

Malaysia Information Technology Report Q3 2016

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Abstracts

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BMI View: A contraction in IT hardware spending dragged Malaysia's IT market down in 2015 as the introduction of the Goods and Services Tax exacerbated the negative impact of ringgit depreciation on PC spending. The hardware segment, and overall IT market, will strengthen in 2016 but downside persists, before moving to a faster growth trajectory from 2017 for all three segments. We are positive on household income trends that will support retail PC spending and drive upgrades, as well as unlock deferred purchases. We expect the stronger domestic economy to also boost enterprise software and services investment, with cloud computing expected to be an area of outperformance. We forecast total IT spending will increase at a CAGR of 6.8% 2016-2020 to MYR26.3bn in 2020.

Latest Updates & Industry Developments

Computer Hardware Sales: MYR9.0bn in 2016 to MYR10.6bn in 2020, a compound annual growth rate (CAGR) of 4.2%. PC penetration is relatively high for an emerging market, but there is pent-up upgrade demand, particularly for mobile form factors.

Software Sales: MYR4.4bn in 2016 to MYR5.9bn in 2020, a CAGR of 7.7%. Cloud software a bright spot, particularly for sales to Malaysian small- and medium-sized enterprises, but price sensitivity will be high.

IT Services Sales: MYR6.8bn in 2016 to MYR9.8bn in 2020, a CAGR of 9.5%. IT services spending forecast to outperform through wider adoption of outsourcing, cloud computing and Internet of Things applications by enterprises.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Enterprise Trends - GVA By Vertical (Malaysia 2015-2020)

Table: IT Industry - Historical Data And Forecasts (Malaysia 2013-2020)

Industry Risk Reward Index

Table: Asia Pacific IT Risk/Reward Index, Q3 2016

Market Overview

Hardware

Software

Cloud Computing

Services

Industry Trends And Developments

IT Hardware Trade

Table: Emerging APAC IT Hardware Trade

Table: Malaysia IT Hardware Trade, 2010-2015

IT Industry Analysis

Regulatory Development

Table: Government Authorities

Competitive Landscape

Retailers

Table: Major Electronics Retailers

Table: Major E-Commerce Vendors

IT Vendors

Table: Acer

Table: HCL Axon

Table: Lenovo

Table: Sunway E-Systems

Regional Overview

Demographic Forecast

Table: Population Headline Indicators (Malaysia 1990-2025)

Table: Key Population Ratios (Malaysia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Malaysia 1990-2025)

Table: Population By Age Group (Malaysia 1990-2025)

Table: Population By Age Group % (Malaysia 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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