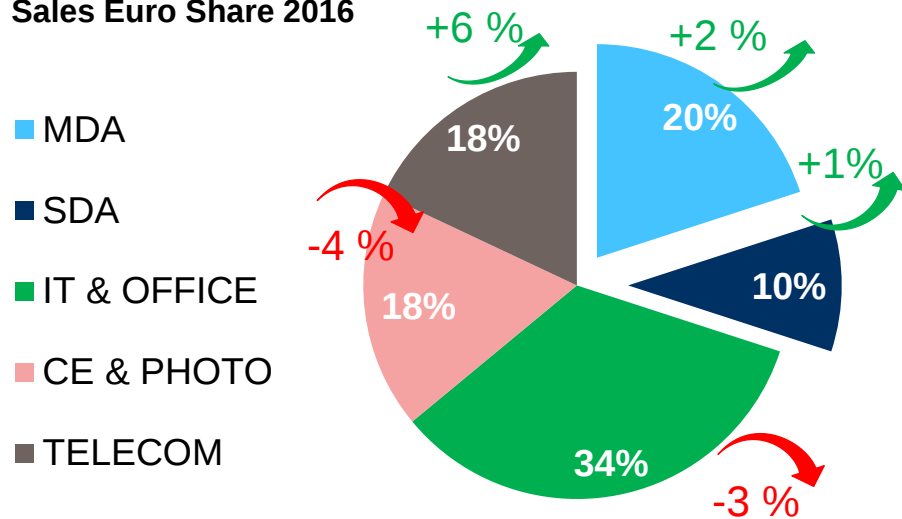


*Digital cameras + memory cards



TCG Market in Europe Value Trend -2%

Sales Euro Share 2016



The Consumer himself gets more and more used to a „smart“ life

Trend MDA 2017*

Smart Home

„Increasing awareness will lead to a greater adoption of smart products and appliances“

Innovative Products

“will seamlessly improve the life of the consumers and give them what they want!”

**PHOTO
& VIDEO
MARKET**

How are the trends affecting the Camera Market?

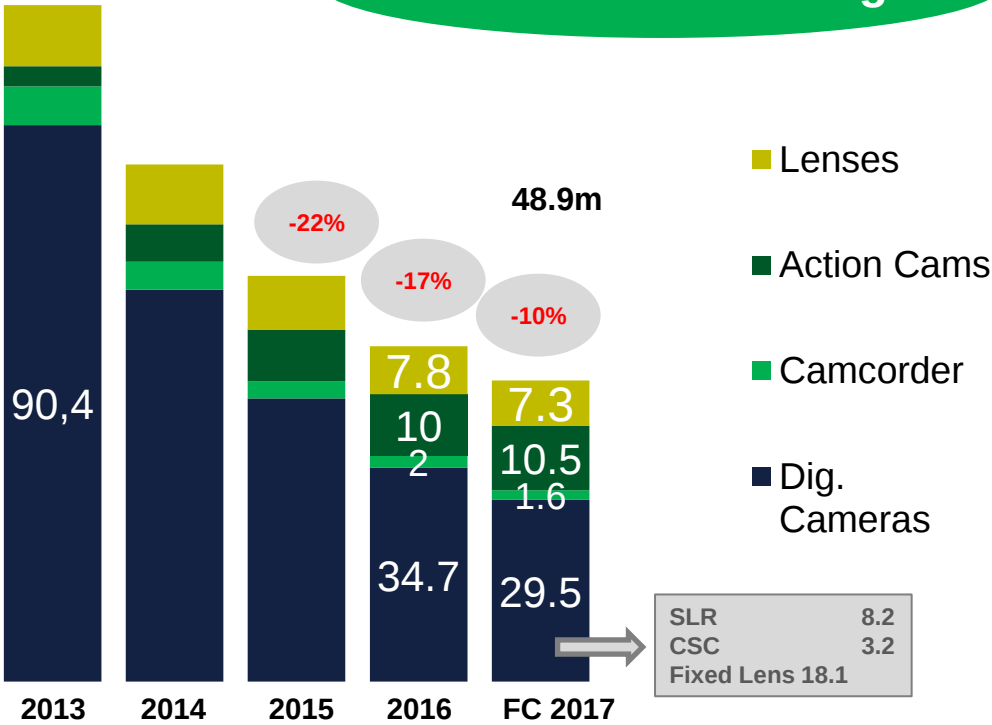
Global Sales Figures Sales Units and Value 2013 - 2016

