

China Information Technology Report Q3 2015

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Abstracts

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BMI View: China continues to outperform in terms of IT spending growth and IT sector development due to a mix of economic strength and a forward-looking policy environment. Even after rapid growth in the past decade, the market remains attractive with strong growth prospects resulting from (inter alia) the size of population, rising incomes, relatively low penetration of devices and solutions and a supportive policy environment. IT spending growth in China is expected to outperform on a regional and global basis, with a CAGR of 8.8% forecast 2015-2019 as IT spending increases as a share of GDP. However, China's IT market is not without its challenges as the pool of first-time buyers diminishes and vendors continue to struggle in the face of ongoing high levels of piracy, cyber security issues, intense competition for pricesensitive consumers and uncertainty generated by regulatory decisions, particularly in the rapidly developing cloud computing market. We believe the outlook is positive overall, with the caveats mentioned above.

Headline Expenditure Projections

Computer Hardware Sales: CNY561.7bn in 2014 to CNY593.4bn in 2015, +5.7% in local currency terms. A stabilisation of the tablet market after declining volumes in 2014 will see growth accelerate slightly in 2015, but remain below the rate to 2013 when tablet sales boomed.

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