

South Korea Information Technology Report Q1 2016

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Abstracts

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BMI View: We have left our forecasts for the South Korean IT market unchanged in the Q1 2016 report update. We had undertaken a negative revision in the Q4 2015 report update to reflect the weaker economic outlook and to account for the weaker sales in H115 that were reported by local retailers. Performance in the hardware market will be weakest in 2016, with fractional growth forecast due to saturation, a weaker consumption outlook and the fact some upgrade demand was brought forward to 2014. However, the outlook for the software and services segments is significantly stronger, and we expect robust growth to be maintained over the medium term due to strong demand from local enterprises, a supportive policy umbrella and the innovation capacity of local IT vendors and telecoms operators. The South Korean IT market is forecast to grow at a CAGR of 4.0% in 2015-2019 to reach a value of KRW33.3trn in 2019.

Latest Updates And Industry Developments

Computer Hardware Sales: KRW12.6trn (+1.3%)

Software Sales: KRW6.57trn (+4.1%)

IT Services Sales: KRW9.55trn (+5.3%)

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