Picture Taking Devices*

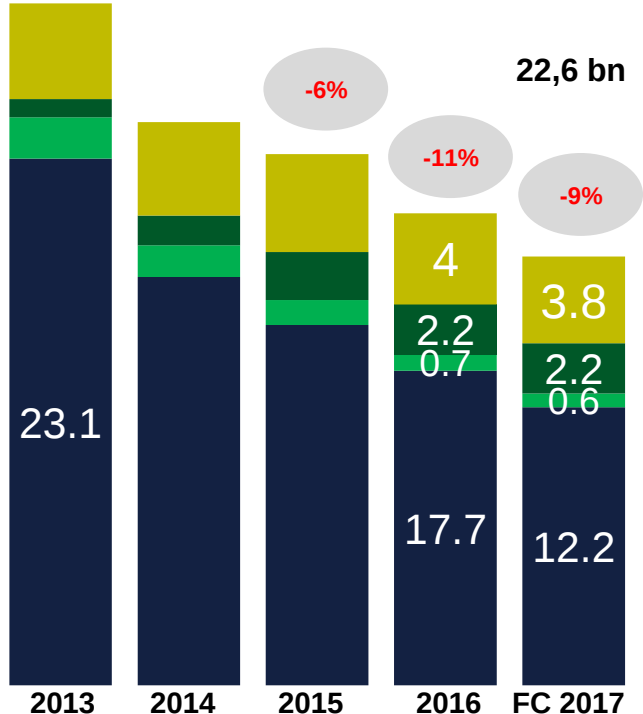


million Units

Decline is flattening



billion Euro

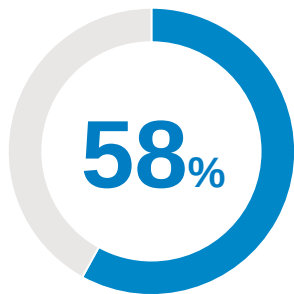


GfK Panelmarket Global Sales Value Share 2016

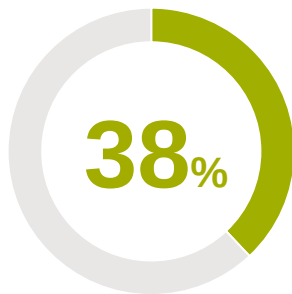
4K Trend by Devices



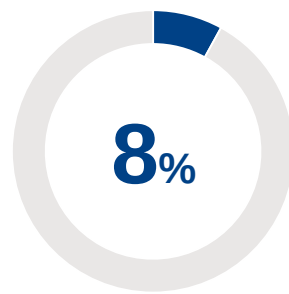
Prof Camcorder
(above 1,000 €)



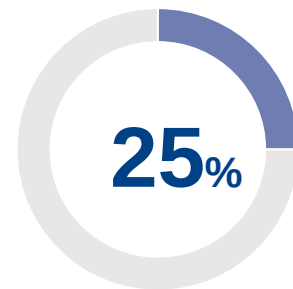
Action Cams



Drones



PTV



How strong is 4K influencing the picture quality at a classic Camera?

