

Israel Information Technology Report Q3 2016

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Abstracts

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BMI View: Israel's IT industry registered strong export performance in 2015, led by the chip industry, but domestic IT spending weakened slightly as shekel depreciation was a drag on confidence and reduced the affordability of imports. We believe that the slowdown will be short-lived and forecast total IT market spending will increase at a CAGR of 5.6% 2016-2020 to a total of ILS29.2bn, with software and IT services expected to lead the market as the adoption of cloud computing services and IoT services increases. Meanwhile, a mature hardware market means that segment will underperform, but income growth trends point to opportunities at the premium end of the market that could offer wider margins.

Latest Updates & Industry Developments

IT hardware sales will expand from ILS6.25bn in 2016 to ILS6.95bn in 2020, corresponding to a compound annual growth rate (CAGR) of 2.7%. A mature market, but deferred upgrades from 2014 and 2015 alongside household income growth should put the segment on a faster growth trajectory.

Software sales will increase from ILS6.12bn in 2016 to ILS7.54bn in 2020, a CAGR of 5.4%. Cybersecurity solutions are in high-demand, while in the broader applications market cloud availability should broaden adoption, but this will be countered slightly by greater more intense price competition.

IT services will be the outperforming segment of the sector, and is forecast to grow from ILS11.14bn in 2016 to ILS14.73bn in 2020, at a CAGR of 7.2%. Demand for cloud computing, Internet of Things (IoT) and outsourcing services expected to be robust.

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