

Argentina Information Technology Report Q3 2016

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Abstracts

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BMI View: The devaluation of the peso in December 2015 was the latest macroeconomic event to impact the Argentine IT market, with retail hardware spending rising in anticipation of expected price rises, and we believe it will result in a contraction in spending in 2016. The normalisation of economic conditions is however expected to result in stronger IT market performance from 2017 as purchasing power growth returns, and our core scenario is for a CAGR of 14.0% over 2016-2020. It could however be a brake on the software and services export industry that has been a noteworthy success in Argentina in recent years.

Latest Updates And Industry Developments

Computer Hardware Sales: From ARS21.7bn in 2016 to ARS34.5bn in 2020, corresponding to a compound annual growth rate (CAGR) of 12.3% in local currency terms. Devaluation resulted in a dip in PC sales over 2014-2016, but a stronger economic environment and pent-up demand will see strong growth over the medium term.

Software Sales: From ARS16.8bn in 2016 to ARS28.1bn in 2020, a CAGR of 13.7%. In recent years, software exports have performed well but economic uncertainty has resulted in deferred domestic spending that should be unlocked as conditions improve.

IT Services Sales: From ARS26.1bn in 2016 to ARS46.6bn in 2020, a CAGR of 15.6%. The cost-saving potential of IT services has insulated the segment from the worst effects of economic uncertainty, and outsourcing and cloud computing are expected to continue to perform well.

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