GfK Panelmarket Global Sales Figures 2016

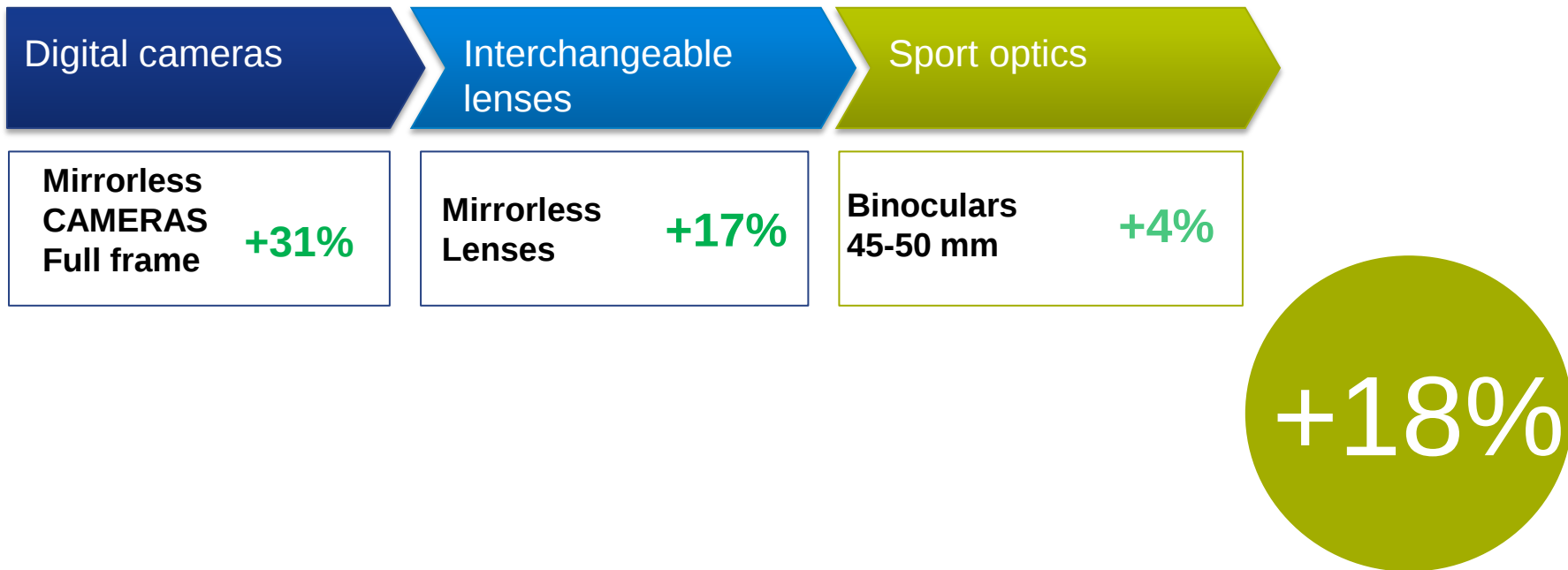
Digital Camera by 4K & Wifi



	Growth Value %	Turnover share €	Average Price EUR Growth	Number of models
4K + Wifi Cameras  	+167 %	 12 %	1.050 €	56
4K Only 	+>1000 %	 2 %	5.680 €	3
Wifi Only 	-10 %	 55 %	476 €	376
No 4K / No Wifi	-47 %	 31 %	290 €	2922

