

Hong Kong Information Technology Report Q2 2016

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Abstracts

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BMI View: We have a positive and stable outlook for Hong Kong's IT market. Medium-term growth will be driven by factors such as high incomes, growing discretionary spending and improving economic fundamentals. After a sharp decline in hardware spending dragged the IT market down in 2015, we forecast a much more stable outlook over the medium term, with a compound annual growth rate (CAGR) of 5.3% forecast over 2016-2020, to reach a total of HKD48.31bn.

The volatility in the hardware market was the result of the boom and subsequent slowdown in the tablet market, as well as concentrated desktop and notebook replacement demand in 2014, but 2016-2020 dynamics will be more stable and based on income growth and replacement spending. Meanwhile, the lucrative enterprise software and services markets will continue to outperform retail spending and Hong Kong's position as a regional datacentre and cloud services hub will sustain growth rates above those observed in most developed markets globally over 2016-2020. There is, however, some downside risk? primarily from the economic and political ties with China, which introduce some uncertainty due to the potential for a hard landing in that country.

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