

Egypt Information Technology Report Q2 2016

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Abstracts

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BMI View: We expect the Egyptian IT market to extend the strong growth from 2015 into 2016, and over the medium term, but with growth decelerating somewhat as the boost from pent-up demand during the period of political and economic instability dissipates. Our core scenario is for a CAGR of 11.5% over 2016-2020 to EGP26.6bn, though the US dollar rate is expected to be slower due to depreciation. Nonetheless the outlook is positive, a view underpinned by our assessment of household income trends and demographics in the context of low device penetration rates - alongside the modernisation momentum in the enterprise market where cloud computing is expected to be an area of outperformance. Although the core scenario is positive we do continue to highlight downside potential in domestic and regional political and security risks.

Latest Updates & Industry Developments

Computer hardware sales will increase from EGP9.0bn in 2016 to EGP12.6bn in 2020, a compound annual growth rate (CAGR) of 8.9%. Underdeveloped market, with tablet penetration particularly low as the global boom coincided with the instability in Egypt, and this growth potential is combined with our positive analysis of income trends to support a bullish hardware outlook.

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