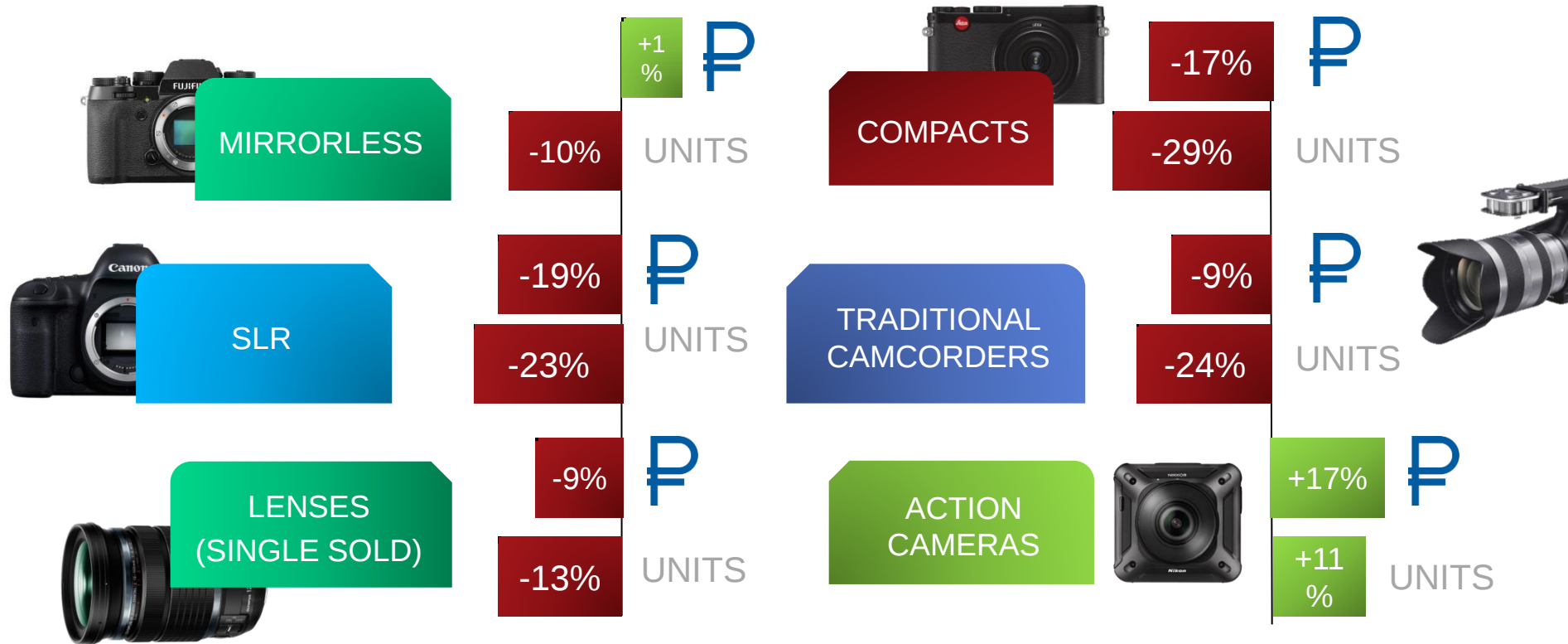
Growth drivers of Russian Photo Market

Growth in Rubles | 2016 vs. 2015



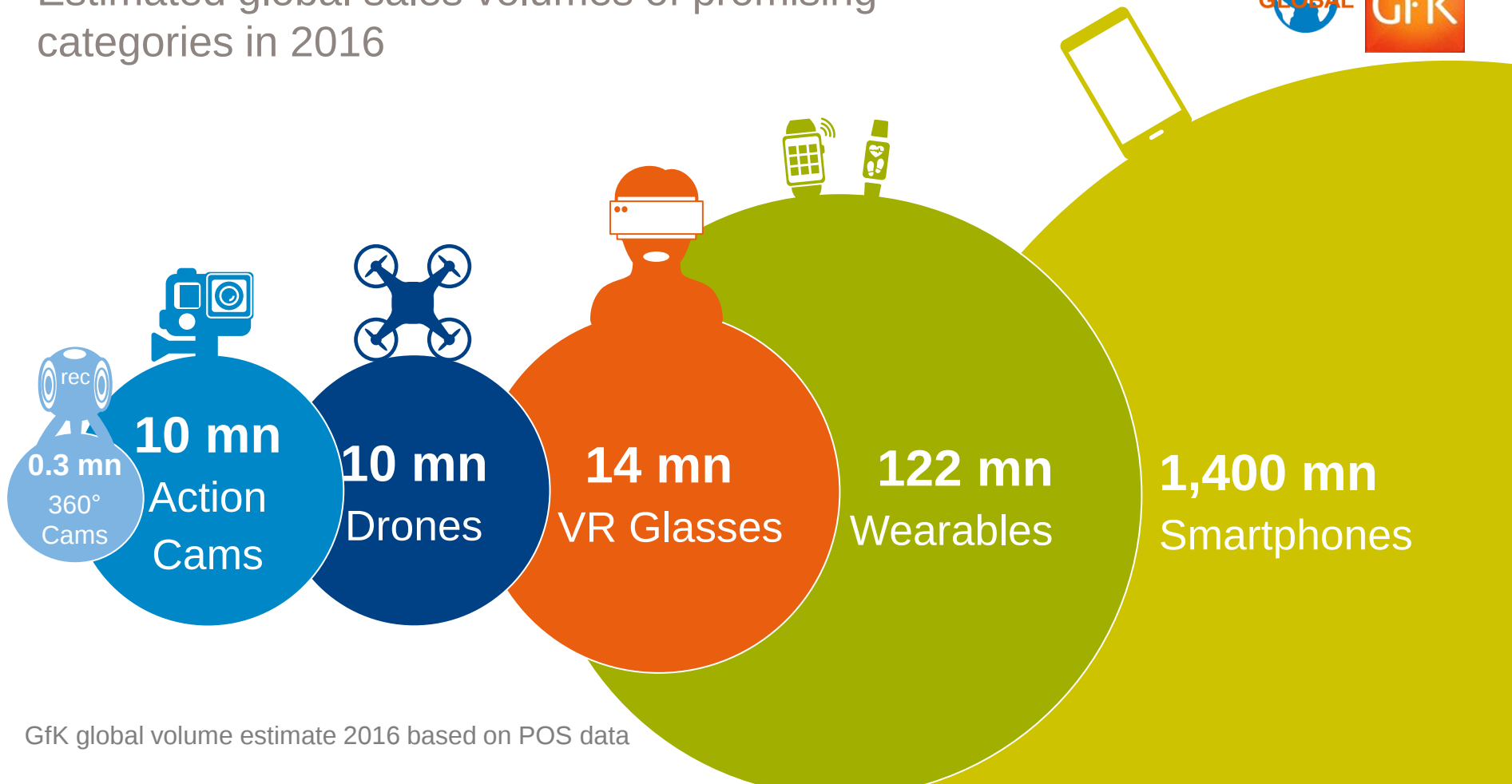
Forecasts 2017 RUSSIA

GROWTH RATES YoY



New **imaging** products must respond to the challenge:
