

Vietnam Information Technology Report Q1 2016

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Abstracts

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BMI View: We believe Vietnam's IT market will be a regional outperformer over 2016-2019 due to strong growth dynamics for retail and enterprise market demand. Broad-based economic growth is expected to have a positive impact on the household income profile of Vietnam over the medium term, which will deepen the retail hardware market, as well as easing price sensitivity in the higher-value replacement market. Meanwhile, Vietnam's broader economic development including the expansion of higher productivity verticals, and the modernisation of traditional sectors, will unlock demand for IT software and services solutions. There is also increasing momentum towards Vietnam becoming a global centre for electronics production as wages rise in China and manufacturers look to protect margins by moving to Vietnam, where wages are as low as a third of those in China. We forecast a CAGR for the market of 13.5% over 2016-2019, with total spending expected to increase to VND99.1trn in 2019.

Latest Updates And Industry Developments

Computer Hardware Sales: VND42.7trn in 2016 to VND55.6trn in 2019, a compound annual growth rate (CAGR) of +10.7% in local currency terms. Significant growth potential exists due to low device penetration rates, which we expect to be unlocked due to the strength of potential income growth trends in Vietnam over 2016-2019.

Software Sales: VND10.9trn in 2016 to VND16.0trn in 2019, a CAGR of +15.7% in local currency terms. Low enterprise software penetration is a major opportunity as firms modernise and become integrated into global supply chains, with lower cost cloud software also expected to deepen the market.

IT Services Sales: VND17.2trn in 2016 to VND27.4trn in 2019, a CAGR of +18.9% in local currency terms. IT services are forecast to outperform over 2016-2019 due to increased domestic demand for cloud computing and outsourcing services from the private and public sectors.

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