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Hong Kong Information Technology Report Q4 2016

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Abstracts

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BMI View: We revised down the IT spending forecast for Hong Kong in the Q416 update in response to a softer economic outlook and we now envisage spending will increase at a CAGR of 4.2% over 2016-2020. A saturated hardware segment will underperform, with cannibalisation of PC and enterprise hardware sales by increasingly powerful smartphone and cloud adoption respectively, presenting downside. Medium-term performance is however, an improvement over 2015 when economic and product trends combined to result in a sharp contraction in spending. Meanwhile, enterprise software and services spending, particularly on cloud computing and Internet of Things solutions, will outperform.

Latest Updates And Industry Developments

Computer Hardware Sales: HKD10.3bn in 2016 to HKD10.7bn in 2020, a CAGR of 1.0% in local currency terms. A stable outlook, reflecting the maturity of the market, but downside should increase as smartphones cannibalise PC replacement spending.

Software Sales: HKD13.0bn in 2016 to HKD15.8bn in 2020, a CAGR of 4.9% in local currency terms. Cloud delivered software and cybersecurity products expected to outperform, while financial services will continue to be the most important vertical.

IT Services Sales: HKD15.1bn in 2016 to HKD18.9bn in 2020, a CAGR of 5.6% in local currency terms. Services forecast to outperform, with the most important growth drivers in the form of cloud computing and Internet of Things solutions adoption.

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