How do they fit into the connected experience?

Estimated global sales volumes of promising categories in 2016



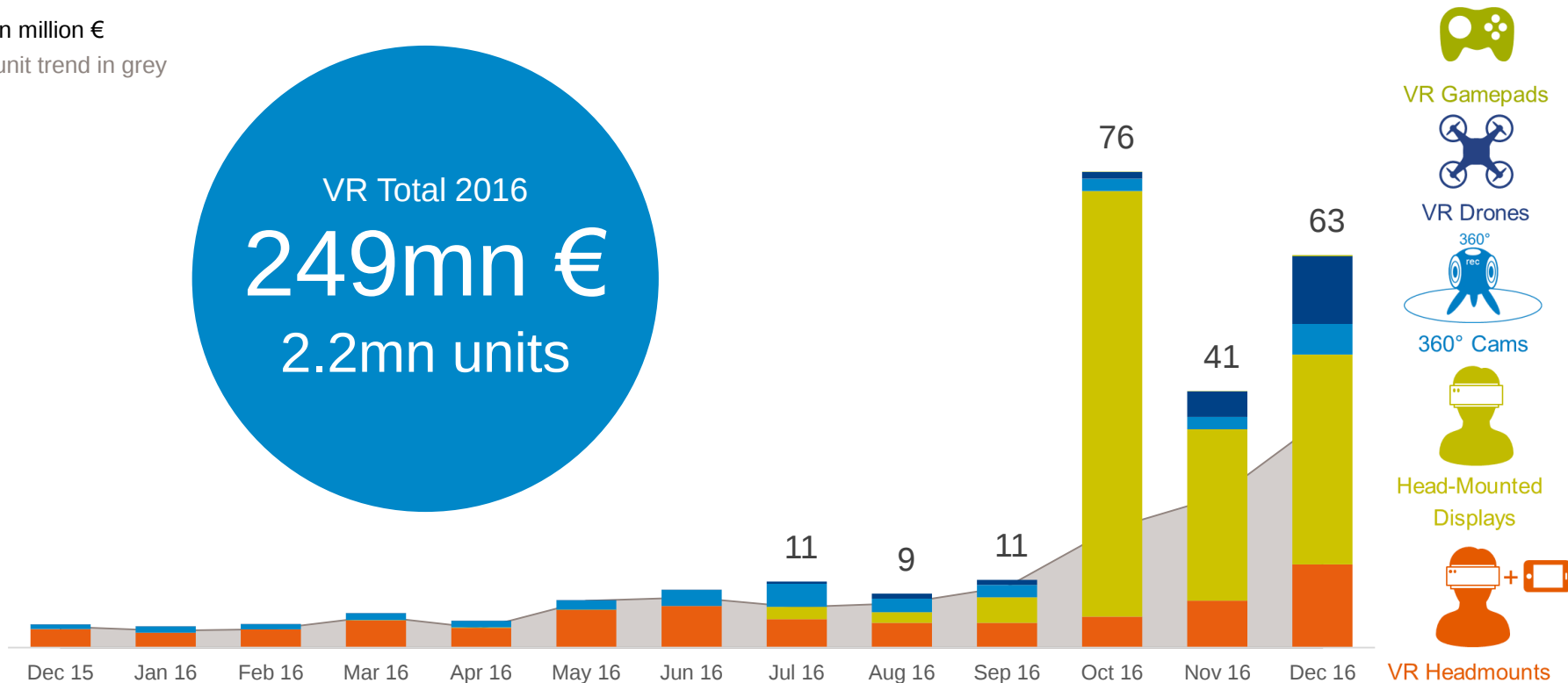
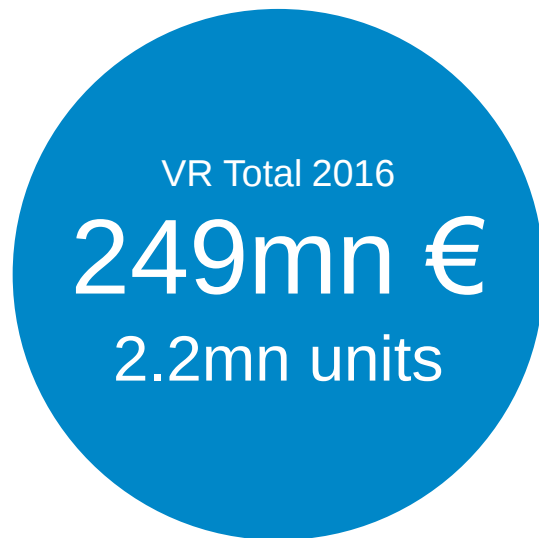
GfK global volume estimate 2016 based on POS data

