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Abstracts

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BMI View: Mexican IT spending growth has been limited in recent years by economic challenges, but we expect the market to move to a higher spending growth trajectory from 2016 as the economic backdrop becomes more supportive, including peso appreciation against the US dollar. Our Country Risk team has a bullish outlook for changes in household income in Mexico over 2016-2019, which, along with the relatively low device and solution penetration rate, underpins our forecast for robust spending growth in the retail market. Meanwhile, enterprise spending should accelerate as sentiment strengthens, with areas of outperformance expected to include cloud computing, enterprise applications, outsourcing, and - in the latter years of our forecast - smart services. We forecast total IT market spending will increase at a CAGR of 7.9% over 2016-2019 to a total of MXN366.5bn in 2019.

Latest Updates & Industry Developments

Computer Hardware Sales: MXN117.8bn in 2016 to MXN141.0bn in 2019 at a compound annual growth rate (CAGR) of 6.2%. Household income growth will underpin robust expansion of PC market in value and volume terms, while enterprise hardware spending expected to accelerate as business sentiment strengthens.

Software Sales: MXN65.7bn in 2016 to MXN84.8bn in 2019 at a CAGR of 8.7%. Enterprise application spending expected to grow as wider availability of software-as-a-service deepens the market, with positive spill over for cybersecurity solutions also envisaged.

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