In Q4 16 Virtual Reality becomes a 180 million € market in Europe mainly driven by stand alone head-mounted Displays.



in million €

unit trend in grey



Estimated total market based on GfK POS data for 10 European Countries, Dec 15 – Dec 16

A photograph of three young people sitting outdoors. On the left, a young woman with curly hair and sunglasses wears large white headphones. In the center, a young woman with long blonde hair and sunglasses wears black headphones with a red cable. On the right, a young man with short brown hair and sunglasses wears black headphones. They are all smiling and looking at a smartphone held by the woman in the center. The background is a blurred outdoor setting with stone steps.

CONSUMER ELECTRONICS MARKET

PTV MARKET



26K
price

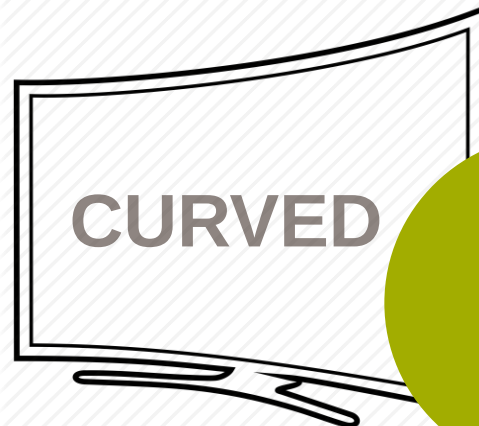
-5
units

+3
value

MARKET TRENDS



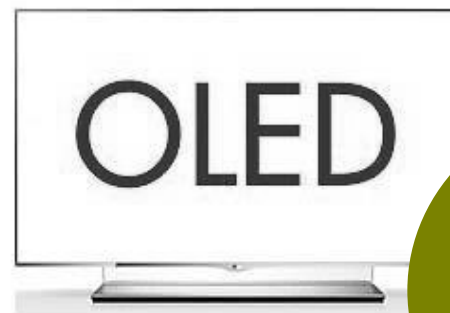
+18
value



+70
value



+74
value



+157
value

HEADPHONES & MOBILE HEADSETS



+15
value

+9
units

747
price

MARKET **TRENDS**



WIRED IN EAR HEADPHONES



+13%

BLUETOOTH HEADPHONES



+51%

SPORT HEADPHONES



+106%

FORECASTS



Forecast per Sector, 2017

Panelmarket, Units



CE	Photo	MDA	SDA	IT/OE	Telecom
0%	-26%	3%	2%	0%	0%
0%	4%	1%	2%	1%	2%
DIY	Lightning	Automotive*	Babycare	Optics	Pharma

*Tires & car oil only

Forecast per Sector, 2017

Panelmarket, RUB



CE	Photo	MDA	SDA	IT/OE	Telecom
1%	-24%	8%	4%	0%	10%
DIY	Lightning	Automotive*	Babycare	Optics	Pharma
1%	11%	4%	8%	9%	4%

*Tires & car oil only

THANK YOU

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Photo & Video, Sport Optics, Drones, 3D printing

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